TASKE Call Center Management Tools

Version 8

Application User Manual

Reporting, Monitoring, Scheduling, and Analysis Solutions for the
IWATSU ADIX Telephone System

TASKE Technology Inc.

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TASKE Call Center Management Tools

Welcome to the TASKE Call Center Management Tools, a collection of Microsoft® Windows based tools and utilities. These applications aid supervisors in analyzing the performance of the ACD call center and fine-tune its operation.

After installing the software, access the applications of the TASKE ACD ToolBox through the TASKE ToolBox folder on the desktop of the PC, or through the Start button on the Windows task bar. Each application within the TASKE ToolBox folder provides the functionality for a particular aspect of call center management.
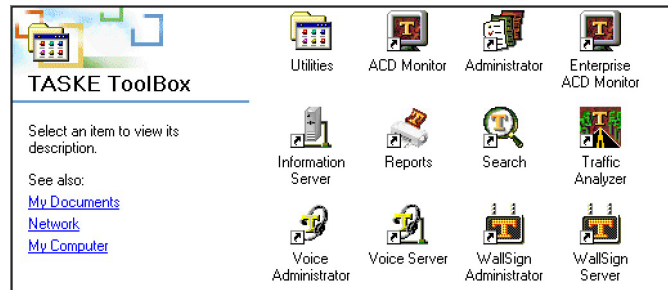
Using this Guide

This guide has a section for each application in the TASKE ACD ToolBox. For installation and configuration instruction, refer to the Installation and Configuration Guide for version 8.0 of the TASKE Call Center Management Tools.

The contents of the TASKE ACD ToolBox vary depending on the type of installation performed on the PC (Server, Supervisor, Enterprise Supervisor, or Agent). The table below outlines the components installed with each type of installation.

Installation Type	Components Installed
Server	- Information Server - Administrator - Reports - ACD Monitor with Chat - Search - Traffic Analyzer - WallSign Server (if selected for installation) - Voice Server (if selected for installation)

Installation Type	Components Installed
Supervisor	• Administrator • Reports • ACD Monitor with Chat • Search • Traffic Analyzer • WallSign Administrator (if selected for installation) • Voice Administrator (if selected for installation)

Installation Type	Components Installed
Enterprise Supervisor	• Administrator • Reports • ACD Monitor with Chat • Enterprise ACD Monitor • Search • Traffic Analyzer • WallSign Administrator (if selected for installation) • Voice Administrator (if selected for installation)

Installation Type	Components Installed
Agent	• Agent Desktop with Chat

TASKE Information Server

The TASKE Information Server is an application for server installations only. Installed on the TASKE Server PC, this application ensures that the data supplied by the telephone system is collected, stored and properly dispersed to the real-time applications of the TASKE ACD ToolBox.

Users of the TASKE Server PC use the Information Server interface for a number of applications. These include:

- Viewing the client connections to the TASKE Information Server
- Viewing site connections to the Information Server for Enterprise enabled sites (local and enterprise connections)
- Monitoring the flow of the data stream
- Viewing and changing the data port settings for the data stream
- Viewing the individual connections to the Chat server
- Viewing the TASKE Server IP information and status
- Viewing the particulars of the TASKE Software license for the site and the number of clients currently using the TASKE suite of Tools
- Integrating the Blue Pumpkin PrimeTime workforce management software with TASKE Call Center Management Tools
- Setting the file location of the real-time adherence schedules
- Showing the data alarms

Starting the Information Server

Use the following steps to start the Information Server application on the TASKE server PC.

1. Click the Start button on the Windows task bar.

2. Select Programs from the Start menu.

3. Select the TASKE 8.0 program group from the Programs menu.

4. Select Information Server from the TASKE 8.0 program group to open the Information Server.
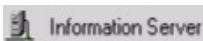
When the Information Server is running, an icon is present in the Windows System Tray. If the application has encountered data alarms the icon appears with a red flag.

Right-click on this icon to open a menu that allows the user to perform the following activities:

- open the Information Server window when it is closed,

- open the TASKE Data Alarms dialog box,

- display information about the TASKE Information Server application, including the Lock Number for the site,

- and exit the Information Server application.

Exiting the Information Server application completely shuts down the application and stops all data collection. Do not perform this action unless it is absolutely necessary.

Viewing Client Connections

The Clients tab of the Information Server allows a user to view the current number of client applications connected to the Information Server. Any client applications that require real-time information (such as the TASKE ACD Monitor) are displayed in the list at the top of the Clients tab. The list displays the client's IP address and the name of the application the client is using, and the site name.
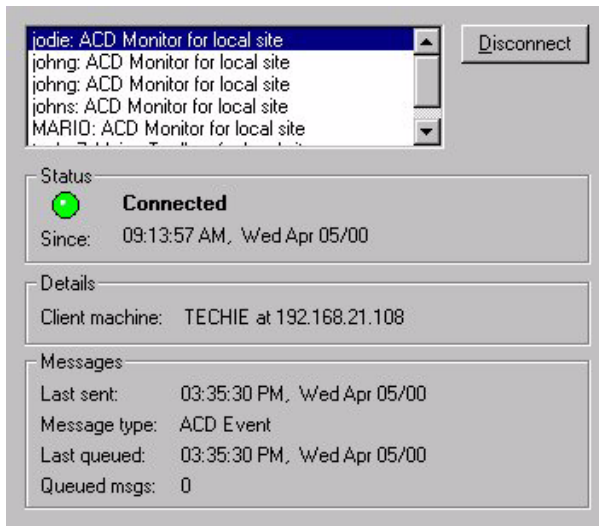
Selecting a client in the list by clicking on the client entry, displays the client information in the Status, Details, and Messages sections of the dialog box.

Status

The Status section of the Clients tab displays the connection status of the selected client to the Information Server. The status is either Connected or Blocked.

When a client is connected and receiving data, the Status section indicates a Connected state and displays a green light with the date and time of the connection.

When the client connection to the Information Server is lost, the status section indicates a Blocked state and displays a yellow light to indicate there is a problem with the connection. The client application automatically attempts to reconnect at 15-second intervals as long as the client application is running.

Disconnect

To permanently disconnect a client from the Information Server, the user of the TASKE server must first lock the site to new connections from the Sites tab (see Locking Sites and Disconnecting Clients in the TASKE Enterprise section). This prevents the client application from reconnecting after 15 seconds. Once the site is locked, return to the clients tab, select the client to disconnect from the list of client connections, and click the Disconnect button.

Details

The Details section of the Clients tab displays the network name and the IP address of the client selected in the connection list. Select any client in the list to view the details for that PC.

Messages

The Messages section of the Clients tab displays information about the PBX messages sent to the Client from the Information Server. The Last sent section displays the date and time of the last message received by the Client from the Information Server. The Last queued section displays the date and time of the last message the Information Server attempted to send.

If the client becomes Blocked, the Last sent and Last queued times may differ. The Last sent field will display the date and time of the last successful message. The Last queued field will display the date and time of the last message sent to the queue. Because the client connection is blocked, the messages will accumulate in the queue until the client connection is re-established, or disconnected.

Viewing the SMDR Connection

The SMDR tab of the TASKE Information Server allows a user to view the SMDR connection to the TASKE Information Server. If the SMDR connection is active, and properly connected, SMDR records can be seen scrolling through the SMDR Events screen in the SMDR tab. The SMDR data cannot be manipulated from the Information Server - and should not be interpreted from the screen. The records are simply displayed to allow a user to confirm that the SMDR data is being collected.
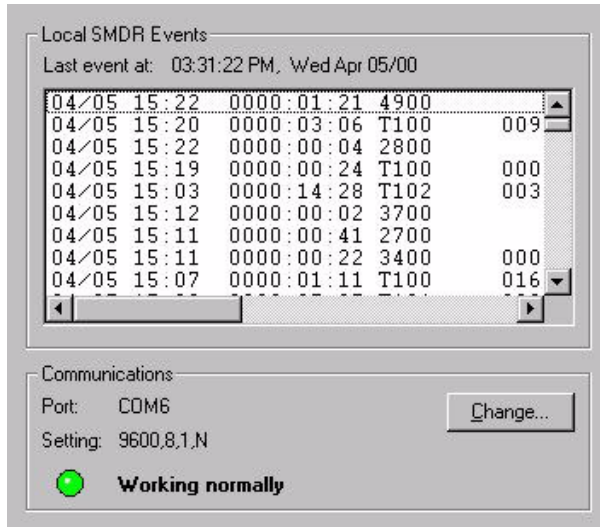
Up to 150 records are displayed in the SMDR tab at a time.

SMDR Events

The SMDR Events section of the SMDR tab displays the data being received from the SMDR connection and collected by the TASKE Collector for use with the ACD ToolBox applications. Scroll bars are present on the right-hand side and across the bottom of the SMDR Events window to allow a user to scroll through the SMDR records.

Communications

The Communications section of the SMDR tab displays information about the SMDR connection to the Information Server machine. The data port on the TASKE Information Server that transports the SMDR data is displayed, as well as the port settings. If the connection is receiving data, a green light is displayed with the title Working Normally. If the connection is not receiving data, a red light is displayed with the title Not working. See log file for details.

The port settings may be changed by clicking the Change... button.
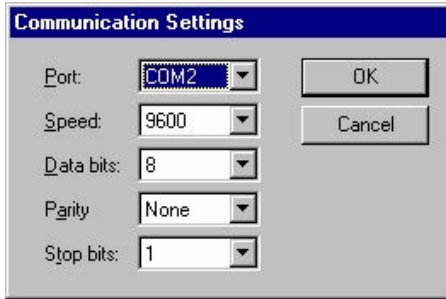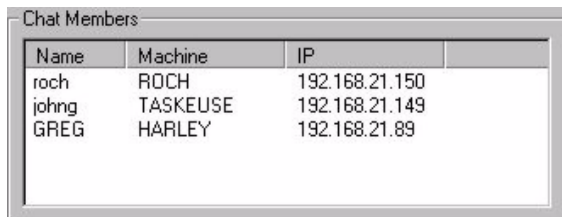
Communications Settings

The Communications Settings dialog box appears when the Change... button is pressed in the Communications section of the SMDR tab. Any settings changed from here affect the port settings of the SMDR port. The settings will be used by the Information Server to attempt to receive data as soon as the OK button is clicked.

The data port settings should only be changed if they are incorrect. If they are changed while the data is being received, the data connection may cease to function properly.

Viewing Chat Connections

The Chat tab of the TASKE Information Server allows a user to view the current number of agents and supervisors currently logged into the TASKE Chat Server through the ACD Monitor and the Agent Desktop applications.

Chat Members

The Chat Members section of the tab provides a table that indicates who is logged into TASKE Chat (using the network PC name), the machine the user is logged in from (also the network PC name), and the IP address of the PC.

Viewing License Information

The TASKE License section of the License tab displays the TASKE software licensing information that is stored in the file "TaskeLck.lis" in the TASKE install directory.

```
┌─ TASKE License ──────────────────────────────┐
│  ┌──────┐                                      │
│  │ TASKE│      Customer: TASKE Customer        │
│  └──────┘   Lock number: TT000001              │
│                                                │
│        Primary agent IDs: maximum - 100        │
│   Secondary IDs per agent: maximum - 15        │
│                                                │
│    Enterprise supervisors: maximum - 1    in use - 0  │
│            Supervisors: maximum - 2    in use - 0     │
│         Agent desktops: maximum - 2    in use - 0     │
│             Wall signs: <no limit>    in use - 0      │
│         Voice channels: maximum - 0    in use - 0     │
│                                                │
│                          ┌─────────┐           │
│                          │ Update... │          │
│                          └─────────┘           │
└────────────────────────────────────────────────┘
```
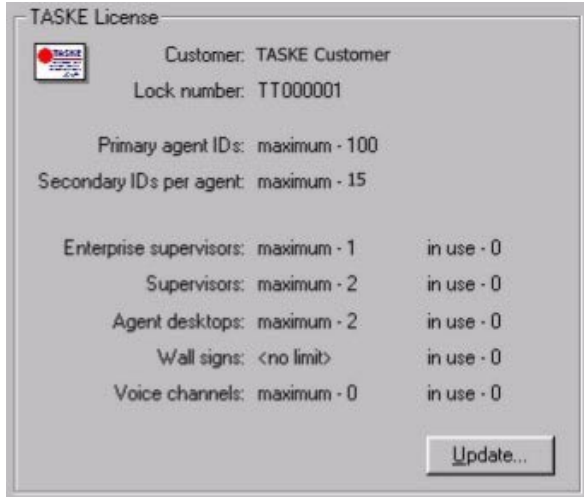
The TASKE License section of the License tab displays the following information:

Customer: the customer name of the site.

Lock Number: the Serial Number (or Lock Number) which is required for to receive TASKE Technical Support or for ordering upgrades of software from TASKE.

Primary agent IDs: the maximum number of agents allowed to connect to the Information Server at any one time.

Secondary IDs per agent: the maximum number of secondary agent IDs allowed on a per agent basis.

Enterprise supervisors: the maximum number of Enterprise Supervisors allowed to connect at any time, and the number of Enterprise Supervisors currently active and connected to the Information Server.

Supervisors: the maximum number of Supervisors allowed to connect at any time, and the number of Supervisors currently active and connected to the Information Server.

Agent desktops: the number of Agent Desktops allowed to connect at any time, and the number of Agent Desktops currently active and connected to the Information Server.

Wall signs: the number of Wall signs (Reader boards) that are in use, the number allowed to connect is unlimited.

Voice channels: the number of voice ports the site is enabled to use and the number actually being used.

The licensing information can be updated by clicking the Update... button on the License tab. This is only necessary when a site upgrades and requires a change to its licensing configuration. The new license file must be provided by TASKE. The site can receive the file on diskette or via email.

Clicking the Update... button opens the Browse for Folder dialog box. Select the location of the new license file and click OK to copy the new licensing information and update the License tab of the TASKE Information Server.

Viewing General Information

The General tab of the TASKE Information Server allows a user to view TASKE Server IP information. The Server information cannot be manipulated from this tab; the information is available for reference only.
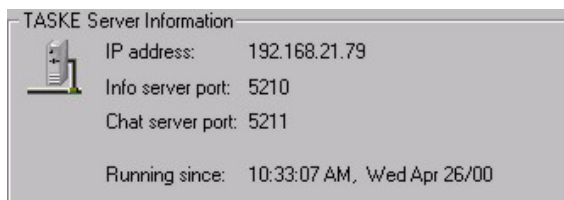
TASKE Server Information

The TASKE Server Information section of the General tab displays the following information.

> **IP address:** the IP address of the TASKE Server PC.

> **Info server port:** the port number the TASKE server uses to receive client connections.

> **Chat server port:** the port number the TASKE server uses to receive chat connections.

> **Running since:** the date and time the TASKE Information Server was launched.

Integrating PrimeTime with TASKE

The PrimeTime option on the Configure menu provides the PrimeTime Integration Wizard that allows users to integrate the Blue Pumpkin PrimeTime workforce management software with the TASKE Call Center Management Tools.
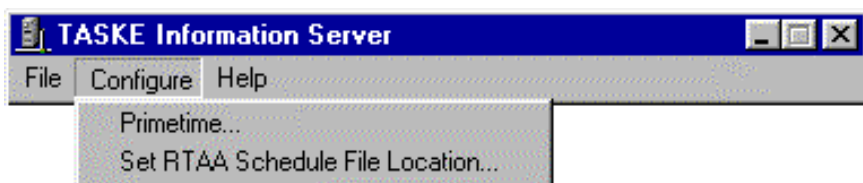
If this is the first time using the PrimeTime Integration Wizard, the Welcome To PrimeTime Installation For TASKE ToolBox dialog box opens. If the integration process has already been completed at an earlier time and the user is simply updating the configuration, the Configure TASKE and PrimeTime dialog box opens.

For instruction and information on integrating PrimeTime with TASKE, refer to the PrimeTime Integration and Configuration Guide for TASKE Call Center Management Tools.

Setting the Real-time Adherence Schedule File Location

TASKE ACD ToolBox applications, such as the ACD Monitor, use the information in the PrimeTime schedules to determine if agents are adhering to the schedules. If an agent is not adhering to the schedule, the ACD Monitor will raise an alarm if it is setup to do so. The practice of tracking agents in this manner is known as Real-time Adherence. This means that the ACD Monitor tracks agent activity in real-time and compares this activity with what is expected in the schedule. If the agent is conducting activities outside of the schedule, supervisors are immediately aware of this deviance from the schedule.

For the Information Server to provide applications such as the ACD Monitor scheduling information, it must know where to locate the schedules. The Set RTAA Schedule File Location... option on the Configure menu opens the Set Schedule File Location dialog box. This dialog box sets the location of the root folder for the PrimeTime schedules.
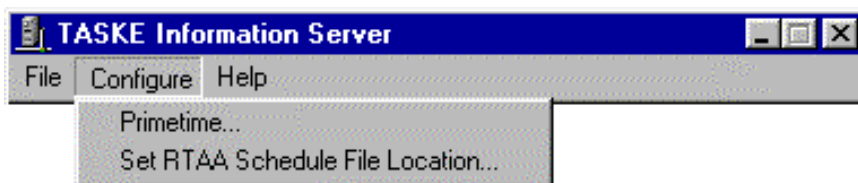
To locate the root folder for the PrimeTime Schedules, input the path to the folder in the Schedule File Location field. If this information is not readily available, click the Browse button to search the local PC or the network. When the appropriate path to the PrimeTime schedules is set, click OK to accept the path and close the Set Schedule File Location dialog box.
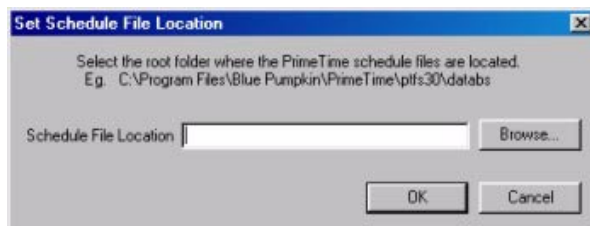
Showing Data Alarms

Data alarms are raised when the Collector does not receive records from the PBX within a user-defined time period and when the disk storage capacity falls below a user-defined threshold. Alarms are defined using the TASKE Administrator application on the server PC, but are displayed through the Information Server.

The Information Server displays all data alarms that occur in the TASKE Data Alarms dialog box. By default, the Information Server automatically displays the TASKE Data Alarms dialog box and rings a bell every time an alarm is raised. To disable the dialog box from automatically opening and the alarm bell from ringing, disable the *Display this window* and *Ring the alarm bell* check boxes in the *Each time an alarm is raised:* section of the TASKE Data Alarms dialog box. To manually open the TASKE Data Alarms dialog box and view the data alarms, select *Show data alarms...* from the *File* menu.
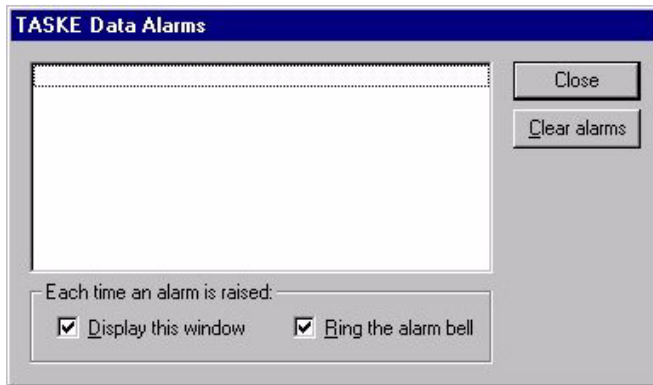
The alarms displayed in the TASKE Data Alarms dialog box provide the date and time that the alarm situation occurred along with a description of the event. To clear the alarms from the dialog box, click the *Clear alarms* button. This deletes all alarms from the window.

Closing Versus Exiting the Information Server

Closing the Information Server window means that the application window is closed, but the application is still running in the background and collecting PBX data. Exiting the Information Server means that the application is completely shut down and all data collection stops. The Information Server should run continuously unless it is absolutely necessary to exit the application.

Closing the Information Server

To close the Information Server window, select *Close* from the *File* menu or click the *X* in the top, right corner of the TASKE Information Server title bar.

The Information Server window closes, but the application continues to run and collect data in the background. When the Information Server is running, an icon is present in the Windows System Tray, as in the image below.

The icon on the left represents the Information Server icon when no data alarms have occurred. The icon on the right represents the Information Server icon when the application has encountered data alarms. The red flag indicates the presence of data alarms.

To re-open the Information Server window, double-click the Information Server icon in the Windows System Tray, or right-click on the icon and select *Open* from the menu.

Exiting the Information Server

To completely shut down the Information Server and stop data collection, right-click on the Information Server icon in the Windows System Tray, and select *Exit* from the menu. This action produces the TASKE Information Server dialog box. The dialog box indicates that exiting from the Information Server closes all client connections and stops data collection.

- 15 -
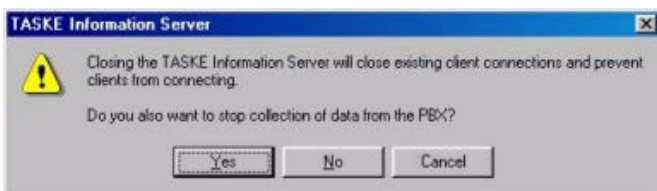
Click *Yes* in the dialog box to stop data collection, close all client connections, and prevent any new client connections. Click *No* to close the Information Server window and prevent new clients from connecting, but continue data collection.

Choosing to stop data collection from the PBX means that data created between the time the Information Server is shut down and restarted will not be collected and will not be available for any historical reporting, searches or analysis.

TASKE Enterprise

TASKE Enterprise is a feature of the TASKE ACD ToolBox that allows the Information Server applications on TASKE Server PCs to share information across LAN (local area network) or WAN (wide area network) connections. The Enterprise feature is activated through licensing. If the site is licensed for one or more Enterprise Supervisors, the Enterprise feature is automatically activated during installation or with a license upgrade.

The Information Server applications at Enterprise enabled sites communicate using TCP/IP. Site information is shared between the sites when Enterprise Supervisors initiate information requests from a remote site. Two TASKE applications provide statistical information over the Enterprise connection. These applications are the Enterprise ACD Monitor and Reports.

Enterprise ACD Monitor functions the same as the ACD Monitor with the exception of ACD Replay. None of the ACD Replay functionality is available with the Enterprise ACD Monitor. Real-time and recent historical (last hour, last 12 hours) agent and queue statistics are available using the same methods as in the local ACD Monitor. Sites are identified using the site names or local for the local site.

The Reports application generates reports for remote sites by retrieving data from a shared PBX directory on the TASKE Server PC at the remote site. When a request for a report on a remote site occurs, the Reports applications launches a Net Client that connects to the local Information Server. The local Information Server then forwards the request to the Information Server at the remote site. If the remote Information Server finds newer data than is available on the local Information Server, copies of the appropriate .pbx files are transferred to the local Information Server and the report is generated from these files.

When an Enterprise Supervisor requests information from a remote site, the following sequence of events occurs.

1. A client application (ACD Monitor) launches on a client PC.
2. The client application opens a new client connection (Net Client).

     When a Net Client connection is open on a client PC, the icon for the Net Client is visible in the Windows System Tray. Only one Net Client connection starts for every client PC. Double-clicking the Net Client icon in the System Tray opens the Net Client Window. Here, a tab is present for every client application that is currently using the Net Client connection.

3. The Net Client sends a request for data through the network to the local Information Server on behalf of the client application.

4. The local Information Server communicates the request for data to the Information Server at the remote site.
5. The Information Server at the remote site routes a copy of the data received from its TASKE Collector to the local Information Server. The TASKE Collector receives call center data directly from the PBX.
6. The local Information Server routes a copy of the data through the network to the Net Client, where it is transferred to the client application.

The following diagram illustrates the path of a request for data between Enterprise enabled TASKE sites.
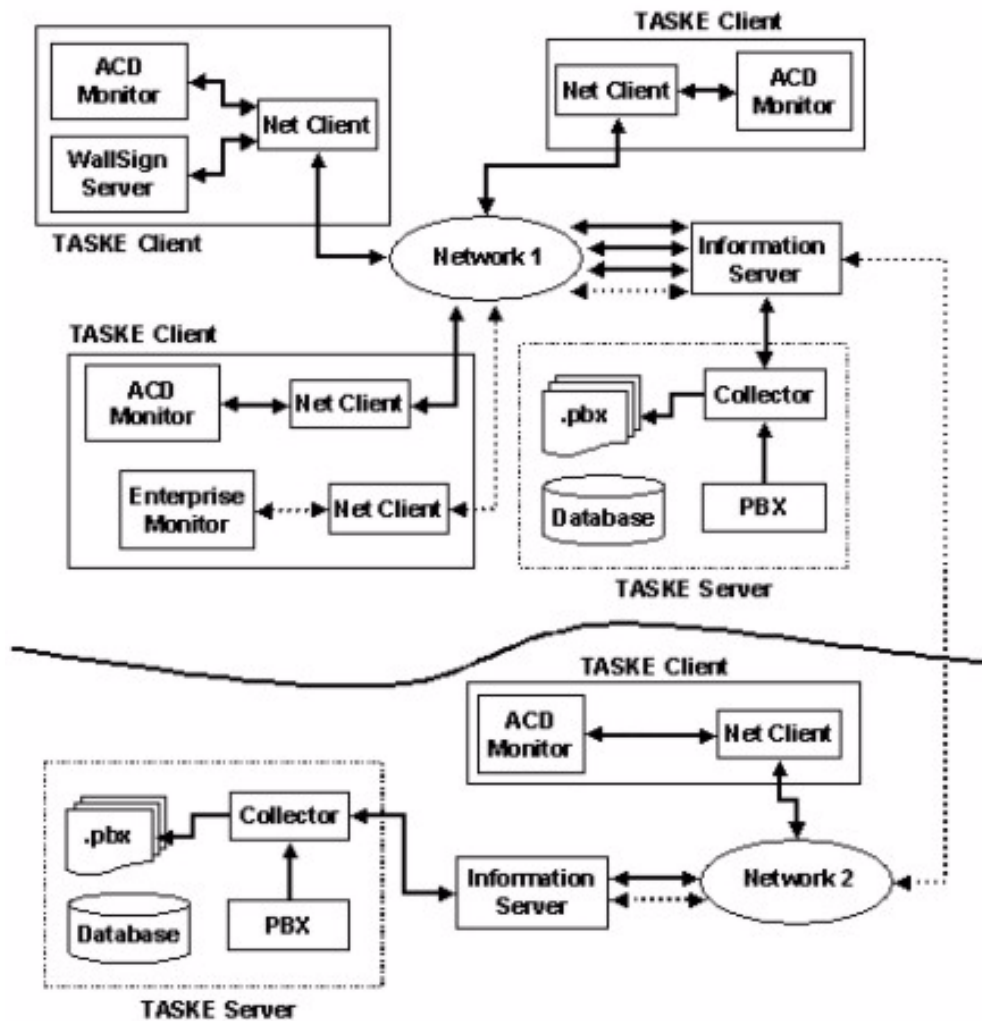
Checking for Enterprise Licensing

There are two methods for determining if the Enterprise functionality is activated in a TASKE Server. Both methods require the Information Server to be started.

The quickest and most obvious method for checking if Enterprise is activated is the presence of the Sites tab in the Information Server interface. If this tab is present, the site is licensed for Enterprise and the Enterprise functionality is active.

The second place to check for Enterprise licensing is the License tab of the Information Server. If an entry for Enterprise Supervisors is displayed in the License tab, the TASKE Information Server is licensed for Enterprise and the Enterprise functionality is active.

The Enterprise Supervisors entry in the License tab shows the maximum number of Enterprise Supervisors allowed to connect at one time and the number of Enterprise Supervisors currently connected. Use the following steps to view the License tab and check for Enterprise licensing.

1. From the TASKE ToolBox, open the Information Server.
2. Click the License tab to view the TASKE licensing information for the local TASKE site.
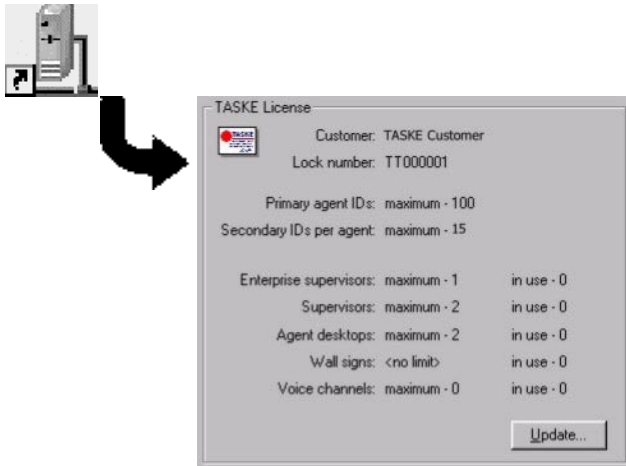
Viewing Enterprise Site Connections

The Sites tab is only present in the Information Server interface if the license file allows licensing for Enterprise Supervisors. This type of licensing allows the Information Server to collect, store, and disperse PBX data from TASKE Server PCs that are located at remote sites. The Sites tab provides an interface for the setup and maintenance of the remote site connections. The list at the top of the Sites tab displays all of the defined sites, regardless of the connection status. The local site is included in the list of Active sites.
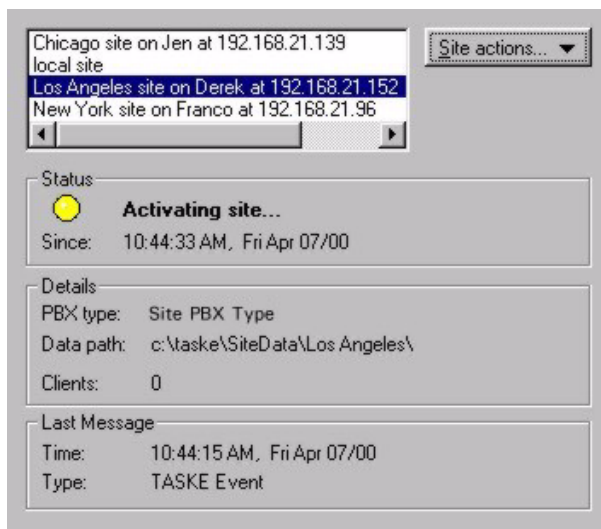
Status

The Status section of the Sites tab displays the status of the connection from the site to the Information Server. If the site is connected and receiving data, a green light is present with the title "Local site activated" for the local TASKE site and "Connected to Remote Site" for other TASKE sites. The date and time the connection commenced are also displayed. If a site is Activated the Information Server can send and receive information requests to and from the site.

Deactivated sites cannot send information to or receive information from the Information Server. Sites are deactivated manually through the Site Actions menu or automatically if there is an error with the site connection. The indicator light turns yellow to indicate the Information Server is attempting to activate the site connection and red when the connection has encountered a fatal error. A gray light indicates that the site is deactivated.

Details

The Details section of the Sites tab displays the following information.

PBX Type: displays the PBX type of the site selected in the sites list.

Data Path: displays the local path for the data being stored from the local or remote site.

Clients: displays the number of clients connected to the Information Server of the site selected in the sites list. This field also shows the lock status. If a site is locked, no new clients can connect to the site through the Information Server at the site. This feature is used for site maintenance.

Last Message

The Last Message section of the Sites tab displays information about the messages sent to the local Information Server from the site selected in the sites list. This section displays the following information.

Time: displays the date and time of the last message received by the local Information Server from the site selected in the sites list.

Type: displays the type of data record that was last received by the local Information Server from the site selected in the sites list.

Adding, Modifying, and Removing Enterprise Site Connections
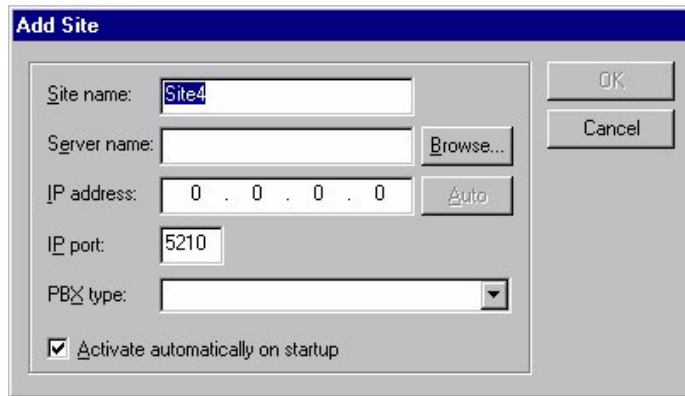
Enterprise site connections to the local Information Server are setup, modified, and removed using the Sites tab of the Information Server. All of these actions are accomplished through the options available in the Site actions... drop-down menu.
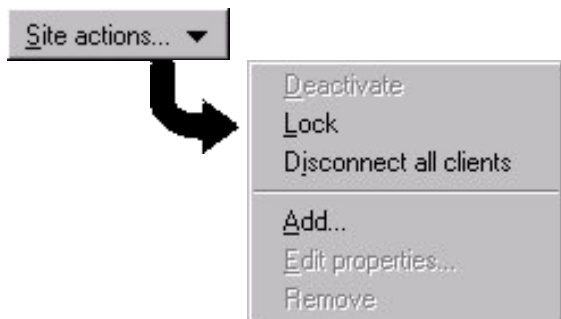
Adding an Enterprise Site Connection

Use the following steps to add an Enterprise site connection to the local Information Server. Once added, the site is added to the sites list on the Sites tab of the Information Server interface.

1. Select the Sites tab in the Information Server interface.
2. Click the Site actions... button on the Sites tab to open the drop-down menu.
3. Select Add... from the menu to open the Add Site dialog box.

4. Enter a unique name for the site in the Site name field.

   When an Enterprise site is added, a directory for storing the site data is created on the local TASKE Server PC. This directory is automatically assigned the same name as the site. When modifying the site connection information, the site name is not editable because of the inconsistency it would create in the directory structure. Local client applications connected to the Information Server also refer to the remote site by this name. To change a site name the site must be removed and re-added to the list with a new name.

5. Enter the network name of the remote TASKE Server PC in the Server name field.

   Click the Browse... button to search the network (LAN or WAN) for the remote TASKE Server PC. When the remote PC is found by browsing the network, the IP address of the PC is automatically entered in the IP address field.

6. Enter the IP address of the remote TASKE Server PC in the IP address field.

   If the Server name was found by browsing the network, the IP address of the remote TASKE Server PC will already be present in the IP address

field. If this is not the case, click the Auto button to have the IP address automatically detected based on the server name provided.

7. Enter the IP port for incoming data from the remote TASKE Server PC in the IP Port field.

   By default, TASKE uses port number 5210 for incoming data from remote sites. Ensure that no other devices are using port number 5210.

8. Select the type of the remote PBX from the drop-down list of PBX types.

   Once the Enterprise site is added, the PBX type cannot be changed. If the PBX type must be changed, the Enterprise site must be removed and re-added.

9. Enable the Activate automatically on startup check box to have the site automatically activated when the local Information Server is started.

   By default this check box is enabled. Disabling this check box means that the user will have to manually activate the site from the Sites tab of the Information Server.

10. Click OK to accept the settings for the Enterprise site and add the new site to the sites list of the Sites tab.

The new site is not activated automatically. The site must be manually activated to commence the collection of data and the processing of information requests.
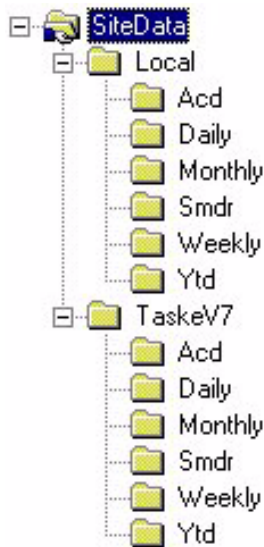
When new sites are added, a change is made to the data directory structure of the local TASKE Server PC. Under the "SiteData" directory, a directory and data subdirectories are created for each remote site. This change allows collected .pbx files from the local and "remote" sites to be saved locally and used by the Enterprise Supervisors.

Modifying an Enterprise Site Connection

Use the following steps to modify the properties of an Enterprise site connection to the local Information Server.

1. Select the Sites tab in the Information Server interface.
2. Select the Enterprise site connection to modify from the sites list.
3. Click the Site actions... button on the Sites tab to open the drop-down menu.
4. Select Edit properties... from the menu to open the Edit Site Properties dialog box.

   This dialog box is identical to the Add Site dialog box. The only exception is that the Site name and PBX type fields are not editable.

5. Make the required changes to the editable fields of the Edit Site Properties dialog box. Refer Adding An Enterprise Site Connection for descriptions of the fields in this dialog box.
6. Click OK to accept the modifications to the properties of the Enterprise site connection and close the Edit Site Properties dialog box.

Removing an Enterprise Site Connection

Use the following steps to remove an Enterprise site connection from the local Information Server.

1. Select the Sites tab in the Information Server interface.
2. Select the Enterprise site connection to modify from the sites list.
3. Click the Site actions... button on the Sites tab to open the drop-down menu.
4. Select Remove from the menu to open the TASKE Information Server dialog box.
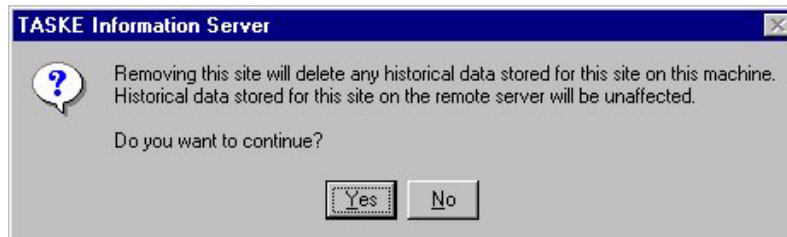
This dialog box warns users that removing the site connection will result in the loss of any historical data for this site on the local TASKE Server PC. The dialog box also states that removing the site connection will not affect the data stored at the remote site.

5. Click Yes to remove the Enterprise site connection.

Removing the Enterprise site connection removes the site from the sites list in the Sites tab of the Information Server.

Activating and Deactivating Sites

Enterprise site connections are manually activated and deactivated using the Sites tab in the Information Server. If a site is activated the Information Server can send and receive information requests to and from the site. Deactivated sites cannot send information to or receive information from the Information Server.

Activating an Enterprise Site Connection

Use the following steps to activate an Enterprise site connection.

1. Select the Sites tab in the Information Server interface.
2. Select the Enterprise site to activate from the sites list.
3. Click the Site actions... button on the Sites tab to open the drop-down menu.
4. Select Activate from the menu to activate the site. If the site is activated, the Activate menu option will not be available. The Deactivate option will be present in place of the Activate option.

The Status section of the Sites tab displays the status of the connection. When the site is activated the light in the Status section is green with the title "Local site activated" for the local TASKE site and "Connected to Remote Site" for other TASKE sites. The date and time the connection commenced are also displayed. If a site is "Activated" the TASKE Information Server can send and receive information requests to and from the site.

Deactivating an Enterprise Site Connection

Use the following steps to deactivate an Enterprise site connection.

1. Select the Sites tab in the Information Server interface.
2. Select the Enterprise site to activate from the sites list.
3. Click the Site actions... button on the Sites tab to open the drop-down menu.
4. Select Deactivate from the menu to deactivate the site. If the site is deactivated, the Deactivate menu option will not be available. The Activate option will be present in place of the Deactivate option.

The Status section of the Sites tab displays the status of the connection. When deactivated the light in the status section is gray with the title "Site is inactive". The date and time the connection commenced are also displayed.

Locking Sites and Disconnecting Clients

Sites can be locked and clients disconnected from the Sites tab of the Information Server. Maintenance at an Information Server is the main reason for locking a site and disconnecting the clients. Locking a site and manually disconnecting the clients provides a polite method for disconnecting service to the clients. Otherwise, clients would be disconnected without warning and continually attempt to reconnect.

If maintenance is occurring at the local Information Server, all remote sites should be locked and all clients from all remote sites disconnected. If maintenance is occurring at a remote Information Server, the site connection at the local Information Server to that site should be locked and all clients disconnected from the site. Any client with access to the remote site through a different Information Server will still be able to connect.

It is important to lock a site prior to disconnecting the clients. When clients are disconnected without locking a site, the client applications will automatically reconnect. Locking the site prior to disconnecting the clients prevents the client applications from reconnecting to the site.

Locking an Enterprise Site

Use the following steps to lock an Enterprise site.

1. Select the Sites tab in the Information Server interface.
2. Select the Enterprise site to lock from the sites list.
3. Click the Site actions... button on the Sites tab to open the drop-down menu.
4. Select Lock from the menu to lock the site. This action prevents new client connections, but does not affect existing client connections.

When a site is locked, the Sites tab displays a lock icon in the Clients field of the Details section with the text "<site is locked to new clients>".
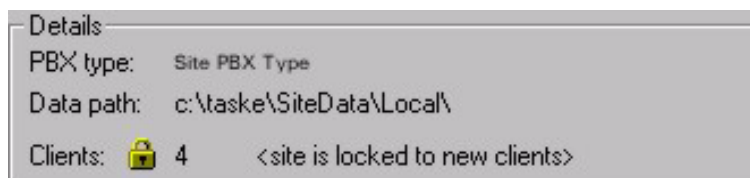
Disconnecting All Clients from an Enterprise Site

Use the following steps to disconnect all clients from an Enterprise site.

1. Select the Sites tab in the Information Server interface.
2. Select the Enterprise site from the sites list that all clients will be disconnected from.
3. Click the Site actions... button on the Sites tab to open the drop-down menu.
4. Select Disconnect all clients from the menu to disconnect the clients from the site. Because the site is locked, the clients cannot reconnect.

TASKE Network Client

The Network Client is a background application that acts as a liaison between client applications requiring real-time information and the Information Server. When a client application requiring real-time data launches, it sends a request to the Information Server through the Network Client application. The request asks the Information Server for permission to connect and receive data. When the Information Server accepts this request the client application has full access to the real-time data acquired from the PBX.

The Network Client application is almost invisible to the user. When the application is running, an icon is present in the Windows System Tray. To open the Network Client window, double-click the icon in the System Tray, or right-click the icon and select *Open* from the menu.

Network Client System Tray Icon
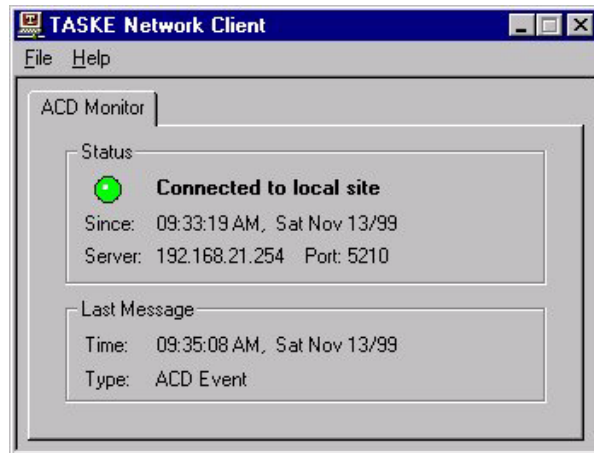
Using the Network Client Interface

The application window contains a tab for each TASKE client application on the PC that is currently interfacing with the Information Server. The Network Client automatically launches when the first of these client applications starts. The title of the application connected to the Information Server is displayed at the top of the tab. Within the tab, the status of the connection and information about the last event received by the client is displayed. When the last of the client applications on the PC is shut down, the Network Client application automatically shuts down as well.

Status

The Status section of the Network Client displays the status of the connection between the client and the Information Server. If the client is connected and receiving data, a green light is present with the title: *Connected to local site*. The date and time indicate when the connection was established. The Server and Port information provides the IP address of the TASKE Server PC and the Port number the Server PC is using to receive client requests. If the client is disconnected, the light turns yellow to indicate a connection problem and the title changes to: *Blocked*. The Network Client automatically attempts to reconnect.

Last Message

The *Last Message* section of the Network Client displays information about the PBX messages being sent to the client from the Information Server. The *Time* section displays the date and time of the last message the client received from the Information Server. The *Type* section displays the type of data that was sent to the client, for instance, and SMDR record. If the client is Blocked the *Last sent* time may be earlier than the present time. During a blockage, messages pile up in the queue until the client re-establishes the connection, or disconnects.

TASKE Administrator

The TASKE Administrator application is responsible for the development of the TASKE database, its configuration and maintenance, and the configuration and maintenance of its associated files. To perform these functions, the Administrator operates in two modes: Database and Configuration.

The TASKE database is comprised of names, numbers, and other characteristics of a customer interaction center. These elements are defined in the Database Mode of the Administrator. The elements defined in the TASKE database mirror those elements defined in the PBX system. Registering these parameters and mirroring the PBX database elements enables the TASKE system to generate reports for the elements of a telephone system used throughout a company. Use the Administrator to define and maintain the TASKE database. This is the only TASKE application where database elements are defined, modified, and deleted.

The Configuration Mode provides maintenance flags and configuration tools for the database. The interface for this mode is divided into three sections: Logs, Maintenance, and Alarms. For security purposes, the TASKE Servers are the only PCs with access to all three sections. On Supervisor PCs only the Logs section is provided in the Configuration Mode of the Administrator.

Maintenance tools include a system log, alarm parameters set to user specifications that warn of maintenance needs, and the generation of statistics files. The configuration tools include an interface for configuring disk storage settings, error log tracking and ensuring the security of stored records by setting alarms to notify of any abnormalities. The application may be used routinely for activities such as reading maintenance logs, archiving, deleting and synchronizing shadow files, as well as performing disk statistics.

Starting the Administrator

The Administrator application is opened from the Windows desktop. Use one of the following methods to open the application.

Opening the Administrator Using the Start Button

Use the following steps to open the Administrator application using the Start button on the Windows desktop.

1. Click Start on the toolbar of the Windows desktop.
2. Select Programs from the menu.
3. Select the TASKE 8.0 folder in the list of programs.
4. Select Administrator from the list of TASKE applications to open the Administrator application.

Opening the Administrator from the TASKE Program Folder

Use the following steps to open the Administrator application from the TASKE 8.0 program folder.

1. Double-click the TASKE 8.0 folder icon on the Windows desktop to open the TASKE 8.0 folder.
2. Double-click the Administrator icon in the folder to open the Administrator application.
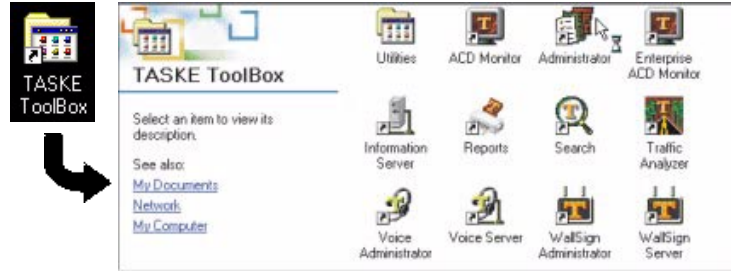
Using the Menu Bar

The menu bar contains three menus that provide keyboard or mouse access to the functions of the Administrator. The menus are File, View, and Help.

File Menu

The contents of the File menu vary depending on the Mode. The table below outlines the menu options for both the Database mode and the Configuration mode.

Database Mode		
Option	**Shortcut**	**Description**
Export	N/A	Select this option to open the Export Database dialog box. Use this dialog box to select the location and file type of the exported database, as well as the types of database elements to include in the export.
Exit	N/A	Select this option to close the Administrator application.

Configuration Mode		
Option	**Shortcut**	**Description**
Open	N/A	This option is only available in the Logs section of the Configuration mode. Select Open to open a saved TASKE log file. Only files with a .log extension can be opened.
Save As...	N/A	Select this option to save the log file currently displayed in the Logs section of the Configuration mode.
Save	N/A	This option is only available in the Alarms section of the Configuration mode. Select Save to save changes to the alarm parameters.
Clear Log...	N/A	This option is only available in the Logs section of the Configuration mode. Select Clear Log... to clear the events from the log file. Prior to deleting the events, the user is prompted to save the log file. To retain the events, the log file must be saved prior to clearing the events.
Refresh	N/A	This option is only available in the Logs section of the Configuration mode. Select Refresh to immediately update the log with the most recent events.
Exit	N/A	Select this option to close the Administrator application.

View Menu

The View menu provides keyboard or mouse access to various sections of the Administrator interface. The table below outlines the functionality of the View menu options.

Option	Shortcut	Description
Database	CTRL+D	Select this option to switch to the Database mode.
Configuration	CTRL+O	Select this option to switch to the Configuration mode.
Next Window	F2	Move the window focus to the next section of the Administrator interface. Use the arrow keys to move throughout the elements of a window section and the spacebar to select.
Previous Window	Shift+F2	Move the window focus to the previous section of the Administrator interface. Use the arrow keys to move throughout the elements of a window section and the spacebar to select.

Help Menu

Use the Help menu to access the online help for the Administrator. Additionally, use this menu to view version and copyright information for the application.

Option	Shortcut	Description
Contents	F1	Select Contents to access the Online Help for the Administrator application.
About TASKE ACD Monitor...	N/A	Select About TASKE Administrator... to view version, copyright, and lock number information for the Administrator.

Using the Main Control Panel

The Main Control Panel is located on the left side of the Administrator window. This section of the window is responsible for:

- Mode selection
- Table selection in Database Mode
- Tool selection in Configuration Mode

Mode Selection

The two buttons located at the top of the Main Control Panel are the mode selection buttons. These buttons toggle between the Database and Configuration modes.

Table Selection in Database Mode

In the Database Mode, the Main Control Panel displays a list of buttons. Each button provides access to a table for the database element described on the button. The tables are provided in the display area of the Administrator window. Use these tables to add, modify, and delete the database elements.

The available tables of database elements are Trunks, Trunk Groups, Extensions, Extension Groups, Agents, Agent Groups, Queues, Queue Groups, Qualifier Codes, and DNIS codes. Use the Spectrum and Options tables to configure the database options.

Tool Selection in Configuration Mode
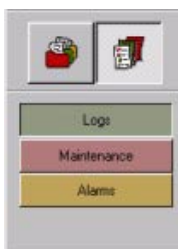
In the Configuration Mode, the contents of the Main Control Panel depends on the installation type of the TASKE software. For Server installations, the Main Control Panel in the Configuration Mode displays three buttons: Logs, Maintenance, and Alarms. For Supervisor installations, the Main Control Panel in the Configuration Mode displays only the Logs button. This difference in installation types is a security feature of the ACD ToolBox, allowing only those authorized to use the Server PC rights to maintaining, configuring, and setting alarm parameters for the TASKE database and PBX files.

Selecting a Mode

The Administrator application operates in two modes: Database and Configuration. Use these modes to build the TASKE database and to maintain and configure its associated files.

The two buttons located at the top of the Main Control Panel toggle between the Database and the Configuration modes.

Database Mode   **Configuration Mode**

The Database Mode is used to construct the TASKE database. The TASKE database is comprised of names, numbers, and other characteristics of a customer interaction center. The elements defined in the TASKE database mirror those elements defined in the PBX system. Registering these parameters and mirroring the PBX database elements enables the TASKE system to generate reports for the elements of a telephone system used throughout a company. Use the Administrator to define and maintain the TASKE database. This is the only TASKE application where database elements are defined, modified, and deleted.

The Configuration Mode provides maintenance flags and configuration tools for the database. The interface for this mode is divided into three sections: Logs, Maintenance, and Alarms. For security purposes, the TASKE Servers are the only PCs with access to all three sections. On Supervisor PCs only the Logs section is provided in the Configuration Mode of the Administrator.

Maintenance tools include a system log, alarm parameters set to user specifications that warn of maintenance needs, and the generation of statistics files. The configuration tools include an interface for configuring disk storage settings, error log tracking and ensuring the security of stored records by setting alarms to notify of any abnormalities. The application may be used routinely for activities such as reading maintenance logs, archiving, deleting and synchronizing shadow files, as well as performing disk statistics.

Using the Database Mode

The Database Mode allows the design, construction and editing of the TASKE database. This Includes configuring the number of Trunks, Extensions, Agents, Queues and Qualifiers in use on a telephone system and establishing groups of these elements for reporting purposes.

Using the Database Mode Interface

To use the Database Mode, click the Database button on the Main Control Panel. In Database Mode the Main Control Panel provides buttons to access the editable tables for the database elements. To select a table for viewing, click the button for the desired table. The available tables of database elements are Trunks, Trunk Groups, Extensions, Extension Groups, Agents, Agent Groups, Queues, Queue Groups, Qualifier Codes, and DNIS codes. Use the Spectrum and Options tables to configure the database options.

The selected table appears in the display area that is located to the right of the Main Control Panel. This area is comprised of two sections for all tables with the exception of the Spectrum table and the Options table. These sections are the List Panel and the Details panel. Both the Spectrum table and the Options table are comprised of a single section.

List panel

The List panel is the top section of the display area. The panel contains a list of all defined database elements for the selected table. Each entry in the list provides the ID Number, Name and Nick Name of the element. To select a database element from the List panel, click on the entry for the element. When selected, the List panel entry is highlighted in blue.

Details panel

The Details panel is the bottom section of the display area. This panel provides detailed information for the record selected in the List panel. As the information required for each type of database element is unique, the contents of the Details panel varies for each table. Use the Details panel to create, edit, or delete database elements. The toolbar at the top of the Details panel provides the tools for performing these tasks.

Exporting the TASKE Database

Use the following steps to export the TASKE database. Each database element selected for export is saved in a separate file in the file type and location selected.

1. From the Database mode, select Export from the File menu to open the Export Database dialog box.
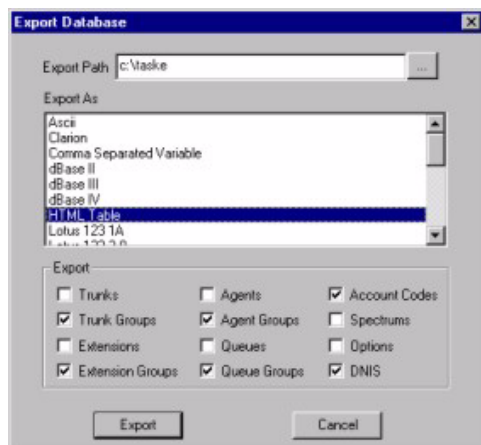
2. Input the path to the exported database files in the Export Path field. The default location for the files is the root of the TASKE directory.

   If desired, click the ⬛ button to access the network and select another file location.

3. Select a file type for the exported files from the Export As list. The file formats available for export include:

   - Ascii
   - Clarion
   - Comma Separated Variable
   - dBase II
   - dBase III
   - dBase IV
   - HTML Table
   - Lotus 123 1A
   - Lotus 123 2.0
   - Lotus 123 3.0
   - Lotus 123 4.0
   - Microsoft Excel 2.1
   - Microsoft Excel 3.0
   - Microsoft Excel 4.0 or greater
   - Print Image
   - Quattro
   - Quattro Pro
   - Quattro Pro 5.0 for Windows
   - Symphony 1.0
   - Symphony 1.1
   - Tab Separated Variable
   - Word Processing Text

4. Enable the check boxes of the database elements to export in the Export section of the dialog box.
5. Disable the check boxes of the database elements not required for export in the Export section of the dialog box.
6. Click Export to export the selected database elements and close the dialog box.

Locate the new files in the location specified in the Export Path field. Open the files using the appropriate application for the file format.

Defining Trunks

Click the Trunks button on the Main Control Panel in Database Mode to display the Trunks table.

The List panel displays a list of all Trunks defined in the database. If the list is too long to display all defined Trunks, scroll bars are provided for navigation throughout the list. The list contains an ID Number, Name and Nick Name for each Trunk.

ID Number Column - displays unique ID Numbers for each Trunk defined in the TASKE Database. The ID Number is the key parameter by which the TASKE Database indexes and tracks Trunk elements.

Name Column - displays the names for each Trunk defined in the TASKE Database. The Name is a character string which represents the Trunk's full name for reference purposes and may appear in Trunk reports.

Nick Name Column - displays nicknames for each Trunk defined in the TASKE Database. The Nick Name is simply an alternate way of naming Trunk records and may be used in reports.

In the Details panel Trunks may be added, deleted or modified by using the New, Update and Delete buttons.

The Is a Member Of section of the Details panel lists all Trunk Groups containing the selected Trunk. To examine one of these Trunks Groups, select the desired Trunk Group from the Is a Member Of section and click the Go To button. This action displays the Trunk Groups table with the details of the selected Trunk Group.

Adding Trunk Entries

Use the following steps to add a trunk entry to the database.

1. In the Trunk Record Details panel, click the New button.
2. In the Trunk Record Detail panel, enter the ID, Name, and Nick Name of the new Trunk Record.
3. Click the Update button.

The Trunk ID in the TASKE database <u>must be</u> identical to the Trunk ID in the PBX system.

Duplicating a Trunk Entry

Use the following steps to duplicate a Trunk entry. This is useful when creating a new Trunk entry that is similar to another Trunk.

1. Choose the Trunk entry to be duplicated from the List panel.
2. In the Trunk Record Detail panel, change the ID (this is the only information that must be changed). Ensure that the new ID does not conflict with any existing trunks.
3. In the Trunk Record Details panel, click the Update button.

Modifying Trunk Entries

Use the following steps to modify a Trunk entry.

1. Choose the Trunk entry to be modified from the List panel.
2. In the Trunk Record Detail panel, modify the Trunk Record.
3. In the Trunk Record Details panel, click the Update button.

Deleting Trunk Entries

Use the following steps to delete a Trunk entry.

1. Choose the Trunk entry to be deleted from the List panel.
2. In the Trunk Record Details panel, click the Delete button.
3. Click Yes in the confirmation box that displays to continue with the Delete.

Defining Trunk Groups

Click the Trunk Groups button on the Main Control Panel in Database Mode to display the Trunk Groups table.

The List panel displays a list of all Trunk Groups defined in the database. If the list is too long to display all defined Trunk Groups, scroll bars are provided for navigation throughout the list. The list contains an ID Number, Name and Nick Name for each Trunk Group.

ID Number Column - displays unique ID Numbers for each Trunk Group defined in the TASKE Database. The ID Number is the key parameter by which the TASKE Database indexes and tracks Trunk Group elements.

To implement Call Costing in the customer interaction center, it is absolutely necessary to define the lowest Trunk Group Numbers, such as 1000, 1001, 1002, and 1003 in the TASKE Database as Call Costing Trunk Groups, and reserve the higher Trunk Group numbers, such as 1010, for reporting purposes. This is because Call Costing searches for costing information on Trunk Groups with the lowest Trunk Group numbers.

Name Column - displays the names for each Trunk Group defined in the TASKE Database. The Name is a character string that represents the Trunk Group's full name and is for reference purposes and may appear in Trunk Group reports.

Nick Name Column - displays nicknames for each Trunk Group defined in the TASKE Database. The Nick Name is simply an alternate way of naming Trunk Group records and may be used in reports.

Use the Details panel to add, delete or modify Trunk Groups by using the New, Update and Delete buttons.

The Trunk Members section of the Details panel lists all Trunks that are members of the selected Trunk Group. To examine one of these Trunks, select the desired Trunk from the Trunk Members section and click the Go To button. This action displays the Trunks table with the details of the selected Trunk.

Adding Trunk Group Entries

Use the following steps to add a Trunk Group entry to the database.

1. In the Trunk Group Record Details panel, click the New button.
2. In the Trunk Group Record Detail panel, enter the ID, Name, and Nick Name of the new Trunk Group Record.
3. Select the Trunks that belong to the new Trunk Group from the Trunk Members list.
4. Click the Update button.

Duplicating a Trunk Group Entry

Use the following steps to duplicate a Trunk Group entry. This is useful when creating a new Trunk Group entry that is similar to another Trunk Group.

1. Choose the Trunk Group entry to be duplicated from the List panel.
2. In the Trunk Group Record Detail panel, change the ID (this is the only information that must be changed). Ensure that the new ID does not conflict with any existing trunk groups.
3. In the Trunk Group Record Details panel, click the Update button.

Modifying Trunk Group Entries

Use the following steps to modify a Trunk Group entry.

1. Choose the Trunk Group entry to be modified from the List panel.
2. In the Trunk Group Record Detail panel, modify the Trunk Group Record.
3. In the Trunk Group Record Details panel, click the Update button.

Deleting Trunk Group Entries

Use the following steps to delete a Trunk Group entry.

1. Choose the Trunk Group entry to be deleted from the List panel.
2. In the Trunk Group Record Details panel, click the Delete button.
3. Click Yes in the confirmation box that displays to continue with the Delete.

Defining Extensions

Click the Extensions button on the Main Control Panel in Database Mode to display the Extensions table.

The List panel displays a list of all Extensions defined in the database. If the list is too long to display all defined Extensions, scroll bars are provided for navigation throughout the list. The list contains an ID Number, Name and Nick Name for each Extension.

ID Number Column - displays unique ID Numbers for each Extension defined in the TASKE Database. The ID Number is the key parameter by which the TASKE Database indexes and tracks Extension elements.

Name Column - displays the names for each Extension defined in the TASKE Database. The Name is a character string which represents the Extension's full name and is for reference purposes and may appear in Extension reports.

Nick Name Column - displays nicknames for each Extension defined in the TASKE Database. The Nick Name is simply an alternate way of naming Extension records and may be used in reports.
Use the Details panel to add, delete, or modify Extensions by using the New, Update and Delete buttons.

The Is a Member Of section of the Details panel lists all Extension Groups containing the selected Extension. To examine one of these Extension Groups, select the desired Extension Group from the Is a Member Of section and click the Go To button. This action displays the Extension Groups table with the details of the selected Extension Group.

Adding Extension Entries

Use the following steps to add an Extension entry to the database.

1. In the Extension Record Details panel, click the New button.
2. In the Extension Record Detail panel, enter the ID, Name, Nick Name, and Port number of the new Extension Record.
3. Click the Update button.

For data collection to occur, the Extension ID in the TASKE database <u>must be</u> identical to the Extension ID in the PBX system.

Duplicating an Extension Entry

Use the following steps to duplicate an Extension entry. This is useful when creating a new Extension entry that is similar to another Extension.

1. Choose the Extension entry to be duplicated from the List panel.
2. In the Extension Record Detail panel, change the ID (this is the only information that must be changed). Ensure that the new ID does not conflict with any existing extensions.
3. In the Extension Record Details panel, click the Update button.

Modifying Extension Entries

Use the following steps to modify an Extension entry.

1. Choose the Extension entry to be modified from the List panel.
2. In the Extension Record Detail panel, modify the Extension Record.
3. In the Extension Record Details panel, click the Update button.

Deleting Extension Entries

Use the following steps to delete an Extension entry.

1. Choose the Extension entry to be deleted from the List panel.
2. In the Extension Record Details panel, click the Delete button.
3. Click Yes in the confirmation box that displays to continue with the Delete.

Defining Extension Groups

Click the Extension Groups button on the Main Control Panel in Database Mode to display the Extension Groups table.

The List panel displays a list of all Extension Groups defined in the database. If the list is too long to display all defined Extension Groups, scroll bars are provided for navigation throughout the list. The list contains an ID Number, Name and Nick Name for each Extension Group.

ID Number Column - displays unique ID Numbers for each Extension Group defined in the TASKE Database. The ID Number is the key parameter by which the TASKE Database indexes and tracks Extension Group elements.

Name Column - displays the names for each Extension Group defined in the TASKE Database. The Name is a character string that represents the Extension Group's full name and is for reference purposes and may appear in Extension Group reports.

Nick Name Column - displays nicknames for each Extension Group defined in the TASKE Database. The Nick Name is simply an alternate way of naming Extension Group records and may be used in reports.

Use the Details panel to add, delete or modify Extension Groups by using the New, Update and Delete buttons.

The Extension Members section of the Details panel lists all Extensions that are members of the selected Extension Group. To examine one of these Extensions, select the desired Extension from the Extension Members section and click the Go To button. This action displays the Extensions table with the details of the selected Extension.

Adding Extension Group Entries

Use the following steps to add an Extension Group entry.

1. In the Extension Group Record Details panel, click the New button.
2. In the Extension Group Record Detail panel, enter the ID, Name, and Nick Name of the new Extension Group Record.
3. Select the Extensions that belong to the new Extension Group from the Extension Members list.
4. Click the Update button.

Duplicating an Extension Group Entry

Use the following steps to duplicate an Extension Group entry. This is useful when creating a new Extension Group entry that is similar to another Extension Group.

1. Choose the Extension Group entry to be duplicated from the List panel.
2. In the Extension Group Record Detail panel, change the ID (this is the only information that must be changed). Ensure that the new ID does not conflict with any existing extension groups.
3. In the Extension Group Record Details panel, click the Update button.

Modifying Extension Group Entries

Use the following steps to modify an Extension Group entry.

1. Choose the Extension Group entry to be modified from the List panel.
2. In the Extension Group Record Detail panel, modify the Extension Group Record.
3. In the Extension Group Record Details panel, click the Update button.

Deleting Extension Group Entries

Use the following steps to delete an Extension Group entry.

1. Choose the Extension Group entry to be deleted from the List panel.
2. In the Extension Group Record Details panel, click the Delete button.
3. Click Yes in the confirmation box that displays to continue with the Delete.

Defining Agents

Click the Agents button on the Main Control Panel in Database Mode to display the Agents table.
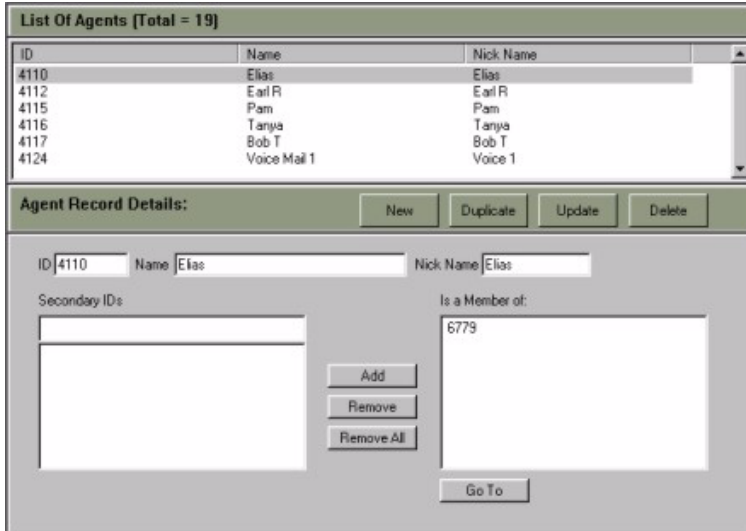
The List panel displays a list of all agents defined in the database. If the list is too long to display all defined agents, scroll bars are provided for navigation throughout the list. The list contains an ID Number, Name and Nick Name for each agent.

> **ID Number Column -** displays unique ID Numbers for each agent defined in the TASKE Database. The ID Number is the key parameter by which the TASKE Database indexes and tracks agent elements.

> **Name Column -** displays the names for each agent defined in the TASKE Database. The Name is a character string which represents the agent's full name and is for reference purposes and may appear in agent reports.

> **Nick Name Column -** displays nicknames for each agent defined in the TASKE Database. The Nick Name is simply an alternate way of naming agent records and may be used in reports.

Use the Details panel to add, delete, or modify agents by using the New, Update and Delete buttons.

The Is a Member Of section of the Details panel lists all Agent Groups containing the selected agent. To examine one of these Agent Groups, select the desired Agent Group from the Is a Member Of section and click the Go To button. This action displays the Agent Groups table with the details of the selected Agent Group.

Adding Agent Entries

Use the following steps to add an agent entry to the database.

1. In the Agent Record Details panel, click the New button.
2. In the Agent Record Detail panel, enter the ID, Name, and Nick Name of the new agent record.
3. Click the Update button.

For data collection to occur, the agent ID in the TASKE database <u>must be</u> identical to the agent ID in the PBX system. An agent Number must be seven digits or less to be compatible with PBX data record entries.

Creating Secondary Agent IDs

Secondary Agent IDs are a useful tool for providing agents with additional IDs for reporting purposes. For instance, a call center may have a queue for English callers, a queue for French callers, and a queue for Spanish callers. A single agent who is fluent in all of these languages may have to log into any of these queues to answer calls.

Using secondary agent IDs, the agent can have an ID for each of the three queues. In this case, the primary ID may be a member of the English queue, while the two secondary IDs are used for the French and Spanish queues. Each ID shares the same name and nick name.

Having established these three IDs for a single agent, the supervisor can view the reports and know the call statistics for this agent in all three languages. Two secondary agent IDs are provided for each agent in the basic TASKE license. Contact TASKE to inquire about increasing the number of secondary agent IDs per agent.

Use the following steps to create a secondary agent ID.

1. Choose the agent requiring the secondary agent ID from the List Panel.
2. Input the new ID number under the heading 'Secondary IDs' in the Record Details Panel. Ensure that the ID number is not used for any other agents.
3. Click Add in the Record Details Panel. The new ID number is added to the list of secondary agent IDs.
4. Click Update to save the changes to the agent record.

Once the maximum number of secondary agent IDs allowed by the TASKE license file is reached, the user is prevented from adding additional secondary IDs.

Duplicating an Agent Entry

Use the following steps to duplicate an agent entry. This is useful when creating a new agent entry that is similar to another agent.

1. Choose the agent entry to be duplicated from the List panel.
2. In the Agent Record Detail panel, change the ID (this is the only information that must be changed). Ensure that the new ID does not conflict with any existing agents.
3. In the Agent Record Details panel, click the Update button.

Modifying Agent Entries

Use the following steps to modify an agent entry.

1. Choose the agent entry to be modified from the List panel.
2. In the Agent Record Detail panel, modify the agent record.
3. In the Agent Record Details panel, click the Update button.

Deleting Agent Entries

Use the following steps to delete an agent entry

1. Choose the agent entry to be deleted from the List panel.
2. In the Agent Record Details panel, click the Delete button.
3. Click Yes in the confirmation box that displays to continue with the Delete.

Defining Agent Groups

Click the Agent Groups button on the Main Control Panel in Database Mode to display the Agent Groups table.

The List panel displays a list of all Agent Groups defined in the database. If the list is too long to display all defined Agents, scroll bars are provided for navigation throughout the list. The list contains an ID Number, Name and Nick Name for each Agent.

ID Number Column - displays unique ID Numbers for each Agent Group defined in the TASKE Database. The ID Number is the key parameter by which the TASKE Database indexes and tracks Agent Group elements.

Name Column - displays the names for each Agent Group defined in the TASKE Database. The Name is a character string which represents the Agent Group's full name and is for reference purposes and may appear in Agent Group reports.

Nick Name Column - displays nicknames for each Agent Group defined in the TASKE Database. The Nick Name is simply an alternate way of naming Agent Group records and may be used in reports.

Use the Details panel to add, delete or modify Agent Groups by using the New, Update and Delete buttons.

The Agent Members section of the Details panel lists all agents that are members of the selected Agent Group. To examine one of these agents, select the desired agent from the Agent Members section and click the Go To button. This action displays the Agents table with the details of the selected Agent.

Adding Agent Group Entries

Use the following steps to add an Agent Group entry to the database.

1. In the Agent Group Record Details panel, click the New button.
2. In the Agent Group Record Detail panel, enter the ID, Name, and Nick Name of the new Agent Group Record.
3. Select the Agents that belong to the new Agent Group from the Agent Members list.
4. Click the Update button.

The Agent Group is a reporting concept for the TASKE Database that identifies a collection of Agents to be reported on as a single entity. The PBX system does not employ this concept, and therefore the Agent Group IDs do not have to mirror any PBX system elements.

Duplicating an Agent Group Entry

Use the following steps to duplicate an Agent Group entry. This is useful when creating a new Agent Group entry that is similar to another Agent Group.

1. Choose the Agent Group entry to be duplicated from the List panel.
2. In the Agent Group Record Detail panel, change the ID (this is the only information that must be changed). Ensure that the new ID does not conflict with any existing agent groups.
3. In the Agent Group Record Details panel, click the Update button.

Modifying Agent Group Entries

Use the following steps to modify an Agent Group entry.

1. Choose the Agent Group entry to be modified from the List panel.
2. In the Agent Group Record Detail panel, modify the Agent Group Record.
3. In the Agent Group Record Details panel, click the Update button.

Deleting Agent Group Entries

Use the following steps to delete an Agent Group entry.

1. Choose the Agent Group entry to be deleted from the List panel.
2. In the Agent Group Record Details panel, click the Delete button.
3. Click Yes in the confirmation box that displays to continue with the Delete.

Defining Queues

Click the Queues button on the Main Control Panel in Database Mode to display the Queues table.

The List panel displays a list of all Queues defined in the database. If the list is too long to display all defined Queues, scroll bars are provided for navigation throughout the list. The list contains an ID Number, Name and Nick Name for each Queue.

> **ID Number Column -** displays unique ID Numbers for each Queue defined in the TASKE Database. The ID Number is the key parameter by which the TASKE Database indexes and tracks Queue elements.

> **Name Column -** displays the names for each Queue defined in the TASKE Database. The Name is a character string which represents the Queue's full name and is for reference purposes and may appear in Queue reports.

> **Nick Name Column -** displays nicknames for each Queue defined in the TASKE Database. The Nick Name is simply an alternate way of naming Queue records and may be used in reports.

Use the Details panel to add, delete, or modify Queues by using the New, Update and Delete buttons.

The Is a Member Of section of the Details panel lists all Queue Groups containing the selected Queue. To examine one of these Queue Groups, select the desired Queue Group from the Is a Member Of section and click the Go To button. This action displays the Queue Groups table with the details of the selected Queue Group.

Adding Queue Entries

Use the following steps to add a Queue entry to the database.

1. In the Queue Record Details panel, click the New button.
2. In the Queue Record Detail panel, enter the ID, Name, Nick Name, and TSF Time of the new Queue Record.
3. In the Type section, enable the Path or Queue radio button.

   Path - select Path to define the routing of calls to an agent group. Select the agent group from the drop-down list for the Agent Group ID field.

   Queue - select Queue to assign one dialable number to all extensions within an extension group. Select the desired extension group number from the Extn. Group ID drop-down list.

4. Input the name of the Schedule Group in the Schedule Group field. This is the name of the group associated with this Queue in PrimeTime. The name must be spelled exactly as it is in PrimeTime, including spaces and punctuation, but it is not case sensitive.
5. Click the Update button.

For data collection to occur, the Queue ID in the TASKE database must be identical to the Queue ID in the PBX system.

If the Schedule Group name is not input or is incorrect, the real-time adherence alarms will not function.

Duplicating a Queue Entry

Use the following steps to duplicate a Queue entry. This is useful when creating a new Queue entry that is similar to another Queue.

1. Choose the Queue entry to be duplicated from the List panel.
2. In the Queue Record Detail panel, change the ID (this is the only information that must be changed). Ensure that the new ID does not conflict with any existing Queues.
3. In the Queue Record Details panel, click the Update button.

Modifying Queue Entries

Use the following steps to modify a Queue entry.

1. Choose the Queue entry to be modified from the List panel.
2. In the Queue Record Detail panel, modify the Queue Record.
3. In the Queue Record Details panel, click the Update button.

Deleting Queue Entries

Use the following steps to delete a Queue entry.

1. Choose the Queue entry to be deleted from the List panel.
2. In the Queue Record Details panel, click the Delete button.
3. Click Yes in the confirmation box that displays to continue with the Delete.

Queue Groups

Click the Queue Groups button on the Main Control Panel in Database Mode to display the Queue Groups table.

The List panel displays a list of all Queue Groups defined in the database. If the list is too long to display all defined Queue Group, scroll bars are provided for navigation throughout the list. The list contains an ID Number, Name and Nick Name for each Queue Group.

ID Number Column - displays unique ID Numbers for each Queue Group defined in the TASKE Database. The ID Number is the key parameter by which the TASKE Database indexes and tracks Queue Group Code elements.

Name Column - displays the names for each Queue Group defined in the TASKE Database. The Name is a character string which represents the Queue Group's full name and is for reference purposes and may appear in Queue Group reports.

Nick Name Column - displays nicknames for each Queue Group defined in the TASKE Database. The Nick Name is simply an alternate way of naming Queue Group records and may be used in reports.

Use the Details panel to add, delete or modify Queue Groups by using the New, Update and Delete buttons.

The Queue Members section of the Details panel lists all Queues that are members of the selected Queue Group. To examine one of these Queues, select the desired Queue from the Queue Members section and click the Go To button. This action displays the Queues table with the details of the selected Queue.

Adding Queue Group Entries

Use the following steps to add a Queue Group entry to the database.

1. In the Queue Group Record Details panel, click the New button.
2. In the Queue Group Record Detail panel, enter the ID, Name, and Nick Name of the new Queue Group Record.
3. Select the Queues that belong to the new Queue Group from the Queue Members list.
4. Click the Update button.

Duplicating a Queue Group Entry

Use the following steps to duplicate a Queue Group entry. This is useful when creating a new Queue Group entry that is similar to another Queue Group.

1. Choose the Queue Group entry to be duplicated from the List panel.
2. In the Queue Group Record Detail panel, change the ID (this is the only information that must be changed). Ensure that the new ID does not conflict with any existing Queue groups.
3. In the Queue Groups Record Details panel, click the Update button.

Modifying Queue Group Entries

Use the following steps to modify a Queue Group entry.

1. Choose the Queue Group entry to be modified from the List panel.
2. In the Queue Group Record Detail panel, modify the Queue Group Record.
3. In the Queue Group Record Details panel, click the Update button.

Deleting Queue Group Entries

Use the following steps to delete a Queue Group entry.

1. Choose the Queue Group entry to be deleted from the list.
2. In the Queue Group Record Details panel, click the Delete button.
3. Click Yes in the confirmation box that displays to continue with the Delete.

Defining Qualifier Codes

Qualifier Codes are numbers an Agent enters into the telephone system while engaged on a Pilot call. The codes flag the call by type so that call statistics can be collected by the TASKE system for analysis and planning. There are two types of Qualifier Codes: Verified and Non-Verified.

Verified Qualifier Codes are constructed as multiple pairs of 2 decimal digits. The first pair of digits forms a primary pair and is typically displayed as a row header in the Call Account Reports. Secondary pairs of digits typically form a column list; in effect a matrix is formed. Combining the primary pair with multiple secondary pairs results in codes of six digits or more.

Non-Verified Qualifier Codes are used in an ad-hoc manner and are free form. They are used as a convenient mechanism to collate statistics on various types of calls. The TASKE system performs no verification on them and requires only that they be constructed in pairs of digits. Because the TASKE system places virtually no restrictions on the format of Non-Verified Qualifier Codes, the Qualifier Codes administrator does not apply to them.
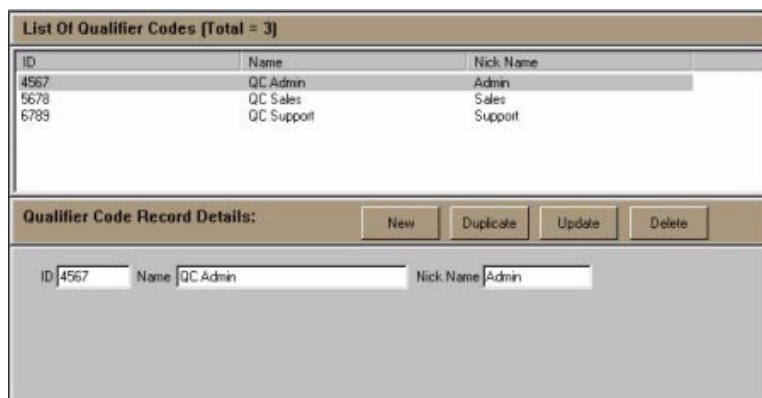
The List panel displays a list of all Qualifier Codes defined in the database. If the list is too long to display all defined Qualifier Codes, scroll bars are provided for navigation throughout the list. The list contains an ID Number, Name and Nick Name for each Qualifier Code.

ID Number Column - displays unique ID Numbers for each Qualifier Code defined in the TASKE Database. The ID Number is the key parameter by which the TASKE Database indexes and tracks Qualifier Code elements.

Name Column - displays the names for each Qualifier Code defined in the TASKE Database. The Name is a character string which represents the Qualifier Code's full name and is for reference purposes and may appear in Qualifier Code reports.

Nick Name Column - displays nicknames for each Qualifier Code defined in the TASKE Database. The Nick Name is simply an alternate way of naming Qualifier Code records and may be used in reports.

Use the Details panel to add, delete, or modify Qualifier Codes by using the New, Update and Delete buttons.

Adding Qualifier Code Entries

Use the following steps to add an Qualifier Code entry to the database.

1. In the Qualifier Code Record Details panel, click the New button.
2. In the Qualifier Code Record Detail panel, enter the ID, Name, and Nick Name of the new Qualifier Code Record.
3. Click the Update button.

Duplicating an Extension Entry

Use the following steps to duplicate an Extension entry. This is useful when creating a new Extension entry that is similar to another Extension.

1. Choose the Extension entry to be duplicated from the List panel.
2. In the Extension Record Detail panel, change the ID (this is the only information that must be changed). Ensure that the new ID does not conflict with any existing Qualifier Codes.
3. In the Qualifier Code Record Details panel, click the Update button.

Modifying Qualifier Code Entries

Use the following steps to modify an Qualifier Code entry.

1. Choose the Qualifier Code entry to be modified from the List panel.
2. In the Qualifier Code Record Detail panel, modify the Qualifier Code Record.
3. In the Qualifier Code Record Details panel, click the Update button.

Deleting Qualifier Code Entries

Use the following steps to delete an Qualifier Code entry.

1. Choose the Qualifier Code entry to be deleted from the List panel.
2. In the Qualifier Code Record Details panel, click the Delete button.
3. Click Yes in the confirmation box that displays to continue with the Delete.

Defining Spectrums

The TASKE ToolBox generates various reports that provide a spectrum or profile of the timing of calls to the customer interaction center. There are three types of Spectrum settings: Answer Spectrums, Abandon Spectrums, and Interflow Spectrums.

Click the Spectrums button on the Main Control Panel in Database Mode to display the Spectrums table in the display area.

For example, the Reports include a Time To Answer spectrum that indicates the numbers of calls answered between 10 and 20 seconds, between 20 and 30 seconds, and so on. This enables users to compare the spectrum of call answering with the time delay, and determine the delays faced by most callers.

Answer Spectrum

The Answer Spectrum section allows users to set 10 threshold times for the Time To Answer spectrum. Each of the 10 threshold times is set to an independent threshold time (in seconds), with each time getting progressively longer. This produces the profile of Time To Answer from 0 to "x" seconds. The Spectrum reports produced indicate the number of calls Answered within each of the threshold times.

Abandon Spectrum

The Abandon Spectrum section allows users to set 10 threshold times for the Time To Abandon spectrum. The Spectrum reports produced indicate the number of calls Abandoned within each of the threshold times. Each of the 10 threshold times is set to an independent threshold time (in seconds), with each time getting progressively longer. This produces the profile of Time To Abandon from 0 to "x" seconds.

Interflow Spectrum

The Interflow Spectrum section allows users to set 10 threshold times for the Time To Interflow spectrum. The Spectrum reports produced indicate the number of calls Interflowed within each of the threshold times. Each of the 10 threshold times is set to an independent threshold time (in seconds), with each time getting progressively longer. This produces the profile of Time To Interflow from 0 to "x" seconds.
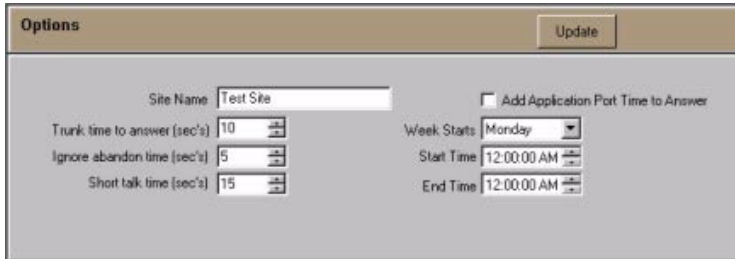
Updating Spectrum Settings

Use the following steps to update Spectrum settings.

1. Enter the number of seconds for each threshold time for the Answer, Abandon, and Interflow Spectrums.
2. Click the Update button.

Defining Options

The ACD ToolBox provides a wide range of reports that provide statistics on almost all aspects of the operation of a customer interaction center. The Options table provides an interface for setting reporting parameters. Click the Options button on the Main Control Panel in Database Mode to display the Options table in the display area.

The available reporting options are listed below.

Site Name

Input a name for the site. All reports include the site name in the header of the report.

Trunk Time to Answer

Trunk Reports list the percentage of calls that are actually answered within "x" seconds. This value is compared with the target service level. The threshold time is entered in the Trunk time to answer selection box in seconds, and is reported under the % Ans'd Before xx Secs column heading in the Reports.

Ignore Abandon Time

Set a threshold time to identify genuine Abandons. These are calls that Abandon after the threshold time set in the Ignore abandon time selection box. Genuine Abandons are used in the Service Percentages for the Queue.

Short Talk Time

The ACD ToolBox allows users to identify calls that terminate after a very short talk time from other calls. The assumption is that a high proportion of very short Answered calls indicates a potential fault on one or more Trunks. For example, a faulty Trunk may allow a call to be Answered, but may not provide a satisfactory audio connection for conversation to take place.

These calls are reported under the Short Dur'n Calls column heading in the TASKE Trunk and Trunk Group Reports. The threshold is set in the Short talk time selection box.

Add Application Port Time to Answer

If the customer interaction center has implemented an automatic answering function, then a call may be answered within seconds. However, this is not the time that the caller perceives as the Time to Answer, since the caller may have to wait an additional period of time after the automatic answer before reaching an Agent.

To obtain a true measure of the time that it takes to reach the Agent, the TASKE system takes into account both time periods. Enabling the Add Application Port Time to Answer check box instructs the ACD ToolBox to add the Time to Answer for the automatic answering device to the Trunk Time to Answer.

Week Starts

The TASKE ToolBox enables users to produce Daily Reports by Day of Week. The setting of the Week Starts selection box determines which day is the start of the work week.

Start Time / End Time

Use the Start Time and End Time fields to define the hours that encompass the reporting period for a day. Input the times using the 12-hour clock in HH:MM:SS AM/PM time format.

Updating Options Settings

Use the following steps to update Options settings.

1. Change the desired Options settings.
2. Click the Update button.

Defining DNIS Numbers

DNIS is an acronym for Dialed Number Identification Service. DNIS is a service in which the telephone company transmits an identification number to a PBX receiving a call. The identification number is typically the last four digits which the Caller dialed, but may be the whole number or may be a translated number. This filter allows users to extract call records based on the number dialed by the Caller. Reports can be generated for Queues and Queue Groups using DNIS information. In a DNIS Report, nick names appear for each DNIS. These nick names must be set up in the TASKE Administrator.

Click the DNIS button on the Main Control Panel in Database Mode to display the DNIS table.

The List panel displays a list of all DNIS numbers defined in the database. If the list is too long to display all defined DNIS numbers, scroll bars are provided for navigation throughout the list. The list contains an ID Number, Name and Nick Name for each DNIS number.

ID Column - displays the ID for each DNIS entry defined in the TASKE Database. The ID is the key parameter by which the TASKE Database indexes and tracks DNIS elements.

Name Column - displays names for each DNIS entry defined in the TASKE Database. The Name is a character string which represents the DNIS entry's full name and is for reference purposes and may appear in DNIS reports.

Nick Name Column - displays nickname for each DNIS entry defined in the TASKE Database. The Nick Name is simply an alternate way of naming DNIS elements and is used in Queue and Queue Group reports.

Use the Details panel to add, delete, or modify DNIS numbers by using the New, Update and Delete buttons.

Adding DNIS Entries

Use the following steps to add a DNIS entry to the database.

1. In the DNIS Details panel, click the New button.
2. In the DNIS Details panel, enter the ID, Name, and Nick Name of the new DNIS record.
3. Click the Update button.

Duplicating a DNIS Entry

Use the following steps to duplicate an DNIS entry. This is useful when creating a new DNIS entry that is similar to another DNIS entry.

1. Choose the DNIS entry to be duplicated from the List panel.
2. In the DNIS Details panel, change the ID (this is the only information that must be changed). Ensure that the new ID does not conflict with any existing agents.
3. In the DNIS Details panel, click the Update button.

Modifying DNIS Entries

Use the following steps to modify a DNIS entry.

1. Choose the DNIS entry to be modified from the List panel.
2. In the DNIS Detail panel, modify the DNIS Record.
3. In the DNIS Details panel, click the Update button.

Deleting DNIS Entries

Use the following steps to delete a DNIS entry.

1. Choose the DNIS entry to be deleted from the list.
2. In the DNIS Details panel, click the Delete button.
3. Click Yes in the confirmation box that displays to continue with the Delete.

Using the Configuration Mode

Configuration Mode allows users to perform file maintenance, set alarms and view logs for the TASKE Administrator Database. To use the TASKE Administrator in Configuration Mode, click on the Configuration icon on the Main Control Panel.

Using the Configuration Mode Interface

The Configuration Mode provides maintenance flags and configuration tools for the database. The interface for this mode is divided into three sections: Logs, Maintenance, and Alarms. For security purposes, the TASKE Servers are the only PCs with access to all three sections. On Supervisor PCs only the Logs section is provided in the Configuration Mode of the Administrator.

Maintenance tools include a system log, alarm parameters set to user specifications that warn of maintenance needs, and the generation of statistics files. The configuration tools include an interface for configuring disk storage settings, error log tracking and ensuring the security of stored records by setting alarms to notify of any abnormalities. The application may be used routinely for activities such as reading maintenance logs, archiving, deleting and synchronizing shadow files, as well as performing disk statistics.

<u>Logs</u>

The Logs section displays a log of system events that include Collector events and any errors and alarms that occur. This log allows for the tracking and reporting of any errors or significant events that are encountered by the TASKE system.

<u>Maintenance</u>

The Maintenance tool contains two panels in the display area. The top panel displays current statistics on file space and disk space for the TASKE Server PC. Display various statistics by choosing the statistical criteria from the Display Usage drop down list.

The lower panel displays tabs that contain controls for archiving, deleting and synchronizing shadow files. Using the tabs, these tasks can be scheduled to run automatically or they can be performed immediately by setting the required parameters and clicking the button to perform the task manually. For instance, click the Archive Now... button on the Archive Files tab, click the Delete Now... button on the Manually Delete Files tab, or click the Synchronize Now button on the Synchronize Shadow Files tab to manually perform these tasks.

Alarms

The Alarms section provides the interface for setting alarm parameters. The alarms notify users when the Collector is not receiving data records, or if the available disk space falls below an acceptable level. Both of these alarms are based on user-defined thresholds. To disable the alarms, set the threshold values to zero.

Using the Event Log

The Logs section of the Configuration Mode displays a log of system events that include Collector events and any errors and alarms that occur. This log allows for the tracking and reporting of any errors or significant events that *are encountered by the TASKE system.*

When errors or significant events occur in the TASKE applications, users are directed to the Log file for details. This Logs section of the Configuration Mode is the area to which these applications are referring. Each log entry contains the application where the event occurred, the date of the event, the time of the event, and a description of what occurred.

Application	Date	Time	Description
State Machine	20000928	19:53:14	Starting ttnetsrv v8.0.143
Taske Server	20000928	19:53:13	activating local site
Taske Server	20000928	19:53:13	automatic site activation started
Taske Server	20000928	19:53:13	listening on port 5210
Taske Server	20000928	19:53:13	Advise for local site display sink succeeded
Collector	20000928	19:53:10	Started
Collector	20000928	19:53:10	Starting
Agent Chat	20000928	19:53:08	Chat listening on port 5211
Taske Server	20000928	19:53:07	TASKE lock number TT000001
Taske Server	20000928	19:53:05	Starting ttnetsrv v8.0.143
Monitor	20000928	19:49:10	State machine service error has occurred. See the log file for more information.
State Machine	20000928	19:49:10	Stopped ttacdmon v8.0.143
Taske Client	20000928	19:49:10	Stopped ttnetcli v8.0.143
State Machine	20000928	19:49:10	Event sink advise failed,hr=8004106B
Taske Client	20000928	19:49:10	connect to local site failed,hr=8004106B
Taske Client	20000928	19:49:10	[socket 184] connect error=10061
Taske Client	20000928	19:49:09	connect to 127.0.0.1:5210 pending
Taske Client	20000928	19:49:09	Starting ttnetcli v8.0.143
State Machine	20000922	11:37:41	Stopped ttnetsrv v8.0.121

Occasionally it will be necessary to save the log file and clear the events. The log file records all system events and can become very large. Although the actual file size may not be large, the number of records in the file may make it difficult to find recent events. By saving the log file and clearing the events, the user is able to retain the events in the saved .log file and start a new log file by clearing the log.

Saving the Log File

Use the following steps to save the log file.

1. Click the Logs button on the Main Control Panel to display the log.
2. Select Save As... from the File menu to open the Save As dialog box.
3. Select the desired location for the log file on the PC or network from the Save in: drop-down list. This list provides the available PC and network locations for saving the file. The default location for the log files is the root of the TASKE directory.
4. Input a name for the log file in the File name: field.
5. Ensure the file type in the Save as type field is: Log Files (*.log).
6. Click OK to save the log file.

Clearing the Log

Use the following steps to clear the events in the log file. Before performing this task, the log file must be saved or the events will be lost.

1. Click the Logs button on the Main Control Panel to display the log.
2. Select Clear Log... from the File menu to open the TASKE Administrator dialog box.
3. Click Yes to open the Save As dialog box and save the log file. The log file is cleared after the file is saved. Or Click No to immediately clear the log file without saving.

Using the Maintenance Tool

The Maintenance section of the Configuration Mode provides the interface for maintaining the TASKE files on the PC. Use this tool to view file statistics and manage files using the archiving, deleting, and shadow file synchronization utilities.

The Maintenance tool contains two panels in the display area. The top panel displays current statistics on file space and disk space for the TASKE Server PC. Display various statistics by choosing the statistical criteria from the Display Usage drop down list.

The lower panel displays tabs that contain controls for archiving, deleting and synchronizing shadow files. Using the tabs, these tasks can be scheduled to run automatically or they can be performed immediately by setting the required parameters and clicking the button to perform the task manually. For instance, click the Archive Now... button on the Archive Files tab, click the Delete Now... button on the Manually Delete Files tab, or click the Synchronize Now button on the Synchronize Shadow Files tab to manually perform these tasks.

Examining Disk and File Statistics

The top panel of the Maintenance Tool in Configuration Mode provides general disk statistics for the drive where the TASKE files reside and very specific statistics for the various types of TASKE files and the amount of disk space they are using. These statistics are only available from the TASKE Server PC.
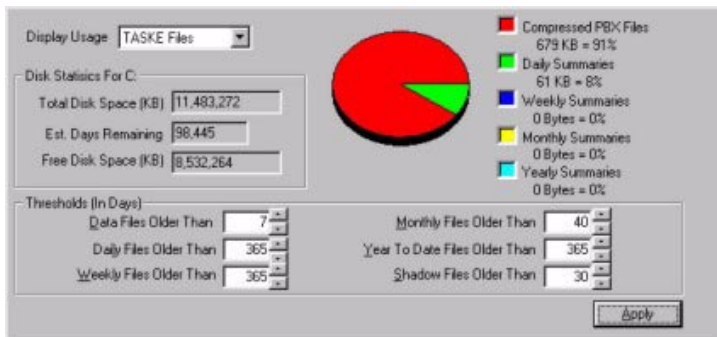
General disk statistics for the drive where the TASKE files reside are provided in the Disk Statistics For... section of the panel. Three statistics are provided. These statistics are: Total Disk Space, Estimated Days Remaining, and Free Disk Space.
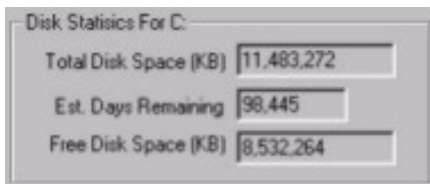
> **Total Disk Space -** displays the total (used and unused) disk space, in kilobytes, that is available on the drive where the TASKE files reside.

> **Estimated Days Remaining -** based on the current rate of disk usage for the TASKE files, this feature displays the estimated number of days remaining that TASKE will have enough disk space to continue producing logs and files until more free disk space is required.

> **Free Disk Space -** displays the amount of free (available for use) disk space, in kilobytes, that is currently available on the drive where the TASKE files reside.

Display statistics for the data files on the TASKE Server PC by choosing various types of statistics from the Display Usage drop-down list in the top panel of the Maintenance Tool. The pie chart in the panel provides a graphical breakdown of the statistic type selected in the Display Usage drop-down list. See below for descriptions of the available options in the Display Usage drop-down list.
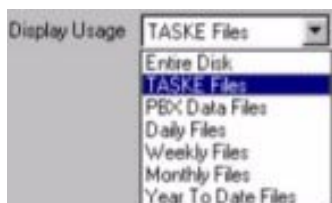
Entire Disk - displays the free disk space available on the drive where the TASKE files reside (red section of pie chart), the amount of disk space the TASKE files are currently using (green section of pie chart), and the amount of disk space occupied by non-TASKE files (blue section of pie chart).
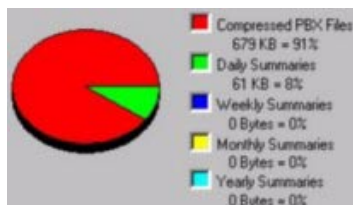
TASKE Files - displays the space occupied by Compressed files (red section of pie chart), Daily Summary files (green section of pie chart), Weekly Summary files (blue section of pie chart), Monthly Summary files (yellow section of pie chart), and Yearly Summary files (cyan section of pie chart).

PBX Data Files - displays the space occupied by PBX Data Files that are newer (red section of the pie chart) and older (green section of the pie chart) than the threshold value of days set for Data Files Older Than field of the Thresholds (In Days) section of the panel. The default value of this threshold is seven days.

Daily Files - displays the space occupied by Daily Summary files that are newer (red section of the pie chart) and older (green section of the pie chart) than the threshold value of days set for Daily Files Older Than field of the Thresholds (In Days) section of the panel. The default value of this threshold is 365 days.

Weekly Files - displays the space occupied by Weekly Summary files that are newer (red section of the pie chart) and older (green section of the pie chart) than the threshold value of days set for Weekly Files Older Than field of the Thresholds (In Days) section of the panel. The default value of this threshold is 365 days.

Monthly Files - displays the space occupied by Monthly Summary files that are newer (red section of the pie chart) and older (green section of the pie chart) than the threshold value of days set for Monthly Files Older Than field of the Thresholds (In Days) section of the panel. The default value of this threshold is 365 days.
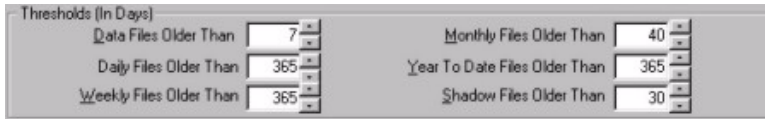
Year to Date Files - displays the space occupied by Year-to-Date Summary files that are newer (red section of the pie chart) and older (green section of the pie chart) than the threshold value of days set for Year to Date Files Older Than field of the Thresholds (In Days) section of the panel. The default value of this threshold is 365 days.

Setting Thresholds for TASKE Files

The Thresholds (In Days) section of the Maintenance tool allows users to set thresholds for the PBX data files, various types of summary files, and shadow files. The thresholds indicate when it is time to archive and delete these files. The Thresholds (In Days) section is located in the top panel of the Maintenance tool. Using this tool helps to keep the files on the TASKE Server current and aids in the efficient use of disk space.

Set thresholds for the following file types:

- PBX Data Files
- Daily Summary Files
- Weekly Summary Files

- Monthly Summary Files
- Year-to-Date Summary Files
- Shadow Files

The thresholds can be any number of days within the range of 0 to 365. These threshold values determine when files are archived and deleted. Those files exceeding the threshold are automatically archived and deleted if set up to do so, and these are also the files that are archived and deleted if the procedure is completed manually.

Use the following steps to set thresholds for the TASKE files.

1. Locate the Thresholds (In Days) section of the Maintenance Tool. This is located in the top panel of the Maintenance Tool.
2. For each file type, input the number of days for each threshold. The threshold range for each file type is 0 to 365 days.
3. Click the Apply button to save the changes.

Archiving PBX Data Files

Archiving PBX data files that exceed the threshold set in the top panel of the Maintenance tool allows the files to be retained while creating more space for the new data files and logs. Once files have been archived, the TASKE Administrator recalculates the current disk usage and displays the information in the Disk Statistics panel of the TASKE Administrator window.

Archiving PBX data files only increases disk space if the original files are deleted after archiving.
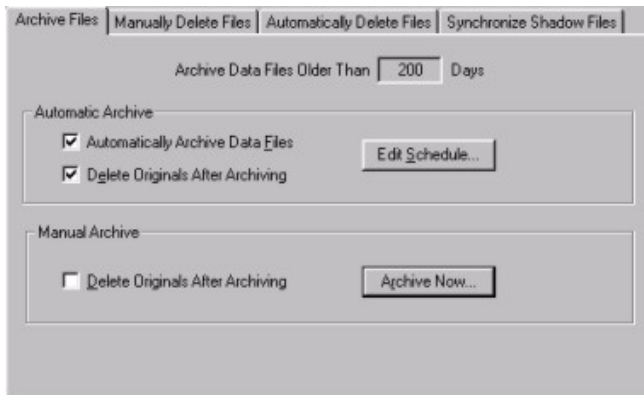
Archived files are placed in the same directory as the source file. Archiving compresses the source files and renames the files with a new extension (.zip). This type of compression is a standard compression that applications such as WinZip® will decompress. Archive files manually or schedule the archive to be performed automatically. Once archived, the Reports application is still able to produce reports on the data in the compressed files. The Reports application is capable of reading data from archived files.

Archiving Files Automatically

Use the following steps to archive PBX data files automatically.
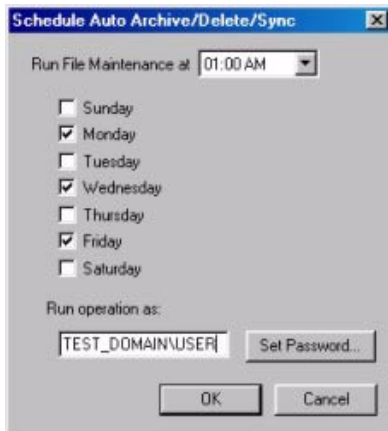
1. Select the Archive Files tab in the lower panel of the Maintenance tool.
2. Ensure that the threshold value (in days) is correct in the Archive Files Older Than field. This is not an editable field. If the value is incorrect, the threshold must be changed in the Thresholds (In Days) section of the top panel.
3. Locate the Automatic Archive section of the tab
4. Enable the Automatically Archive Data Files checkbox. This opens the Schedule Auto Archive / Delete / Sync dialog box.

If the schedule has already been defined in the Automatically Delete Files tab or the Synchronize Shadow Files tab, the schedule does not have to be altered. All of these tasks must be performed at the same time and share the same schedule. If this is the case, click Cancel in the Schedule Auto Archive / Delete / Sync dialog box and continue to step 14.

5. Select a time from the Run File Maintenance at drop-down list. This sets the time for all scheduled activities for the files (archiving, deleting, synchronizing shadow files).
6. Enable the check boxes for the days of the week to perform the automatic archiving, deleting, and synchronization of the shadow files.
7. Click the Set Password... button to open the Set Password dialog box. This is where the log-in information is defined for the PC to log itself into the network at the time to perform the scheduled activities.

8. Verify the network ID for the PC in the Account field.
9. Input the network password for the PC in the password field.
10. Re-enter the network password for the PC in the Confirm Password field.
11. Click OK to confirm the network log-in information and close the Set Password dialog box.
12. Click OK in the Schedule Auto Archive / Delete / Sync dialog box to confirm all changes and close the dialog box.
13. If desired, enable the Delete Originals after Archiving check box. Enabling this check box means that the original files are deleted as they are archived. This reclaims the space on the hard disk that was previously occupied by the original files.
14. Click either the Logs or Alarms button on the Main Control Panel to open the TASKE Administrator dialog box. This dialog box prompts users to save the new archive settings.
15. Click OK to save the schedule for archiving files.

Archiving Files Manually

Use the following steps to archive PBX data files manually.

1. Select the Archive Files tab in the lower panel of the Maintenance tool.
2. Ensure that the threshold value (in days) is correct in the Archive Files Older Than field. This is not an editable field. If the value is incorrect, the threshold must be changed in the Thresholds (In Days) section of the top panel.
3. Locate the Manual Archive section of the tab.
4. If desired, enable the Delete Originals after Archiving check box. Enabling this check box means that the original files are deleted as they are archived. This reclaims the space on the hard disk that was previously occupied by the original files.
5. Click the Archive Now... button to open the TASKE Administrator dialog box.
6. Click Yes to archive the files.

Manually Deleting Data and Summary Files

Deleting files purges the disk of old data files, creating space for new data files and log entries. Once files have been deleted, the Administrator recalculates the current disk usage and displays the information in the Disk Statistics panel of the Maintenance tool.

The Manually Delete Files tab in the bottom panel of the Maintenance tool provides the interface for the immediate deletion of PBX data files and summary files. On this tab, users choose to delete all files exceeding their threshold value, or select the types of files to delete. Each file type is associated with a threshold

value that is measured in days. The thresholds are defined in the Thresholds (In Days) section of the Maintenance tool. Those files within the selected file types that exceed the number of days defined by the threshold are deleted. For instance, assume the threshold value for the Weekly Summary files is set to 10 days. Selecting the Weekly Summary files for deletion and clicking the Delete Now... button will delete any Weekly Summary files that are older than 10 days.

Caution is required when deleting files. This is a permanent and irreversible act that removes the files and the information they contain from the system. To retain the files in a compressed format and delete the original files, archive the files prior to deletion.

Deleting All Files Exceeding a Threshold

Use the following steps to delete all files exceeding a threshold.

1. Select the Manually Delete Files tab in the lower panel of the Maintenance tool.
2. Ensure that the threshold value (in days) is correct for each file type. If thresholds are incorrect, the threshold values must be changed in the Thresholds (In Days) section of the top panel.
3. Enable the Delete All Files Exceeding Their Threshold radio button.
4. Click Delete Now... to open the TASKE Administrator dialog box.
5. Click Yes to confirm the deletion.

Deleting Specific File Types Exceeding a Threshold

Use the following steps to delete selected files exceeding a threshold.

1. Select the Manually Delete Files tab in the lower panel of the Maintenance tool.
2. Ensure that the threshold value (in days) is correct for each file type. If thresholds are incorrect, the threshold values must be changed in the

Thresholds (In Days) section of the top panel.
3. Enable the Delete Selected Files Exceeding Their Threshold radio button.
4. In the list of file types, enable the check box of each file type to delete.

   The file types available for deletion are:

   a. PBX Data Files
   b. Daily Summary Files
   c. Weekly Summary Files
   d. Monthly Summary Files
   e. Year-to-date Summary Files
   f. Shadow Files

5. Click Delete Now... to open the TASKE Administrator dialog box.
6. Click Yes to confirm the deletion.

Automatically Deleting Data and Summary Files

Deleting files purges the disk of old data files, creating space for new data files
and log entries. Once files have been deleted, the Administrator recalculates the
current disk usage and displays the information in the Disk Statistics panel of the
Maintenance tool.

The Automatically Delete Files tab in the bottom panel of the Maintenance tool
provides the interface for scheduling the deletion of PBX data files and summary
files. On this tab, users select the types of files to delete. Each file type is
associated with a threshold value that is measured in days. The thresholds are
defined in the Thresholds (In Days) section of the Maintenance tool. Those files
within the selected file types that exceed the number of days defined by the
threshold are automatically deleted when the scheduled task runs. For instance,
assume the threshold value for the Weekly Summary files is set to 10 days.
Selecting the Weekly Summary files for deletion means that any Weekly
Summary files that are older than 10 days will be deleted when the system runs
the scheduled task to delete the files.
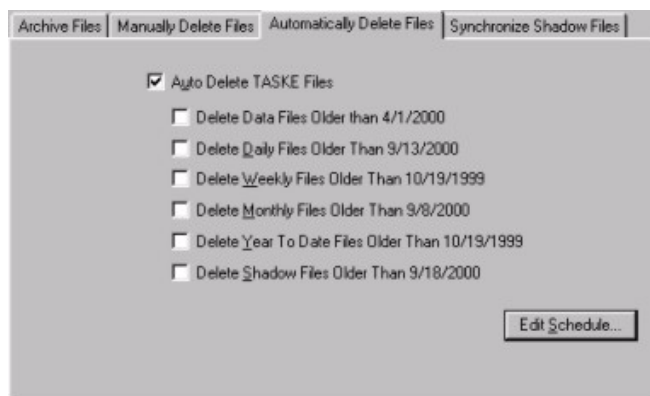
Caution is required when deleting files. This is a permanent and irreversible act that removes the files and the information they contain from the system. To retain the files in a compressed format and delete the original files, archive the files prior to deletion.

Scheduling Files for Deletion

Use the following steps to schedule the deletion of selected files exceeding a threshold.

1. Select the Automatically Delete Files tab in the lower panel of the Maintenance tool.
2. Ensure that the threshold value (in days) is correct for each file type. If thresholds are incorrect, the threshold values must be changed in the Thresholds (In Days) section of the top panel.
3. Enable the Auto Delete TASKE Files check box.
4. In the list of file types, enable the check box of each file type to schedule for deletion.

   The file types available for deletion are:

   a. PBX Data Files
   b. Daily Summary Files
   c. Weekly Summary Files
   d. Monthly Summary Files
   e. Year-to-date Summary Files
   f. Shadow Files

If the schedule has already been defined in the Archive Files tab or the Synchronize Shadow Files tab, the schedule does not have to be altered. All of these tasks must be performed at the same time and share the same schedule. If this is the case, click Cancel in the Schedule Auto Archive / Delete / Sync dialog box and continue to step 13.

5. Click Edit Schedule... to open the Schedule Auto Archive / Delete / Sync dialog box.
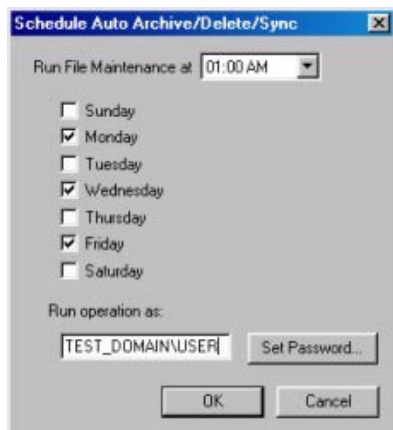
6. Select a time from the Run File Maintenance at drop-down list. This sets the time for all scheduled activities for the files (archiving, deleting, synchronizing shadow files).
7. Enable the check boxes for the days of the week to perform the automatic archiving, deleting, and synchronization of the shadow files.
8. Click the Set Password... button to open the Set Password dialog box. This is where the log-in information is defined for the PC to log itself into the network at the time to perform the scheduled activities

9. Verify the network ID for the PC in the Account field.
10. Input the network password for the PC in the password field.
11. Re-enter the network password for the PC in the Confirm Password field.
12. Click OK to confirm the network log-in information and close the Set Password dialog box.
13. Click OK in the Schedule Auto Archive / Delete / Sync dialog box to confirm all changes and close the dialog box.
14. Click either the Logs or Alarms button on the Main Control Panel to open the TASKE Administrator dialog box. This dialog box prompts users to save the new settings for automatic deletion.
15. Click OK to save the schedule for deleting files.

Synchronizing Shadow Files

A Shadow drive is a redundant file saving mechanism for TASKE systems using a remote LAN file server. When a TASKE system is setup to save to a Shadow drive, the PBX data files are stored to the Shadow drive and the remote file server simultaneously. Generally, the Shadow drive is a local hard drive on the TASKE Server PC, while the main drive that stores all TASKE files is a hard drive on the remote file server.

The Maintenance tool in the Administrator application provides the tools to check the integrity of the files on the remote file server with those saved to the Shadow drive through a file synchronization process. This process compares the file on the Shadow drive with the file stored on the network. If a file does not exist on the network, it is copied from the Shadow drive to the network. If a file differs in size, the Shadow drive file is copied to the network. This process protects the system from file errors induced by network problems.
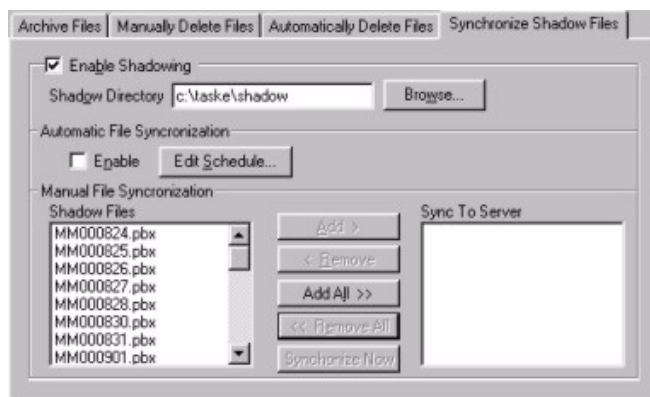
Enabling a Shadow Drive

Use the following steps to define a shadow drive location on the TASKE Sever PC.

1. Select the Synchronize Shadow Files tab in the lower panel of the Maintenance tool.
2. Enable the Enable Shadowing check box.
3. Define the path for the Shadow drive in the Shadow Directory field. By default this directory is \taske\shadow. Click the Browse button to look for another directory or enter the new path in the field.
4. When leaving the Maintenance tool, the TASKE Administrator dialog box will open, indicating that the changes should be saved. Click Yes to save the Shadow drive setup.

Manually Synchronizing Shadow Files

Use the following steps to manually synchronize Shadow files with those files on the remote file server. These steps assume the Shadow drive is already enabled.

1. Select the Synchronize Shadow Files tab in the lower panel of the Maintenance tool.
2. Select the files to synchronize from the Shadow Files list in the Manual File Synchronization section of the tab and click the appropriate button to move the files to the Sync to Server list. See the options below.

   a. To select all files for synchronization, click the Add All >> button to move all files from the Shadow Files list to the Sync To Server list.
   b. To select multiple files grouped together, SHIFT + click the first and last files in the group. Click the Add > button to move the selected files to the Sync to Server list.
   c. To select multiple files that are not grouped together, CTRL + click each of the desired files. Click the Add > button to move the selected files to the Sync to Server list.

   To remove all the files from the Sync To Server list, click the << Remove All button.

   To select specific files to remove from the Sync To Server list, use the same selection methods as above and click the < Remove button.

3. Click the Synchronize Now button to start the synchronization. The TASKE Administrator dialog box opens when the synchronization is complete. Click OK to acknowledge that the synchronization is complete and close the dialog box.

Automatically Synchronizing Shadow Files

Use the following steps to automatically synchronize Shadow files with those files on the remote file server. These steps assume the Shadow drive is already enabled.

1. Select the Synchronize Shadow Files tab in the lower panel of the Maintenance tool.
2. Enable the Enable check box in the Automatic File Synchronization section of the tab.
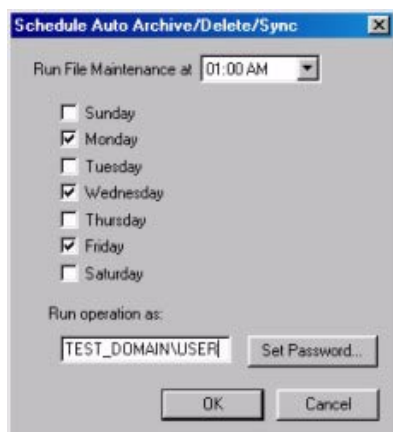
3. Click the Edit Schedule... button to open the Schedule Auto Archive / Delete / Sync dialog box.

If the schedule has already been defined in the Archive Files tab or the Automatically Delete Files tab, the schedule does not have to be altered. All of these tasks must be performed at the same time and share the same schedule. If this is the case, do not click the Edit Schedule... button and continue to step 13.

4. Select a time from the Run File Maintenance at drop-down list. This sets the time for all scheduled activities for the files (archiving, deleting, synchronizing shadow files).
5. Enable the check boxes for the days of the week to perform the automatic archiving, deleting, and synchronization of the shadow files.
6. Click the Set Password... button to open the Set Password dialog box. This is where the log-in information is defined for the PC to log itself into the network at the time to perform the scheduled activities.

7. Verify the network ID for the PC in the Account field.
8. Input the network password for the PC in the password field.
9. Re-enter the network password for the PC in the Confirm Password field.
10. Click OK to confirm the network log-in information and close the Set Password dialog box.
11. Click OK in the Schedule Auto Archive / Delete / Sync dialog box to confirm all changes and close the dialog box.
12. Click either the Logs or Alarms button on the Main Control Panel to open the TASKE Administrator dialog box. This dialog box prompts users to save the new archive settings.
13. Click OK to save the schedule for synchronizing Shadow files.

Setting Alarms

The Alarms section of the Configuration Mode provides the interface for setting alarm parameters for data collection and available disk space.

The alarms notify users when the Collector is not receiving data records, or if the available disk space falls below an acceptable level. Both of these alarms are based on user-defined thresholds. To disable the alarms, set the threshold values to zero.

Setting Collector Alarms

The Alarms section of the Configuration mode provides the interface for defining parameters for Collector alarms. The Collector is a background utility of the ACD ToolBox that collects the data records from the PBX system.

The Collector monitors the connection to the PBX system and observes its data stream. Through its monitoring and observations, the Collector is able to verify the integrity of the data stream by timing the rate of arrival of event records. If data is not received from the PBX system within a user specified time threshold the Collector raises an alarm.

All potential data loss alarms are recorded, however, to avoid raising an alarm when there is no one available to respond to the situation, enter a time range for raising alarms. For instance, if the business hours for the customer interaction center are from 8 AM to 6 PM, set these as the hours for raising data alarms. For alarms that are raised outside of these hours, users must refer to the Log file.

Setting Parameters for Collector Alarms

Use the following steps to set the parameters for the Collector alarms.

1. In the Configuration mode, click the Alarms button to display the Collector and disk alarm parameters in the display area.
2. Locate the Collector - Raise an Alarm If... section of the Alarms tool. This area contains the alarm settings for the Collector alarms.
3. The first field requires the number of seconds the system should wait for new SMDR data records from the PBX. If no data records are received from the PBX within the specified number of seconds, the system raises a Collector alarm. Setting this value to 0 disables the alarm.
4. The next two fields require the start time and the end time that define the time range for raising data alarms. Enter the start time in the first field and the end time in the second field. Both times must be in HH:MM format, using the 24-hour clock.
5. Click the Save Changes button to save the new Collector alarm settings.

Setting Disk Space Alarms

The Alarms section of the Configuration mode provides the interface for defining disk space alarms. Using the disk space alarm parameters the Administrator monitors the available disk space to ensure it has sufficient space to handle the expected data records from the PBX system.

Disk - Raise an Alarm If...

A̲vailable disk space falls below 10 %

The TASKE system stores all records received from the PBX system. Even for small customer interaction centers, this can be a large number of records every day. Despite the data compression techniques available, TASKE does require a large disk for storage.

To prevent potential data loss due to insufficient storage space, TASKE provides a disk audit function that notifies users when the available disk space is running low. The disk audit function monitors the percentage of available disk space. When this percentage falls below a user specified amount, the system raises an alarm.

When determining the percentage to set for the disk space alarm, consider the following:

    a. the amount of disk space the data records generally use on a daily basis, and
    b. the amount of time it will take to off-load some of the information on the disk and make room for new data.

The top panel of the Maintenance tool in the Configuration mode provides disk statistics. Review these statistics to determine the amount of disk space the data records consume in an average day.

When an alarm is activated, clear it by removing unnecessary information from the disk. This may include unnecessary programs (do not remove TASKE applications) or old data files that have been archived or are no longer needed. To remove data files from the disk, use the Manually Delete Files tab in the Maintenance tool.

Prior to deleting programs or files from the disk, contact the system administrator to ensure that these programs and files are not needed.

Setting Disk Space Alarm Parameters

Use the following steps to set the disk space alarm parameter.

1. In the Configuration mode, click the Alarms button to display the Collector and disk alarm parameters in the display area.
2. Locate the Disk - Raise an Alarm If... section of the Alarms tool. This area contains the alarm setting for the disk space alarm.
3. In the editable field, input a percentage for the disk space. When the disk space falls below the percentage entered in this field, the system will raise an alarm. This must be a value in the range of 0 to 100.

    a. Setting this value to 0 disables the alarm.
    b. Setting this value to 100 means that the system will raise an alarm the moment the disk space falls below 100%.

4. Click the Save Changes button to save the new disk space alarm setting.

Administrator Glossary

Term	Definition
Account Code	Account Codes are numbers an Agent enters in the system while engaged on a Queue call. The purpose is to flag a call by type so that call statistics can be collected by the TASKE system for analysis and planning. The fields that are applicable to Verified Call Activity Account Codes are: the Call Account Code Number, Name and Nick Name. A Call Account Code Number must be four (4) digits or less. Verified Account Codes are constructed as multiple pairs of 2 decimal digits. The first pair of digits forms a primary pair and is typically displayed as a row header in the Call Account Reports. Secondary pairs of digits typically form a column list; in effect a matrix is formed. Combining the primary pair with multiple secondary pairs results in codes of six digits or more. Non-Verified Account Codes are used in an ad-hoc manner and are free form. They are used as a convenient mechanism to collate statistics on various types of calls. The TASKE system performs no verification on them and requires only that they be constructed in pairs of digits. Because the TASKE system places virtually no restrictions on the format of Non-Verified Account Codes, the Account Codes administrator does not apply to them.
Agent Group	A group of Agents used as the resource to handle incoming telephone calls depending on the Queue the caller is on. Agent Groups are also used for reporting purposes.
DNIS	DNIS is an acronym for Dialed Number Identification Service. DNIS is a service in which the telephone company transmits an identification number to a PBX receiving a call. The identification number is typically the last four digits the Caller dialed, but may be the whole number or may be a translated number.
Extension	The telephone connected to the telephone system is described as an *Extension* or *Station*. In principle, the telephone operates in the same way as the telephone in your home, and may in fact be the same type of telephone instrument. The telephones that are used in the business environment, particularly the telephones that are used in customer interaction centers, may also be more sophisticated than typical residential telephones.

Term	Definition
Extension Group	Extensions may be placed in groups to form Extension Groups. The use of a group enables calls to be addressed to all Extensions of a group, rather than trying one Extension after another to find one free.
Queue	From a telephone perspective, a Queue is an access code. From a TASKE perspective, a Queue is what shows up in the data records. The TASKE system employs a *Queue* concept, where a Queue is primarily a means of providing an address mechanism for Extension Groups. The Queue enables one dialable number to represent all Extension members of a Group. The Queues that are used in the telephone system are dialable address numbers that correspond to telephone Hunt Groups.
Queue Group	Queues are placed in *Queue Groups*, in the same manner that Trunks and Extensions are grouped. This effectively enables "super-addresses" to be formed, where one Queue Group represents multiple answering points for reporting purposes. This provides powerful and flexible reporting mechanisms to be developed and used within the TASKE system.
Shadow File	The TASKE ToolBox network may run with a shadow disk function, where each record received from the Telephone System is written both to a network file server (used to share TASKE data files) and to the shadow directory (not necessarily "local", it may be located on another hard drive). This double storage of records provides you with a duplicate copy of the data records that are received from the Telephone System. Typically, the shadow drive would be a local hard drive resident on the TASKE Network Server, and the primary drive (storing all TASKE data files) would be a hard drive resident on a separate network file server. The shadow drive is used as a backup mechanism and stores data for a relatively short period of time, such as 30 days. This usually provides a long enough period for you to determine if the data on the primary network file server is accurate.

Term	Definition
Trunk	A Trunk is a telephone circuit from the local Central Office to your telephone system, and is similar to the telephone line from the Central Office to your house or the telephone line from the telephone system to your desk. That is, a Trunk is a connection between two telephone switching systems, while a line is a connection between a telephone switching system and a telephone instrument. Outgoing calls from your telephone system to the Public Network are made over outgoing Trunks, whereas calls to the telephone system from the Public Network are made over incoming Trunks. In some Call Centers, Trunks handle both incoming and outgoing calls.
Trunk Group	The Trunks on a telephone system are usually programmed in one or more groups of Trunks called *Trunk Groups*. Using a Trunk Group enables several Trunks to be addressed as single entity, so that the Central Office does not have to direct a call to a particular Trunk and be concerned with whether the Trunks are individually busy or free. It merely sends a call to the telephone system's Trunk Group(s). If any Trunk in the group is free, then the call gets through to the system. This avoids the Caller having to try a Trunk and find it busy, and then try another, and so on until a free Trunk is found.
TSF	The Telephone Service Factor (TSF) is the ratio of calls which are either Answered or Abandoned before a threshold time, to the total number of calls which are offered. You specify the threshold, or TSF Time, in the TSF Time field for individual Queues.

TASKE ACD Monitor

The TASKE ACD Monitor and Enterprise ACD Monitor are customer interaction center monitoring applications that report both real-time and historical customer interaction center activity for Queues and Queue Groups at local or remote sites. Use the ACD Monitor application to monitor only local Queues and Queue groups and the Enterprise ACD Monitor to monitor Queues and Queue groups at local and remote locations.

The ACD Monitor application operates in two modes: Real-time and Replay. The Enterprise ACD Monitor application operates in Real-time mode only. With the exception of the Replay mode, both applications share the same user interface and functionality.

Real-time Mode

The Real-time mode displays customer interaction center activity in real-time, for the past hour, for the past 12 hours, and for the current day. The real-time statistics and reports are updated constantly to provide a dynamic view of the current customer interaction center activity. The last hour, last 12 hours, last 24 hours, and current day statistics and reports provide a shift overview using the customer interaction center statistics compiled over the selected time frame.

Replay Mode

The Replay mode is an animated review of a 24-hour period that shares the reports of the Real-time mode. Using the same real-time, last hour, last 12 hours, last 24 hours, and current day reports, users select a date with logged customer interaction center data. The information for the day is replayed in a real-time simulation.

ACD Monitor Interface

Together, the Menu Bar, the Main Control Panel, and the Queue Information Display Area (QIDA) comprise the ACD Monitor interface. The interactive interface reports Queue and Queue Group information numerically, graphically, and tabularly.

The TASKE ACD Monitor aids the management of a customer interaction center through the display of real-time and historical data. This data is easily accessible using the buttons on the Queue Panels. A Queue Panel is displayed in the QIDA for each Queue or Queue Group selected in the Queue Monitor List. Each Queue Panel is comprised of two panels, the Real-time Panel and the Review Panel.

The Real-time Panel presents a number of buttons that display the current customer interaction center statistics. Clicking any button produces a report in graph or table

format. Click the button a second time to close the report. Each button displays the numerical value for the statistic it represents. Those buttons that do not provide a numeric value provide reports only. The icons on the buttons provide a graphical representation of the statistic for easy recognition.

Clicking the Review button on the Real-time Panel opens the Review Panel. To close the Review Panel, click the Review button on the Real-time Panel a second time. The Review Panel is located directly below the Real-time Panel. Like the Real-time Panel, this panel is also populated with buttons that display customer interaction center statistics. Clicking any button produces a report in graph or table format. Click the button a second time to close the report.

A button on the left side of the Review Panel selects the time period for viewing. The title of this button may be Last Hour, Last 12 Hours, last 24 hours, or Current Day. These titles reflect the time periods that are available for review. The current title of the button identifies the time period for the statistics currently displayed on the Review Panel. Clicking this button produces a menu of the available review periods.

The Queues and Queue groups displayed in the QIDA are selected from the Queue Monitor List on the Main Control Panel. To aid in the global assessment of customer interaction center operations, multiple Queues can be selected from the Queue Monitor List and viewed simultaneously. The QIDA self-scales to accommodate multiple Queues. When there is more information than the QIDA can display, a scroll bar is provided for scrolling through the Queue information.

The Real-time Panel statistics and reports are not available for PBX types that do not provide real-time information.

Many of the application controls and graphs are annotated by ToolTips. If you require further information about a specific control or graph line, hold the cursor over it for a moment to produce a short message describing the purpose of the control or other screen element.

Starting the TASKE ACD / Enterprise ACD Monitor

To start the ACD Monitor application, double-click the ACD Monitor or the Enterprise ACD Monitor icon in the TASKE ToolBox folder. This action opens the ACD Monitor window in Real-time mode and opens the TASKE Network Client for the ACD Monitor.

If this is the first time opening the ACD Monitor application, the Queue Manager will open before the application window opens. Select the desired Queues and Queue Groups for monitoring from the Queue Selector and enable the "Monitor activity on selected Queue(s)" check box. Define the alarm settings for the Queues and Queue Groups if desired and click the OK button. The ACD Monitor application window opens, displaying the Queue Panels of the selected Queues and Queue Groups.
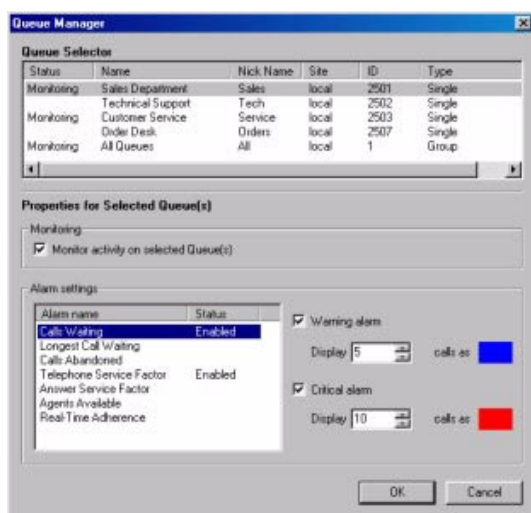
Network Client

The Network Client is the communication link between the ACD Monitor application and the real-time information provided by the Information Server. When the Network Client for the ACD Monitor is running, its icon ⌨ appears in the Windows System Tray. Exiting the ACD Monitor application automatically closes the ACD Monitor Network Client and terminates the connection with the Information Server.

Using the Menu Bar

The menu bar varies depending on the mode. In the Real-time mode, there are five menus that provide keyboard or mouse access to the functions of the ACD Monitor in the Real-time mode. The menus are File, View, Properties, Chat, and Help. In the Replay mode, a sixth menu, titled Replay, is added that provides the replay controls.

File Menu

Use the File menu to exit the ACD Monitor application. The table below outlines the functionality of the File menu option.

Option	Shortcut	Description
Exit	N/A	Closes the ACD Monitor application and the Network Client for the ACD Monitor. When the Network Client is closed the connection to the Information Server is terminated.

View Menu

The View menu provides keyboard or mouse access to various sections of the ACD Monitor interface. The table below outlines the functionality of the View menu options.

Option	Shortcut	Description
Real Time	CTRL+T	Select this option to switch to the Real-time mode.
Replay	CTRL+R	Select this option to switch to the Replay mode.
Next Window	F2	Move the window focus to the next section of the ACD Monitor interface. Use the arrow keys to move throughout the elements of a window section and the Enter key to select.
Previous Window	Shift+F2	Move the window focus to the previous section of the ACD Monitor interface. Use the arrow keys to move throughout the elements of a window section and the Enter key to select.
Queue Manager	CTRL+L	Select this option to open the Queue Selection dialog box.
Goto	N/A	Select this option to produce a sub-menu of the Queues and Queue Groups selected for monitoring. Select a Queue or Queue Group from the list to view that Queue or Queue Group in the QIDA.

Properties Menu

The Properties menu provides keyboard or mouse access to various features of the ACD Monitor interface. The table below outlines the functionality of the Properties menu options.

Option	Shortcut	Description
Alarms	N/A	Select the Alarms option to produce a sub-menu that contains three options. These options are Real-time Adherence, Thresholds, and Info. Enable these options to display the alarm situations. Disable these options to avoid seeing these alarm situations. When enabled, the alarm option is displayed with a check-mark. When disabled, the check-marks are not present.
Alarm Sound Frequency	N/A	Select this option to produce a sub-menu that contains four sound options for the alarms. These options are No Sound, Once, Every 30 seconds, and Every minute. The selected option is displayed with a check mark.
Show Queue Nick Names	CTRL+N	Select this option to label the Queues and Queue Groups by the nick names instead of the ID numbers.
Show Agent List...	CTRL+A	Select this option to open the Agent List dialog box for the selection of agents in Agent Maps.
Show State Color Legend	CTRL+E	Select this option to open the State Colors dialog box.

Replay Menu - Replay Mode Only

Use the Replay menu to access the replay controls of the Main Control Panel.

Option	Shortcut	Description
Step Back	Ctrl+B	As a replay progresses, the information is saved at the beginning of each hour. When a save occurs, a temporary marker, or placeholder, is created. Use the Step Back option to move backward to the last placeholder.
Stop	Ctrl+S	Select Stop to stop the replay and reset the time to 12:00 for the selected date.
Play	Ctrl+P	Select Play to start the playback of call center data. The speed of the data replay is determined by the selection in the Speed field.
Pause	Ctrl+U	Select Pause to pause the replay at the current event. When the replay is paused, the time field flashes the time the replay was paused. Click Pause again or click Play to restart the replay.
Fast Forward	Ctrl+F	Select Fast Forward to immediately advance the replay to the next event.
Step Forward	Ctrl+O	As a replay progresses, the information is saved at the beginning of each hour. When a save occurs, a temporary marker, or placeholder, is created. Use the Step Forward option to move forward to the next placeholder. A Step Forward cannot be completed before the time interval has been played. A Step Back must be completed before attempting to Step Forward.
Triggers	N/A	Select Triggers to produce a sub-menu that contains a General option and a list of all Queues and Queue Groups selected for monitoring. Select General to open the Trigger dialog box and create a time of day trigger stop. Select a Queue or Queue Group to open the Queue Triggers dialog box and create trigger stops based on customer interaction center conditions.

Chat Menu

Use the Chat menu to log into Chat and to open the Chat window. A user must log into the Chat application before the Chat window can be opened.

Option	Shortcut	Description
Chat	N/A	Opens the Chat application window.
Logon	N/A	Log into the Chat application. The log-on process is automatic, no passwords or user names are required. The application uses the network name of the PC logging in as a user name. This option is not available for selection if the user is already logged into the Chat application.
Logoff	N/A	Log out of the Chat application. The log-off process is automatic, no passwords or user names are required. This option is not available for selection if the user is already logged out of the Chat application.

Help Menu

Use the Help menu to access the online help for ACD Monitor and Chat. Additionally, use this menu to view version and copyright information for the application.

Option	Shortcut	Description
Contents	F1	Select Contents to access the Online Help for the ACD Monitor application.
Chat Contents	N/A	Select Chat Contents to access the Online Help for the Chat application.
About TASKE ACD Monitor...	N/A	Select About TASKE ACD Monitor... to view version, copyright, and lock number information for the ACD Monitor.

Using the Main Control Panel

The Main Control Panel is located on the left side of the ACD Monitor window. This section of the window is responsible for:

- Mode selection
- Display of system date and time in the Real-time mode
- Access to the Queue Manager
- Queue Monitor List display for Queue/Queue Group selection
- Date selection in replay mode
- Replay control

Mode Selection

The two buttons located at the top of the Main Control Panel are the mode selection buttons. These buttons toggle between the Real-time and Replay modes.

Click the Real-time button to switch to the Real-time mode.

Click the Replay button to switch to the Replay mode.

Date and Time

In the Real-time mode both the date and time are displayed for read-only purposes. In the Replay mode, the date is provided in a box that allows for the selection of the replay date and the time displays the time of day that is being replayed.

Queue Manager

Clicking the Queues... button accesses the Queue Manager where Queues and Queue Groups are selected for monitoring and the Alarm conditions are set for each. When a Queue or Queue Group is selected for monitoring it is added to the Queue Monitor List.

Queue Monitor List

The Queue Monitor List displays the Queues and Queue Groups selected for monitoring. The Queue Monitor List provides a button for each of the Queues selected in the Queue Manager. Select one or more Queues from the Queue Monitor List to display the Queue information in the QIDA.

To change the order of the Queue and Queue Group buttons displayed on the Queue Monitor List, click a button and drag it to its new position in the list before releasing the mouse button.

Replay Date Selection

Use the date box on the Main Control Panel in the Replay mode to select a date for the data replay.
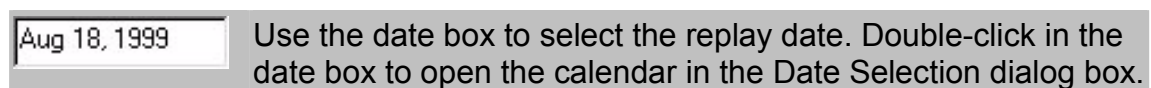
Aug 18, 1999	Use the date box to select the replay date. Double-click in the date box to open the calendar in the Date Selection dialog box.

Replay Control

In the replay mode, set the replay speed and control the replay of data on the Main Control Panel. Similar to VCR controls, the replay controls maneuver throughout the day's data. In addition, use the trigger button to pause the replay at a specific time.

Using the Queue Manager

Click the Queues... button on the Main Control Panel to open the Queue Manager. The Queue Manager provides the interface for selecting the Queues and Queue Groups to monitor and to set the individual alarm conditions for each.

The Queue Manager is a dialog box that is comprised of two main sections. These sections are Queue Selector and Properties for Selected Queue(s). The Queue Selector is responsible for selecting Queues and Queue Groups. Once one or more Queues or Queue Groups are selected in the Queue Selector, the properties for the selections are set in the Properties for Selected Queue(s) section. Use the Properties for Selected Queue(s) section to enable or disable the monitoring of the selected Queues and Queue Groups and to set alarm parameters for the Queues and Queue Groups.
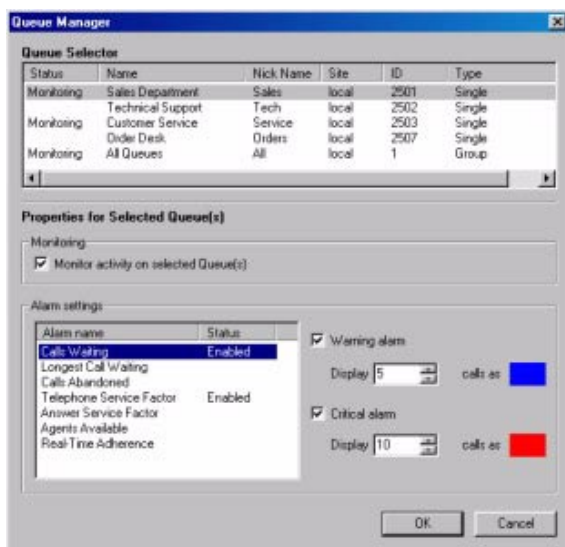
Queue Selector

The Queue selector selects or de-selects Queues and Queue Groups for monitoring. The Queue Selector is a table containing six columns. The columns are as follows.

Status - displays the monitoring status of the Queue or Queue Group. If the Status column for a Queue or Queue Group displays "Monitoring", the Queue or Queue Group is selected for monitoring and displayed in the Queue

Monitor List. If the Status column for a Queue or Queue Group is blank, the Queue or Queue Group is not selected for monitoring.

Name - displays the name of the Queue or Queue Group as it is defined in the Administrator application.

Nick Name - displays the nick name of the Queue or Queue Group as it is defined in the Administrator application. The ACD Monitor can identify Queues and Queue Groups by the numerical ID or by the nick name.

Site - indicates the location of the Queue or Queue Group. If the Queue or Queue Group originates from the local site, the column displays "local". If the Queue or Queue Group originates from an Enterprise site, the column displays the name of the remote site.

ID - displays the numerical ID of the Queue or Queue Group as it is defined in the Administrator application. The ACD Monitor can identify Queues and Queue Groups by the ID or by the nick name.

Type - displays whether the selection is a Queue or a Queue Group. If it is an individual Queue, the column displays "Single". If it is a group of Queues, the column displays "Group".

Properties for Selected Queue(s)

The Properties for Selected Queue(s) section of the Queue Manager is comprised of two main areas. These areas are Monitoring and Alarm Settings. The Monitoring area enables and disables the monitoring of the Queues and Queue Groups selected in the Queue Selector. The Alarm Settings area sets the alarm properties for the selected Queues and Queue Groups.

The Monitoring area of the Properties for Selected Queue(s) section of the Queue Manager enables or disables the monitoring of the Queues and Queue Groups selected in the Queue Selector. When the Monitor activity on selected Queue(s) check box is enabled, the selected Queue or Queue Group is being monitored and a button for the Queue or Queue Group is present in the Queue Monitor List. When this check box is disabled, the Queue or Queue Group is not being monitored.
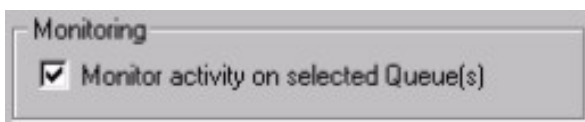
The Alarm Settings area of the Properties for Selected Queue(s) section of the Queue Manager defines the alarm settings for the Queues and Queue Groups. There are two alarm types: Warning alarms and Critical alarms. The alarms are

applied to real-time call and agent statistics, and to the adherence of the agents to the schedule. One, both, or neither of the alarm types can be applied to each statistic. Each alarm is associated with a threshold. Set the threshold to determine the value the statistic must achieve prior to initiating an alarm.
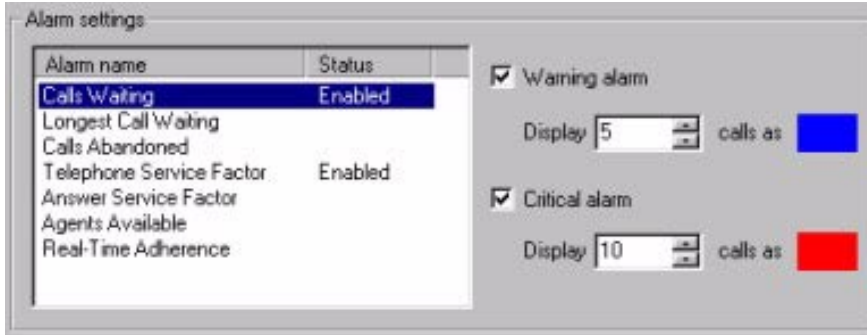
Closing the Queue Manager

When all required Queues and Queue Groups are selected for monitoring and the required alarm settings are complete, click the OK button to enable the changes and close the Queue Manager. Those Queues and Queue Groups newly selected for monitoring will now appear on the Queue Monitor List and those Queues and Queue Groups where monitoring has been disabled will no longer appear on the Queue Monitor List.

Enabling and Disabling the Monitoring of Queues and Queue Groups

The Queue Manager is responsible for enabling and disabling the monitoring of Queues and Queue Groups. When enabled for monitoring, the Queue Monitor List in the Main Control Panel displays a button for the Queue or Queue Group. Selecting this button in the Queue Monitor List displays the Queue Panel for the Queue or Queue Group in the Queue Information Display Area (QIDA). When monitoring for a Queue or Queue Group is disabled, the Queue Monitor List does not provide a button and monitoring must be enabled before statistics can be viewed.

Enabling Monitoring for Queues and Queue Groups

Use the following steps to enable monitoring for one or more Queues and Queue Groups in the Queue Manager.

1. If the Queue Manager is not already open, click the Queues... button on the Main Control Panel of the Real-time mode to open the Queue Manager dialog box.

2. In the Queue Selector, select one or more Queues or Queue Groups. The Status column for all of these Queues and Queue Groups should be blank, indicating that none are currently being monitored.

   a. To select a single Queue or Queue Group from the Queue Selector, simply click the desired Queue or Queue Group.
   b. To select a group of Queues and Queue Groups that are in order, select the first Queue or Queue Group and SHIFT+click the last Queue or Queue Group in the list of those desired for selection.
   c. To select a group of Queues and Queue Groups that are not in order, select the first Queue or Queue Group and CTRL+click each of the remaining Queues and Queue Groups desired for selection.

3. Enable the Monitor activity on selected Queue(s) check box in the Properties for Selected Queue(s) section of the Queue Manager. The Status column of the Queue Selector displays the word "Monitoring" for the selected Queues and Queue Groups.

Disabling Monitoring for Queues and Queue Groups

Use the following steps to disable monitoring for one or more Queues and Queue Groups in the Queue Manager.

1. If the Queue Manager is not already open, click the Queues... button on the Main Control Panel of the Real-time mode to open the Queue Manager dialog box.
2. In the Queue Selector, select one or more Queues or Queue Groups. The Status column for all of these Queues and Queue Groups should display the word "Monitoring", indicating that all are currently being monitored.

   a. To select a single Queue or Queue Group from the Queue Selector, simply click the desired Queue or Queue Group.
   b. To select a group of Queues and Queue Groups that are in order, select the first Queue or Queue Group and SHIFT+click the last Queue or Queue Group in the list of those desired for selection.
   c. To select a group of Queues and Queue Groups that are not in order, select the first Queue or Queue Group and CTRL+click each of the remaining Queues and Queue Groups desired for selection.

3. Disable the Monitor activity on selected Queue(s) check box in the Properties for Selected Queue(s) section of the Queue Manager. The Status column of the Queue Selector displays nothing for the selected Queues and Queue Groups.

Setting Alarm Parameters for Queues and Queue Groups

Use the following steps to define both the Warning Alarm and the Critical Alarm for one or more Queues and Queue Groups in the Queue Manager.

1. If the Queue Manager is not already open, click the Queues... button on the Main Control Panel of the Real-time mode to open the Queue Manager dialog box.
2. Select the Queues and Queue Groups that require the same alarm settings in the Queue Selector.
3. Select an alarm name in the Alarm Settings area of the Queue Manager. The alarm names available for selection are:

   a. Calls Waiting
   b. Longest Call Waiting
   c. Calls Abandoned (Last Hour)
   d. TSF (Last Hour)
   e. ASF (Last Hour)
   f. Agents Available
   g. Real-time Adherence (only available when licensed for PrimeTime)
   h. Bad Logins / Re-queues (alarm for the Queue Information Report)
   i. Expected Wait Time (15 Min)

4. Enable the Warning alarm check box.
5. Set the threshold value for the Warning alarm.
6. Enable the Critical alarm check box.
7. Set the threshold value for the Critical alarm.
8. Repeat steps 3 to 6, as required, for the remaining alarm names.

Threshold values are not applicable to the Bad Logins / Requeues alarm. To enable the alarm, select the desired queues and queue groups to display the alarm, select Bad Logins / Requeues from the Alarm Settings list, and enable the Critical check box. This alarm notifies users of bad login and requeue occurrences. To view the alarm details, view the Queue Information Report by clicking the Info button on the Real-time Panel.

By default the Warning Alarm is displayed in blue and the Critical Alarm is displayed in red. These colors are changeable in the State Colors dialog box. Access this dialog box by selecting Show State Color Legend... from the Properties menu. When the dialog box is open, click the down arrows beside the alarms to open the Color dialog box and select a new color.

Selecting a Mode: Real-time or Replay

The ACD Monitor application operates in two modes: Real-time and Replay. The Enterprise ACD Monitor application operates in Real-time mode only. With the exception of the Replay mode, both applications share the same user interface and functionality. The two buttons located at the top of the Main Control Panel toggle between the Real-time mode and the Replay modes.

The Real-time mode displays customer interaction center activity in real-time, for the past hour, the past 12 hours, the past 24 hours, and the current day. The real-time statistics and reports are updated constantly to provide a dynamic view of the current customer interaction center activity. The last hour, last 12 hours, last 24 hours, and current day statistics and reports provide a shift overview using the customer interaction center statistics compiled over the selected time frame.

The Replay mode is an animated review of a 24-hour period that shares the reports of the Real-time mode. Using the same real-time, last hour, last 12 hours, last 24 hours, and current day reports, users select a date with logged customer interaction center data. The information for the day is replayed in a real-time simulation.

The Queue Information Display Area

Occupying the window area to the right of the Main Control Panel, the Queue Information Display Area (QIDA) presents statistical and performance information for Queues and Queue Groups based on queue and agent activity. The information displayed in the QIDA is dependent on the Queues and Queue Groups selected from the Queue Monitor List. Information is presented using numbers, graphs, and tables in both the Real-time mode and the Replay mode.

Selection of a Queue or Queue Group from the Queue Monitor List displays the Queue Panel for the selection in the QIDA. If none of the Queues or Queue Groups are selected from the Queue Monitor List, none of the Queue Panels for the monitored Queues and Queue Groups are displayed in the QIDA.

A Queue Panel is displayed in the QIDA for each Queue or Queue Group selected in the Queue Monitor List. Each Queue Panel is comprised of two panels, the Real-time Panel and the Review Panel.

The Real-time Panel presents a number of buttons that display the current customer interaction center statistics. Clicking any button produces a report in graph or table format. Click the button a second time to close the report. Each button displays the numerical value for the statistic it represents. Those buttons that do not provide a numeric value provide reports only. The icons on the buttons provide a graphical representation of the statistic for easy recognition.

Clicking the Review button on the Real-time Panel opens the Review Panel. To close the Review Panel, click the Review button on the Real-time Panel a second time. The Review Panel is located directly below the Real-time Panel. Like the Real-time Panel, this panel is also populated with buttons that display customer interaction center statistics. Clicking any button produces a report in graph or table format. Click the button a second time to close the report.

A button on the left side of the Review Panel selects the time period for viewing. The title of this button may be Last Hour, Last 12 Hours, Last 24 Hours, or Current Day. These titles reflect the time periods that are available for review. The current title of the button identifies the time period for the statistics currently displayed on the Review Panel. Clicking this button produces a menu of the available review periods.

The Real-time Panel statistics and reports are not available for PBX types that do not provide real-time information.

Many of the application controls and graphs are annotated by ToolTips. If you require further information about a specific control or graph line, hold the cursor over it for a moment to produce a short message describing the purpose of the control or other screen element.

Displaying Queue and Queue Group Information

The Queue Monitor List on the Main Control Panel provides an easy way to select one or more Queues or Queue Groups to display. Depending on how the list is used, the entire QIDA can display the details of a single Queue or Queue Group, or display several Queues and Queue Groups at once.

To change the order of the Queue and Queue Group buttons displayed on the Queue Monitor List, click a button and drag it to its new position in the list before releasing the mouse button.

To select one or more Queue(s) or Queue Group(s)

1. Click the Queue(s) ✚ and Queue Group(s) ✦ of interest on the Queue Monitor List. A Queue or Queue Group is selected when its button in the Queue Monitor List is depressed. Click the button a second time to de-select the Queue or Queue Group.
2. The Queue panels for the selected Queue(s) and Queue Group(s) open in the QIDA.
3. De-select a Queue or Queue Group by clicking it a second time.

Alarm Situations

When a Queue or Queue Group encounters an alarm situation, it is indicated on the button for the Queue or Queue Group in the Queue Monitor List. The indicator is a colored box that appears around the icon for the Queue or Queue Group. By default the color for a critical alarm is red and the color for a warning alarm is blue. These colors are user definable through the State Color dialog box.

Overview of the Queue Panels

The TASKE ACD Monitor aids the management of a customer interaction center through the display of real-time and historical data. This data is easily accessible using the buttons on the Queue Panels. A Queue Panel is displayed in the QIDA for each Queue or Queue Group selected in the Queue Monitor List. Each Queue Panel is comprised of two panels, the Real-time Panel and the Review Panel.

Real-time Panel

The Real-time Panel presents a number of buttons that display the current customer interaction center statistics. Clicking any button produces a report in graph or table format. Click the button a second time to close the report. Each button displays the numeric value for the statistic it represents. Those buttons that do not provide a numeric value provide reports only. The icons on the buttons provide a graphical representation of the statistic for easy recognition.

The Replay mode adds the Trigger button to the Real-time Panel. This button allows users to select specific call center conditions that will stop the replay when the selected conditions are encountered in the call center records.

Review Panel

Clicking the Review button on the Real-time Panel opens the Review Panel. To close the Review Panel, click the Review button on the Real-time Panel a second time. The Review Panel is located directly below the Real-time Panel. Like the Real-time Panel, this panel is also populated with buttons that display customer interaction center statistics. Clicking any button produces a report in graph or table format. Click the button a second time to close the report.

A button on the left side of the Review Panel selects the time period for viewing. The title of this button may be Last Hour, Last 12 Hours, Last 24 Hours, or Current Day. These titles reflect the time periods that are available for review. The current title of the button identifies the time period for the statistics currently displayed on the Review Panel. Clicking this button produces a menu of the available review periods.

The Real-time Panel statistics and reports are not available for PBX types that do not provide real-time information.

Recognizing Alarm Situations

There are two types of alarm situations, warning and critical. The thresholds for the alarms are defined by the user in the Queue Manager. When a Queue or Queue Group encounters an alarm situation, it is flagged using color indicators in several areas of the ACD Monitor interface. By default the color for the warning alarm is blue and the color for the critical alarm is red. Change the colors or turn the color display off through the State Colors dialog box. The areas of the ACD Monitor interface where alarms are indicated are:

Queue Monitor List - the button for the Queue or Queue Group experiencing the alarm turns to the color of the alarm type it is encountering.

Queue Panel - the background for the numeric value on the button experiencing the alarm turns the color of the alarm type it is encountering. If it is a real-time agent adherence alarm, the States button indicates the color of the alarm type and the Map button may also indicate the color, if the active map contains the agents who are not adhering to the schedule.

Agent States Table / Agent Maps - for real-time agent adherence alarm situations, the background of the cells containing the agents not adhering to the schedule turn to the color of the alarm they are experiencing.

Understanding Real-time Agent Adherence Alarms

Real-time adherence alarms use the information in the PrimeTime schedules to determine if agents are adhering to the schedules. This means that the ACD Monitor tracks agent activity in real-time and compares this activity with what is expected in the schedule. If the agent is conducting activities outside of the schedule, supervisors are immediately aware of this deviance from the schedule.

The following table identifies the conditions for agent non-adherence to the schedule.

Actual State	Scheduled State	
	Taking Calls	**Off-Phone Period**
Unknown	Non-Adherence	Adherence
Logged Out	Non-Adherence	Adherence
Idle	Adherence	Non-Adherence
Idle Forward	Adherence	Non-Adherence
ACD	Adherence	Non-Adherence
ACD Hold*	Adherence	Non-Adherence
Non-ACD*	Adherence	Adherence
Non-ACD Hold*	Adherence	Adherence
Outbound*	Adherence	Adherence
Outbound Trunk*	Adherence	Adherence
Outbound Hold*	Adherence	Adherence
Make Busy	Non-Adherence	Adherence
DND	Non-Adherence	Adherence
Make Busy/DND	Non-Adherence	Adherence
Work Time	Adherence	Non-Adherence
Ringing	Adherence	Non-Adherence
Unavailable	Non-Adherence	Adherence

* When in a non-ACD state, it is not possible to determine if the agent is actually adhering to the schedule. While in a non-ACD state an agent may be:

- talking with a customer that directly dialed the agent's extension
- talking with a customer the agent dialed directly (outbound)
- taking a personal call

The number of possible scenarios makes it difficult to gauge whether the agent is actually adhering to the schedule. Therefore, the non-ACD states always constitute adherence regardless of the schedule.

Real-time agent adherence alarms in Replay mode use the schedule that is currently in place. If a schedule change has occurred between the time the data was actually recorded and the time it is being played in the ACD Replay, the real-time agent adherence alarms may not be accurate.

Saved Settings

The ACD Monitor application creates a profile for each user based on the network log-in information. These user profiles provide users with a stable interface that is based on personal preferences. The profiles are created on a per PC basis, meaning that a user profile may vary from PC to PC.

When exiting the ACD Monitor application, the profile is saved on the local PC with the current screen configuration. This includes color selections for alarms and agent states, Queue and Queue Group selections for display, and mode selection. When a user restarts the ACD Monitor, it is opened displaying the same screen configuration that was displayed when the application was last closed by that user.

Using the Real-time Mode

The Real-time mode displays customer interaction center activity in real-time, for the past hour, for the past 12 hours, and for the current day. The real-time statistics and reports are updated constantly to provide a dynamic view of the current customer interaction center activity. The last hour, last 12 hours, and current day statistics and reports provide a shift overview using the statistics compiled over the selected time frame. When in the Real-time mode, the application title bar states TASKE ACD Monitor. When operating in the Replay Mode, the title bar states TASKE ACD Monitor - Replay.

Using the features of the Real-time mode simplifies the management of a customer interaction center. Agent and queue status is reported in real-time using a number of reporting formats. These formats include the numerical display of real-time statistics on the Queue Panel, a graphical view of the real-time statistics, a tabular view of the agent queue, and the user-definable agent maps that allow users to group agents logically in a table and display their status.

The last hour, last 12 hours, last 24 hours, and current day statistics provide material for shift evaluation. Review answer service factors, telephone service factors, queue traffic, and agent performance. Reporting formats for the statistics in these time periods include the numerical display of the statistics on the Queue Panel, a corresponding graphical view for each statistic, a graphical performance evaluation of the agents by group, and an agent utilization graph that displays the agent states for the last hour.

The review panel reports on four different time periods: Last Hour, Last 12 Hours, Last 24 Hours, and Current Day.

Last Hour - provides customer interaction center data and statistical averages for the past 60 minutes.

Last 12 Hours - provides customer interaction center data and statistical averages for the past 12 hours.

Last 24 Hours - provides customer interaction center data and statistical averages for the past 24 hours.

Current Day - provides customer interaction center data and statistical averages from 00:00 of the current day to the current time.

Accessing Real-time Information

The Queue Panels are the access point for all real-time and recent historical information. When a Queue Panel is displayed, the Real-time Panel is displayed. The ID or nick name of the Queue or Queue Group is presented in the top, left corner. Click the Review button on the Real-time Panel to access the Review Panel where the statistics for the Last Hour, Last 12 Hours, Last 24 Hours, and the Current Day are provided.

The buttons on the Real-time Panels that display numeric values provide the Current States report when clicked. This report provides the real-time statistical values in the form of a dynamic bar graph.

Click the States button to open the Agent States report. This report is a dynamic table that provides the current status of all agents in the Queue or Queue Group. This is a key report for tracking agent non-adherence to the schedule.

Click the Map button to open the user-defined agent maps that provide agent state information. Use these maps to create a custom layout that groups agents according to the preferences of the user. For instance, create a map layout that groups agents according to their seating position in the call center.

Click the Info button on a Queue Panel to display a text-based report that lists requeue, bad log-in, and invalid record incidences for the Queue or Queue Group in real-time. The report is a read-only display. Events are listed based on the time of the occurrence.

The Real-time Panel statistics and reports are not available for PBX types that do not provide real-time information.

Viewing the Current States Report

Real-time call center information is provided on the Real-time Panels of the Queue Panels. Many of the buttons on the Real-time Panel display the numeric values of the call center statistics they represent. When clicked, these buttons open the Current States report. For easy recognition of the statistics, icons are provided on each button. The button that was clicked to open the Current States report is depressed as long as the report is open and the report is titled with the statistical name of the button and the current value of the statistic. Clicking this button a second time closes the Current States report.

The Current States report is a bar graph that includes the real-time statistics on the Real-time Panel. All bars on the graph are gray in color except for the bar that represents the statistic selected to open the graph. This bar is displayed in blue. The real-time statistics presented through the Queue Panels and the Current States report provide both queue and agent status information. These statistics are:

- the time of the longest call waiting
- the number of calls waiting
- the number of agents on ACD calls
- the number of agents on non-ACD calls
- the number of agents logged on
- the number of agents available
- the number of agents idle
- the number of agents unavailable
- the number of agents logged out

ToolTips are available for the real-time statistics. Descriptions for the buttons are available by holding the mouse over the button for a moment. To acquire an exact value for a statistic in the Current States report, hold the mouse over the graph bar until the value appears with a short description.

Viewing the Agent States Report

The Agent States table is accessed by clicking the States button on the Real-time Panel of a Queue Panel. This is a read-only tabular display that reports real-time agent activity for the Queue or Queue Group. The five agent states included in the table are Idle, ACD, Non-ACD, Unavailable, and Logged Out. All agents in the Queue or Queue Group are included and as their states change, it is reflected by their placement in the table. This is a key report for tracking agent non-adherence to the schedule. When an agent is not adhering to the schedule, the cell for the agent in the table changes

color. This color change overrides all other states in the table. To learn the details of an agent's non-adherence, simply hold the mouse pointer over the agent's cell to produce a ToolTip that contains the scheduling information.

Viewing Agent Maps

The Agent Maps are accessed by clicking the Map button on the Real-time Panel of a Queue Panel. This is a real-time graphical report that dynamically illustrates the status of agents. Agents are grouped on the Agent Map logically and their status is reported using a combination of color, icons, and text. The ability to group agents by department or by seating placement within the call center translates into quick and easy personnel tracking and management. As with the Agent States report, the Agent Maps also provide information on non-adherence to the schedule. When an agent is not adhering to the schedule, the cell for the agent in the map changes color. This color change overrides all other state colors in the map. To learn the details of an agent's non-adherence, simply hold the mouse pointer over the agent's cell to produce a ToolTip that contains the scheduling information.

Viewing the Queue Information Report

Click the Info button on a Queue Panel to display a text-based report that lists requeue and bad log-in record incidences for the Queue or Queue Group in real-time. The report is a read-only display. Events are listed based on the time of the occurrence.
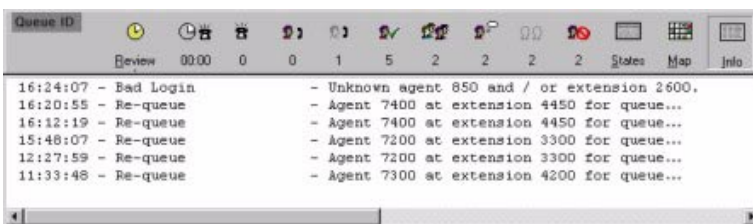
Each entry in the report includes the time of the event, the event type, and a description of the event. The table below provides descriptions of the event types.

Event Type	Description
Requeue	A requeue occurs when the queue sends an available agent an ACD call, but the agent does not answer. The call is returned to the queue to be answered by the next available agent.
Bad Log-in	A bad log-in occurs when an agent attempts to log into an ACD queue using the wrong agent ID.

Legend of Queue Panel Icons

The following table provides each of the Queue Panel icons with a description for both the Real-time Panel and the Review Panel.

<u>**Real-time Panel**</u>

Icon	Description
◐ Review	**Review -** opens the Review Panel for the display of historical statistics below the Real-time Panel. By default the Last Hour statistics are provided when the Review panel first displays. Other data available for display in this panel includes statistics for the last 12 hours, statistics for the past 24 hours, and statistics for the current day.
◐☎ 00:00	**Longest Call Waiting -** the button displays the amount of time that the longest waiting caller has been waiting in MM:SS format. Clicking the button opens the Current States report.
☎ 0	**Calls Waiting -** the button displays the number of calls waiting. Clicking the button opens the Current States report.
👤） 0	**Agents on ACD -** the button displays the number of agents currently on ACD calls. Clicking the button opens the Current States report.
👤） 0	**Agents on Non-ACD -** the button displays the number of agents currently on non-ACD calls. Clicking the button opens the Current States report.

A non-ACD call is a call that does not originate from the ACD queue. When on a non-ACD call, an agent is considered available to accept ACD calls. |
| 👤✓ 0 | **Agents On -** the button displays the number of agents currently logged into the ACD queue. Clicking the button opens the Current States report.

The number of agents logged in includes all agents currently logged into the ACD queue, including those who are unavailable to accept ACD calls. |

Icon	Description
0	**Agents Available -** the button displays the number of agents currently available to accept an ACD call. Clicking the button opens the Current States report. The number of agents available includes idle agents and agents on non-ACD calls.
0	**Agents Idle -** the button displays the number of agents who are currently idle and waiting to be offered an ACD call. Clicking the button opens the Current States report.
0	**Agents Unavailable -** the button displays the number of agents currently unavailable to accept ACD calls. Clicking the button opens the Current States report. An agent is unavailable when logged out of the ACD queue or when the agent uses a PBX feature to place himself/herself into a state that indicates he/she is busy. An agent may do this while completing call related activities or when away from the agent station.
0	**Agents Logged Out -** the button displays the number of agents currently logged out of the ACD queue. Clicking the button opens the Current States report.
States	**Agent States -** opens the Agent States report. The Agent States report is a read-only tabular display that reports real-time queue activity for the Queue or Queue Group. The five agent states included in the table are Idle, ACD, Non-ACD, Unavailable, and Logged Out.
Map	**Agent Map -** opens the Agent Map reports. The Agent Map is a real-time graphical report that dynamically illustrates the status of agents. Agents are grouped on the Agent Map logically and their status is reported using a combination of color, icons, and text.
Info	**Info -** opens a tabular, text-based report for re-queues and bad log-ins.
Trigger	**Trigger -** opens the Queue Triggers dialog box to set Trigger Stops for call center conditions. Available only in Replay mode.

Review Panel

Historical Data Selection - locate this button on the Review Panel. The title of this button varies according to the type of data currently displayed in the Review Panel. The possibilities for the button title include Last Hour, Last 12 Hours, Last 24 Hours, and Current Day. Click the button to produce a menu and select another type of data for display in the Review Panel.
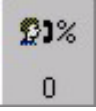
Last Hour - provides customer interaction center data and statistical averages for the past 60 minutes.

Last 12 Hours - provides customer interaction center data and statistical averages for the past 12 hours.

Last 24 Hours - provides customer interaction center data and statistical averages for the past 24 hours.

Current Day - provides customer interaction center data and statistical averages from 00:00 of the current day to the current time.

Icon	Description
00:00	**Longest Waiting Time** - displays the time of the longest waiting caller for the last hour and opens the Longest Waiting Time report. This statistic is not available for the last 12 hours, the last 24 hours, or for the current day.
0	**Maximum Calls Waiting** - displays the maximum number of calls waiting for the last hour and opens the Calls Waiting report. This statistic is not available for the last 12 hours, the last 24 hours, or for the current day.
0	**Calls Answered** - displays the number of calls answered for the last hour, last 12 hours, the last 24 hours, or the current day. Clicking the button opens the Call Counts report. Hold the mouse pointer over the button to produce a ToolTip that provides the number of calls answered and the total number of calls offered for the selected review period.
0	**Calls Interflowed** - displays the number of calls interflowed for the last hour, last 12 hours, the last 24 hours, or the current day. Clicking the button opens the Call Counts report. Hold the mouse pointer over the button to produce a ToolTip that provides the number of calls interflowed and the total number of calls offered for the selected review period.

Icon	Description
ɩ✕ 0	**Calls Abandoned -** displays the number of calls abandoned for the last hour, last 12 hours, the last 24 hours, or the current day. Clicking the button opens the Call Counts report. Hold the mouse pointer over the button to produce a ToolTip that provides the number of calls abandoned and the total number of calls offered for the selected review period.
ꜙ% 0	**Answer Service Factor -** displays the Answer Service Factor for the last hour, last 12 hours, the last 24 hours, or the current day. Clicking the button opens the Service Factors report.
% 0	**Telephone Service Factor -** displays the Telephone Service Factor for the last hour, last 12 hours, the last 24 hours, or the current day. Clicking the button opens the Service Factors report.
🕐ꜙ 00:00	**Average Time to Answer -** displays the average time to answer for the last hour, last 12 hours, the last 24 hours, or the current day. Clicking the button opens the Time to Answer report.
🕐ꜙ 00:00	**Maximum Time to Answer -** displays the maximum time to answer for the last hour, last 12 hours, the last 24 hours, or the current day. Clicking the button opens the Time to Answer report.
🕐ɩ✕ 00:00	**Average Time to Abandon -** displays the average time to abandon for the last hour, last 12 hours, the last 24 hours, or the current day. Clicking this button opens the Average Time to Abandon report.
🕐 00:00	**Average Talk Time -** displays the average talk time for the last hour, last 12 hours, the last 24 hours, or the current day. Clicking this button opens the Average Talk Time report.
🕐☎ 00:00	**Average Interflow Time -** displays the average time to interflow for the last hour, last 12 hours, the last 24 hours, or the current day. Clicking this button opens the Average Time to Interflow report.
ꜙ)))	**Agent by Group -** click this button to open the Agent by Group report for the last hour, last 12 hours, the last 24 hours, or the current day.
👤	**Agent Utilization -** click this button to open the Agent Utilization report for the last hour. This report is not available for the last 12 hours, the last 24 hours, or for the current day.

Monitoring with the Agent States Report

The Agent States report is a read-only tabular display that reports real-time queue activity for the Queue or Queue Group. The five agent states included in the table are Idle, ACD, Non-ACD, Unavailable, and Logged Out. All agents in the Queue or Queue Group are included in the table and as their states change, it is reflected by their placement in the table. If there is more information in the table than the screen can accommodate, use the scroll bar to the right of the table to view the remaining information.

The report is displayed in the QIDA after clicking the States button on the Queue Panel. The table is organized into five columns, each based on one or more agent states. The cells in the columns provide agent and agent state information. The amount of information displayed in the cells is dependant on the filters selected by the user.

The Idle (I) and ACD (A) columns in the Agent Queue table are all very specific in regard to the state that is reported. The Non-ACD column reports both inbound (P) and outbound (O) non-ACD calls, the Logged Out column displays both the logged out (L) and inactive (?) states, while the Unavailable column reports the remaining agent states.

In the title bar of each column a number is provided in brackets. This number indicates the number of agents currently in that state.

Monitoring with Agent Maps

The Agent Map is a real-time graphical report that dynamically illustrates the status of agents. Agents are grouped on the Agent Map logically and their status is reported using a combination of color, icons, and text. The ability to group agents by department or by seating placement within the call center translates into quick and easy personnel tracking and management.
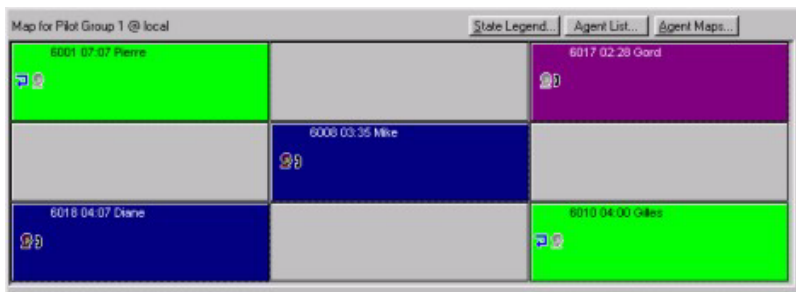
A default Agent Map is created for each monitored Queue that is titled: Map for *Queue Name*. This Agent Map is a shell only. Users must place agents on the map, edit the title if desired, and set the preferences.

Clicking the Map button on a Queue Panel displays the last viewed agent map for that Queue in the QIDA. The agent map consists of a toolbar and a grid area that displays the selected map layout. The toolbar contains one button, the Agent Maps... button that accesses the map setup. Other critical items required for the definition of an agent map are the Agent List and the State Color legend. Both of these items are accessible from the Agent Map toolbar and the Properties menu.

The grid in the Agent Map is where the agents are grouped. The grid can be as small as one cell or as large as thirty rows by thirty columns, or nine-hundred cells. The cell size is scaled to accommodate the grid size, meaning that smaller grids have larger cells that can display more agent information.

Agents can be grouped in any order, with blank cells surrounding each group for easy group recognition. The cells can display an agent state icon, the agent ID, the agent name, a character that represents the state, and the amount of time the agent has been in the state. This information can be filtered to display only the information that is pertinent to the user.

Agent Map Setup

The Agent Maps... button opens the Agent Maps dialog box where map layouts are created and modified. Several map layouts can be created for each Queue or Queue Group, allowing custom map layouts to be created that reflect the individual preferences of the users. To edit a map layout, enable the check box of the map layout to edit.

Accessing the State Colors Legend

Click the State Legend... button on the Agent Map toolbar or select Show State Color Legend from the Properties menu to open the State Colors dialog box. The State Colors dialog box lists each of the agent states with an associated color. Each state is provided on a button. By default all of these button are depressed, meaning that the state color for all of the states are enabled. To disable the display of color for a state, click the button so it is no longer depressed.

Change any of the colors by clicking the down arrow beside a state. This action opens the Color dialog box where the user can select a new color for the state. When an agent enters a state, the cell is displayed in the color selected for that state in the State Colors dialog box. The only exceptions to this are when the display of color for the state is disabled or when the agent is not adhering to the schedule. This state is associated with another color that overrides all other states.

Disabling an agent state color through the State Color Legend turns off the color for the state only. The cell can still report the agent state through the agent state icon and the state character.

Accessing the Agent List

Click the Agent List... button on the Agent Map toolbar or select Show Agent List... from the Properties menu to open the Agent List - *Queue Name @ Site Name* dialog box. This dialog box contains a list of all agents in the Queue or Queue Group. Each agent listing includes the agent ID and the agent's name. Agents are added to the Agent Map by dragging the agent from the Agent List into an empty cell on the Agent Map.

Only one agent map can be displayed for a Queue or Queue Group at any time.

Create a New Map Layout

Use the following steps to create a new map layout.

1. Click Agent Maps... on the toolbar to open the Agent Maps dialog box.
2. Click New to add a new map layout to the list.
3. Type a name for the new map layout in the Map Name column.
4. Click the Rows column and input the number of rows for the table.
5. Click the Columns column and input the number of columns for the table.
6. Click Update to save the new map layout.

Edit a Map Layout

Use the following steps to edit a map layout.

1. Click Agent Maps... on the toolbar to open the Agent Maps dialog box.
2. Change the map layout name in the Map Name column if required.
3. Click the Rows column and change the number of rows for the table if required.
4. Click the Columns column and change the number of columns for the table if required.
5. Click Update to save the changes to the map layout.

Removing occupied cells from the grid by reducing the grid size automatically removes the agents occupying the cells from the grid and returns the agent names to the Agent List.

Deleting a Map Layout

Use the following steps to delete a map layout.

1. Click Agent Maps... on the toolbar to open the Agent Maps dialog box.
2. Enable the check box of the map layout to delete.
3. Click Delete to open the TASKE ACD Monitor dialog box.
4. Click Yes to delete the map layout.

Map Layout - Adding and Removing Agents

The ability to group agents by department or by seating placement within the call center translates into quick and easy personnel tracking and management. Agents can be grouped in any order, with blank cells surrounding each group for easy group recognition. A drag-and-drop feature is used to add agents to and remove agents from a map layout.

Placing an Agent in a Map Layout - use the following steps to place an agent in a map layout.

1. Click the Agent List... button on the Agent Map toolbar or select Show Agent List... from the Properties menu to open the Agent List dialog box.
2. Drag an agent from the Agent List to an empty cell in the Agent Map.

Move an Agent to Another Cell - use the following steps to move an agent to another cell within the map layout.

1. Click the cell occupied by the agent to be moved. Do not release the mouse button.
2. Drag the agent to the desired cell.
3. Release the mouse button to place the agent in the new cell.

Remove an Agent from a Map Layout - use the following steps to remove an agent from a map layout.

1. Click the Agent List... button on the Agent Map toolbar or select Show Agent List... from the Properties menu to open the Agent List dialog box.
2. Click the cell occupied by the agent to be moved. Do not release the mouse button.
3. Drag the agent to the Agent List and release the mouse button to remove the agent from the agent map and place the agent back in the Agent List.

Adding or moving an agent to an occupied cell removes the agent occupying the cell from the grid and returns the agent name to the Agent List.

Switching Between Map Layouts

The map layouts for individual Queues or Queue Groups are accessed via the Map button on the Queue Panels. Several map layouts can exist for a single Queue or Queue Group. This allows custom maps to be created for each call center shift that reflect the individual preferences of the users.

Use the following steps to switch between map layouts.

1. Click the Agent Maps... button on the toolbar of the Agent Map to open the Agent Maps dialog box.
2. Enable the check box for the desired map layout.
3. Click Close to close the Agent Maps dialog box.

Every Queue and Queue Group has a default map layout titled "Map for *Queue Name*".

Filtering the Agent States Report and Agent Maps

The Agent States report and Agent Maps are customizable to display varying amounts of information. This filtering process allows users to display only the information that is required in the cells and avoid overcrowding. Cell information is filtered in two ways, through the definition of the cell properties and the State Color Legend.

Filtering Cell Information Using the Cell Properties

Each cell in the Agent States report and the Agents Maps can display up to seven items. These items are: an agent state icon, the agent ID, the agent name, the agent nick name, the ACD Queue ID, a state character, and the amount of time the agent has spent in the current state. Users can choose to display all or none of these items in the cells of the report. By default, the agent state icon, agent ID, agent name, and the amount of time the agent has spent in the current state are displayed.

Use the following steps to select or de-select the agent properties for display.

1. Right-click in any cell of the Agent States report or an Agent Map to access the cell properties drop-down menu.
2. Click an item to select it or de-select it from the list of properties to display. If a check mark is present beside the item, it is selected. If a check mark is not present beside the item, it is not selected.
3. Repeat steps 1 and 2 for the selection or de-selection of additional items.

Properties cannot be changed for individual agents. Changing the display properties in the report affects the information display for all agents.
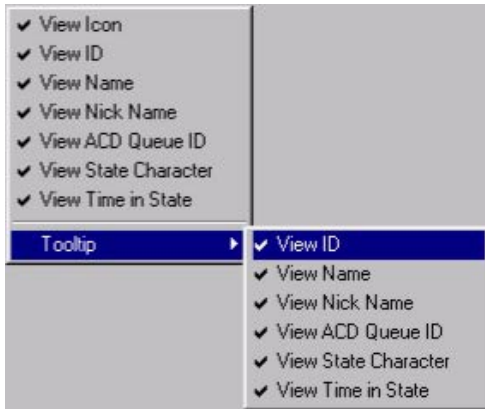
The last option on the cell properties drop-down menu is ToolTip. This option provides a sub-menu that contains all of the options in the cell properties menu except for View Icon. The selections in the ToolTip menu allow users to decide what information to include in the ToolTip that appears when the mouse pointer is held over the cell of an agent in the table. The options with a check mark beside them are selected and will be included in the ToolTip. To disable an item, simply select it to remove the check mark.

Using Color to Display Agent States

The use of color in the Agent States report and Agent Maps is very effective for a quick analysis of agent states. To further enhance the use of color, users can select any number of colors to represent the states, or even turn off the display of color for a state. The State Colors dialog box lists each of the agent states with an associated color. Each state is provided on a button. By default all of these button are depressed, meaning that the state color for all of the states are enabled. To disable the display of color for a state, click the button so it is no longer depressed.
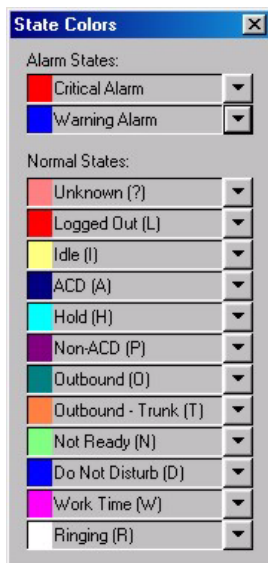
Use the following steps to change the default colors for the agent states.

1. Select Show State Color Legend... from the Properties menu or press CTRL+E to open the State Colors dialog box.
2. Click the down arrow button beside one of the states in the Normal States section to open the Color dialog box.
3. Select a new color for the state from the color dialog box and click OK. The state is immediately displayed in the new color.
4. Repeat steps 2 and 3 as desired for the remaining states.

Accessing Recent Historical Information

The Queue Panels are the access point for all real-time and recent historical information. A Queue Panel is displayed in the QIDA for each Queue or Queue Group selected in the Queue Monitor List. Each Queue Panel is comprised of two panels, the Real-time Panel and the Review Panel.

Clicking the Review button on the Real-time Panel opens the Review Panel where the recent historical information is located for the last hour, last 12 hours, the last 24 hours, and the current day. To close the Review Panel, click the Review button on the Real-time Panel a second time. The Review Panel is populated with buttons that display customer interaction center statistics. Clicking any button produces a report in graph or table format. Click the button a second time to close the report.

A button on the left side of the Review Panel selects the time period for viewing. The title of this button may be Last Hour, Last 12 Hours, Last 24 Hours, or Current Day. These titles reflect the time periods that are available for review. The current title of the button identifies the time period for the statistics currently displayed on the Review Panel. Clicking this button produces a menu of the available review periods.

Last Hour - provides customer interaction center data and statistical averages for the past 60 minutes.

Last 12 Hours - provides customer interaction center data and statistical averages for the past 12 hours.

Last 24 Hours - provides customer interaction center data and statistical averages for the past 24 hours.

Current Day - provides customer interaction center data and statistical averages from 00:00 of the current day to the current time.

The graphs that present the Last Hour, Last 12 Hours, Last 24 Hours, and Current Day statistics are:

- Longest Call Waiting (Last Hour only)
- Calls Waiting (Last Hour only)
- Call Counts
- Service Factors
- Average Time to Answer
- Average Time to Abandon
- Average Talk Time
- Average Time to Interflow
- Answered By Group
- Agent Utilization

Many of the application controls and graphs are annotated by ToolTips. If you require further information about a specific control or graph line, hold the cursor over it for a moment to produce a short message describing the purpose of the control or other screen element.

Using the Longest Waiting Time Report

The Longest Waiting Time report is a bar graph that indicates the amount of time the longest waiting caller has been waiting in the Queue or Queue Group for each minute of the last hour.

Use the following steps to view the report.

1. Select the Queue or Queue Group of interest from the Queue Monitor List. The Queue Panel for the selected Queue or Queue group opens.
2. Click the Review button on the Queue Panel.
3. Select the Last Hour time period. If the button on the left side of the Review Panel is titled Last Hour, the correct time period is selected. If the button is titled Last 12 Hours, Last 24 Hours, or Current Day, click the button and select Last Hour from the drop-down menu.
4. Click the Longest Waiting Time button on the Review Panel to open the graph.

Using the Calls Waiting Report

The Calls Waiting report is a bar graph that details the number of calls waiting in the queue for the Queue or Queue Group over the past hour.

Use the following steps to view the report.

1. Select the Queue or Queue Group of interest from the Queue Monitor List . The Queue Panel for the selected Queue or Queue group opens.
2. Click the Review button on the Queue Panel.
3. Select the Last Hour time period. If the button on the left side of the Review Panel is titled Last Hour, the correct time period is selected. If the button is titled Last 12 Hours, Last 24 Hours, or Current Day, click the button and select Last Hour from the drop-down menu.
4. Click the Calls Waiting button on the Review Panel to open the graph.

Using the Call Counts Report

The Call Counts report is a bar graph that provides the number of calls answered, the number of calls abandoned, and the number of calls interflowed. The graph is available for all time segments.

Use the following steps to view the report for any time period.

1. Select the Queue or Queue Group of interest from the Queue Monitor List . The Queue Panel for the selected Queue or Queue group opens.
2. Click the Review button on the Queue Panel.
3. Select the desired time period. Click the button on the left side of the Review Panel to produce a drop-down menu with the available time periods. Select the desired time period from this menu. When a time period is selected, the button adopts the time period title as its title. The button may be titled Last Hour, Last 12 Hours, Last 24 Hours, or Current Day.
4. Click either the Calls Answered, Calls Interflowed, or Calls Abandoned button on the Review Panel to open the graph.

Using the Service Factors Report

The Service Factors report is a bar graph that provides the Answer Service Factor and Telephone Service Factor. These statistics indicate how the calls that reach the call center are being handled. The graph is available for all time segments.

Use the following steps to view the report for any time period.

1. Select the Queue or Queue Group of interest from the Queue Monitor List. The Queue Panel for the selected Queue or Queue group opens.
2. Click the Review button on the Queue Panel.
3. Select the desired time period. Click the button on the left side of the Review Panel to produce a drop-down menu with the available time periods. Select the desired time period from this menu. When a time period is selected, the button adopts the time period title as its title. The button may be titled Last Hour, Last 12 Hours, Last 24 Hours, or Current Day.
4. Click either the Answer Service Factor or the Telephone Service Factor button on the Review Panel to open the graph.

Using the Time to Answer Report

The Time to Answer report is a stacked bar graph that provides the average time to answer and the maximum time to answer. The graph is available for all time segments.

Use the following steps to view the report for any time period.

1. Select the Queue or Queue Group of interest from the Queue Monitor List. The Queue Panel for the selected Queue or Queue group opens.
2. Click the Review button on the Queue Panel.
3. Select the desired time period. Click the button on the left side of the Review Panel to produce a drop-down menu with the available time periods. Select the desired time period from this menu. When a time period is selected, the button adopts the time period title as its title. The button may be titled Last Hour, Last 12 Hours, Last 24 Hours, or Current Day.
4. Click either the Average Time to Answer or the Maximum Time to Answer button on the Review Panel to open the graph.

Using the Average Time to Abandon Report

The Average Time to Abandon report is a bar graph that provides the average amount of time a caller will wait in the queue before disconnecting and terminating the call. The graph is available for all time segments. The graph is available for all time segments.

Use the following steps to view the report for any time period.

1. Select the Queue or Queue Group of interest from the Queue Monitor List. The Queue Panel for the selected Queue or Queue group opens.
2. Click the Review button on the Queue Panel.
3. Select the desired time period. Click the button on the left side of the Review Panel to produce a drop-down menu with the available time periods. Select the desired time period from this menu. When a time period is selected, the button adopts the time period title as its title. The button may be titled Last Hour, Last 12 Hours, Last 24 Hours, or Current Day.
4. Click the Average Time to Abandon button on the Review Panel to open the graph

Using the Average Talk Time Report

The Average Talk Time report is a bar graph that provides the average length of answered calls for the Queue or Queue Group. The graph is available for all time segments.

Use the following steps to view the report for any time period.

1. Select the Queue or Queue Group of interest from the Queue Monitor List. The Queue Panel for the selected Queue or Queue group opens.
2. Click the Review button on the Queue Panel.
3. Select the desired time period. Click the button on the left side of the Review Panel to produce a drop-down menu with the available time periods. Select the desired time period from this menu. When a time period is selected, the button adopts the time period title as its title. The button may be titled Last Hour, Last 12 Hours, Last 24 Hours, or Current Day.
4. Click the Average Talk Time button on the Review Panel to open the graph.

Using the Average Time to Interflow Report

The Average Time to Interflow report is a bar graph that provides the average length of time a call will remain in the Queue or Queue Group queue before being routed to another queue. The graph is available for all time segments.

Use the following steps to view the report for any time period.

1. Select the Queue or Queue Group of interest from the Queue Monitor List. The Queue Panel for the selected Queue or Queue group opens.
2. Click the Review button on the Queue Panel.
3. Select the desired time period. Click the button on the left side of the Review Panel to produce a drop-down menu with the available time periods. Select the desired time period from this menu. When a time period is selected, the button adopts the time period title as its title. The button may be titled Last Hour, Last 12 Hours, Last 24 Hours, or Current Day.
4. Click the Average Time to Interflow button on the Review Panel to open the graph.

Using the Answered by Group Report

The Answered by Group report is a bar graph that indicates the percentage of calls handled by each Agent Group within the Queue or Queue Group. The graph is available for all time segments.

Use the following steps to view the report for any time period.

1. Select the Queue or Queue Group of interest from the Queue Monitor List. The Queue Panel for the selected Queue or Queue group opens.
2. Click the Review button on the Queue Panel.
3. Select the desired time period. Click the button on the left side of the Review Panel to produce a drop-down menu with the available time periods. Select the desired time period from this menu. When a time period is selected, the button adopts the time period title as its title. The button may be titled Last Hour, Last 12 Hours, Last 24 Hours, or Current Day.
4. Click the Answered by Group button on the Review Panel to open the graph.

Using the Agent Utilization Report

The Agent Utilization report is a bar graph that indicates the agent states and the number of agents in each state for the last hour. The graph includes the number of agents idle, the number of agents on ACD calls, the number of agents on non-ACD calls, and the number of agents unavailable.

Use the following steps to view the report.

1. Select the Queue or Queue Group of interest from the Queue Monitor List. The Queue Panel for the selected Queue or Queue group opens.
2. Click the Review button on the Queue Panel.
3. Select the Last Hour time period. If the button on the left side of the Review Panel is titled Last Hour, the correct time period is selected. If the button is titled Last 12 Hours, Last 24 Hours, or Current Day, click the button and select Last Hour from the drop-down menu.
4. Click the Agent Utilization button on the Review Panel to open the graph.

Using the Replay Mode

The Replay mode is an animated review of a 24-hour period that shares the reports of the Real-time mode. Using the same real-time, last hour, last 12 hours, last 24 hours, and current day reports, users select a date with logged customer interaction center data. The information for the day is replayed in a real-time simulation. When in the Replay mode, the application title bar states TASKE ACD Monitor - Replay. When operating in the Real-time mode the title bar simply states TASKE ACD Monitor.

Click the Replay button on the Main Control Panel to switch to the Replay Mode. Located on the Main Control Panel, the controls for the replay are similar to that of a VCR. Use the replay controls to maneuver throughout the day's data. To further control the replay of data, users select thresholds, or trigger stops, based on customer interaction center conditions or a specific time of day. These thresholds pause the replay when the selected conditions are encountered.

The thresholds for customer interaction center conditions are selected for individual Queues or Queue Groups from the Queue Panels. Thresholds can be set for three customer interaction center conditions. These are the number of calls waiting, the number of abandoned calls during a 15-minute interval, and the amount of time the longest waiting caller has been waiting.

The time of day trigger stop is accessed from the Main Control Panel. It is a general threshold that applies to all monitored Queues and Queue Groups.

The Speed slider control on the Main Control Panel determines the speed of the replay. At its slowest, the data is replayed in real-time, where one second equals one second. At its fastest, the data is replayed at 1000 times the real-time increments, meaning that one millisecond equals one second. Between these two extremes, the replay speeds range from 2 times to 999 times the real-time increments. The speed is changeable while the replay is in progress, allowing users to quickly move through the information and slow it down when an in-depth analysis is required.

As the replay progresses, the time indicates the time of day the replay is displaying. The time is presented in 24-hour format and its speed of progression depends on the replay speed.

Selecting the Replay Date

The Replay mode is an animated review of any 24-hour period with logged call center data. To replay call center data, the user must select a date from the date box on the Main Control Panel where the replay controls and date selection options are located. The date box in the top of the replay controls section allows users to select a date using one of two methods. Type the date into the date box or to double-click the date box and open the Replay Date Selection calendar.

Use the following steps to select the replay date using the Replay Date Selection calendar.

1. Double-click the date box to open the Replay Date Selection calendar.
1. Use ◄◄ and ►► to select the desired year.
2. Use ◄ and ► to select the desired month.
3. Click on each of the desired date(s). When a date is selected it is highlighted in blue.
4. Click OK to close the Replay Date Selection calendar.
5. Click ► to begin the replay.

Using the Replay Controls

The Replay mode uses stored PBX data to provide an as-it-happened repetition of a selected 24-hour period. The replay of call center data is controlled in a manner similar to that of a VCR. Use the replay controls to maneuver throughout the data for the selected day. Prior to playing the data, select the date for the replay and set the replay speed to an adequate level.

The controls for the Replay mode are located on the Main Control Panel. Use the controls to select the replay date and speed, and to control the progression of the information. The controls for the replay are similar to that of a VCR. Use the replay controls to maneuver throughout the day's data.

In addition, a time of day trigger stop can be set using the Trigger Stops button on the Main Control Panel. To set Queue or Queue Group specific thresholds for customer interaction center conditions, use the Trigger buttons on the Queue Panels.

Starting the Replay

Clicking the ▶ button starts the playback of call center data. The speed of the data replay is determined by the selection in the Speed field.

Pausing the Replay

Clicking the ❙❙ button pauses the replay at the current event. When the replay is paused, the time field flashes the time the replay was paused. Click Pause again or Play to restart the replay.

Stopping the Replay

Clicking the ■ button stops the replay and resets the time to 12:00 for the selected date.

Fast Forwarding the Replay

Clicking the ▶▶ button immediately advances the replay to the next event. Clicking and holding the button continues to advance through the events until the button is released.

Using the Hourly Placeholder Buttons

As a replay progresses, the information is saved at the beginning of each hour. When a save occurs, a temporary marker, or placeholder, is created. The ◄ and ► buttons are used to move from placeholder to placeholder when the replay is paused.

When the ■ button is clicked, the replay time returns to 12:00 and all markers are removed.

Setting Trigger Stops

Use the Trigger buttons on the Main Control Panel and on the Queue Panels to define time of day and queue events that pause the replay when encountered.

Setting the Replay Speed

The Speed slider control on the Main Control Panel determines the speed of the replay. At its slowest, the data is replayed in real-time, where one second equals one second. At its fastest, the data is replayed at 1000 times the real-time increments, meaning that one millisecond equals one second. Between these two extremes, the replay speeds range from 2 times to 999 times the real-time increments. The speed is changeable while the replay is in progress, allowing users to quickly move through the information and slow it down when an in-depth analysis is required.

Setting the Replay Speed

The Replay mode is an animated review of a 24-hour period that shares the reports of the Real-time mode. Using the same real-time, last hour, last 12 hours, last 24 hours, and current day reports, users select a date with logged customer interaction center data. The information for the day is replayed in a real-time simulation. The speed of the simulation is set using the Speed slider control.

Use the following steps to set the replay speed.

1. Move the slider to the desired position within the replay speed range.
2. Adjust the slider at any time during the replay.

At its right-most position, or slowest replay speed, the data is replayed in real-time, where one second equals one second. At its left-most position, or fastest replay speed, the data is replayed at 1000 times the real-time increments, meaning that one millisecond equals one second. Between these two extremes, the replay speeds increase in increments of 50. The speed is changeable while

the replay is in progress, allowing users to quickly move through the information and slow it down when an in-depth analysis is required.

Setting Trigger Stops in Replay

The replay mode is an animated review of call center data over a 24-hour period. Control of the replay is similar to that of a VCR. Use the replay controls to maneuver throughout the data for the selected day. To further control the replay of data, users select thresholds based on customer interaction center conditions or a specific time of day that pause the replay when the selected conditions are encountered.

Known as Trigger Stops, the thresholds for customer interaction center conditions are selected for individual Queues or Queue Groups using the Trigger button on the Queue Panel. Thresholds can be set for three conditions. These are Calls Waiting, Abandoned Calls, and the Longest Waiting Call. The time of day Trigger Stop is a general threshold that applies to all monitored Queues and Queue Groups. Only one time of day trigger stop can be set at a time.

Defining Trigger Stops for Customer Interaction Center Conditions

Use the following steps to define a trigger stop for customer interaction center conditions.

1. Click the Trigger button on the Queue Panel for the desired Queue or Queue Group to open the Queue Triggers dialog box.
2. Enable the check boxes for the desired Trigger Stops and set the value or time thresholds for each.
3. Click OK.

Defining a Time of Day Trigger Stop

Use the following steps to define a trigger stop based on the time of day.

1. Select the Trigger button on the Main Control Panel to open the Trigger dialog box.
2. Enable the Stop at Record Time (HH:MM:SS) check box and set the time for the Trigger Stop.
3. Click OK.

Using the Enterprise ACD Monitor

To monitor the Queues/Queue Groups on a remote TASKE site, the Enterprise Monitor looks at the information from a remote Information Server.

Launching the Enterprise ACD Monitor application and selecting the desired local or remote Queues and Queue Groups to monitor prompts the following sequence of events:

1. The Enterprise Monitor opens a State Machine session for each site selected - local or remote.
2. The State Machine uses the Net Client, visible in the Windows system tray 🖳, to receive the request to monitor a specific Queue/Group and sends that request to the local Information Server.
3. The Information Server, seeing that the request is for data from a remote TASKE site, looks in the site list for the location of the remote site and sends the request to the Information Server at the remote site.
4. The remote Information Server receives the request and sends the information back to the "local" Information Server.
5. The Information Server receives the information and passes it back through the local network to the Net Client for the Enterprise ACD Monitor.
6. The Net Client passes the information to the state machine, which then passes it to the Enterprise ACD Monitor application.
7. The Enterprise ACD Monitor displays the information as requested.

The following diagram illustrates the path the information request follows from the Enterprise ACD Monitor being started, to the display of the information.
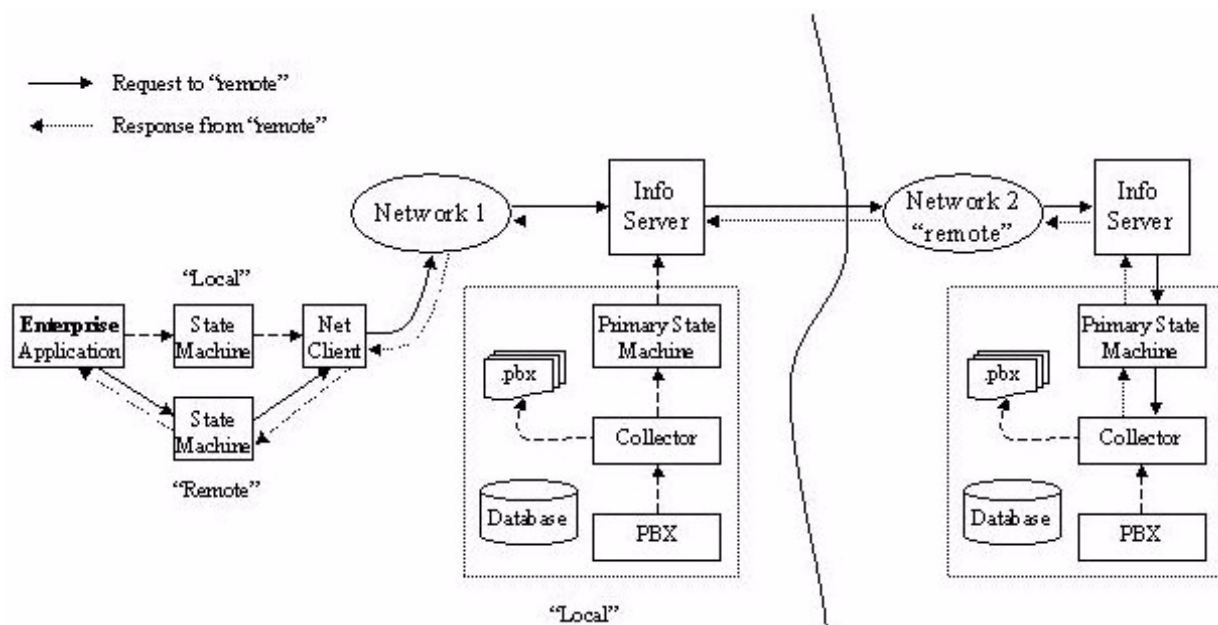
Monitoring Remote Sites

To monitor the Queues and Queue Groups on a remote TASKE site, the TASKE Enterprise Monitor looks at .pbx files that are saved on the local Information Server of the remote site. The Enterprise Supervisor then only needs to have access to a shared PBX directory on the local Information Server.

Use the following steps to monitor remote and local TASKE sites with Enterprise Monitor.

1. From the TASKE ToolBox, open the Enterprise Monitor.
2. Click the Queues... button on the Main Control Panel to open the Queue Manager.
3. Select the Queues and Queue Groups to be monitored in the Queue Selector. All Queues and Queue Groups from all available TASKE Enterprise Queues and Queue Groups are displayed in the Queue Selector with the monitoring status, name, nick name, location, ID, and type.
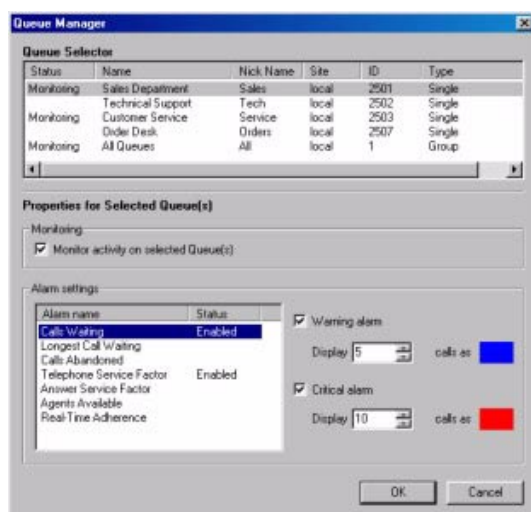
4. Assuming the monitoring status for all Queues and Queue Groups in this case is disabled, enable the "Monitor activity on selected Queue(s)" check box to enable the monitoring status for the selected Queues and Queue Groups.
5. Set the alarm settings for the desired Queues and Queue Groups.
6. Click OK to enable the changes and close the Queue Manager. The Queues and Queue Groups selected for monitoring now appear in the Queue Monitoring List.
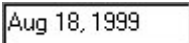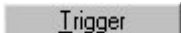
From this point forward, the only functionality the Enterprise ACD Monitor does not provide that the ACD Monitor does is the Replay mode. The Enterprise Monitor does not include any of the Replay features that are available in ACD Monitor and the Replay mode selection button is disabled.

ACD Monitor Glossary

Term	Definition
Agent Map	Clicking the Map button on the Real-time Panel of the Queue Panels opens the Agent Map reports.
	An Agent Map is a real-time graphical report that dynamically illustrates the status of agents. Agents are grouped logically and their status is reported using a combination of color, icons, and text. To access the map layouts for a Queue or Queue Group, click the Map button on the Queue Panel of the desired Queue or Queue Group.
Agent State Characters	? No activity recorded for the agent since log in
	A Agent is on an ACD call
	D Agent is in Do Not Disturb
	F Idle Forward
	H Agent is on Hold
	I Agent is Idle (waiting to be offered a call)
	L Agent is Logged Out
	M Agent is in Make Busy
	N Agent is Unavailable / Not Ready
	O Agent is on an Outbound call
	P Agent is on an inbound non-ACD call
	R Ringing
	T Outbound Trunk
	U Make Busy – DND
	V Not Ready - DND
	W Agent is in Work Time
	X Unavailable
Agent States Report	Clicking the States button on the Real-time Panel of the Queue Panels opens the Agent States report.
	The Agent States report is a read-only, real-time display that reports queue activity for the Queue or Queue Group. The five agent states included in the table are Idle, ACD, Non-ACD, Unavailable, and Logged Out. To access the Agent States report for a Queue or Queue Group, click the States button on the Queue Panel of the desired Queue or Queue Group.

Term	Definition
Current States Report	The Current States report is a bar graph that represents the real-time statistics. The title of the statistic selected on the Real-time Panel is displayed in the graph margin with the numeric value of the statistic. All statistics are represented by a bar in the graph with the graph of the selected statistic displayed in a highlight color.
Main Control Panel	Located on the left side of the ACD Monitor window, the Main Control Panel is responsible for mode selection, the display of the system date and time in the real-time mode, the display and setup of the Queue Monitor List, the date selection in the Replay mode, and replay control.
Menu Bar	The menu bar spans the top of the ACD Monitor window. The menu bar contains four menus that provide keyboard or mouse access to the functions of the ACD Monitor. The menus are File, View, Chat, and Help.
Mode Selection	Click the Real-time button to switch to the Real-time mode. Click the Replay button to switch to the Replay mode.
Queue	A Queue is a dialable number that accesses a group of answering positions (agent or extension groups).
Queue Group	A Queue Group is used strictly for reporting and monitoring purposes in TASKE applications. This is a group of Queues given a single identifying number that is traceable in reports and the ACD Monitor. For instance, in a call center with three Technical Support Queues create a Queue Group that includes all three Queues. Using the Queue Group monitor all agents in all three Queues simultaneously and include all three Queues in a single report.
Queue Information Display Area (QIDA)	The Queue Information Display Area (QIDA) displays Queue and Queue Group information for the Queues or Queue Groups selected from the Queue Monitor List. Information is presented numerically, graphically, and tabularly in both the Real-time mode and the Replay mode.

Term	Definition
Queue Monitor List	The Queue Monitor List, located on the Main Control Panel, provides a button for each of the Queues or Queue Groups selected for monitoring. Select one or more Queues or Queue Groups from the Queue Monitor List to display the information in the QIDA. Use the list to view the details of a single Queue or Queue Group, or monitor several Queue panels and their reports at once in the QIDA.
Queue Panels	Queue Panels display the graph control buttons that provide call center statistics and performance information. For those graph control buttons that represent a call center statistic, the numeric value of the statistic is visible on the button. Clicking any of the graph control buttons provides a graphical or tabular view of the call center information.
Review Panel Time Periods	The review panel reports on four different time periods: Last Hour, Last 12 Hours, Last 24 Hours, and Current Day.

Last Hour - provides customer interaction center data and statistical averages for the past 60 minutes.

Last 12 Hours - provides customer interaction center data and statistical averages for the past 12 hours.

Last 24 Hours - provides customer interaction center data and statistical averages for the past 24 hours.

Current Day - provides customer interaction center data and statistical averages from 00:00 of the current day to the current time. |

Term	Definition	
Replay Controls	Aug 18, 1999	Use the date box to select the replay date. Double-click in the date box to open the calendar in the Date Selection dialog box.
	▶	Clicking the play button starts the playback of call center data. The speed of the data replay is determined by the selection in the Speed field.
	❚❚	Clicking the pause button pauses the replay at the current event. When the replay is paused, the time field flashes the time the replay was paused. Click Pause again or Play to restart the replay.
	■	Clicking the stop button stops the replay and resets the time to 12:00 for the selected date.
	▶▶	Clicking the fast forward button immediately advances the replay to the next event. Clicking and holding the button continues to advance through the events until the button is released.
	◀ ▶	Clicking the hourly placeholder buttons immediately advances the replay to the next event. Clicking and holding the button continues to advance through the events until the button is released.
	Trigger	The Trigger button on the Main Control Panel opens the Triggers dialog box where time of day thresholds are set. To set the time, individually click the hour, minute, and second fields and type, or use the up and down arrows, to set the two-digit value for each field.
	Trigger	The Trigger button on the Queue Panels open the Queue Triggers dialog box where thresholds are set for individual Queues and Queue Groups.
	Speed ──❘	The Speed slider control on the Main Control Panel determines the speed of the replay. At its slowest, the data is replayed in real-time, where one second equals one second. At its fastest, the data is replayed at 1000 times the real-time increments, meaning that one millisecond equals one second Between these two extremes, the replay speeds increase in increments of 50.

TASKE Reports

The TASKE Reports application generates custom reports based on data collected from the PBX system. These reports aid in managing a balance between the call load presented to the customer interaction center, and the capacity of the customer interaction center to process these calls.

The Reports application also features the ability to forecast the future call demand. The future call demand is forecast with reasonable reliability by studying calling patterns derived from historical data. Supervisors use this information to estimate the call load and to schedule the resource requirements.

The Reports application generates several types of custom reports that are presented in text format. These reports are viewed in the Publication Viewer, a main section of the Reports interface.

The content of the reports can be categorized in three ways:

- by customer interaction center resource (Trunks, Extensions, Extension Groups, Agents, Agent Groups, Queues, and Queue Groups)
- by reporting period (day, week, and month)
- by interval (half-hour, hour, day, week, or month)

Select a reporting period and generate a report for a specific resource or resource group. The data is collated across several time intervals and describes the performance of the selected resource or resource group. The statistics in a report are totaled or averaged by time interval, over the reporting period.

Starting TASKE Reports

The Reports application is opened from the Windows desktop. Use one of the following methods to open the application.

Opening Reports Using the Start Button

Use the following steps to open the Reports application using the Start button on the Windows desktop.

1. Click Start on the toolbar of the Windows desktop.
2. Select Programs from the menu.
3. Select the TASKE folder in the list of programs.
4. Select Reports from the list of TASKE applications to open the Reports application.

Opening Reports from the TASKE Program Folder

Use the following steps to open the Reports application from the TASKE ToolBox program folder.

1. Double-click the TASKE ToolBox folder icon on the Windows desktop to open the TASKE ToolBox folder.
2. Double-click the Reports icon in the folder to open the Reports application.
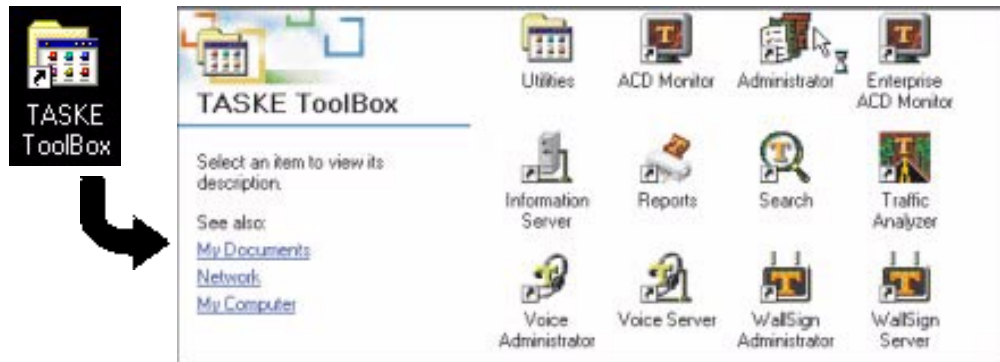
Using the Menu Bar

The menu bar contains two menus that provide keyboard or mouse access to the functions of the Reports application. The menus are File and Help.

File Menu

Use the File menu to access various areas and functions of the Reports application. The table below outlines the functionality of the File menu.

Option	Shortcut	Description
New	N/A	Opens the properties window to create a new report for the reporting period selected in the Main Control Panel.
Delete	N/A	Deletes the report template selected in the Report Templates panel.
Export	N/A	Generates a summary for the report selected in the Report Templates panel and exports the report in the format selected for the report in the Export tab of the properties window. When Export is selected from the File menu, the user is required to select a date for the report from the Date Selection calendar.

Option	Shortcut	Description
Properties	N/A	Opens the properties window for the report template selected in the Report Templates panel.
Print Setup	N/A	Opens the Print Setup dialog box. Select a printer and define the properties for printing the report in this dialog box.
Print...	N/A	Opens the Print dialog box. Select a printer,define the properties for printing the report, and print the report from this dialog box.
Print Preview	N/A	Provides a preview of the printed report. Print the report from the preview window.
Notification Reports	N/A	Enables or disables the Notification Reports. When a check mark is present beside this menu option Notification Reports are enabled. If a check mark is not present, Notification Reports are disabled.
Schedule Report Generator	N/A	Opens the Schedule Report Generator for scheduling the automatic printing and exporting of reports.
Exit	N/A	Select this option to close the Reports application.

Help Menu

Use the Help menu to access the online help for the Reports application. Additionally, use this menu to view version and copyright information for the application.

Option	Shortcut	Description
Contents	F1	Select Contents to access the Online Help for the Reports application.
About TASKE Reports...	N/A	Select About TASKE Reports... to view version, copyright, and lock number information for the Reports.

Using the Main Control Panel

The Main Control Panel spans the left side of the Reports interface and contains a set of six buttons. These buttons serve as the starting point for creating report templates. The first five buttons represent reporting periods. The reporting periods are: Daily, Weekly, Monthly, Year by Week and Year by Month.

The sixth button, the Forecast button, also represents a reporting period, however, this reporting period is in the future. The report templates created for the Forecast period are based on the projected call load.

The reports that can be generated for all of the reporting periods are listed in the Report Types by Period tables below.

Trunk Reports		
Reporting Period	**Resource**	**Report Options**
Daily	Trunk	Quarter hour, half hour, hour
Weekly	Trunk	Quarter hour, half hour, hour, day of week
Monthly	Trunk	Quarter hour, half hour, hour, day of month
Year by Week	Trunk	Half hour, hour, day of week, week
Year by Month	Trunk	Half hour, hour, day of month, month

Extension Reports		
Reporting Period	**Resource**	**Report Options**
Daily	Extension	Quarter hour, half hour, hour
Weekly	Extension	Quarter hour, half hour, hour, day of week
Monthly	Extension	Quarter hour, half hour, hour, day of month
Year by Week	Extension	Half hour, hour, day of week, week
Year by Month	Extension	Half hour, hour, day of month, month

Extension Group Reports		
Reporting Period	**Resource**	**Report Options**
Daily	Extension Group	By Extension
Weekly	Extension Group	By Extension
Monthly	Extension Group	By Extension
Year by Week	Extension Group	By Extension
Year by Month	Extension Group	By Extension

Agent Reports

Reporting Period	Resource	Report Options
Daily	Agent	Quarter hour, half hour, hour, agent group, Queue
Weekly	Agent	Quarter hour, half hour, hour, day of week, agent group, Queue
Monthly	Agent	Quarter hour, half hour, hour, day of month, agent group, Queue
Year by Week	Agent	Half hour, hour, day of week, week, agent group, Queue
Year by Month	Agent	Half hour, hour, day of month, month, agent group, Queue

Agent Group Reports

Reporting Period	Resource	Report Options
Daily	Agent Group	Quarter hour, half hour, hour, agent, Queue
Weekly	Agent Group	Quarter hour, half hour, hour, day of week, agent, Queue
Monthly	Agent Group	Quarter hour, half hour, hour, day of month, agent, Queue
Year by Week	Agent Group	Half hour, hour, day of week, week, agent, Queue
Year by Month	Agent Group	Half hour, hour, day of month, month, agent, Queue

Queue Reports

Reporting Period	Resource	Report Options
Daily	Queue	Quarter hour, half hour, hour, DNIS, area code, area code & city, state
Weekly	Queue	Quarter hour, half hour, hour, day of week, DNIS, area code, area code & city, state
Monthly	Queue	Quarter hour, half hour, hour, day of month, DNIS, area code, area code & city, state
Year by Week	Queue	Half hour, hour, day of week, week, DNIS, area code, area code & city, state
Year by Month	Queue	Half hour, hour, day of month, month, DNIS, area code, area code & city, state
Daily	Queue Answer Spectrum	Quarter hour, half hour, hour
Weekly	Queue Answer Spectrum	Quarter hour, half hour, hour, day of week

Queue Reports		
Reporting Period	**Resource**	**Report Options**
Monthly	Queue Answer Spectrum	Quarter hour, half hour, hour, day of month
Year by Week	Queue Answer Spectrum	Half hour, hour, day of week, week
Year by Month	Queue Answer Spectrum	Half hour, hour, day of month, month
Daily	Queue Abandon Spectrum	Quarter hour, half hour, hour
Weekly	Queue Abandon Spectrum	Quarter hour, half hour, hour, day of week
Monthly	Queue Abandon Spectrum	Quarter hour, half hour, hour, day of month
Year by Week	Queue Abandon Spectrum	Half hour, hour, day of week, week
Year by Month	Queue Abandon Spectrum	Half hour, hour, day of month, month
Daily	Queue Interflow Spectrum	Quarter hour, half hour, hour
Weekly	Queue Interflow Spectrum	Quarter hour, half hour, hour, day of week
Monthly	Queue Interflow Spectrum	Quarter hour, half hour, hour, day of month
Year by Week	Queue Interflow Spectrum	Half hour, hour, day of week, week
Year by Month	Queue Interflow Spectrum	Half hour, hour, day of month, month
Daily	Queue Activity	Quarter hour, half hour, hour, pairs of acct codes
Weekly	Queue Activity	Quarter hour, half hour, hour, day of week, pairs of acct codes
Monthly	Queue Activity	Quarter hour, half hour, hour, day of month, pairs of acct codes
Year by Week	Queue Activity	Half hour, hour, day of week, week, pairs of acct codes
Year by Month	Queue Activity	Half hour, hour, day of month, month, pairs of acct codes
Monthly	Queue Peaks	Peak offered, peak answered, peak abandoned, peak interflowed

Queue Group Reports		
Reporting Period	**Resource**	**Report Options**
Daily	Queue Group	Quarter hour, half hour, hour, Queue, DNIS, area code, area code & city, state
Weekly	Queue Group	Quarter hour, half hour, hour, day of week, Queue, DNIS, area code, area code & city, state
Monthly	Queue Group	Quarter hour, half hour, hour, day of month, Queue, DNIS, area code, area code & city, state
Year by Week	Queue Group	Half hour, hour, day of week, week, Queue, DNIS, area code, area code & city, state
Year by Month	Queue Group	Half hour, hour, day of month, month, Queue, DNIS, area code, area code & city, state
Daily	Queue Group Answer Spectrum	Quarter hour, half hour, hour, Queue
Weekly	Queue Group Answer Spectrum	Quarter hour, half hour, hour, day of week, Queue
Monthly	Queue Group Answer Spectrum	Quarter hour, half hour, hour, day of month, Queue
Year by Week	Queue Group Answer Spectrum	Half hour, hour, day of week, week, Queue
Year by Month	Queue Group Answer Spectrum	Half hour, hour, day of month, month, Queue
Daily	Queue Group Abandon Spectrum	Quarter hour, half hour, hour, Queue
Weekly	Queue Group Abandon Spectrum	Quarter hour, half hour, hour, day of week, Queue
Monthly	Queue Group Abandon Spectrum	Quarter hour, half hour, hour, day of month, Queue
Year by Week	Queue Group Abandon Spectrum	Half hour, hour, day of week, week, Queue
Year by Month	Queue Group Abandon Spectrum	Half hour, hour, day of month, month, Queue
Daily	Queue Group Interflow Spectrum	Quarter hour, half hour, hour, Queue
Weekly	Queue Group Interflow Spectrum	Quarter hour, half hour, hour, day of week, Queue
Monthly	Queue Group Interflow Spectrum	Quarter hour, half hour, hour, day of month, Queue
Year by Week	Queue Group Interflow Spectrum	Half hour, hour, day of week, week, Queue

Queue Group Reports		
Reporting Period	**Resource**	**Report Options**
Year by Month	Queue Group Interflow Spectrum	Half hour, hour, day of month, month, Queue
Daily	Queue Group Activity	Quarter hour, half hour, hour, Queue, pairs of acct codes
Weekly	Queue Group Activity	Quarter hour, half hour, hour, day of week, Queue, pairs of acct codes
Monthly	Queue Group Activity	Quarter hour, half hour, hour, day of month, Queue, pairs of acct codes
Year by Week	Queue Group Activity	Half hour, hour, day of week, Queue, pairs of acct codes
Year by Month	Queue Group Activity	Half hour, hour, day of month, month, Queue, pairs of acct codes
Monthly	Queue Group Peaks	Peak offered, peak answered, peak abandoned, peak interflowed

Daily Reports

Daily reports have three (3) report interval options: 15 minutes, half hour and hour. Daily reports are used to monitor the operations of a customer interaction center on a daily basis. The load activity data from the Daily reports of previous months or years can be used to forecast the call demand expected on a specific day of the year, such as Boxing day. For example, the level of Load Activity shown in last year's Daily report for September 9th might be a good indication of the level of Load Activity expected on September 9th of the current year.

The statistics for each day typically cover an entire 24 hour time span. However, this time span may be truncated if the report options are set to limit the reporting hours of the day to a personalized definition of a business bay. The start and end times for the business day are set in the Administrator application. Go to the Options table of the Database mode to set these parameters.

Weekly Reports

Weekly reports have four (4) report interval options: 15 minutes, half hour, hour, and day of the week. Weekly reports are used to monitor the operations of a customer interaction center on a weekly basis. If the load activity for a customer interaction center is not expected to vary much between the days of the week but is expected to vary from week to week, then the Weekly reports might be used for forecasting purposes. This would be less

time consuming than viewing Daily reports since the data is reviewed a week at a time rather than a day at a time.

Weekly reports represent a reporting period of seven (7) consecutive days. The statistics for each day of the week typically cover an entire 24 hour time span unless daily reports have been truncated to fewer hours. The week start day is set in the Administrator application. Go to the Options table of the Database mode to set this parameter.

Monthly Reports

Monthly reports have four (4) report interval options: 15 minutes, half hour, hour, and day of the month. Monthly reports may be used to compare this month's performance and call handling productivity with a previous month's performance. Monthly reports may also be used for budget planning purposes. For example, to examine the seasonal load activity levels that pertain to term hiring, Monthly reports would provide the load activity data in a manageable number of reports, rather than 31 Daily reports or 4 Weekly reports.

Monthly reports represent a report period of up to 31 consecutive days, representing an entire calendar month. The statistics for each day of the month typically cover an entire 24 hour time span unless daily reports have been truncated to fewer hours.

Year By Week Reports

Year By Week reports have four (4) report interval options: half hour, hour, day of the week, and week. Year By Week reports may be used to compare this year's performance and call handling productivity by week with a previous year. The Year By Week reports enable performance and load activity for a relatively long period of time to be reviewed in one report.

Year By Week reports can be generated for a minimum period of 1 week to a maximum period of 52 consecutive weeks, representing an entire calendar year, divided by week. The statistics for each day of the year that forms the Weekly report that is used by the Year By Week report typically covers an entire 24 hour time span unless daily reports have been truncated to fewer hours.

Year By Month Reports

Year by Month | Year By Month reports have four (4) report interval options: half hour, hour, day of the month, and month. Year By Month reports may be used to compare this year's performance and call handling productivity by month with a previous year. The Year By Month reports enable performance and load activity for a relatively long period of time to be reviewed in one report.

Year By Month reports can be generated for a minimum period of 1 month to a maximum period of 24 consecutive months, representing 2 entire calendar years, divided by month. The statistics for each day of the year that forms the Monthly report that is used by the Year By Month report typically covers an entire 24 hour time span unless daily reports have been truncated to fewer hours.

Forecast Reports

Forecast | Within a customer interaction center, if there are more Agents than calls, then the Agents are idle for part of the time and costs are increased. In most cases, the Queue is designed so that the number of Agents available at any given time is less than the number of incoming calls. This places an upper limit on the number of Agents required for a customer interaction center.

If there are more calls than available Agents, then callers must be kept waiting for an available Agent. The length of time a Caller waits depends on how many calls there are compared to the number of available Agents. However, there is an upper limit on the amount of time a caller will wait before abandoning the call. Therefore, there must be enough agents available to maintain the desired level of service.

In between these upper and lower limits there is a balance where a given number of Agents provide satisfactory service at minimal cost. The objective of customer interaction center management is to achieve a good balance.

The balance between economy and service is the crux of the operation of the customer interaction center, and produces very significant problems. The first of these is to predict how many calls can be expected over a given period of time (of an hour, a work shift or a day, for example). As telephone traffic (or the total number of calls made and the total duration of these) is highly variable in nature, it is very difficult to predict. The only practical means of obtaining a reasonable estimate is to perform an historical analysis of past experience and use this to predict future traffic volumes and patterns.

The process of estimating projected traffic levels, or call loads on the Queue is termed Forecasting. Forecasting data is used to estimate the number of Agents

and other resources (such as Queues) needed to meet the forecast call load, and identify which Agents will work which shifts (i.e. scheduling).

Using the Report Templates Panel

The Report Templates panel occupies the upper, right quadrant of the Reports interface. This panel displays a table of the report templates created for the reporting period currently selected in the Main Control Panel.

The table provides the following columns:

Name - displays the names of the report templates defined for the reporting period.

Sites - displays the name of the site where the content of the report template is based.

Description - displays a short description of the report templates.

Auto Print - displays a Yes or No indicator to flag whether the report template is set-up for automatic printing.

Auto Export - displays a Yes or No indicator to flag whether the report template is set-up for automatic export.

The color of the Report Templates panel title bar corresponds to the color of the button selected for the reporting period in the Main Control Panel. The title bar of the Report Templates panel contains four buttons. These buttons provide the tools for creating new report templates, editing existing report templates, viewing the report for a report template, and immediately exporting a report for a report template.

New - creates a new template for the reporting period selected in the Main Control Panel.

Properties - displays the Properties window for the selected report template.

View - generates a report based on the selected report template and displays the report in the Publication Viewer.

Export - generates a report based on the selected report template in the format selected in the Export tab of the Properties window.

Using the Properties Window

The Properties window defines the properties for the report templates. The window contains three tabs: General, Content and Export. The Properties window is launched when creating a new report template or when an existing report template is selected in the Report Templates panel and the Properties button is clicked.

To open the Properties window for an existing report template, double-click the entry of the desired report template in the table of the Report Templates panel.

General Tab

The General tab of the Properties window displays the general properties available for the report templates. To create a report template a name and description must be assigned.

This tab provides the interface for users to define the name and description of the report template as well as set-up the automatic printing and exporting of the report.

> **Site -** a non-editable field that displays the name of the site for the report template.

> **Report Template -** an editable field where the user inputs a name for the report template. The name is mandatory, and is displayed in the Name column of the table in the Report Templates panel.

> **Report Description -** an editable field where the user inputs a description for the report template. The description is displayed in the Description column of the table in the Report Templates panel.

Auto Print - enable this check box to flag the report for automatic printing.

Auto Export - enable this check box to flag the report for automatic export. The report is exported in the format selected on the Export tab of the Properties window.

Schedule Report Generator... - click this button to open the Schedule Report Generator dialog box. Use this dialog box to set the days of the week and time of day to automatically print and export reports.

Time Period - the Time Period section of the General tab is only visible for Year by Week and Year by Month report templates. This section of the tab allows users to set a variable time period for the report.

Content Tab

The Content tab of the Properties window displays the resources and report options available for the report templates.
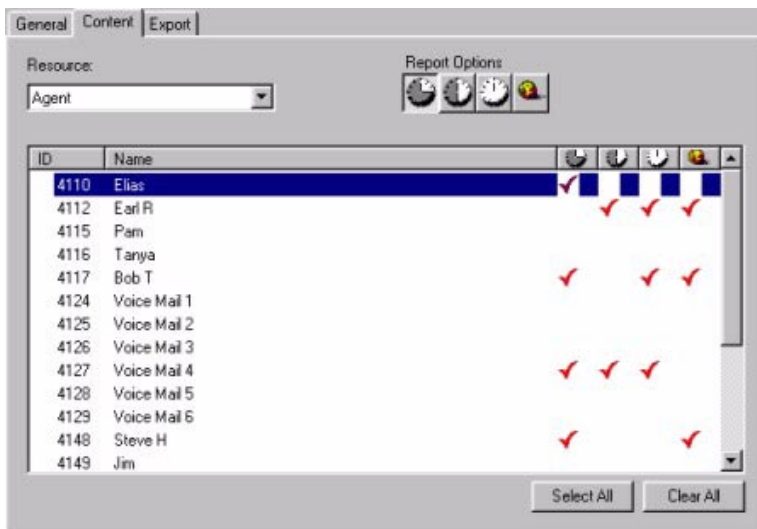
This tab provides the interface for users to select the resource and report options for the report template.

Resource - the Resource drop-down list provides a selection of resource types. Each resource type represents an element of the TASKE database. Selection of a resource type determines the resource content of the report.

Report Options - the report options provide various intervals and criteria for reporting on the selected resource. The report options vary depending on the resource selected. Select the resource options globally using the Report Options buttons at the top of the Content tab, or individually for the members

of the resource group. To apply report options to individual members of a resource group, select a resource member in the table of the display area and enable the check boxes of the desired report options.

Display Area - the display area of the Contents tab contains a table that lists all members of the selected resource type. The table has a column for the ID of the resource member, the name of the resource member, as well as a column for each of the report options. Report options that have been selected for any of the resource members in the current template appear with a red check mark.

Export Tab

The Export tab of the Properties window displays the available options for exporting a report.
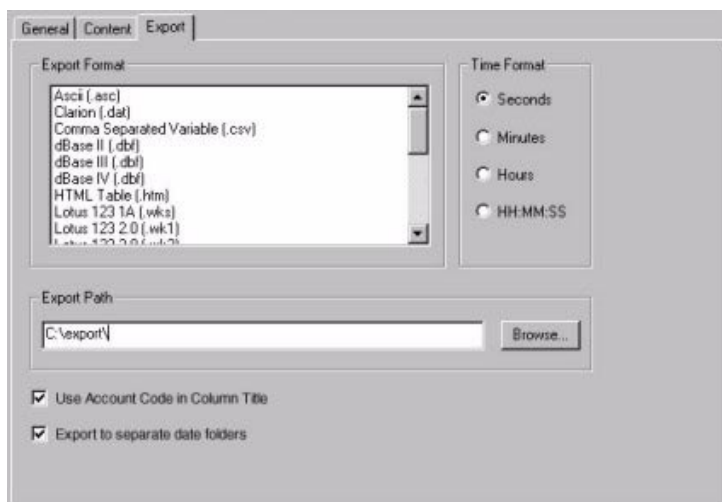
This tab provides the interface for users to select an export file format, time format, and location of the new file after the export. Use the check boxes to further define the format and location of the exported reports.

Export Format - select the file format for the exported file. A report may be exported to one of several file formats. A file format must be chosen before the report can be exported.

Time Format - select a time format to determine how the data is displayed in the report.

Export Path - set the Export Path to define the location of the exported report in the selected file format. Click the Browse button to search for a directory on the local PC or network, or enter the path of the export directory location directly in the Export Path field.

Use Account Code in Column Title - use this check box to determine the format of the column titles in the Queue Activity report. When enabled, the Account Code ID is included in the column titles of the Queue Activity report.

Export to separate date folder - use this check box to determine how the files are exported to the desired location. If this check box is disabled, the files will be exported to the specified folder and will overwrite any existing files in that folder with the same names. Enabling this check box prompts the creation of a new folder within the folder specified in the Export Path field. The new folder is named in the format YYYYMMDD. If a folder with this name already exists, any data in the folder will be overwritten with the newly exported files.

Defining Export Properties for Reports

The Export tab of the Properties window displays the available options for exporting a report.
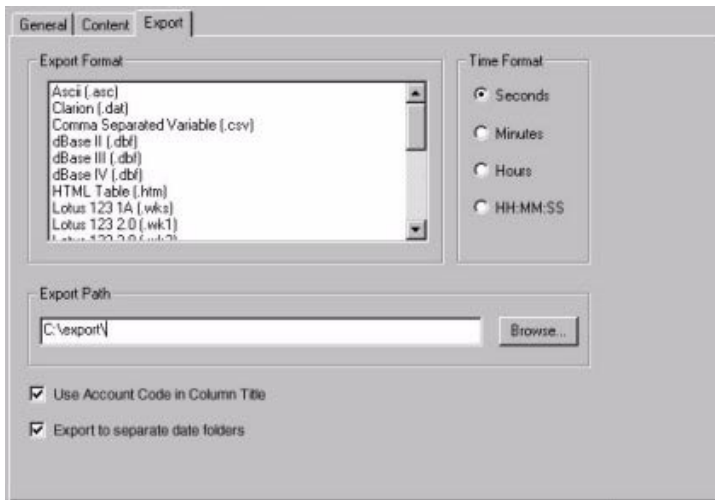
This tab provides the interface for users to select an export file format, time format, and location of the new file after the export. Use the check boxes to further define the format and location of the exported reports.

Export Filenames - exported reports are named with very specific filenames to aid in the identification of the exported files. The files are named using the following conventions:

Component	Component Options	Appearance in Filename
Period	Daily	Pd
	Weekly	Pw
	Monthly	Pm
	Yearly	Py
Type	Agent	Ta
	Extension	Te
	Group	Tg
	Queue	Tq
	Trunk	Tt
	Activity (Queue)	Tact
	Answer Spectrum	Tansp
	Abandon Spectrum	Tabsp
	Interflowed Spectrum	Tfsp
Interval	15 Minute	I15
	30 Minute	I30
	60 Minute	I60
	Day	Id
	Week	Iw
	Month	Im
	Area Code	Iar
	DNIS	Idn
	Area Code and City	Iac
	State or Province	Isp
	Abandon Caller	Iabn
	Agent	Ia
	Account Code	Iact

Component	Component Options	Appearance in Filename
Interval	Peak Offered	Ipo
	Peak Answered	Ipan
	Peak Abandoned	Ipab
	Peak Interflowed	Ipf
Element #	The element number is the ID of the reporting element that is the focus of the report. A reporting element may be a trunk, trunk group, extension, extension group, agent, agent group, Queue, or Queue group.	

Using these naming conventions, a filename for an Agent Daily by Period report for agent 7500 with a 30-minute interval that is exported to Microsoft Excel would be: PdTaI307500.xls

Export Format - select the file format for the exported file. A report may be exported to one of several file formats. A file format must be chosen before the report can be exported.

The file formats available for export include:

- Ascii
- Clarion
- Comma Separated Variable
- dBase II
- dBase III
- dBase IV
- HTML Table
- Lotus 123 1A
- Lotus 123 2.0
- Lotus 123 3.0
- Lotus 123 4.0

- Microsoft Excel 2.1
- Microsoft Excel 3.0
- Microsoft Excel 4.0
- Print Image
- Quattro
- Quattro Pro
- Quattro Pro 5.0 for Windows
- Symphony 1.0
- Symphony 1.1
- Tab Separated Variable
- Word Processing Text

Time Format - select a time format to determine how the data is displayed in the report.

Export Path - set the Export Path to define the location of the exported report in the selected file format. Click the Browse button to search for a directory on the local PC or network, or enter the path of the export directory location directly in the Export Path field.

Use Account Code in Column Title - use this check box to determine the format of the column titles in the Queue Activity report. When enabled, the Account Code ID is included in the column titles of the Queue Activity report.

Export to separate date folder - use this check box to determine how the files are exported to the desired location.

If this check box is disabled, files are exported to the specified folder and overwrite any existing files in that folder with the same names.

Enabling this check box prompts the creation of a new folder within the folder specified in the Export Path field. The new folder is named in the format YYYYMMDD. If a folder with this name already exists, any files in the folder with the same filenames are overwritten with the newly exported files.

When exporting weekly or monthly files, the exported files are placed in the date folder for the first day of the month. All daily files for that day are also placed in that folder. When exporting YearbyWeek or YearbyMonth reports, the files are placed in the folder for the first day of the report.
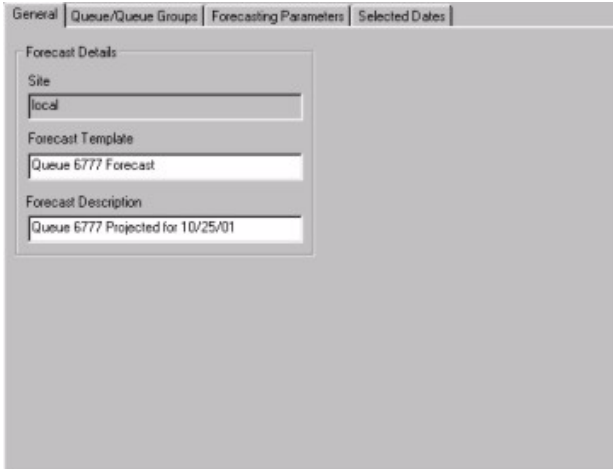
Using the Forecast Properties Window

The Forecast Properties window defines the properties for the Forecast report templates. The window contains four tabs: General, Queues/Queue Groups, Forecast Parameters, and Selected Dates. The Forecast Properties window is launched when creating a new report template or when an existing report template is selected in the Report Templates panel and the Properties button is clicked.

To open the Forecast Properties window for an existing report template, double-click the entry of the desired report template in the table of the Report Templates panel.

General Tab

The General tab of the Properties window displays the general properties available for the Forecast report templates. To create a Forecast report template assign a name and description to the report template.

This tab provides the interface for users to define the name and description of the Forecast report template.

Site - a non-editable field that displays the name of the site for the report template.

Report Template - an editable field where the user inputs a name for the report template. The name is mandatory, and is displayed in the Name column of the table in the Report Templates panel.

Report Description - an editable field where the user inputs a description for the report template. The description is displayed in the Description column of the table in the Report Templates panel.

Queues/Queue Groups Tab

The Queues/Queue Groups tab of the Forecast Properties window displays the resources and report options available for the Forecast report templates.
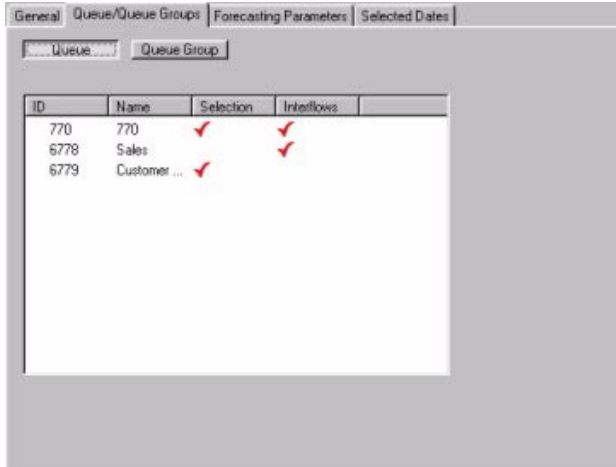
This tab provides the interface for users to define the content and reporting options of the report.

Queue - click the Queue button to base the Forecast report template on Queues. Enable the reporting options for the desired Queues in the display area. When a reporting option is selected, a red check mark populates its cell for the Queue entry in the display area.

Queue Group - click the Queue Group button to base the Forecast report template on Queue Groups. Enable the reporting options for the desired Queue Groups in the display area. When a reporting option is selected, a red check mark populates its cell for the Queue Group entry in the display area.

Selection - a reporting option that marks the Queue or Queue Group for inclusion in the Forecast report. If the Selection option is not checked, the Queue/Queue Group will not be included in the report.

Interflows - a reporting option that classifies interflowed calls as one call, rather than multiple calls for multiple Queues/Queue Groups. With this option unchecked, an interflowed call is counted as a new call each time it is transferred to another Queue/Queue Group.

Forecasting Parameters Tab

The Forecasting Parameters tab of the Forecast Properties window displays the user-defined parameters for creating the Forecast.
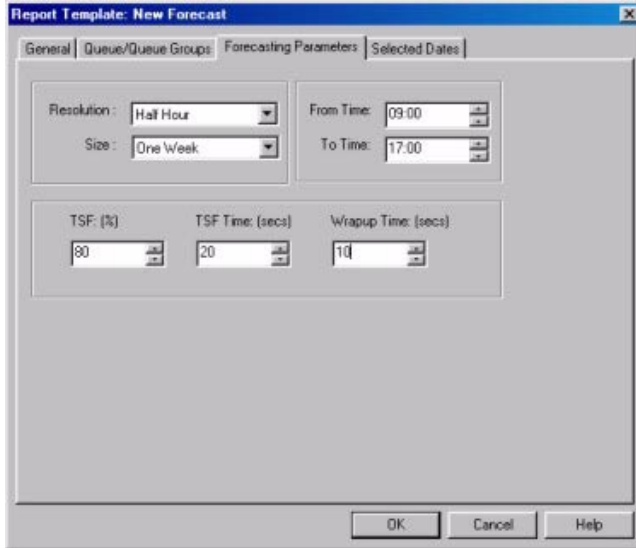
The Forecast Parameters tab provides the interface for users to accept the default Forecast parameters or to edit the parameters if these parameters do not fit the customer interaction center.

Resolution - this is the interval used by the Forecast report when calculating and reporting the results for the numbers of calls, the number of Agents, and the average Talk Time. The Resolution options include quarter hour, half hour or one hour. The default resolution is Half Hour.

Size - this selection determines whether the Forecast report will be run for one (or more) days or one (or more) weeks. The Size options include one day and one week. The default size is One Day.

From Time/To Time - set the beginning time for the daily reporting period in the From Time field and the end time for the daily reporting period in the To Time field. Both times must be input in HH:MM format using the 24-hour clock. The default for the From Time is 9:00. The default for the To Time is 17:00. The Forecast report is divided into quarter hour, half hour or one hour intervals for each day. To avoid cluttering the reports with entries that fall outside of the regular business hours, use the From Time and To Time fields to set the daily time range to include in the Forecast report.

TSF % - the Telephone Service Factor (TSF) percentage is used for Forecast report calculations. This value is the ratio of calls that are either Answered or Abandoned before a threshold time, divided by the total number of calls that

are offered. The default TSF percentage is 80%, but is adjustable in 1% increments from 1% to 100%.

TSF Time (secs) - the TSF time defines the threshold time for the TSF percentage. The default TSF time is 20 seconds, but any value between 0 and 100 is acceptable.

Wrapup Time (secs) - the wrap-up time, also known as work time, is a factor that is added to call times for agents to complete paperwork after the callers disconnect. The default wrap-up time is 0 seconds, but any value between 0 and 100 is acceptable.

Selected Dates Tab

The Selected Dates tab of the Forecast Properties window displays a calendar for selecting the days or weeks to use as the historical basis of the Forecast report.
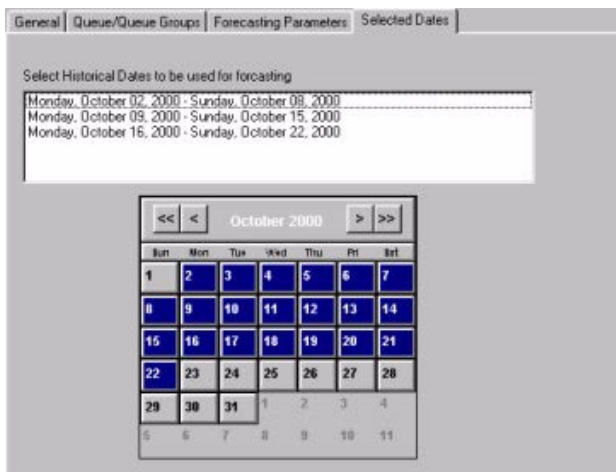
The interface of the Select Dates tab provides a calendar in the bottom portion of the tab and a display area in the top portion of the tab. As dates are selected in the calendar, they are displayed in the display area above. Users select days or weeks in the calendar. The selection from the Size drop-down list (days or weeks) in the Forecast Parameters tab determines whether days or weeks are selected in the calendar.

Use the following steps to select dates from the calendar in the Select Dates tab.

1. Use ⏪ and ⏩ to select the desired year.
2. Use ◀ and ▶ to select the desired month.
3. Click the desired date(s). This may be a span of days or weeks.

The selected calendar period is highlighted in blue. The dates selected in this tab act as the historical basis for the Forecast report template. The logged data that exists for these days should be similar to the period the user is attempting to forecast in order to achieve an accurate projection.

Using the Publication Viewer

The Publication Viewer occupies the lower, right quadrant of the Reports interface. This panel displays the reports generated for the report templates of Report Templates panel. The Publication Viewer displays the last report generated. This may not always correspond with the report template currently selected in the Report Templates Panel. The View button must be clicked on the Report Templates title bar for a report to be generated and displayed in the Publication Viewer.

The color of the Publication Viewer title bar corresponds to the color of the button selected for the reporting period in the Main Control Panel. The title bar of the Report Templates panel contains three buttons and a page selection tool for maneuvering throughout the pages of the report. The buttons provide the tools for previewing the printed report, printing the report, and changing the font of the report. The page selection tool provides left and right arrow buttons for moving forward or backward throughout the pages of the report. In addition it tells the user the page number of the report that is currently displayed in the Publication Viewer and the total number of pages in the report.

Print Preview - provides a preview of the printed report, if desired, print the report from this window.

Print - opens the Print dialog box where users can select a printer, define the properties for printing the report, and print the report.

Change Font - opens the Font dialog box where users can change the font type, style, and size.

All fonts used by the Reports application are provided by the default printer for the computer. If a message appears that states no fonts are installed, this indicates that there is no default printer installed and one must be designated.

Page Counter - allows users to scroll through the pages of the generated report.

Changing the Report Font

The font of a report is changeable to accommodate user preferences. Use any of the installed default printer fonts and set the style and size as desired. When changing the font, it is important that this is a global change. All future reports will use the new font.

Use the following steps to change the font of a report.

1. Click Change Font... on the title bar of the Publication Viewer to open the Font dialog box.
2. Select a font from the Font list.
3. Select a font style from the Font style list.
4. Select a font size from the Size list or input a value for the font size in the Size box.
5. Click OK.

The Sample section of the Font dialog box provides an illustration of the selected font variables.

Manually Exporting a Report

Use the following steps to export a report using an existing report template.

1. Select the desired reporting period (Daily, Weekly, Monthly, Year by Week, Year by Month, or Forecast) from the Main Control Panel.
2. Select a report template from the list of available templates.
3. Click Properties on the title bar of the Main Control Panel to open the Properties window.
4. Select the Export tab.
5. Check the export settings (export file format, time format, and export path) and make any required changes to these settings.

The file formats available for export include:

- Ascii
- Clarion
- Comma Separated Variable
- dBase II
- dBase III
- dBase IV
- HTML Table
- Lotus 123 1A
- Lotus 123 2.0
- Lotus 123 3.0
- Lotus 123 4.0

- Microsoft Excel 2.1
- Microsoft Excel 3.0
- Microsoft Excel 4.0
- Print Image
- Quattro
- Quattro Pro
- Quattro Pro 5.0 for Windows
- Symphony 1.0
- Symphony 1.1
- Tab Separated Variable
- Word Processing Text

6. Click OK to accept the export settings and close the Properties window.
7. Ensure the appropriate report template is selected in the Report Templates panel.
8. Click Export on the Report Template panel title bar to open the Date Selection calendar.
9. Use ◄◄ and ►► to select the desired year.
10. Use ◄ and ► to select the desired month.
11. Click the desired date (may be a span of one day, one week, or one month depending on the reporting period selected). The selected calendar period is highlighted in blue.
12. Click OK to close the Date Selection calendar and export the report for the selected date.
13. Locate the exported file in the directory specified in Export Path field of the Properties window and open the file using the appropriate software application.

The export properties do not have to be reset every time the report is exported. These settings are saved with the Export Properties and only require changes as needed.

Manually Printing a Report

Preview and print reports manually using the Print Preview... and Print... buttons on the title bar of the Publication Viewer. Each printed page of a report includes the date of the report, the report title, the page number, the site name, and the content of the report.

Use the following steps to preview a report before printing.

1. Click Print Preview... from the title bar of the Publication Viewer to open the preview window.
2. Use the Next Page, Prev Page, One/Two Page, Zoom In, and Zoom Out buttons to view the report in the preview window.
3. If desired, click Print to open the Print dialog box and print the search results.
4. Click Close to exit the preview window.

Use the following steps to print a report.

1. Click Print... from the title bar of the Publication Viewer to open the Print dialog box.
2. Select the printer, print range, and the number of copies.
3. Click OK.

Use the following steps to define the print setup.

1. Select Print Setup from the File menu to open the Print Setup dialog box.
2. Make the required changes to the printer, paper, and paper orientation.
3. Click OK.

Generating Reports

A report template is a shell for a report. The template defines the resources, reporting options, and characteristics of the report but does not contain the report content. The report content is generated based on the data for the selected date(s) in the TASKE database.

To view, export, or print a report, a report template must first be created for the report. Report templates are created for each of the reporting periods. To view a report template or to create a new report template for a reporting period, click the button for the desired reporting period on the Main Control Panel. This action displays the existing report templates in the Report Templates panel and provides the tools for creating a new report template in the title bar of the panel.

Once a template is created, the report is viewable, exportable, and printable for any

date with pertinent data in the TASKE database. Create report templates for the Daily, Weekly, Monthly, Year by Week, Year by Month, and Forecast reporting periods.

To change the name of a report template, right-click on the template listing in the Report Templates panel, and select Rename from the menu.

Generating Reports from Existing Templates

Use the following steps to generate a report using an existing report template.

1. Select the desired reporting period (Daily, Weekly, Monthly, Year by Week, Year by Month, or Forecast) from the Main Control Panel.
2. Select a report template from the list of available templates.
3. Click View on the Report Templates panel title bar to open the Date Selection calendar.
4. Use ◄◄ and ►► to select the desired year.
5. Use ◄ and ► to select the desired month.
6. Click the desired date (may be a span of one day, one week, or one month depending on the reporting period selected). The selected calendar period is highlighted in blue.
7. Click OK to close the Date Selection calendar and generate the report for the selected date.
8. The report opens in the Publication Viewer. If no data is available for the selected date, the TASKE Reports dialog box opens indicating that there is nothing to report on for the specified options.
9. Scroll through the pages of the report using the page selector tools on the title bar of the Publication Viewer.

Creating Trunk Report Templates

Generate Trunk reports for specific dates using a report template. The template draws data from the TASKE database that pertains to the selected Trunk(s) and organizes it into a tabular report. The template is based on a reporting period (Daily, Weekly, Monthly, Year by Week, or Year by Month) and reports on the Trunk(s) using the selected reporting options.

Use the following steps to create a report template for a Trunk.

1. Select the reporting period.
    a. Select the desired reporting period (Daily, Weekly, Monthly, Year by Week, or Year by Month) from the Main Control Panel.

2. Create a new template.
    a. Click New in the Report Templates panel to open the Properties window.

3. Define the General properties.
    a. Select the General tab.
    b. Input a name for the template in the Report Templates field. A name is mandatory and can contain any combination of characters and spaces.
    c. If desired, input a description for the template in the Report Description field. The description can contain any combination of characters and spaces.
    d. Enable the Auto Print check box to have the report print automatically. The report must be scheduled to print automatically. To schedule the automatic printing, click the Schedule Report Generator... button to open the Schedule Report Generator dialog box.
    e. Enable the Auto Export check box to have the report export automatically. The report must be scheduled to export automatically. To schedule the automatic export, click the Schedule Report Generator... button to open the Schedule Report Generator dialog box.
    f. If it is a Year by Week report, select the number of weeks to use for the Time Period. If it is a Year by Month report, select the number of months to use for the Time Period.

4. Define the Content properties.
    a. Select the Content tab.
    b. Select Trunk from the Resource drop-down list.
    c. Enable the Individual Trunks check box to report on individual trunks only.
    d. Select the Trunks to include in the report from the list of Trunks in the display area. To select a group of Trunks that are in order,

select the first Trunk and SHIFT+click the last Trunk in the list of those desired for selection. To select a group of Trunks that are not in order, select the first Trunk and CTRL+click each of the remaining Trunks desired for selection.

e. Click the buttons of the desired report options. When a report option is selected, its button is depressed and the column in the display area, for that report option, is populated with a red check mark for the selected Trunks. The report options for Trunks vary according to the reporting period selected. The table below outlines the report options available for each reporting period.

Trunk Reports		
Reporting Period	**Resource**	**Report Options**
Daily	Trunk	Quarter hour, half hour, hour
Weekly	Trunk	Quarter hour, half hour, hour, day of week
Monthly	Trunk	Quarter hour, half hour, hour, day of month
Year by Week	Trunk	Half hour, hour, day of week, week
Year by Month	Trunk	Half hour, hour, day of month, month

5. Define the Export Properties.
    a. Select the Export tab.
    b. Select a file type for the exported file from the Export Format list.
    c. Select a time format for the exported report from the Time Format list of radio buttons.
    d. Define the location of the exported file in the Export Path field. Click the Browse button to browse the local PC or the network for a file location.

6. Accept the properties.
    a. Click OK to save the properties of the new Trunk report template and close the Properties window.

7. View the report.
    a. Select the new Trunk report template in the Report Templates panel.
    b. Click View on the Report Templates panel title bar to open the Date Selection Calendar.
    c. Use ◄◄ and ►► to select the desired year.
    d. Use ◄ and ► to select the desired month.
    e. Click the desired date (may be a span of one day, one week, or one month depending on the reporting period selected). The selected calendar period is highlighted in blue.

f. Click OK to close the Date Selection calendar and generate the report for the selected date.

g. The report opens in the Publication Viewer. If no data is available for the selected date, the TASKE Reports dialog box opens indicating that there is nothing to report on for the specified options.

h. Scroll through the pages of the report using the page selector tools on the title bar of the Publication Viewer.

Creating Extension Report Templates

Generate Extension reports for specific dates using a report template. The template draws data from the TASKE database that pertains to the selected Extension(s) and organizes it into a tabular report. The template is based on a reporting period (Daily, Weekly, Monthly, Year by Week, or Year by Month) and reports on the Extension(s) using the selected reporting options.

Use the following steps to create a report template for an Extension.

1. Select the reporting period.
   a. Select the desired reporting period (Daily, Weekly, Monthly, Year by Week, or Year by Month) from the Main Control Panel.

2. Create a new template.
   a. Click New in the Report Templates panel to open the Properties window.

3. Define the General properties.
   a. Select the General tab.
   b. Input a name for the template in the Report Templates field. A name is mandatory and can contain any combination of characters and spaces.
   c. If desired, input a description for the template in the Report Description field. The description can contain any combination of characters and spaces.
   d. Enable the Auto Print check box to have the report print automatically. The report must be scheduled to print automatically. To schedule the automatic printing, click the Schedule Report Generator... button to open the Schedule Report Generator dialog box.
   e. Enable the Auto Export check box to have the report export automatically. The report must be scheduled to export automatically. To schedule the automatic export, click the Schedule Report Generator... button to open the Schedule Report Generator dialog box.

f. If it is a Year by Week report, select the number of weeks to use for the Time Period. If it is a Year by Month report, select the number of months to use for the Time Period.

4. Define the Content properties.
   a. Select the Content tab.
   b. Select Extension from the Resource drop-down list.
   c. Enable the Individual Extensions check box to report on individual Extensions only.
   d. Select the Extensions to include in the report from the list of Extensions in the display area. To select a group of Extensions that are in order, select the first Extension and SHIFT+click the last Extension in the list of those desired for selection. To select a group of Extensions that are not in order, select the first Extension and CTRL+click each of the remaining Extensions desired for selection.
   e. Click the buttons of the desired report options. When a report option is selected, its button is depressed and the column in the display area, for that report option, is populated with a red check mark for the selected Extensions. The report options for Extensions vary according to the reporting period selected. The table below outlines the report options available for each reporting period.

Extension Reports		
Reporting Period	**Resource**	**Report Options**
Daily	Extension	Quarter hour, half hour, hour
Weekly	Extension	Quarter hour, half hour, hour, day of week
Monthly	Extension	Quarter hour, half hour, hour, day of month
Year by Week	Extension	Half hour, hour, day of week, week
Year by Month	Extension	Half hour, hour, day of month, month

5. Define the Export Properties.
   a. Select the Export tab.
   b. Select a file type for the exported file from the Export Format list.
   c. Select a time format for the exported report from the Time Format list of radio buttons.
   d. Define the location of the exported file in the Export Path field. Click the Browse button to browse the local PC or the network for a file location.

6. Accept the properties.
   a. Click OK to save the properties of the new Extension report template and close the Properties window.

7. View the report.
    a. Select the new Extension report template in the Report Templates panel.
    b. Click View on the Report Templates panel title bar to open the Date Selection Calendar.
    c. Use ◄◄ and ►► to select the desired year.
    d. Use ◄ and ► to select the desired month.
    e. Click the desired date (may be a span of one day, one week, or one month depending on the reporting period selected). The selected calendar period is highlighted in blue.
    f. Click OK to close the Date Selection calendar and generate the report for the selected date.
    g. The report opens in the Publication Viewer. If no data is available for the selected date, the TASKE Reports dialog box opens indicating that there is nothing to report on for the specified options.
    h. Scroll through the pages of the report using the page selector tools on the title bar of the Publication Viewer.

Creating Extension Group Report Templates

Generate Extension Group reports for specific dates using a report template. The template draws data from the TASKE database that pertains to the selected Extension Group(s) and organizes it into a tabular report. The template is based on a reporting period (Daily, Weekly, Monthly, Year by Week, or Year by Month) and reports on the Extension Group(s) using the selected reporting options.

Use the following steps to create a report template for an Extension Group.

1. Select the reporting period.
    a. Select the desired reporting period (Daily, Weekly, Monthly, Year by Week, or Year by Month) from the Main Control Panel.
        Create a new template.
    b. Click New in the Report Templates panel to open the Properties window.

2. Define the General properties.
    a. Select the General tab.
    b. Input a name for the template in the Report Templates field. A name is mandatory and can contain any combination of characters and spaces.
    c. If desired, input a description for the template in the Report Description field. The description can contain any combination of characters and spaces.

    d. Enable the Auto Print check box to have the report print automatically. The report must be scheduled to print automatically. To schedule the automatic printing, click the Schedule Report Generator... button to open the Schedule Report Generator dialog box.

    e. Enable the Auto Export check box to have the report export automatically. The report must be scheduled to export automatically. To schedule the automatic export, click the Schedule Report Generator... button to open the Schedule Report Generator dialog box.

    f. If it is a Year by Week report, select the number of weeks to use for the Time Period. If it is a Year by Month report, select the number of months to use for the Time Period.

3. Define the Content properties.

    a. Select the Content tab.

    b. Select Extension Group from the Resource drop-down list.

    c. Select the Extension Groups to include in the report from the list of Extension Groups in the display area. To select a group of Extension Groups that are in order, select the first Extension Group and SHIFT+click the last Extension Group in the list of those desired for selection. To select a group of Extension Groups that are not in order, select the first Extension Group and CTRL+click each of the remaining Extension Groups desired for selection.

    d. Click the buttons of the desired report options. When a report option is selected, its button is depressed and the column in the display area, for that report option, is populated with a red check mark for the selected Extension Groups. The report options for Extension Groups vary according to the reporting period selected. The table below outlines the report options available for each reporting period.

Extension Group Reports		
Reporting Period	**Resource**	**Report Options**
Daily	Extension Group	By Extension
Weekly	Extension Group	By Extension
Monthly	Extension Group	By Extension
Year by Week	Extension Group	By Extension
Year by Month	Extension Group	By Extension

4. Define the Export Properties.

    a. Select the Export tab.

    b. Select a file type for the exported file from the Export Format list.

   c. Select a time format for the exported report from the Time Format list of radio buttons.

   d. Define the location of the exported file in the Export Path field. Click the Browse button to browse the local PC or the network for a file location.

5. Accept the properties.

   a. Click OK to save the properties of the new Extension Group report template and close the Properties window.

6. View the report.

   a. Select the new Extension Group report template in the Report Templates panel.

   b. Click View on the Report Templates panel title bar to open the Date Selection Calendar.

   c. Use ◂◂ and ▸▸ to select the desired year.

   d. Use ◂ and ▸ to select the desired month.

   e. Click the desired date (may be a span of one day, one week, or one month depending on the reporting period selected). The selected calendar period is highlighted in blue.

   f. Click OK to close the Date Selection calendar and generate the report for the selected date.

   g. The report opens in the Publication Viewer. If no data is available for the selected date, the TASKE Reports dialog box opens indicating that there is nothing to report on for the specified options.

   h. Scroll through the pages of the report using the page selector tools on the title bar of the Publication Viewer.

Creating Agent Report Templates

Generate Agent reports for specific dates using a report template. The template draws data from the TASKE database that pertains to the selected Agent(s) and organizes it into a tabular report. The template is based on a reporting period (Daily, Weekly, Monthly, Year by Week, or Year by Month) and reports on the Agent(s) using the selected reporting options.

Use the following steps to create a report template for an Agent.

1. Select the reporting period.
   a. Select the desired reporting period (Daily, Weekly, Monthly, Year by Week, or Year by Month) from the Main Control Panel.

2. Create a new template.
   a. Click New in the Report Templates panel to open the Properties window.

3. Define the General properties.
   a. Select the General tab.
   b. Input a name for the template in the Report Templates field. A name is mandatory and can contain any combination of characters and spaces.
   c. If desired, input a description for the template in the Report Description field. The description can contain any combination of characters and spaces.
   d. Enable the Auto Print check box to have the report print automatically. The report must be scheduled to print automatically. To schedule the automatic printing, click the Schedule Report Generator... button to open the Schedule Report Generator dialog box.
   e. Enable the Auto Export check box to have the report export automatically. The report must be scheduled to export automatically. To schedule the automatic export, click the Schedule Report Generator... button to open the Schedule Report Generator dialog box.
   f. If it is a Year by Week report, select the number of weeks to use for the Time Period. If it is a Year by Month report, select the number of months to use for the Time Period.

4. Define the Content properties.
    a. Select the Content tab.
    b. Select Agent from the Resource drop-down list.
    c. Select the Agents to include in the report from the list of Agents in the display area. To select a group of Agents that are in order, select the first Agent and SHIFT+click the last Agent in the list of those desired for selection. To select a group of Agents that are not in order, select the first Agent and CTRL+click each of the remaining Agents desired for selection.
    d. Click the buttons of the desired report options. When a report option is selected, its button is depressed and the column in the display area, for that report option, is populated with a red check mark for the selected Agents. The report options for Agents vary according to the reporting period selected. The table below outlines the report options available for each reporting period.

Agent Reports		
Reporting Period	**Resource**	**Report Options**
Daily	Agent	Quarter hour, half hour, hour, agent group, Queue
Weekly	Agent	Quarter hour, half hour, hour, day of week, agent group, Queue
Monthly	Agent	Quarter hour, half hour, hour, day of month, agent group, Queue
Year by Week	Agent	Half hour, hour, day of week, week, agent group, Queue
Year by Month	Agent	Half hour, hour, day of month, month, agent group, Queue

5. Define the Export Properties.
    a. Select the Export tab.
    b. Select a file type for the exported file from the Export Format list.
    c. Select a time format for the exported report from the Time Format list of radio buttons.
    d. Define the location of the exported file in the Export Path field. Click the Browse button to browse the local PC or the network for a file location.

6. Accept the properties.
    a. Click OK to save the properties of the new Agent report template and close the Properties window.

7. View the report.
    a. Select the new Agent report template in the Report Templates panel.
    b. Click View on the Report Templates panel title bar to open the Date Selection Calendar.
    c. Use ◄◄ and ►► to select the desired year.
    d. Use ◄ and ► to select the desired month.
    e. Click the desired date (may be a span of one day, one week, or one month depending on the reporting period selected). The selected calendar period is highlighted in blue.
    f. Click OK to close the Date Selection calendar and generate the report for the selected date.
    g. The report opens in the Publication Viewer. If no data is available for the selected date, the TASKE Reports dialog box opens indicating that there is nothing to report on for the specified options.
    h. Scroll through the pages of the report using the page selector tools on the title bar of the Publication Viewer.

Creating Agent Group Report Templates

Generate Agent Group reports for specific dates using a report template. The template draws data from the TASKE database that pertains to the selected Agent Group(s) and organizes it into a tabular report. The template is based on a reporting period (Daily, Weekly, Monthly, Year by Week, or Year by Month) and reports on the Agent Group(s) using the selected reporting options.

Use the following steps to create a report template for an Agent Group.

1. Select the reporting period.
    a. Select the desired reporting period (Daily, Weekly, Monthly, Year by Week, or Year by Month) from the Main Control Panel.

2. Create a new template.
    a. Click New in the Report Templates panel to open the Properties window.

3. Define the General properties.
    a. Select the General tab.
    b. Input a name for the template in the Report Templates field. A name is mandatory and can contain any combination of characters and spaces.
    c. If desired, input a description for the template in the Report Description field. The description can contain any combination of characters and spaces.

d. Enable the Auto Print check box to have the report print automatically. The report must be scheduled to print automatically. To schedule the automatic printing, click the Schedule Report Generator... button to open the Schedule Report Generator dialog box.

e. Enable the Auto Export check box to have the report export automatically. The report must be scheduled to export automatically. To schedule the automatic export, click the Schedule Report Generator... button to open the Schedule Report Generator dialog box.

f. If it is a Year by Week report, select the number of weeks to use for the Time Period. If it is a Year by Month report, select the number of months to use for the Time Period.

4. Define the Content properties.

a. Select the Content tab.

b. Select Agent Group from the Resource drop-down list.

c. Select the Agent Groups to include in the report from the list of Agent Groups in the display area. To select a group of Agent Groups that are in order, select the first Agent Group and SHIFT+click the last Agent Group in the list of those desired for selection. To select a group of Agent Groups that are not in order, select the first Agent Group and CTRL+click each of the remaining Agent Groups desired for selection.

d. Click the buttons of the desired report options. When a report option is selected, its button is depressed and the column in the display area, for that report option, is populated with a red check mark for the selected Agent Groups. The report options for Agent Groups vary according to the reporting period selected. The table below outlines the report options available for each reporting period.

Agent Group Reports		
Reporting Period	**Resource**	**Report Options**
Daily	Agent Group	Quarter hour, half hour, hour, agent, Queue
Weekly	Agent Group	Quarter hour, half hour, hour, day of week, agent, Queue
Monthly	Agent Group	Quarter hour, half hour, hour, day of month, agent, Queue
Year by Week	Agent Group	Half hour, hour, day of week, week, agent, Queue
Year by Month	Agent Group	Half hour, hour, day of month, month, agent, Queue

5. Define the Export Properties.
    a. Select the Export tab.
    b. Select a file type for the exported file from the Export Format list.
    c. Select a time format for the exported report from the Time Format list of radio buttons.
    d. Define the location of the exported file in the Export Path field. Click the Browse button to browse the local PC or the network for a file location.

6. Accept the properties.
    a. Click OK to save the properties of the new Agent Group report template and close the Properties window.

7. View the report.
    a. Select the new Agent Group report template in the Report Templates panel.
    b. Click View on the Report Templates panel title bar to open the Date Selection Calendar.
    c. Use ◄◄ and ►► to select the desired year.
    d. Use ◄ and ► to select the desired month.
    e. Click the desired date (may be a span of one day, one week, or one month depending on the reporting period selected). The selected calendar period is highlighted in blue.
    f. Click OK to close the Date Selection calendar and generate the report for the selected date.
    g. The report opens in the Publication Viewer. If no data is available for the selected date, the TASKE Reports dialog box opens indicating that there is nothing to report on for the specified options.
    h. Scroll through the pages of the report using the page selector tools on the title bar of the Publication Viewer.

Creating Queue Report Templates

Generate Queue reports for specific dates using a report template. The template draws data from the TASKE database that pertains to the selected Queue(s) and organizes it into a tabular report. The template is based on a reporting period (Daily, Weekly, Monthly, Year by Week, or Year by Month) and reports on the Queue(s) using the selected reporting options.

Use the following steps to create a report template for a Queue.

1. Select the reporting period.
    a. Select the desired reporting period (Daily, Weekly, Monthly, Year by Week, or Year by Month) from the Main Control Panel.

2. Create a new template.
    a. Click New in the Report Templates panel to open the Properties window.

3. Define the General properties.
    a. Select the General tab.
    b. Input a name for the template in the Report Templates field. A name is mandatory and can contain any combination of characters and spaces.
    c. If desired, input a description for the template in the Report Description field. The description can contain any combination of characters and spaces.
    d. Enable the Auto Print check box to have the report print automatically. The report must be scheduled to print automatically. To schedule the automatic printing, click the Schedule Report Generator... button to open the Schedule Report Generator dialog box.
    e. Enable the Auto Export check box to have the report export automatically. The report must be scheduled to export automatically. To schedule the automatic export, click the Schedule Report Generator... button to open the Schedule Report Generator dialog box.
    f. If it is a Year by Week report, select the number of weeks to use for the Time Period. If it is a Year by Month report, select the number of months to use for the Time Period.

4. Define the Content properties.
   a. Select the Content tab.
   b. Select Queue from the Resource drop-down list.
   c. Select the Queues to include in the report from the list of Queues in the display area. To select a group of Queues that are in order, select the first Queue and SHIFT+click the last Queue in the list of those desired for selection. To select a group of Queues that are not in order, select the first Queue and CTRL+click each of the remaining Queues desired for selection.
   d. Click the buttons of the desired report options. When a report option is selected, its button is depressed and the column in the display area, for that report option, is populated with a red check mark for the selected Queues. The report options for Queues vary according to the reporting period selected. The table below outlines the report options available for each reporting period.

Queue Reports		
Reporting Period	**Resource**	**Report Options**
Daily	Queue	Quarter hour, half hour, hour, DNIS, area code, area code & city, state
Weekly	Queue	Quarter hour, half hour, hour, day of week, DNIS, area code, area code & city, state
Monthly	Queue	Quarter hour, half hour, hour, day of month, DNIS, area code, area code & city, state
Year by Week	Queue	Half hour, hour, day of week, week, DNIS, area code, area code & city, state
Year by Month	Queue	Half hour, hour, day of month, month, DNIS, area code, area code & city, state

5. Define the Export Properties.
   a. Select the Export tab.
   b. Select a file type for the exported file from the Export Format list.
   c. Select a time format for the exported report from the Time Format list of radio buttons.
   d. Define the location of the exported file in the Export Path field. Click the Browse button to browse the local PC or the network for a file location.

6. Accept the properties.
   a. Click OK to save the properties of the new Queue report template and close the Properties window.

7. View the report.
   a. Select the new Queue report template in the Report Templates panel.
   b. Click View on the Report Templates panel title bar to open the Date Selection Calendar.
   c. Use ⏴⏴ and ⏵⏵ to select the desired year.
   d. Use ⏴ and ⏵ to select the desired month.
   e. Click the desired date (may be a span of one day, one week, or one month depending on the reporting period selected). The selected calendar period is highlighted in blue.
   f. Click OK to close the Date Selection calendar and generate the report for the selected date.
   g. The report opens in the Publication Viewer. If no data is available for the selected date, the TASKE Reports dialog box opens indicating that there is nothing to report on for the specified options.
   h. Scroll through the pages of the report using the page selector tools on the title bar of the Publication Viewer.

Creating Queue Answer Spectrum Report Templates

Generate Queue Answer Spectrum reports for specific dates using a report template. A Queue Answer Spectrum report indicates how many calls were answered in a specified time period by a specific Queue. The template draws data from the TASKE database that pertains to the selected Queue(s) and organizes it into a tabular report. The template is based on a reporting period (Daily, Weekly, Monthly, Year by Week, or Year by Month) and reports on the Queue(s) using the selected reporting options.

Use the following steps to create a report template for a Queue Answer Spectrum.

1. Select the reporting period.
   a. Select the desired reporting period (Daily, Weekly, Monthly, Year by Week, or Year by Month) from the Main Control Panel.

2. Create a new template.
   a. Click New in the Report Templates panel to open the Properties window.

3. Define the General properties.
    a. Select the General tab.
    b. Input a name for the template in the Report Templates field. A name is mandatory and can contain any combination of characters and spaces.
    c. If desired, input a description for the template in the Report Description field. The description can contain any combination of characters and spaces.
    d. Enable the Auto Print check box to have the report print automatically. The report must be scheduled to print automatically. To schedule the automatic printing, click the Schedule Report Generator... button to open the Schedule Report Generator dialog box.
    e. Enable the Auto Export check box to have the report export automatically. The report must be scheduled to export automatically. To schedule the automatic export, click the Schedule Report Generator... button to open the Schedule Report Generator dialog box.
    f. If it is a Year by Week report, select the number of weeks to use for the Time Period. If it is a Year by Month report, select the number of months to use for the Time Period.

4. Define the Content properties.
    a. Select the Content tab.
    b. Select Queue Answer Spectrum from the Resource drop-down list.
    c. Select the Queues to include in the report from the list of Queues in the display area. To select a group of Queues that are in order, select the first Queue and SHIFT+click the last Queue in the list of those desired for selection. To select a group of Queues that are not in order, select the first Queue and CTRL+click each of the remaining Queues desired for selection.

d. Click the buttons of the desired report options. When a report option is selected, its button is depressed and the column in the display area, for that report option, is populated with a red check mark for the selected Queues. The report options for Queue Answer Spectrums vary according to the reporting period selected. The table below outlines the report options available for each reporting period.

Queue Answer Spectrum Reports		
Reporting Period	**Resource**	**Report Options**
Daily	Queue Answer Spectrum	Quarter hour, half hour, hour
Weekly	Queue Answer Spectrum	Quarter hour, half hour, hour, day of week
Monthly	Queue Answer Spectrum	Quarter hour, half hour, hour, day of month
Year by Week	Queue Answer Spectrum	Half hour, hour, day of week, week
Year by Month	Queue Answer Spectrum	Half hour, hour, day of month, month

5. Define the Export Properties.
   a. Select the Export tab.
   b. Select a file type for the exported file from the Export Format list.
   c. Select a time format for the exported report from the Time Format list of radio buttons.
   d. Define the location of the exported file in the Export Path field. Click the Browse button to browse the local PC or the network for a file location.

6. Accept the properties.
   a. Click OK to save the properties of the new Queue Answer Spectrum report template and close the Properties window.

7. View the report.
   a. Select the new Queue Answer Spectrum report template in the Report Templates panel.
   b. Click View on the Report Templates panel title bar to open the Date Selection Calendar.
   c. Use << and >> to select the desired year.
   d. Use < and > to select the desired month.

e. Click the desired date (may be a span of one day, one week, or one month depending on the reporting period selected). The selected calendar period is highlighted in blue.
f. Click OK to close the Date Selection calendar and generate the report for the selected date.
g. The report opens in the Publication Viewer. If no data is available for the selected date, the TASKE Reports dialog box opens indicating that there is nothing to report on for the specified options.
h. Scroll through the pages of the report using the page selector tools on the title bar of the Publication Viewer.

Creating Queue Abandon Spectrum Report Templates

Generate Queue Abandon Spectrum reports for specific dates using a report template. A Queue Abandon Spectrum report indicates how many calls were abandoned in a specified time period by a specific Queue. The template draws data from the TASKE database that pertains to the selected Queue(s) and organizes it into a tabular report. The template is based on a reporting period (Daily, Weekly, Monthly, Year by Week, or Year by Month) and reports on the Queue(s) using the selected reporting options.

Use the following steps to create a report template for a Queue Abandon Spectrum.

1. Select the reporting period.
   a. Select the desired reporting period (Daily, Weekly, Monthly, Year by Week, or Year by Month) from the Main Control Panel.

2. Create a new template.
   a. Click New in the Report Templates panel to open the Properties window.

3. Define the General properties.
   a. Select the General tab.
   b. Input a name for the template in the Report Templates field. A name is mandatory and can contain any combination of characters and spaces.
   c. If desired, input a description for the template in the Report Description field. The description can contain any combination of characters and spaces.
   d. Enable the Auto Print check box to have the report print automatically. The report must be scheduled to print automatically. To schedule the automatic printing, click the Schedule Report Generator... button to open the Schedule Report Generator dialog box.

e. Enable the Auto Export check box to have the report export automatically. The report must be scheduled to export automatically. To schedule the automatic export, click the Schedule Report Generator... button to open the Schedule Report Generator dialog box.

f. If it is a Year by Week report, select the number of weeks to use for the Time Period. If it is a Year by Month report, select the number of months to use for the Time Period.

4. Define the Content properties.
   a. Select the Content tab.
   b. Select Queue Abandon Spectrum from the Resource drop-down list.
   c. Select the Queues to include in the report from the list of Queues in the display area. To select a group of Queues that are in order, select the first Queue and SHIFT+click the last Queue in the list of those desired for selection. To select a group of Queues that are not in order, select the first Queue and CTRL+click each of the remaining Queues desired for selection.
   d. Click the buttons of the desired report options. When a report option is selected, its button is depressed and the column in the display area, for that report option, is populated with a red check mark for the selected Queues. The report options for Queue Abandon Spectrums vary according to the reporting period selected. The table below outlines the report options available for each reporting period.

Queue Abandon Spectrum Reports		
Reporting Period	**Resource**	**Report Options**
Daily	Queue Abandon Spectrum	Quarter hour, half hour, hour
Weekly	Queue Abandon Spectrum	Quarter hour, half hour, hour, day of week
Monthly	Queue Abandon Spectrum	Quarter hour, half hour, hour, day of month
Year by Week	Queue Abandon Spectrum	Half hour, hour, day of week, week
Year by Month	Queue Abandon Spectrum	Half hour, hour, day of month, month

5. Define the Export Properties.
   a. Select the Export tab.
   b. Select a file type for the exported file from the Export Format list.

    c. Select a time format for the exported report from the Time Format list of radio buttons.

    d. Define the location of the exported file in the Export Path field. Click the Browse button to browse the local PC or the network for a file location.

6. Accept the properties.

    a. Click OK to save the properties of the new Queue Abandon Spectrum report template and close the Properties window.

7. View the report.

    a. Select the new Queue Abandon Spectrum report template in the Report Templates panel.

    b. Click View on the Report Templates panel title bar to open the Date Selection Calendar.

    c. Use ≤ and ≥ to select the desired year.

    d. Use < and > to select the desired month.

    e. Click the desired date (may be a span of one day, one week, or one month depending on the reporting period selected). The selected calendar period is highlighted in blue.

    f. Click OK to close the Date Selection calendar and generate the report for the selected date.

    g. The report opens in the Publication Viewer. If no data is available for the selected date, the TASKE Reports dialog box opens indicating that there is nothing to report on for the specified options.

    h. Scroll through the pages of the report using the page selector tools on the title bar of the Publication Viewer.

Creating Queue Interflow Spectrum Report Templates

Generate Queue Interflow Spectrum reports for specific dates using a report template. A Queue Interflow Spectrum report indicates how many calls were interflowed in a specified time period by a specific Queue. The template draws data from the TASKE database that pertains to the selected Queue(s) and organizes it into a tabular report. The template is based on a reporting period (Daily, Weekly, Monthly, Year by Week, or Year by Month) and reports on the Queue(s) using the selected reporting options.

Use the following steps to create a report template for a Queue Interflow Spectrum.

1. Select the reporting period.
   a. Select the desired reporting period (Daily, Weekly, Monthly, Year by Week, or Year by Month) from the Main Control Panel.

2. Create a new template.
   a. Click New in the Report Templates panel to open the Properties window.

3. Define the General properties.
   a. Select the General tab.
   b. Input a name for the template in the Report Templates field. A name is mandatory and can contain any combination of characters and spaces.
   c. If desired, input a description for the template in the Report Description field. The description can contain any combination of characters and spaces.
   d. Enable the Auto Print check box to have the report print automatically. The report must be scheduled to print automatically. To schedule the automatic printing, click the Schedule Report Generator... button to open the Schedule Report Generator dialog box.
   e. Enable the Auto Export check box to have the report export automatically. The report must be scheduled to export automatically. To schedule the automatic export, click the Schedule Report Generator... button to open the Schedule Report Generator dialog box.
   f. If it is a Year by Week report, select the number of weeks to use for the Time Period. If it is a Year by Month report, select the number of months to use for the Time Period.

4. Define the Content properties.
   a. Select the Content tab.
   b. Select Queue Interflow Spectrum from the Resource drop-down list.
   c. Select the Queues to include in the report from the list of Queues in the display area. To select a group of Queues that are in order, select the first Queue and SHIFT+click the last Queue in the list of those desired for selection. To select a group of Queues that are not in order, select the first Queue and CTRL+click each of the remaining Queues desired for selection.

d. Click the buttons of the desired report options. When a report option is selected, its button is depressed and the column in the display area, for that report option, is populated with a red check mark for the selected Queues. The report options for Queue Interflow Spectrums vary according to the reporting period selected. The table below outlines the report options available for each reporting period.

Queue Interflow Spectrum Reports		
Reporting Period	**Resource**	**Report Options**
Daily	Queue Interflow Spectrum	Quarter hour, half hour, hour
Weekly	Queue Interflow Spectrum	Quarter hour, half hour, hour, day of week
Monthly	Queue Interflow Spectrum	Quarter hour, half hour, hour, day of month
Year by Week	Queue Interflow Spectrum	Half hour, hour, day of week, week
Year by Month	Queue Interflow Spectrum	Half hour, hour, day of month, month

5. Define the Export Properties.
   a. Select the Export tab.
   b. Select a file type for the exported file from the Export Format list.
   c. Select a time format for the exported report from the Time Format list of radio buttons.
   d. Define the location of the exported file in the Export Path field. Click the Browse button to browse the local PC or the network for a file location.
6. Accept the properties.
   a. Click OK to save the properties of the new Queue Interflow Spectrum report template and close the Properties window.

7. View the report.
   a. Select the new Queue Interflow Spectrum report template in the Report Templates panel.
   b. Click View on the Report Templates panel title bar to open the Date Selection Calendar.
   c. Use ◄◄ and ►► to select the desired year.
   d. Use ◄ and ► to select the desired month.
   e. Click the desired date (may be a span of one day, one week, or one month depending on the reporting period selected). The selected calendar period is highlighted in blue.

f. Click OK to close the Date Selection calendar and generate the report for the selected date.

g. The report opens in the Publication Viewer. If no data is available for the selected date, the TASKE Reports dialog box opens indicating that there is nothing to report on for the specified options.

h. Scroll through the pages of the report using the page selector tools on the title bar of the Publication Viewer.

Creating Queue Activity Report Templates

Generate Queue Activity reports for specific dates using a report template. A Queue Activity report provides a detailed analysis of the types of calls received and handled by referencing Account Codes entered in the TASKE database. Queue Activity reports indicate the number of received call records for each Account Code, by Queue. The template draws data from the TASKE database that pertains to the selected Queue(s) and organizes it into a tabular report. The template is based on a reporting period (Daily, Weekly, Monthly, Year by Week, or Year by Month) and reports on the Queue(s) using the selected reporting options.

Use the following steps to create a report template for Queue Activity.

1. Select the reporting period.
    a. Select the desired reporting period (Daily, Weekly, Monthly, Year by Week, or Year by Month) from the Main Control Panel.

2. Create a new template.
    a. Click New in the Report Templates panel to open the Properties window.

3. Define the General properties.
    a. Select the General tab.
    b. Input a name for the template in the Report Templates field. A name is mandatory and can contain any combination of characters and spaces.
    c. If desired, input a description for the template in the Report Description field. The description can contain any combination of characters and spaces.
    d. Enable the Auto Print check box to have the report print automatically. The report must be scheduled to print automatically. To schedule the automatic printing, click the Schedule Report Generator... button to open the Schedule Report Generator dialog box.

e. Enable the Auto Export check box to have the report export automatically. The report must be scheduled to export automatically. To schedule the automatic export, click the Schedule Report Generator... button to open the Schedule Report Generator dialog box.

f. If it is a Year by Week report, select the number of weeks to use for the Time Period. If it is a Year by Month report, select the number of months to use for the Time Period.

4. Define the Content properties.

a. Select the Content tab.

b. Select Queue Activity from the Resource drop-down list.

c. Select the Queues to include in the report from the list of Queues in the display area. To select a group of Queues that are in order, select the first Queue and SHIFT+click the last Queue in the list of those desired for selection. To select a group of Queues that are not in order, select the first Queue and CTRL+click each of the remaining Queues desired for selection.

d. Click the buttons of the desired report options. When a report option is selected, its button is depressed and the column in the display area, for that report option, is populated with a red check mark for the selected Queues. The report options for Queue Activity vary according to the reporting period selected. The table below outlines the report options available for each reporting period.

Queue Activity Reports		
Reporting Period	**Resource**	**Report Options**
Daily	Queue Activity	Quarter hour, half hour, hour, pairs of account codes
Weekly	Queue Activity	Quarter hour, half hour, hour, day of week, pairs of account codes
Monthly	Queue Activity	Quarter hour, half hour, hour, day of month, pairs of account codes
Year by Week	Queue Activity	Half hour, hour, day of week, week, pairs of account codes
Year by Month	Queue Activity	Half hour, hour, day of month, month, pairs of account codes

5. Define the Export Properties.

a. Select the Export tab.

b. Select a file type for the exported file from the Export Format list.

c. Select a time format for the exported report from the Time Format list of radio buttons.

d. Define the location of the exported file in the Export Path field. Click the Browse button to browse the local PC or the network for a file location.

6. Accept the properties.
   a. Click OK to save the properties of the new Queue Activity report template and close the Properties window.

7. View the report.
   a. Select the new Queue Activity report template in the Report Templates panel.
   b. Click View on the Report Templates panel title bar to open the Date Selection Calendar.
   c. Use $\ll$ and $\gg$ to select the desired year.
   d. Use $<$ and $>$ to select the desired month.
   e. Click the desired date (may be a span of one day, one week, or one month depending on the reporting period selected). The selected calendar period is highlighted in blue.
   f. Click OK to close the Date Selection calendar and generate the report for the selected date.
   g. The report opens in the Publication Viewer. If no data is available for the selected date, the TASKE Reports dialog box opens indicating that there is nothing to report on for the specified options.
   h. Scroll through the pages of the report using the page selector tools on the title bar of the Publication Viewer.

Creating Queue Peaks Report Templates

Generate Queue Peaks reports for specific dates using a report template. These reports provide a detailed analysis of call traffic by identifying the peak intervals for calls that were received in a specified time period by a specific Queue. The template draws data from the TASKE database that pertains to the selected Queue(s) and organizes it into a tabular report. The template is based on the Monthly reporting period only and reports on the Queue(s) using the selected reporting options.

Use the following steps to create a report template for Queue Peaks.

1. Select the reporting period.
   a. Click the Monthly button on the Main Control Panel.

2. Create a new template.
   a. Click New in the Report Templates panel to open the Properties window.

3. Define the General properties.
   a. Select the General tab.
   b. Input a name for the template in the Report Templates field. A name is mandatory and can contain any combination of characters and spaces.
   c. If desired, input a description for the template in the Report Description field. The description can contain any combination of characters and spaces.
   d. Enable the Auto Print check box to have the report print automatically. The report must be scheduled to print automatically. To schedule the automatic printing, click the Schedule Report Generator... button to open the Schedule Report Generator dialog box.
   e. Enable the Auto Export check box to have the report export automatically. The report must be scheduled to export automatically. To schedule the automatic export, click the Schedule Report Generator... button to open the Schedule Report Generator dialog box.
   f. If it is a Year by Week report, select the number of weeks to use for the Time Period. If it is a Year by Month report, select the number of months to use for the Time Period.

4. Define the Content properties.
   a. Select the Content tab.
   b. Select Queue Peaks from the Resource drop-down list.

c. Select the Queues to include in the report from the list of Queues in the display area. To select a group of Queues that are in order, select the first Queue and SHIFT+click the last Queue in the list of those desired for selection. To select a group of Queues that are not in order, select the first Queue and CTRL+click each of the remaining Queues desired for selection.

d. Click the buttons of the desired report options. When a report option is selected, its button is depressed and the column in the display area, for that report option, is populated with a red check mark for the selected Queues. The report options for Queue Peaks vary according to the reporting period selected. The table below outlines the report options available for each reporting period.

Queue Peaks Reports		
Reporting Period	**Resource**	**Report Options**
Monthly	Queue Peaks	**Peak Offered** - analyzes data for the report, identifying the interval of the month producing the highest number of calls (i.e. the Busy Hour). **Peak Answered -** analyzes data for the report, identifying the interval of the month producing the highest number of answered calls. This information is used to identify intervals when the highest level of Agent staffing is required. **Peak Abandoned -** analyzes data for the report, identifying the interval of the month producing the highest number of abandoned calls and the number of calls for the interval. This information is used to identify intervals during the business day or work shift that are under-staffed. **Peak Interflowed -** analyzes data for the report, identifying the interval of the month producing the highest number of interflowed calls.

5. Define the Export Properties.
    a. Select the Export tab.
    b. Select a file type for the exported file from the Export Format list.
    c. Select a time format for the exported report from the Time Format list of radio buttons.
    d. Define the location of the exported file in the Export Path field. Click the Browse button to browse the local PC or the network for a file location.

6. Accept the properties.
    a. Click OK to save the properties of the new Queue Peaks report template and close the Properties window.

7. View the report.
    a. Select the new Queue Peaks report template in the Report Templates panel.
    b. Click View on the Report Templates panel title bar to open the Date Selection Calendar.
    c. Use ◄◄ and ►► to select the desired year.
    d. Use ◄ and ► to select the desired month.
    e. Click the desired date (may be a span of one day, one week, or one month depending on the reporting period selected). The selected calendar period is highlighted in blue.
    f. Click OK to close the Date Selection calendar and generate the report for the selected date.
    g. The report opens in the Publication Viewer. If no data is available for the selected date, the TASKE Reports dialog box opens indicating that there is nothing to report on for the specified options.
    h. Scroll through the pages of the report using the page selector tools on the title bar of the Publication Viewer.

Creating Queue Group Report Templates

Generate Queue Group reports for specific dates using a report template. The report provides a detailed analysis of the calls received and entered in the TASKE database by indicating how many calls were handled in a specified time period by a specific Queue Group. The template draws data from the TASKE database that pertains to the selected Queue Group(s) and organizes it into a tabular report. The template is based on a reporting period (Daily, Weekly, Monthly, Year by Week, or Year by Month) and reports on the Queue Group(s) using the selected reporting options.

Use the following steps to create a report template for a Queue Group.

1. Select the reporting period.
    a. Select the desired reporting period (Daily, Weekly, Monthly, Year by Week, or Year by Month) from the Main Control Panel.

2. Create a new template.
   a. Click New in the Report Templates panel to open the Properties window.

3. Define the General properties.
   a. Select the General tab.
   b. Input a name for the template in the Report Templates field. A name is mandatory and can contain any combination of characters and spaces.
   c. If desired, input a description for the template in the Report Description field. The description can contain any combination of characters and spaces.
   d. Enable the Auto Print check box to have the report print automatically. The report must be scheduled to print automatically. To schedule the automatic printing, click the Schedule Report Generator... button to open the Schedule Report Generator dialog box.
   e. Enable the Auto Export check box to have the report export automatically. The report must be scheduled to export automatically. To schedule the automatic export, click the Schedule Report Generator... button to open the Schedule Report Generator dialog box.
   f. If it is a Year by Week report, select the number of weeks to use for the Time Period. If it is a Year by Month report, select the number of months to use for the Time Period.

4. Define the Content properties.
   a. Select the Content tab.
   b. Select Queue Group from the Resource drop-down list.
   c. Select the Queue Groups to include in the report from the list of Queue Groups in the display area. To select a group of Queue Groups that are in order, select the first Queue Group and SHIFT+click the last Queue Group in the list of those desired for selection. To select a group of Queue Groups that are not in order, select the first Queue Group and CTRL+click each of the remaining Queue Groups desired for selection.

d. Click the buttons of the desired report options. When a report option is selected, its button is depressed and the column in the display area, for that report option, is populated with a red check mark for the selected Queue Groups. The report options for Queue Groups vary according to the reporting period selected. The table below outlines the report options available for each reporting period.

Queue Group Reports		
Reporting Period	**Resource**	**Report Options**
Daily	Queue Group	Quarter hour, half hour, hour, Queue, DNIS, area code, area code & city, state
Weekly	Queue Group	Quarter hour, half hour, hour, day of week, Queue, DNIS, area code, area code & city, state
Monthly	Queue Group	Quarter hour, half hour, hour, day of month, Queue, DNIS, area code, area code & city, state
Year by Week	Queue Group	Half hour, hour, day of week, week, Queue, DNIS, area code, area code & city, state
Year by Month	Queue Group	Half hour, hour, day of month, month, Queue, DNIS, area code, area code & city, state

5. Define the Export Properties.
   a. Select the Export tab.
   b. Select a file type for the exported file from the Export Format list.
   c. Select a time format for the exported report from the Time Format list of radio buttons.
   d. Define the location of the exported file in the Export Path field. Click the Browse button to browse the local PC or the network for a file location.

6. Accept the properties.
   a. Click OK to save the properties of the new Queue Group report template and close the Properties window.

7. View the report.
   a. Select the new Queue Group report template in the Report Templates panel.
   b. Click View on the Report Templates panel title bar to open the Date Selection Calendar.
   c. Use ◄◄ and ►► to select the desired year.

d. Use <u><</u> and <u>></u> to select the desired month.
e. Click the desired date (may be a span of one day, one week, or one month depending on the reporting period selected). The selected calendar period is highlighted in blue.
f. Click OK to close the Date Selection calendar and generate the report for the selected date.
g. The report opens in the Publication Viewer. If no data is available for the selected date, the TASKE Reports dialog box opens indicating that there is nothing to report on for the specified options.
h. Scroll through the pages of the report using the page selector tools on the title bar of the Publication Viewer.

Creating Queue Group Answer Spectrum Report Templates

Generate Queue Group Answer Spectrum reports for specific dates using a report template. A Queue Group Answer Spectrum report indicates how many calls were Answered in a specified time period by a specific Queue Group. The template draws data from the TASKE database that pertains to the selected Queue Group(s) and organizes it into a tabular report. The template is based on a reporting period (Daily, Weekly, Monthly, Year by Week, or Year by Month) and reports on the Queue Group(s) using the selected reporting options.

Use the following steps to create a report template for a Queue Group Answer Spectrum.

1. Select the reporting period.
    a. Select the desired reporting period (Daily, Weekly, Monthly, Year by Week, or Year by Month) from the Main Control Panel.

2. Create a new template.
    a. Click New in the Report Templates panel to open the Properties window.

3. Define the General properties.
    a. Select the General tab.
    b. Input a name for the template in the Report Templates field. A name is mandatory and can contain any combination of characters and spaces.
    c. If desired, input a description for the template in the Report Description field. The description can contain any combination of characters and spaces.
    d. Enable the Auto Print check box to have the report print automatically. The report must be scheduled to print automatically. To schedule the automatic printing, click the Schedule Report Generator... button to open the Schedule Report Generator dialog box.

e. Enable the Auto Export check box to have the report export automatically. The report must be scheduled to export automatically. To schedule the automatic export, click the Schedule Report Generator... button to open the Schedule Report Generator dialog box.

f. If it is a Year by Week report, select the number of weeks to use for the Time Period. If it is a Year by Month report, select the number of months to use for the Time Period.

4. Define the Content properties.

a. Select the Content tab.

b. Select Queue Group Answer Spectrum from the Resource drop-down list.

c. Select the Queue Groups to include in the report from the list of Queue Groups in the display area. To select a group of Queue Groups that are in order, select the first Queue Group and SHIFT+click the last Queue Group in the list of those desired for selection. To select a group of Queue Groups that are not in order, select the first Queue Group and CTRL+click each of the remaining Queue Groups desired for selection.

d. Click the buttons of the desired report options. When a report option is selected, its button is depressed and the column in the display area, for that report option, is populated with a red check mark for the selected Queue Groups. The report options for Queue Group Answer Spectrums vary according to the reporting period selected. The table below outlines the report options available for each reporting period.

Queue Group Answer Spectrum Reports		
Reporting Period	**Resource**	**Report Options**
Daily	Queue Group Answer Spectrum	Quarter hour, half hour, hour, Queue
Weekly	Queue Group Answer Spectrum	Quarter hour, half hour, hour, day of week, Queue
Monthly	Queue Group Answer Spectrum	Quarter hour, half hour, hour, day of month, Queue
Year by Week	Queue Group Answer Spectrum	Half hour, hour, day of week, week, Queue
Year by Month	Queue Group Answer Spectrum	Half hour, hour, day of month, month, Queue

5. Define the Export Properties.

a. Select the Export tab.

b. Select a file type for the exported file from the Export Format list.

    c.   Select a time format for the exported report from the Time Format list of radio buttons.

    d.   Define the location of the exported file in the Export Path field. Click the Browse button to browse the local PC or the network for a file location.

6.   Accept the properties.

    a.   Click OK to save the properties of the new Queue Group Answer Spectrum report template and close the Properties window.

7.   View the report.

    a.   Select the new Queue Group Answer Spectrum report template in the Report Templates panel.

    b.   Click View on the Report Templates panel title bar to open the Date Selection Calendar.

    c.   Use ⏪ and ⏩ to select the desired year.

    d.   Use ◀ and ▶ to select the desired month.

    e.   Click the desired date (may be a span of one day, one week, or one month depending on the reporting period selected). The selected calendar period is highlighted in blue.

    f.   Click OK to close the Date Selection calendar and generate the report for the selected date.

    g.   The report opens in the Publication Viewer. If no data is available for the selected date, the TASKE Reports dialog box opens indicating that there is nothing to report on for the specified options.

    h.   Scroll through the pages of the report using the page selector tools on the title bar of the Publication Viewer.

Creating Queue Group Abandon Spectrum Report Templates

Generate Queue Group Abandon Spectrum reports for specific dates using a report template. A Queue Group Abandon Spectrum report indicates how many calls were abandoned in a specified time period by a specific Queue Group. The template draws data from the TASKE database that pertains to the selected Queue Group(s) and organizes it into a tabular report. The template is based on a reporting period (Daily, Weekly, Monthly, Year by Week, or Year by Month) and reports on the Queue Group(s) using the selected reporting options.

Use the following steps to create a report template for a Queue Group Abandon Spectrum.

1.   Select the reporting period.

    a.   Select the desired reporting period (Daily, Weekly, Monthly, Year by Week, or Year by Month) from the Main Control Panel.

2. Create a new template.
   a. Click New in the Report Templates panel to open the Properties window.

3. Define the General properties.
   a. Select the General tab.
   b. Input a name for the template in the Report Templates field. A name is mandatory and can contain any combination of characters and spaces.
   c. If desired, input a description for the template in the Report Description field. The description can contain any combination of characters and spaces.
   d. Enable the Auto Print check box to have the report print automatically. The report must be scheduled to print automatically. To schedule the automatic printing, click the Schedule Report Generator... button to open the Schedule Report Generator dialog box.
   e. Enable the Auto Export check box to have the report export automatically. The report must be scheduled to export automatically. To schedule the automatic export, click the Schedule Report Generator... button to open the Schedule Report Generator dialog box.
   f. If it is a Year by Week report, select the number of weeks to use for the Time Period. If it is a Year by Month report, select the number of months to use for the Time Period.

4. Define the Content properties.
   a. Select the Content tab.
   b. Select Queue Group Abandon Spectrum from the Resource drop-down list.
   c. Select the Queue Groups to include in the report from the list of Queue Groups in the display area. To select a group of Queue Groups that are in order, select the first Queue Group and SHIFT+click the last Queue Group in the list of those desired for selection. To select a group of Queue Groups that are not in order, select the first Queue Group and CTRL+click each of the remaining Queue Groups desired for selection.

d. Click the buttons of the desired report options. When a report option is selected, its button is depressed and the column in the display area, for that report option, is populated with a red check mark for the selected Queue Groups. The report options for Queue Group Abandon Spectrums vary according to the reporting period selected. The table below outlines the report options available for each reporting period.

Queue Group Abandon Spectrum Reports		
Reporting Period	**Resource**	**Report Options**
Daily	Queue Group Abandon Spectrum	Quarter hour, half hour, hour, Queue
Weekly	Queue Group Abandon Spectrum	Quarter hour, half hour, hour, day of week, Queue
Monthly	Queue Group Abandon Spectrum	Quarter hour, half hour, hour, day of month, Queue
Year by Week	Queue Group Abandon Spectrum	Half hour, hour, day of week, week, Queue
Year by Month	Queue Group Abandon Spectrum	Half hour, hour, day of month, month, Queue

5. Define the Export Properties.
   a. Select the Export tab.
   b. Select a file type for the exported file from the Export Format list.
   c. Select a time format for the exported report from the Time Format list of radio buttons.
   d. Define the location of the exported file in the Export Path field. Click the Browse button to browse the local PC or the network for a file location.

6. Accept the properties.
   a. Click OK to save the properties of the new Queue Group Abandon Spectrum report template and close the Properties window.

7. View the report.
   a. Select the new Queue Group Abandon Spectrum report template in the Report Templates panel.
   b. Click View on the Report Templates panel title bar to open the Date Selection Calendar.
   c. Use ◄◄ and ►► to select the desired year.
   d. Use ◄ and ► to select the desired month.

e. Click the desired date (may be a span of one day, one week, or one month depending on the reporting period selected). The selected calendar period is highlighted in blue.

f. Click OK to close the Date Selection calendar and generate the report for the selected date.

g. The report opens in the Publication Viewer. If no data is available for the selected date, the TASKE Reports dialog box opens indicating that there is nothing to report on for the specified options.

h. Scroll through the pages of the report using the page selector tools on the title bar of the Publication Viewer.

Creating Queue Group Interflow Spectrum Report Templates

Generate Queue Group Interflow Spectrum reports for specific dates using a report template. A Queue Group Interflow Spectrum report indicates how many calls were Interflowed in a specified time period by a specific Queue Group. The template draws data from the TASKE database that pertains to the selected Queue Group(s) and organizes it into a tabular report. The template is based on a reporting period (Daily, Weekly, Monthly, Year by Week, or Year by Month) and reports on the Queue Group(s) using the selected reporting options.

Use the following steps to create a report template for a Queue Group Interflow Spectrum.

1. Select the reporting period.
    a. Select the desired reporting period (Daily, Weekly, Monthly, Year by Week, or Year by Month) from the Main Control Panel.

2. Create a new template.
    a. Click New in the Report Templates panel to open the Properties window.

3. Define the General properties.
    a. Select the General tab.
    b. Input a name for the template in the Report Templates field. A name is mandatory and can contain any combination of characters and spaces.
    c. If desired, input a description for the template in the Report Description field. The description can contain any combination of characters and spaces.
    d. Enable the Auto Print check box to have the report print automatically. The report must be scheduled to print automatically. To schedule the automatic printing, click the Schedule Report Generator... button to open the Schedule Report Generator dialog box.

e. Enable the Auto Export check box to have the report export automatically. The report must be scheduled to export automatically. To schedule the automatic export, click the Schedule Report Generator... button to open the Schedule Report Generator dialog box.

f. If it is a Year by Week report, select the number of weeks to use for the Time Period. If it is a Year by Month report, select the number of months to use for the Time Period.

4. Define the Content properties.

a. Select the Content tab.

b. Select Queue Group Interflow Spectrum from the Resource drop-down list.

c. Select the Queue Groups to include in the report from the list of Queue Groups in the display area. To select a group of Queue Groups that are in order, select the first Queue Group and SHIFT+click the last Queue Group in the list of those desired for selection. To select a group of Queue Groups that are not in order, select the first Queue Group and CTRL+click each of the remaining Queue Groups desired for selection.

d. Click the buttons of the desired report options. When a report option is selected, its button is depressed and the column in the display area, for that report option, is populated with a red check mark for the selected Queue Groups. The report options for Queue Group Interflow Spectrums vary according to the reporting period selected. The table below outlines the report options available for each reporting period.

Queue Group Reports		
Reporting Period	**Resource**	**Report Options**
Daily	Queue Group Interflow Spectrum	Quarter hour, half hour, hour, Queue
Weekly	Queue Group Interflow Spectrum	Quarter hour, half hour, hour, day of week, Queue
Monthly	Queue Group Interflow Spectrum	Quarter hour, half hour, hour, day of month, Queue
Year by Week	Queue Group Interflow Spectrum	Half hour, hour, day of week, week, Queue
Year by Month	Queue Group Interflow Spectrum	Half hour, hour, day of month, month, Queue

5. Define the Export Properties.

a. Select the Export tab.

b. Select a file type for the exported file from the Export Format list.

<blockquote>
c. Select a time format for the exported report from the Time Format list of radio buttons.

d. Define the location of the exported file in the Export Path field. Click the Browse button to browse the local PC or the network for a file location.
</blockquote>

6. Accept the properties.

> a. Click OK to save the properties of the new Queue Group Interflow Spectrum report template and close the Properties window.

7. View the report.

> a. Select the new Queue Group Interflow Spectrum report template in the Report Templates panel.
>
> b. Click View on the Report Templates panel title bar to open the Date Selection Calendar.
>
> c. Use ≤ and ≥ to select the desired year.
>
> d. Use < and > to select the desired month.
>
> e. Click the desired date (may be a span of one day, one week, or one month depending on the reporting period selected). The selected calendar period is highlighted in blue.
>
> f. Click OK to close the Date Selection calendar and generate the report for the selected date.
>
> g. The report opens in the Publication Viewer. If no data is available for the selected date, the TASKE Reports dialog box opens indicating that there is nothing to report on for the specified options.
>
> h. Scroll through the pages of the report using the page selector tools on the title bar of the Publication Viewer.

Creating Queue Group Activity Report Templates

Generate Queue Group Activity reports for specific dates using a report template. A Queue Group Activity report provides a detailed analysis of the types of calls received and handled by referencing Account Codes entered in the TASKE database. Queue Group Activity reports indicate the number of received call records for each Account Code, by Queue Group. The template draws data from the TASKE database that pertains to the selected Queue(s) and organizes it into a tabular report. The template is based on a reporting period (Daily, Weekly, Monthly, Year by Week, or Year by Month) and reports on the Queue(s) using the selected reporting options.

Use the following steps to create a report template for Queue Group Activity.

1. Select the reporting period.
   a. Select the desired reporting period (Daily, Weekly, Monthly, Year by Week, or Year by Month) from the Main Control Panel.

2. Create a new template.
   a. Click New in the Report Templates panel to open the Properties window.

3. Define the General properties.
   a. Select the General tab.
   b. Input a name for the template in the Report Templates field. A name is mandatory and can contain any combination of characters and spaces.
   c. If desired, input a description for the template in the Report Description field. The description can contain any combination of characters and spaces.
   d. Enable the Auto Print check box to have the report print automatically. The report must be scheduled to print automatically. To schedule the automatic printing, click the Schedule Report Generator... button to open the Schedule Report Generator dialog box.
   e. Enable the Auto Export check box to have the report export automatically. The report must be scheduled to export automatically. To schedule the automatic export, click the Schedule Report Generator... button to open the Schedule Report Generator dialog box.
   f. If it is a Year by Week report, select the number of weeks to use for the Time Period. If it is a Year by Month report, select the number of months to use for the Time Period.

4. Define the Content properties.
   a. Select the Content tab.
   b. Select Queue Group Activity from the Resource drop-down list.

c. Select the Queues to include in the report from the list of Queues in the display area. To select a group of Queues that are in order, select the first Queue and SHIFT+click the last Queue in the list of those desired for selection. To select a group of Queues that are not in order, select the first Queue and CTRL+click each of the remaining Queues desired for selection.

d. Click the buttons of the desired report options. When a report option is selected, its button is depressed and the column in the display area, for that report option, is populated with a red check mark for the selected Queues. The report options for Queue Group Activity vary according to the reporting period selected. The table below outlines the report options available for each reporting period.

Queue Group Activity Reports		
Reporting Period	**Resource**	**Report Options**
Daily	Queue Group Activity	Quarter hour, half hour, hour, Queue, pairs of account codes
Weekly	Queue Group Activity	Quarter hour, half hour, hour, day of week, Queue, pairs of account codes
Monthly	Queue Group Activity	Quarter hour, half hour, hour, day of month, Queue, pairs of account codes
Year by Week	Queue Group Activity	Half hour, hour, day of week, Queue, pairs of account codes
Year by Month	Queue Group Activity	Half hour, hour, day of month, month, Queue, pairs of account codes

5. Define the Export Properties.
   a. Select the Export tab.
   b. Select a file type for the exported file from the Export Format list.
   c. Select a time format for the exported report from the Time Format list of radio buttons.
   d. Define the location of the exported file in the Export Path field. Click the Browse button to browse the local PC or the network for a file location.

6. Accept the properties.
   a. Click OK to save the properties of the new Queue Group Activity report template and close the Properties window.

7. View the report.
   a. Select the new Queue Group Activity report template in the Report Templates panel.

b. Click View on the Report Templates panel title bar to open the Date Selection Calendar.

c. Use ⏪ and ⏩ to select the desired year.

d. Use ◁ and ▷ to select the desired month.

e. Click the desired date (may be a span of one day, one week, or one month depending on the reporting period selected). The selected calendar period is highlighted in blue.

f. Click OK to close the Date Selection calendar and generate the report for the selected date.

g. The report opens in the Publication Viewer. If no data is available for the selected date, the TASKE Reports dialog box opens indicating that there is nothing to report on for the specified options.

h. Scroll through the pages of the report using the page selector tools on the title bar of the Publication Viewer.

Creating Queue Group Peaks Report Templates

Generate Queue Group Peaks reports for specific dates using a report template. These reports provide a detailed analysis of call traffic by identifying the peak intervals for calls that were received in a specified time period by a specific Queue Group. The template draws data from the TASKE database that pertains to the selected Queue Group(s) and organizes it into a tabular report. The template is based on the Monthly reporting period only and reports on the Queue Group(s) using the selected reporting options.

Use the following steps to create a report template for Queue Group Peaks.

1. Select the reporting period.
   a. Click the Monthly button on the Main Control Panel.

2. Create a new template.
   a. Click New in the Report Templates panel to open the Properties window.

3. Define the General properties.
   a. Select the General tab.
   b. Input a name for the template in the Report Templates field. A name is mandatory and can contain any combination of characters and spaces.
   c. If desired, input a description for the template in the Report Description field. The description can contain any combination of characters and spaces.
   d. Enable the Auto Print check box to have the report print automatically. The report must be scheduled to print automatically. To schedule the automatic printing, click the Schedule Report Generator... button to open the Schedule Report Generator dialog box.
   e. Enable the Auto Export check box to have the report export automatically. The report must be scheduled to export automatically. To schedule the automatic export, click the Schedule Report Generator... button to open the Schedule Report Generator dialog box.
   f. If it is a Year by Week report, select the number of weeks to use for the Time Period. If it is a Year by Month report, select the number of months to use for the Time Period.

4. Define the Content properties.
   a. Select the Content tab.
   b. Select Queue Group Peaks from the Resource drop-down list.
   c. Select the Queues to include in the report from the list of Queues in the display area. To select a group of Queues that are in order, select the first Queue and SHIFT+click the last Queue in the list of those desired for selection. To select a group of Queues that are not in order, select the first Queue and CTRL+click each of the remaining Queues desired for selection.

d. Click the buttons of the desired report options. When a report option is selected, its button is depressed and the column in the display area, for that report option, is populated with a red check mark for the selected Queues. The report options for Queue Group Peaks vary according to the reporting period selected. The table below outlines the report options available for each reporting period.

Queue Group Peaks Reports		
Reporting Period	**Resource**	**Report Options**
Monthly	Queue Group Peaks	**Peak Offered** - analyzes data for the report, identifying the interval of the month producing the highest number of calls (i.e. the Busy Hour). **Peak Answered -** analyzes data for the report, identifying the interval of the month producing the highest number of answered calls. This information is used to identify intervals when the highest level of Agent staffing is required. **Peak Abandoned -** analyzes data for the report, identifying the interval of the month producing the highest number of abandoned calls and the number of calls for the interval. This information is used to identify intervals during the business day or work shift that are under-staffed. **Peak Interflowed -** analyzes data for the report, identifying the interval of the month producing the highest number of interflowed calls.

5. Define the Export Properties.
   a. Select the Export tab.
   b. Select a file type for the exported file from the Export Format list.
   c. Select a time format for the exported report from the Time Format list of radio buttons.
   d. Define the location of the exported file in the Export Path field. Click the Browse button to browse the local PC or the network for a file location.

6. Accept the properties.
   a. Click OK to save the properties of the new Queue Group Peaks report template and close the Properties window.

7. View the report.
   a. Select the new Queue Group Peaks report template in the Report Templates panel.
   b. Click View on the Report Templates panel title bar to open the Date Selection Calendar.
   c. Use ⏪ and ⏩ to select the desired year.
   d. Use ◀ and ▶ to select the desired month.
   e. Click the desired date (may be a span of one day, one week, or one month depending on the reporting period selected). The selected calendar period is highlighted in blue.
   f. Click OK to close the Date Selection calendar and generate the report for the selected date.
   g. The report opens in the Publication Viewer. If no data is available for the selected date, the TASKE Reports dialog box opens indicating that there is nothing to report on for the specified options.
   h. Scroll through the pages of the report using the page selector tools on the title bar of the Publication Viewer.

Creating Forecast Report Templates

Generate Forecast reports for specific dates using a report template. The template draws data from the TASKE database and organizes it into a tabular report. The process of estimating projected traffic levels, or call loads on a Queue is termed Forecasting. Forecast data is used to estimate the number of Agents and other resources needed to meet the expected call load and to schedule shifts.

The Forecast report template defines the reporting resource (Queues or Queue Groups), the forecasting parameters, (resolution, size, time range, TSF %, TSF time, and wrap-up time) and the specific date(s) to include in the report.

Use the following steps to create a report template for a Forecast.

1. Select the reporting period.
   a. Click the Forecast button on the Main Control Panel.

2. Create a new template.
   a. Click New in the Report Templates panel to open the Properties window.

3. Define the General properties.
   a. Select the General tab.
   b. Input a name for the template in the Forecast Templates field. A name is mandatory and can contain any combination of characters and spaces.

c. If desired, input a description for the template in the Forecast Description field. The description can contain any combination of characters and spaces.

4. Define the content of the Forecast report template.
   a. Select the Queue/Queue Groups tab.
   b. Click the Queue button to base the Forecast report template on Queues, or click the Queue Groups button to base the Forecast report template on Queue Groups. The depressed button indicates the selection.
   c. Select the Queues or Queue Groups to include in the Forecast from the list in the display area. To select a group of Queues or Queue Groups that are in order, select the first Queue/Queue Group and SHIFT+click the last Queue/Queue Group in the list of those desired for selection. To select a group of Queues/Queue Groups that are not in order, select the first Queue/Queue Group and CTRL+click each of the remaining Queues/Queue Groups desired for selection.
   d. Enable the desired report options for the selected Queues/Queue Groups in the appropriate columns of the display area. There are two report options: Selection and Interflows. When a report option is selected for a Queue or Queue Group, its column in the display area is populated with a red check mark. **Selection -** marks the Queue or Queue Group for inclusion in the Forecast report. If the Selection option is not checked, the Queue/Queue Group will not be included in the report. **Interflows -** classifies interflowed calls as one call, rather than multiple calls for multiple Queues/Queue Groups. With this option unchecked, an interflowed call is counted as a new call each time it is transferred to another Queue/Queue Group.

5. Define the Forecasting Parameters.
   a. Select the Forecasting Parameters tab.
   b. Select the report resolution from the Resolution drop-down list. The Resolution options include quarter hour, half hour or one hour. This is the interval used by the Forecast report when calculating and reporting the results for the numbers of calls, the number of Agents, and the average Talk Time. The default resolution is Half Hour.
   c. Select the size of the reporting period from the Size drop-down list. The Size options include one day and one week. This selection determines whether the Forecast report will be run for one (or more) days or one (or more) weeks. The default size is One Day.
   d. Set the beginning time for the daily reporting period in the From Time field and the end time for the daily reporting period in the To Time field. Both times must be input in HH:MM format using the 24-hour clock. The default for the From Time is 9:00. The default for

the To Time is 17:00. The Forecast report is divided into quarter hour, half hour or one hour intervals for each day. To avoid cluttering the reports with entries that fall outside of the regular business hours, use the From Time and To Time fields to set the daily time range to include in the Forecast report.

e. Set the Telephone Service Factor (TSF) percentage in the TSF % field. The TSF (%) is used for Forecast report calculations. This value is the ratio of calls that are either Answered or Abandoned before a threshold time, divided by the total number of calls that are offered. The default TSF percentage is 80%, but is adjustable in 1% increments from 1% to 100%.

f. Set the number of seconds for the TSF time in the TSF Time (secs) field. The TSF time defines the threshold time for the TSF percentage. The default TSF time is 20 seconds, but any value between 0 and 100 is acceptable.

g. Set the number of seconds to use for the wrap-up time in the Wrapup Time (secs) field. The wrap-up time, also known as work time, is a factor that is added to call times for agents to complete paperwork after the callers disconnect. The default wrap-up time is 0 seconds, but any value between 0 and 100 is acceptable.

6. Select the dates to use as a forecasting base.
    a. Select the Select Dates tab. The date(s) selected in this tab are used as the historical base of the Forecast report.
    b. Use ≤ and ≥ to select the desired year.
    c. Use < and > to select the desired month.
    d. Select the desired date(s). This may be a span of one day or more days or one or more weeks, depending on the Size value selected in the Forecasting Parameters tab. The selected calendar period is highlighted in blue.

7. Accept the properties.
    a. Click OK to save the properties of the new Forecast report template and close the Properties window.
    8. View the report.
    a. Select the new Forecast report template in the Report Templates panel.
    b. Click View on the Report Templates panel title bar to open the Date Selection Calendar.
    c. The report opens in the Publication Viewer. If no data is available for the selected date, the TASKE Reports dialog box opens indicating that there is nothing to report on for the specified options.
    d. Scroll through the pages of the report using the page selector tools on the title bar of the Publication Viewer.

Printing and Exporting Reports Automatically

Schedule reports to automatically print and export during the slow or non-working hours of a customer interaction center. The advantages of scheduling the automatic printing and exporting of reports include the use of printer and network resources during non-demanding hours and the availability of reports to supervisors and managers when the customer interaction center day begins.

Schedule reports to automatically print and export for all reporting periods except Forecast. The schedule is defined in the Schedule Report Generator dialog box. This dialog box is accessible from the General tab of any report template, except for Forecast report templates, or by selecting Schedule Report Generator... from the File menu.
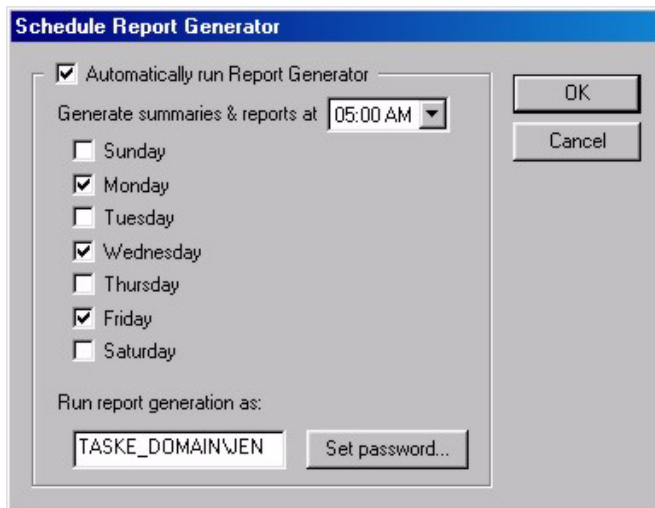
Schedule the task to run daily or for any combination of the days of the week. Select any half-hour interval between 4:00 AM and 6:30 AM to begin the scheduled task of automatically printing and exporting the reports. When the time comes to run the scheduled task, the network user information defined in the Schedule Report Generator dialog box allows the PC to log itself into the network and perform the report printing and exporting. The schedule applies to all reports defined for automatic printing and exporting. Changing a schedule that has already been defined changes the schedule for all reports enabled for automatic printing and exporting.

Scheduling Reports to Print and Export Automatically

Use the Schedule Report Generator dialog box to schedule Daily, Weekly, Monthly, Year by Week, and Year by Month reports to automatically print and/or export at specified dates and times. For a report to automatically print according to the schedule, the Auto Print check box must be enabled on the General tab of the Properties window for the report template. For a report to automatically

export according to the schedule, the Auto Export check box must be enabled on the General tab of the Properties window.

Microsoft Windows limits TASKE Reports to a single Schedule Report Generator. Because of this it may be wise to schedule only daily reports for automatic printing and exporting. In a call center it may be necessary to print and export daily reports Monday through Friday and a weekly report on a Saturday. By including the Saturday weekly report in the schedule for automatic printing and exporting, all daily reports will also be run on Saturday, producing exported and/or printed reports that are not required.

Use the following steps to enable a report for automatic printing and/or export and set-up the schedule. The schedule applies to all reports defined for automatic printing and exporting. Changing a schedule that has already been defined changes the schedule for all reports enabled for automatic printing and exporting.

1. Select the desired reporting period from the Main Control Panel. This can be any reporting period except Forecast.
2. Select the desired report template from the Report Templates panel.
3. Click the Properties button in the title bar of the Report Templates panel to open the Properties window.
4. Select the General tab.
4. Enable the Auto Print button to flag the report for automatic printing.
5. Enable the Auto Export button to flag the report for automatic export.
6. Click the Schedule Report Generator... button to open the Schedule Report Generator dialog box.
7. Enable the Automatically run Report Generator check box.
8. Select the time of day to begin the automatic printing and exporting of the reports from the Generate summaries & reports at drop-down list of times. The times are listed in half-hour intervals from 4:00 AM to 6:30 AM.
9. Enable the check boxes for the days of the week to run the scheduled tasks of automatically printing and exporting the reports.

   This schedule applies to all reports defined for automatic printing and exporting. Changing a schedule that has already been defined changes the schedule for all reports enabled for automatic printing and exporting.

10. If using Windows NT or Windows 2000, click the Set password... button to open the Set Password dialog box. If Windows NT or Windows 2000 is not the operating system, this option is not available.
11. Verify the network domain and PC name in the Account field. This is the name the PC uses to log into the network when it is time to run the scheduled task.

12. Input the network log-in password in the Password field. The password must be the network recognized password for the PC for the log-in to be successful.
13. Re-type the password in the Confirm password field.
14. Click OK to accept the network log-in information and to close the Set Password dialog box.
15. Click OK in the Schedule Report Generator dialog box to accept the schedule and close the dialog box.

Using Enterprise Reports

To generate an Enterprise report, the Reports application looks at .pbx files that are saved on the Enterprise Supervisor's local Information Server. The Enterprise Supervisor needs to have access to a shared directory that contains these files, at the TASKE site to retrieve and use data.

When a report is requested by an Enterprise Supervisor for information from a "remote" TASKE site, the following sequence of events occurs.

1. An Enterprise Supervisor launches the TASKE Reports application.
2. The Enterprise Supervisor selects a site and creates a new report template or selects an existing report template.
3. The Enterprise Supervisor chooses "View" or "Export" to create the report, and then selects the date(s) for the report to cover.

   If the report is for the local site, steps 4 through 7 are omitted.

4. TASKE Reports opens a Net Client. The icon for the Net Client is visible in the Windows System tray . The Net Client connects to the Information Server and asks it to check for an up to date .pbx file for the date(s).
5. If necessary, the Enterprise enabled Information Server forwards the request to the Information Server who owns the remote site.
6. If necessary, the Information Server for the remote site sends an up to date copy of the requested .pbx file back to the requesting Enterprise enabled Information Server.
7. The Enterprise enabled Information Server receives the data file (if sent) and saves it in the appropriate directory for the remote site.
8. The TASKE Reports application retrieves the information from the .pbx files in its Information Servers directory and builds the report to be displayed in the TASKE Reports application.

The diagram below illustrates the path that the request follows, from the report being requested, to the display of the report.
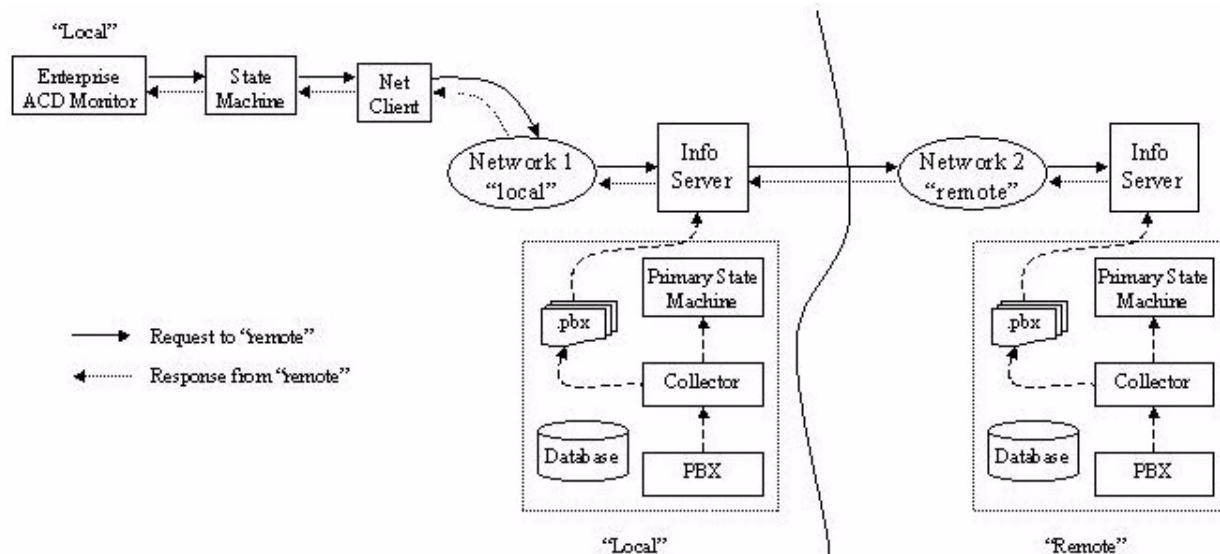
Creating Enterprise Reports

When an Enterprise Supervisor is installed, the Reports application for the Enterprise Supervisor works differently than for a non-enterprise Supervisor. The Reports application for an Enterprise Supervisor has the ability report on data from all sites connected to the Enterprise Supervisor's Information Server
.
Use the following steps to create a report for a remote site.

1. Select the reporting period.
   a. Select the desired reporting period (Daily, Weekly, Monthly, Year by Week, or Year by Month) from the Main Control Panel.

2. Create a new template.
   a. Click New in the Report Templates panel to open the Select Site dialog box.
   b. Select the site for the report.
   c. Click OK.

3. Define the General properties.
   a. Select the General tab.
   b. Input a name for the template in the Report Templates field. A name is mandatory and can contain any combination of characters and spaces.
   c. If desired, input a description for the template in the Report Description field. The description can contain any combination of
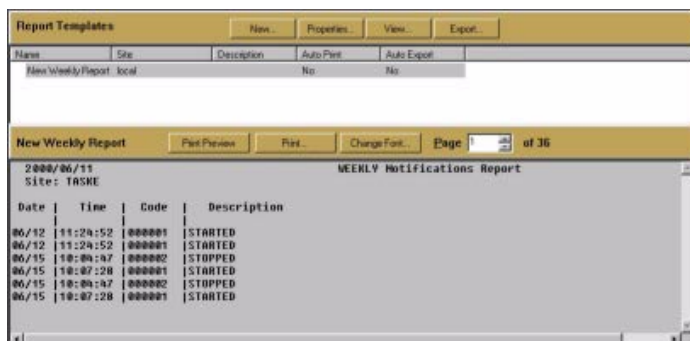
characters and spaces.

d. Enable the Auto Print check box to have the report print automatically. The report must be scheduled to print automatically. To schedule the automatic printing, click the Schedule Report Generator... button to open the Schedule Report Generator dialog box.

e. Enable the Auto Export check box to have the report export automatically. The report must be scheduled to export automatically. To schedule the automatic export, click the Schedule Report Generator... button to open the Schedule Report Generator dialog box.

f. If it is a Year by Week report, select the number of weeks to use for the Time Period. If it is a Year by Month report, select the number of months to use for the Time Period.

4. Define the Content properties.

a. Select the Content tab.

b. Select a resource from the Resource drop-down list.

c. If it is a Trunk or Extension report, enable the Individual Trunks/Extensions check box to report on individual trunks/extensions only.

d. Select the members of the resource group to include in the report from the list in the display area. To select a group of resource members that are in order, select the first member and SHIFT+click the last member in the list of those desired for selection. To select a group of members that are not in order, select the first member and CTRL+click each of the remaining members desired for selection.

e. Click the buttons of the desired report options. When a report option is selected, its button is depressed and the column in the display area, for that report option, is populated with a red check mark for the selected resource members. The report options for vary according to the reporting period and resource selected.

5. Define the Export Properties.

a. Select the Export tab.

b. Select a file type for the exported file from the Export Format list.

c. Select a time format for the exported report from the Time Format list of radio buttons.

d. Define the location of the exported file in the Export Path field. Click the Browse button to browse the local PC or the network for a file location.

6. Accept the properties.

a. Click OK to save the properties of the new report template and close the Properties window.

7. View the report.
    a. Select the new report template in the Report Templates panel.
    b. Click View on the Report Templates panel title bar to open the Date Selection Calendar.
    c. Use ◄◄ and ►► to select the desired year.
    d. Use ◄ and ► to select the desired month.
    e. Click the desired date (may be a span of one day, one week, or one month depending on the reporting period selected). The selected calendar period is highlighted in blue.
    f. Click OK to close the Date Selection calendar and generate the report for the selected date.
    g. The report opens in the Publication Viewer. If no data is available for the selected date, the TASKE Reports dialog box opens indicating that there is nothing to report on for the specified options.
    h. Scroll through the pages of the report using the page selector tools on the title bar of the Publication Viewer.

Using Notification Reports

Notification reports inform users of data collection events that have occurred over the time period of the selected report. These reports detail three types of events: data collection started, data collection stopped, and call record errors.

A Notification report is the first page of any report generated and displayed in the Publication Viewer, assuming there are valid events to include in a Notification report. If there are no valid events to include in a Notification report for the period, the Notification report is not generated. Each event type in a Notification report is represented by an identifying code. The reports include columns for the date, the time, the event code, and descriptions of the events.
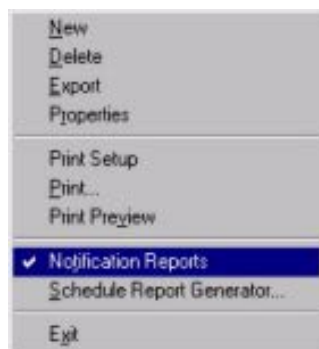
Generating Notification Reports

Notification reports are either enabled or disabled. When enabled, a Notification report is the first page of any report generated and displayed in the Publication Viewer, assuming there are valid events to include in a Notification report. If there are no valid events to include in a Notification report for the period, the Notification report is not generated. When the Notification reports are disabled, the reports are not produced for the reporting period, even if valid events exist.

Enabling and Disabling Notification Reports

Notification reports are enabled and disabled from the File menu. Use the following steps to enable or disable the Notification reports.

1. Click File on the toolbar to open the File menu.
2. Select Notification Reports from the File menu to enable or disable the Notification reports and close the File menu.

By default the Notification reports are enabled. When a check mark is present beside the Notification Reports option in the File menu the reports are enabled. If a check mark is not present, the reports are disabled.

Notification Report Events

Each event in a Notification report is provided with the date and time that the event occurred, a code, and a description. If the event represents a faulty call record, the record is included in the description.

The following events are included in Notification reports.

Code	Description
000001	Data collection started
000002	Data collection stopped
000003	Faulty record - the record is displayed in the description column of the report

Traffic Analyzer

The TASKE Traffic Analyzer application aids in the identification of required resources for a customer interaction center. Use the calculation wizards to quickly and easily apply complex traffic equations to the data of the customer interaction center. Reports provide information in a combination of tables and graphs.

Use the Cost Justification Guide to generate a cost benefit analysis of running a customer interaction center. Input values for the operating costs and learn how to decrease costs and increase revenue.

Using the Traffic Analyzer, perform traffic calculations relevant to the customer interaction center. The application applies three of the most commonly applied traffic equations: Erlang B, Erlang C, and Poisson. Two of the equations: Erlang B and Poisson relate the Grade of Service (GOS) to the traffic and the number of Trunks. The Erlang C equation relates the level of traffic allowed through by the Trunks, to the number of Extensions/Agents and the delay characteristics.

Erlang B is the equation most commonly used for Trunk and Blocking calculations. It assumes that there is no queuing and that Callers who get blocked simply give up and do not try the call again. Erlang C is the equation most commonly used for Agent and delay calculations where ACD queuing is employed. It assumes that all Callers who reach the Queue wait until the call is answered, no matter how long it takes. Poisson is another equation sometimes used for Trunk and Blocking calculations. It assumes that there is no queuing, and that all Callers who get a busy signal retry the call. Among the probabilities that can be calculated are the chance that an incoming call will be blocked, the probability that an Agent will be busy, and the number of Agents required to achieve a specified level of service.

Overview of the Traffic Analyzer Interface

To open the Traffic Analyzer program, double click on the Traffic Analyzer icon in the TASKE ToolBox. The Traffic Analyzer window is presented below. Continue with this section for descriptions of the features available in the Traffic Analyzer program window.
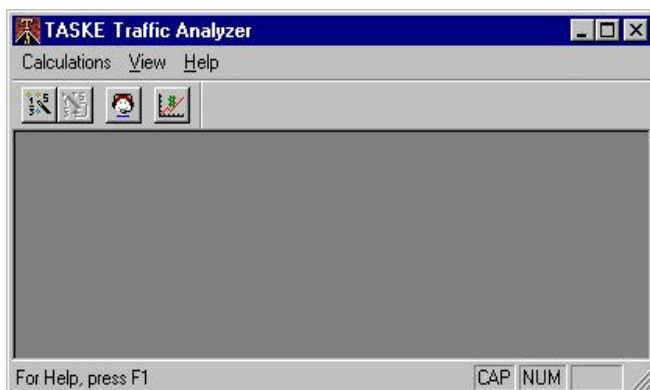
Menu Bar

In the Menu Bar (top of the window) of the Traffic Analyzer, a set of drop-down menus is displayed.

The three menus include Calculations, View and Help and are for creating analyses of the traffic on the phone system, changing the display of toolbars and menus, and accessing the Traffic Analyzer online help.

Tool Bar

In the Tool Bar (top of window, below menu bar) of the Traffic Analyzer program, a set of tool buttons is displayed. The buttons include 2D Horizontal Bar Graph, Recalculate Current Statistics, Calculate Required Staffing, and Activate Cost Justification Wizard.

These tools are used to create and recalculate new and existing analyses of traffic, and perform cost justification for a call center.

Main Window

In the Traffic Analyzer Main Window, any analyses of traffic are displayed. The main window appears blank upon entering the traffic analyzer, but different graphs and statistics are displayed once created.

Status Bar

The Status Bar (bottom of window) of the Traffic Analyzer displays statistics about the status of the analysis being displayed in the Main Window. The Status bar also displays button names when the mouse pointer is held over a button in the button bar, as well as displaying a brief description of menu options as they are highlighted in the drop-down menus.

Understanding Traffic Concepts

There can be wide variations in the number of calls received over different intervals of time. However, in an ACD customer interaction center, call arrivals do tend to form hourly, daily, and seasonal patterns. These patterns can be used to analyze traffic and perform estimates on expected traffic loads. Therefore, although telephone call behavior is essentially random over a short period of time, patterns can be detected over longer periods of time.

A rough pattern is established for call duration over a very large number of calls. The pattern is a 'bell curve' with very few calls of very short duration and very few calls of great duration when compared with the average call duration. However, most calls approximate the average. The pattern of call arrivals and call durations has a great affect on how many calls can be handled successfully.

The average number of calls and the average call duration are estimated in order to determine the degree of Server utilization over a given period of time. In telephone traffic engineering terms, a Server is a device that accepts telephone traffic. A Server may be a Trunk which accepts calls that originate from an Extension, as is the case for Outbound calls, or an Extension or Agent in the case of Incoming calls. In both instances, the Server is the acceptor of the call.

If a call is not accepted by a Server then it may be Blocked, and the Caller given a busy signal. If the Server is not immediately available but the call is allowed to wait to be accepted, then it will be delayed. The two key service parameters affecting the call and the Servers are Blocking and delay. The traffic load on a group of Servers is determined by multiplying the average call duration by the average number of calls over a given period of time, and is expressed in either Erlangs (number of hours of server time) or CCS (100 call seconds, or centum call seconds of time).

Busy Hour/Busy Season

To determine how many Servers should be provided on a telephone or ACD system, the concept of a Busy Hour is used.   The Busy Hour is the period of the day when the traffic is the highest.

There are also seasonal variations in traffic over periods such as the Christmas season, where an increase or decrease in the number of incoming calls can be predicted. The term Busy Season is used to designate these periods. The Busy Hour is usually measured in the busy season so that an average Busy Hour is found for the Busy Season—or Average Busy Season Busy Hour (ABSBH).

Telephone Systems are typically engineered based on the ABSBH traffic model. This ensures good service at all times, with the exception of peak periods without being excessively expensive.

Blocking

Blocking is the term used to indicate a call, which is unsuccessful, because it cannot be connected, as opposed to a call that connects but finds the called party busy. The probability of Blocking lies between 0 and 100%, and typically falls in the range between 1% and 10%. The probability of a call being Blocked (expressed as P.01 to P.10) is between 1 in 100, and 1 in 10.

In formal traffic engineering terms this probability is termed the Grade of Service (GOS). The higher the GOS, the lower the service provided, the lower the GOS, the higher the service provided.

Queue Delay/Call Abandons

In an ACD situation, successful Callers are placed in Queue and may face a delay. This introduces another measurement of service performance—the probability of delay. The less the chance of being delayed and the less the delay, the better the service and vice versa.

In the following example, a threshold delay of 30 seconds is chosen. Service might be considered acceptable if 90% of Callers experience this, or a lesser delay. This is expressed as a service performance target of a '90% probability of delay of less than 30 seconds'. If a Caller is not delayed longer than 30 seconds, then service is considered to be acceptable. If a Caller is delayed longer than 30 seconds, then service is considered to be unacceptable.

Call Duration

The duration of an ACD call typically consists of the following three components.

- The average Queue Time is the time spent in the ACD Queue waiting for an Agent to become free and is often termed the Average Speed of Answer (ASA).
- The average Talk Time is the time the Caller actually spends connected to an Agent, regardless of whether conversation is taking place or not.
- The average Work Time is the time the Agent spends performing paper work in connection with a call, but after the Caller has disconnected.

To a Trunk, the call duration consists only of the Queue Time and the Talk Time; the Trunk (and the Caller) are not involved while the Agent is performing paperwork on Work Time.

To the Extension and Agent, the call duration consists only of the Talk Time and the Work Time; the Extension and Agent are not involved while the call is waiting in Queue on Queue Time.

Thus, the duration of a call usually differs from the perspective of the Trunk carrying the call into the CO or Telephone System PBX from the Extension or Agent who is handling the call.

Service Criteria

To provide good service requires that a call be responded to within or approximately within the Caller's expectations. What does a Caller expect? Good service might be defined by the three components illustrated below.

TELEPHONE SERVICE CRITERIA

- The Caller expects to have a reasonable chance of obtaining a free Trunk into the system.
- The Caller expects a response within a reasonable amount of time.
- The Caller expects to be treated with reasonable courtesy and to be given reasonably accurate and current information.

Creating a Traffic Analysis

The Grade Of Service (GOS) is primarily related to the number of Trunks compared to the level of traffic. The delay characteristic is primarily related to the number of Extensions/Agents compared to the level of traffic allowed through by the Trunks.

Traffic engineering revolves around several basic questions concerning the relationship between the following parameters.

- What is the GOS for a given number of Trunks and level of traffic?

- How many Trunks are required to handle a given level of traffic at a particular GOS?

- What is the probability of delay and the amount of delay experienced for a given level of traffic and number of Extensions/Agents?

- What are the delay characteristics?

- How many Extensions/Agents are required to handle a given level of traffic with particular delay characteristics?

Mathematical models that approximate these relationships have been developed but they are complex. The TASKE ToolBox enables the most common of these equations for you to perform the calculations required for traffic engineering.
Two of the equations: Erlang B and Poisson relate the GOS to the traffic and the number of Trunks. The Erlang C equation relates the level of traffic allowed through by the Trunks, to the number of Extensions/Agents and the delay characteristics.
"Erlang B" is the equation most commonly used for Trunk and Blocking calculations. It assumes that there is no queuing and that Callers who get blocked simply give up and do not try the call again.

"Erlang C" is the equation most commonly used for Agent and delay calculations where ACD queuing is employed. It assumes that all Callers who reach the Queue wait until the call is answered, no matter how long it takes.

"Poisson" is another equation sometimes used for Trunk and Blocking calculations. It assumes that there is no queuing, and that all Callers who get a busy signal retry the call.

The following figure summarizes the different traffic equations and the assumptions behind them. The three equations (Poisson, Erlang B and Erlang C) correspond to idealized situations at the corners of the triangle, where the assumptions behind the equations are fully applied. Points "A", "B", "C", "D" represent practical situations.
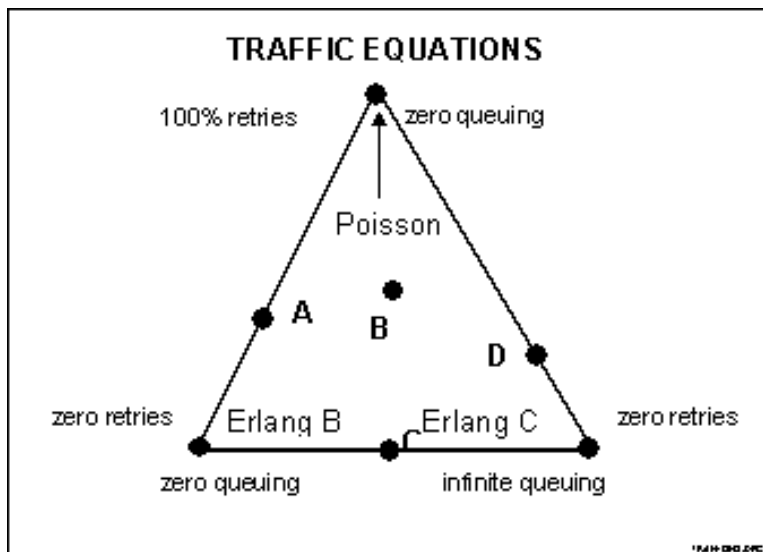
Service Percentage - Level of Abandons

The Service Percentage is a term used to represent service performance. This is the percentage of calls which obtain a Trunk and are answered compared to the total number of calls which obtain a Trunk, and is the inverse of the rate of abandons. For example, if 6% of Callers abandon while waiting in the Queue, then the Abandon Rate is 6%, and the Service Percentage is 94%.

Telephone Service Factor - Speed of Answer

As mentioned previously, the TSF is the ratio of calls that obtain a Trunk and are either answered or abandoned before a threshold time, to the total number of calls which obtain a Trunk. The Telephone Service Factor is illustrated below.
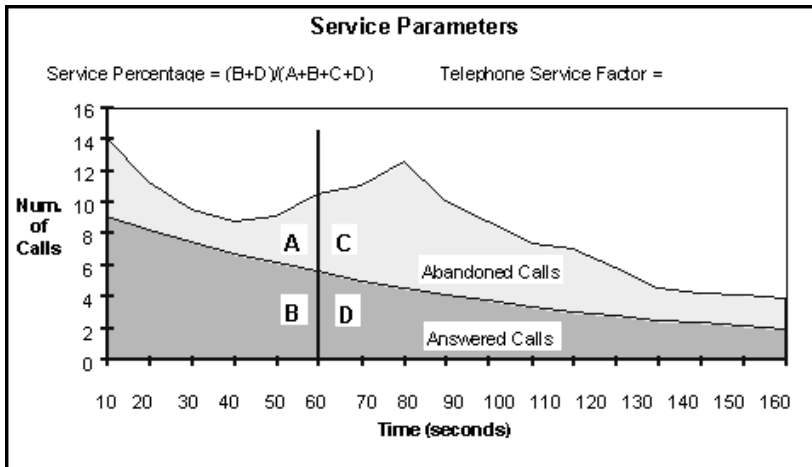
Creating an Erlang C Traffic Analysis

The Calculation Wizard prompts for all of the information needed to create a graph of the traffic analysis calculation. Clicking the Calculation Wizard button on the toolbar takes users step-by-step through the process of creating a traffic analysis, using the traffic equation of the user's choice. The steps below act as a guide for creating an Erlang C traffic analysis.

Erlang C - Erlang C modeling assumes calls placed by a source that are blocked will never hang up, but will queue forever waiting for a server to become free. This model follows the characteristics of an incoming ACD caller to an ACD group or a caller into a Queue Group.

1. Click the Calculation Wizard button on the toolbar to open the Statistic Selection dialog box.
2. Enable the Erlang C radio button.
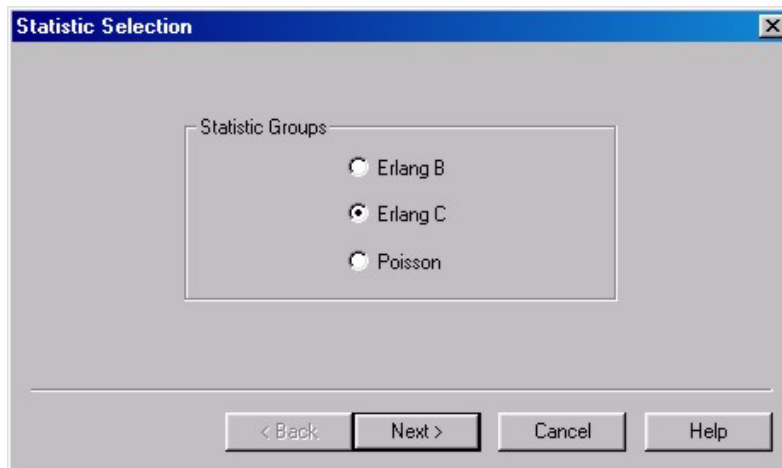
3. Click Next to open the Erlang C Statistics dialog box.
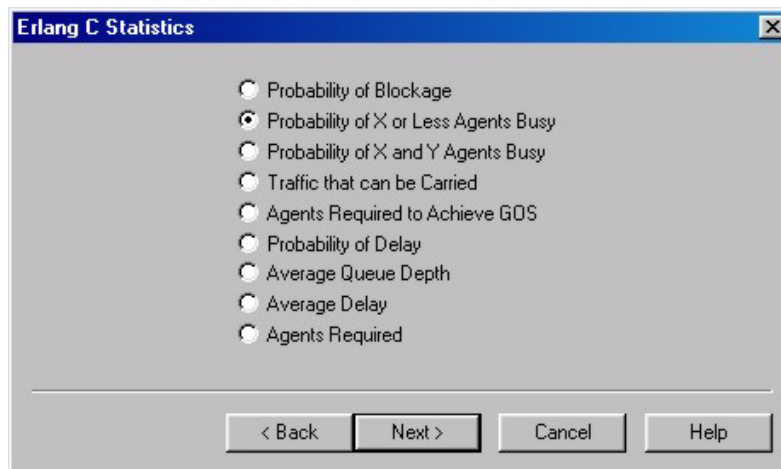
4. Enable the radio button for the desired statistic and click the Next button. The remaining dialog boxes that follow vary according to the type of statistic selected.

5. With each dialog box that follows, enter the calculation parameters and click the Next button to continue to the next dialog box in the Calculation Wizard.

6. In the final dialog box the Next button is replaced by the Finish button. Click Finish to create the traffic analysis based on the selections of the previous dialog boxes.

Erlang C Traffic Calculations

The Erlang C selection allows the following calculations to be performed. The explanation of each of the parameters, shown below, together with an example indicates how these calculations are used to manage customer interaction center traffic.

Probability of Blockage (ERLC_GOS formula)

This calculation relates the GOS to the number of Agents and the call load (or the number of calls per hour and the average duration of these). The calculator accepts the number of calls per hour, the average call duration, and the number of available Agents as parameters. The GOS that results from the call load being presented to a given number of Agents, may be determined.

For example, the Probability of Blockage calculation can be applied to estimate the expected call load and to know how many Agents are scheduled to work. Then, you can calculate the GOS that Callers are expected to receive. Although the GOS is generally stated as the probability of Blockage, the GOS in an Erlang C model actually represents the probability that a Caller will experience a delay. Thus, a GOS of P.10, or 10%, means that a Caller has a 10% chance of being delayed.

Probability of X or Less Agents Busy (ERLC_X_CHAN formula)

This calculation determines the probability that X Agents are simultaneously busy when a given call load is presented to a limited number of available Agents. The calculator accepts the number of calls per hour, the average call duration, and the number of available Agents as parameters. It then calculates the probability of a specified number of Agents being busy at any point in time.

This calculation is used to determine the probability of having no Agents that are busy (i.e. All Agents idle). Agent utilization, or the proportion of time that an

Agent is busy compared to the total work time of the Agent, depends on the call load and the number of Agents available.

For a certain call load and a limited number of Agents, the calculation reveals that an Agent(s) would be idle for a significant proportion of the time. Then, you might consider reducing the number of Agents for the shift. However, there is a close relationship between Agent utilization and the TSF experienced by Callers. Particularly for a small Agent group, you may find that a relatively low Agent utilization is the price that must be paid to ensure a high level of service to Callers.

This calculation determines the probability that between X and Y Agents are simultaneously busy when a given call load is presented to a given number of available Agents. The calculator accepts as parameters, the number of calls per hour, the average call duration, and the number of available Agents, and calculates the probability that greater than X and fewer than Y Agents are busy at any point in time.

This calculation determines the probability that between X and Y Agents are simultaneously busy when a given call load is presented to a given number of available Agents. The calculator accepts as parameters, the number of calls per hour, the average call duration, and the number of available Agents, and calculates the probability that greater than X and fewer than Y Agents are busy at any point in time.

This calculation determines the probability that four or more Agents in a group of eight are busy at any known point in time. If you supervise a Queue with eight Agents in the morning work shift and four Agents in the afternoon work shift, you can calculate the affect of reducing the number of Agents to four for the morning work shift.

Probability of X and Y Agents Busy (ERLC_INTEG formula)

This calculation determines the probability that between X and Y Agents will be simultaneously busy when a current call load is presented to a limited number of available Agents. The calculator accepts the number of calls per hour, the average call duration, and the number of available Agents as parameters. Then, it calculates the probability that no fewer than X, and no more than Y Agents are busy at any point in time.

You can use this calculation to determine the traffic on the least occupied Agents in an Agent Group. For example, you can calculate the probability of Agents 8 to 10 (for a group of 10 Agents) being busy when presented with 250 calls per hour, and having an average duration of 70 seconds. This calculator calculates the probability of Agents 8 to 10 being busy and determines whether the individual Agent traffic justifies the cost.

Traffic that can be Carried (ERLC_TRAF formula)

This calculation determines the traffic or call load that can be handled by a limited number of Agents within a given GOS. The calculator accepts the number of available Agents, the required GOS, and the average call duration as parameters. Then, it calculates the number of calls per hour that can be handled.

For example, you can determine the call load, with an average call duration of 70 seconds, that can be handled by four Agents, while maintaining the GOS within the company's target of P.05. This calculation can demonstrate that the number of calls per hour that can be handled is less than expected. To remedy this, you can either increase the number of Agents to maintain the GOS within target, or the GOS must be allowed to decline to enable the call load to be handled by the available Agents.

Agents Required to Achieve a GOS (ERLC_TKS formula)

This calculation determines the number of servers (or Agents in this case) required to handle a certain call load within an acceptable GOS. The calculator accepts the number of calls per hour, the average call duration of those calls, and the required GOS as parameters. Then, it calculates the number of Agents required to handle the calls.

For example, you can determine how many Agents are required to handle 300 calls per hour at an average call duration of 80 seconds, while maintaining the GOS rating at P.20. If this calculation shows that the number of Agents required is more than the number you expect to have available, then the GOS will be worse than the target GOS of P.20.

Probability of Delay (ERLC_DELAYT formula)

This calculation determines the probability of a Caller having to wait a minimum of XX seconds to be answered, when a limited number of Agents are presented with a certain call load. The calculator accepts the number of seconds for the threshold time, the number of calls per hour, the average call duration of those calls, and the number of available Agents, as parameters. Then, it calculates the probability of Callers having to wait for at least the threshold time.

For example, you can determine the probability of Callers that will have to wait more than 20 seconds for an Agent to respond, when 30 calls per hour with an average single call duration of 70 seconds, are presented to 3 Agents. If the Call Center's level of service target is that 80% of calls be answered within 15 seconds, then 20 seconds might be considered a very poor response. The Supervisor can use this probability to know the number of Callers that receive this poor level of service.

Average Queue Depth (ERLC_AVQ formula)

This calculation determines the average number of Callers waiting in the Queue at any point in time, when there are a limited number of Agents being presented with a certain call load. The calculator accepts the number of calls per hour, the average call duration of those calls, and the number of available Agents as parameters. Then, it calculates the average number of Callers who are delayed and waiting in the ACD Queue at any point in time.

Because this calculation produces a value for the average number of Callers, the result may not be a whole number. For example, in the first second there may be one Caller waiting in Queue. For the next three seconds there may be no Callers waiting; the average probability is then 1+3/4 = 1.25 Callers in Queue.

This calculation determines the average number of Callers waiting in Queue, when 70 calls per hour with an average call duration of 70 seconds, are presented to 4 Agents.

Use this calculation to determine the amount of Recorded Announcement Devices (RAD) that are required to provide Queue delay announcements to Callers. For example, if the calculation indicates that the average number of Callers in Queue is 0.03, then enough RAD equipment to deliver an announcement to one Caller at a time is required. If the calculation for a larger Queue were to indicate that the average number of Callers in Queue is 3.8, then it would probably be wise to provide enough RAD equipment to deliver announcements to 5 Callers at a time; sometimes there are more Callers in Queue than the average.

Average Delay (ERLC_AVGDLY formula)

This calculation determines the average time that a Caller waits in the ACD Queue before being answered by an Agent, when a limited number of Agents is presented with a certain call load. The calculator accepts the number of calls per hour, the average call duration of those calls, and the number of available Agents as parameters. Then, it calculates the average delay experienced by the Callers.

For example, you can determine the average waiting time for Callers when 7 Agents are presented with 70 calls per hour with an average call duration of 70 seconds. In this case, the average wait is insignificant. If different parameters are applied and the wait time is considered to be too long, then additional Agents should be made available, or the average call duration should be decreased.

<u>**Agents Required (ERLC_AGENTS formula)**</u>

This calculation determines the number of Agents required to handle a given call load within a stated TSF. The calculator accepts the number of calls per hour, the average call duration of the calls, and the required TSF percentage and time as parameters. Then, it calculates the number of Agents required to handle the call load within the TSF requirements.

For example, you can determine the number of Agents required to handle 150 calls per hour, with an average duration of 80 seconds, and within a TSF of 80% of calls answered or abandoned within 20 seconds. This is a key calculation in the Forecasting and Scheduling process.

Creating an Erlang B Traffic Analysis

The Calculation Wizard prompts for all of the information needed to create a graph of the traffic analysis calculation. Clicking the Calculation Wizard button on the toolbar takes users step-by-step through the process of creating a traffic analysis, using the traffic equation of the user's choice. The steps below act as a guide for creating an Erlang B traffic analysis.

Erlang B - Erlang B modeling assumes that calls placed by a source that are initially blocked will not reattempt the call and that the call will not queue up waiting for a server to come free. When the call is initially blocked, the caller hangs up and NEVER re-attempts to originate again. This distribution typically models outgoing trunk groups.

1. Click the Calculation Wizard button on the toolbar.
2. Enable the Erlang B radio button.
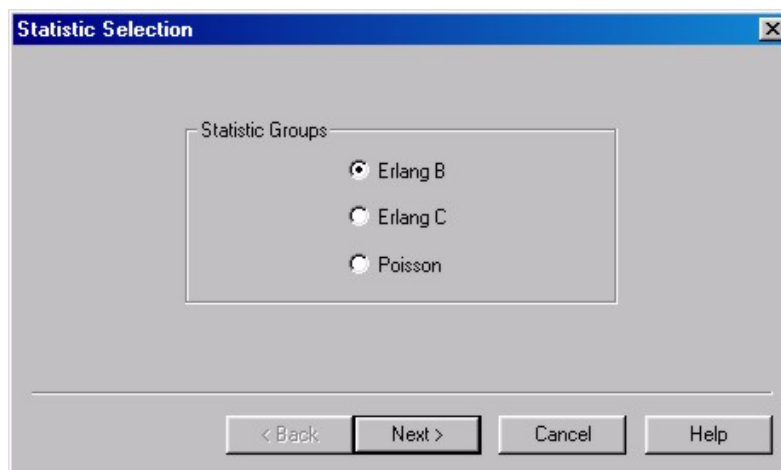
3. Click Next to open the Erlang B Statistics dialog box.
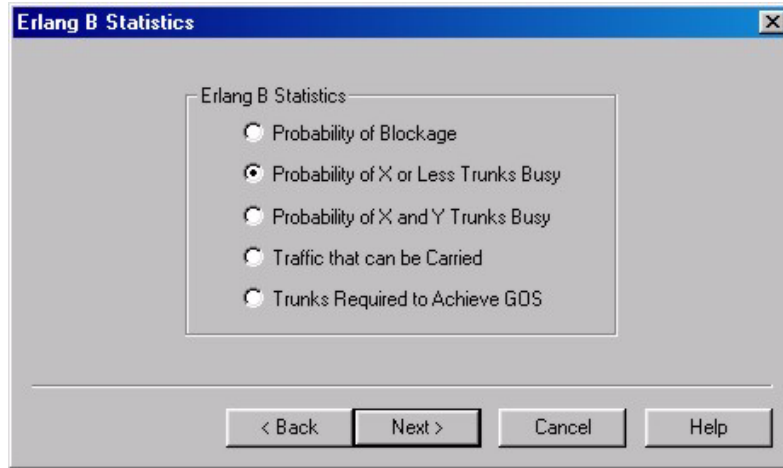
4. Enable the radio button for the desired statistic and click the Next button. The remaining dialog boxes that follow vary according to the type of statistic selected.
5. With each dialog box that follows, enter the calculation parameters and click the Next button to continue to the next dialog box in the Calculation Wizard.
6. In the final dialog box the Next button is replaced by the Finish button. Click Finish to create the traffic analysis based on the selections of the previous dialog boxes.

Erlang B Traffic Calculations

The Erlang B selection allows the following calculations to be performed. The explanation of each of the parameters, shown below, together with an example indicates how these calculations are used to manage Call Center traffic.

Probability of Blockage (ERLB_GOS formula)

This calculation relates the Grade Of Service (GOS) to the number of Trunks and to the call load (or the number of calls per hour and the average duration of these). The calculator accepts the number of calls per hour, the average call duration, and the number of available Trunks as parameters Then, it calculates the GOS that results from the designated call load being presented to the designated number of Trunks.

For example, you can determine the probability of a Caller receiving a busy signal when trying to access an outgoing Trunk under the following conditions: it is expected that the number of outgoing calls is 150 per hour; the average call duration is 70 seconds; and the number of Trunks is 3. In an Erlang B model, the

GOS directly represents the level of Blocking. This calculation results in a P.34 chance of receiving a busy signal. This means that a Caller trying to access an outgoing Trunk has a 34%, or approximately a 1 in 3 chance of receiving a busy signal. This is a very poor level of service. The GOS would typically be in the range of P.01 to P.10.

Probability of X or Less Trunks Busy (ERLB_X_CHAN formula)

This calculation determines the probability that exactly X number of Trunks will be simultaneously busy when a stated call load is presented to a given number of available Trunks. The calculator accepts the number of calls per hour, the average call duration, and the number of available Trunks as parameters. Then, it calculates the probability that exactly the specified number of Trunks are busy at any point in time.

For example, you can determine the probability of getting an all Trunks busy condition in a group of 4 Trunks under the following conditions: there are 250 calls per hour, with an average duration of 70 seconds. The calculation results in a probability of about 0.39, meaning that there is a 39% chance of all 4 Trunks in the group being busy at the same time. This can also be expressed as precisely 4 Trunks being busy for 39% of the time.

Probability of X and Y Trunks Busy (ERLB_INTEG formula)

This calculation determines the probability that between X and Y Trunks will be simultaneously busy when a current call load is presented to a limited number of available Trunks. The calculator accepts the number of calls per hour, the average call duration, and the number of available Trunks as parameters. Then, it calculates the probability that no fewer than X, and no more than Y Trunks are busy at any point in time.

You can use this calculation to determine the traffic on the least occupied Trunks in a Trunk Group. For example, you can calculate the probability of Trunks 8 to 10 (for a group of 10 Trunks) being busy when presented with 250 calls per hour, and having an average duration of 70 seconds. This calculator calculates the probability of Trunks 8 to 10 being busy and determines if the individual Trunk traffic justifies the cost.

Traffic that can be Carried (ERLB_TRAF formula)

This calculation determines the traffic (call load) that can be handled by a limited number of Trunks within a certain GOS. The calculator accepts the number of Trunks, the GOS required to be met, and the average call duration as parameters. Then, it calculates the number of calls per hour that can be handled.

Alternatively, the number of calls can be used. In this case, the calculator determines the average call duration needed in order to meet the GOS.

For example, you can determine the call load, with an average call duration of 70 seconds, that can be handled by three Trunks while maintaining the GOS within the company's target of P.03. If this calculation shows that the number of calls per hour that can be handled is less than expected, then the number of Trunks must be increased to maintain the target GOS. Otherwise, the level of Blocking must be allowed to worsen to enable the call load to be handled by the Trunks that are available.

Alternatively, the same calculation might be performed with a known number of calls per hour. The calculator then determines the average call duration that can be accepted while still remaining within the target GOS.

Trunks Required to Achieve a GOS (ERLB_TKS formula)

This calculation determines the number of Trunks required to handle a certain call load within a stated GOS. The calculator accepts the number of calls per hour, the average call duration of those calls, and the required GOS as parameters. Then, it calculates the number of Trunks required to handle the call load within the required GOS.

For example, you can determine the number of Trunks required to handle 150 calls per hour, with an average duration of 70 seconds, within a GOS of P.02. This is a key calculation in the Forecasting and Scheduling process.

Creating a Poisson Traffic Analysis

The Calculation Wizard prompts for all of the information needed to create a graph of the traffic analysis calculation. Clicking the Calculation Wizard button on the toolbar takes users step-by-step through the process of creating a traffic analysis, using the traffic equation of the user's choice. The steps below act as a guide for creating a Poisson traffic analysis.

> **Poisson -** Poisson modeling assumes that calls placed by a source that are initially blocked will hang up and reattempt the call at random intervals until the call successfully connects OR until it has waited the length of time the call would have lasted if not blocked. The model assumes that calls will never queue. This distribution is not widely used in North America, but is provided for completeness.

1. Click the Calculation Wizard button on the toolbar.
2. Enable the Poisson radio button.
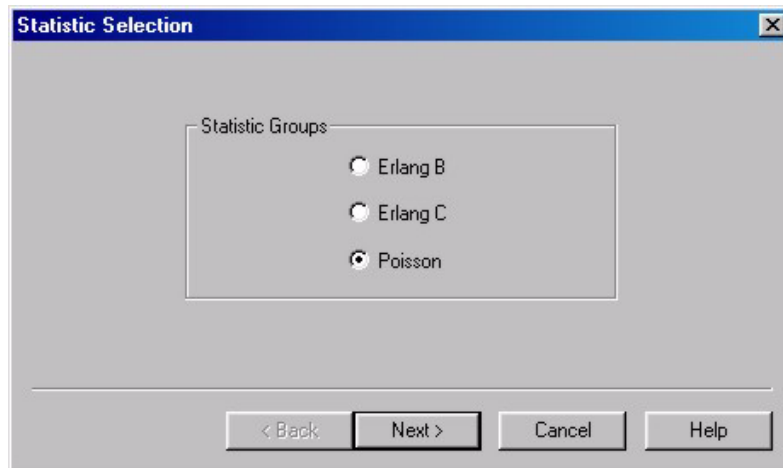
3. Click Next to open the Poisson Statistics dialog box.
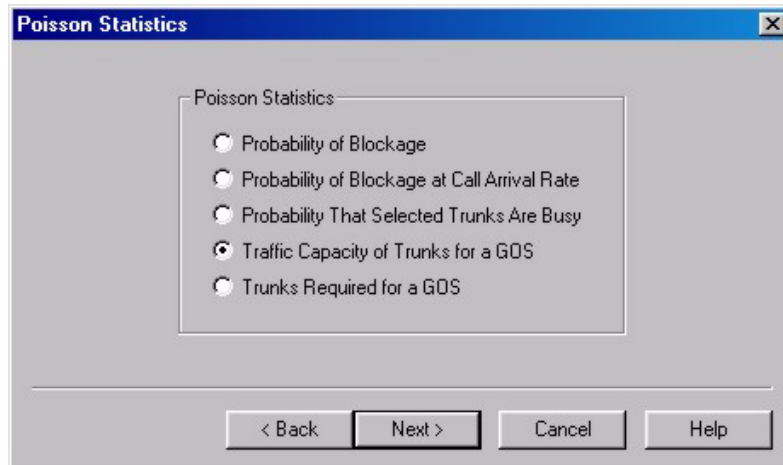
4. Enable the radio button for the desired statistic and click the Next button. The remaining dialog boxes that follow vary according to the type of statistic selected.

5. With each dialog box that follows, enter the calculation parameters and click the Next button to continue to the next dialog box in the Calculation Wizard.

6. In the final dialog box the Next button is replaced by the Finish button. Click Finish to create the traffic analysis based on the selections of the previous dialog boxes.

Poisson Traffic Calculations

This calculation relates the GOS to the number of Trunks and the call load (the number of calls per hour and the average duration of these). The calculator accepts the number of calls per hour, the average call duration, and the number of available Trunks as parameters. Then, it calculates the GOS that results from the call load being presented to the designated number of Trunks.

Although the GOS generally means the probability of Blockage, the GOS in the Poisson model represents the probability that a Caller will receive a busy signal on the first call attempt. The Poisson model assumes that Callers who meet a busy condition will re-try the call. The GOS in the Poisson model does not necessarily represent the probability of a call being unsuccessful, only that it is unsuccessful on the first attempt.

For example, you can determine the probability of getting an all Trunks busy condition in a group of 4 Trunks, where there are 150 calls per hour with an average duration of 70 seconds. The calculation results in a probability of approximately 0.33, meaning that there is a 33% chance of all 4 Trunks being busy at the same time. Because the Poisson model assumes that Callers who meet a busy condition on the first call attempt re-try the call, this is not the same as saying that the Callers have a 33% probability of being unsuccessful in obtaining a Trunk.

<u>Probability of Blockage at Call Arrival Rate (POIS_GOS formula)</u>

This calculation relates the probability of call Blocking to the number of Trunks and to the call load (the number of calls per hour and the average duration of these). The calculator accepts the number of calls per hour, the average call duration, and the number of available Trunks as parameters. Then, it calculates the probability of call Blocking that results from a certain call load being presented to a given number of Trunks.

The term 'probability of Blocking' is used here to distinguish this calculation from that of the Poisson GOS. The probability of Blocking is the chance that a Caller

will meet a busy signal on repeated call attempts, whereas, the Poisson GOS relates only to the chance of receiving a busy signal on the first attempt.

For example, you can determine the probability of a Caller being unsuccessful in getting a free Trunk (even after re-trying the call), when four Trunks are presented, with 150 calls per hour, and an average call duration of 70 seconds. The calculation results in a probability of about 0.16, meaning that there is a 16% chance of a Caller meeting a busy condition on the first and subsequent call attempts.

Notice that the result here is 16%, as opposed to the 33% result obtained when the Poisson GOS was calculated. Together these results mean that the Caller has a 33% chance of meeting a busy condition on the first call attempt and a 16% overall chance of meeting a busy condition on all call attempts.

Probability That Selected Trunks Are Busy (POIS INTEG formula)

This calculation determines the probability that X Trunks or fewer are busy at any point in time when a certain call load is presented to a limited number of Trunks. The calculator accepts the number of calls per hour, the average call duration, and the number of Trunks as parameters. Then, it calculates the probability that X or fewer number of the Trunks will be busy at any point in time.

This calculation might be applied where you suspect that you have too many Trunks in a Trunk Group and you wish to determine the peak number of Trunks required. In this situation you may wish to know the probability that eight or fewer Trunks are busy in a group of 10, when presented with 150 calls per hour, with an average call duration of 70 seconds.

This calculation might be applied where you suspect that you have too many Trunks in a Trunk Group and you wish to determine the peak number of Trunks required. In this situation you may wish to know the probability that eight or fewer Trunks are busy in a group of 10, when presented with 150 calls per hour, with an average call duration of 70 seconds.

This calculator allows you to calculate the probability that 8 or fewer Trunks are busy. Then, you can calculate the probability that 9 or fewer Trunks are busy. If the difference between the probability of 9 or fewer Trunks, and 8 or fewer Trunks being busy is small, then it may be that no more than 8 Trunks are required (statistical comparison).

Traffic capacity of Trunks for a GOS (POIS_TRAF formula)

This calculation determines the traffic or call load that can be handled by a limited number of Trunks within a stated GOS. The calculator accepts the number of Trunks with the required GOS, and the average call duration as parameters. Then, it calculates the number of calls per hour that can be handled. For example, you can determine the required call load, with an average call duration of 70 seconds, that can be handled by three Trunks, while maintaining a GOS within the value of P.03. If this calculation shows that the number of calls per hour that can be handled is less than expected, then the following is true. The number of Trunks must be increased to maintain the GOS within target, or the level of Blocking must be allowed to worsen to enable the call load to be handled by the Trunks that are available.

The Blocking formula used in this function is that described in the 'Probability of Blockage at a call arrival rate', not that described in the 'Probability of Blockage for a GOS'.

Trunks Required for a GOS (POIS_TKS formula)

This calculation determines the number of Trunks required to handle a given call load within a given GOS. The calculator accepts the number of calls per hour, the average call duration of these calls and the required GOS as parameters. Then, it calculates the number of Trunks required to handle the call load within the GOS requirement.

For example, you can determine the number of Trunks required to handle 150 calls per hour, with an average duration of 70 seconds, within a GOS of P.02. This is a key calculation in the Forecasting and Scheduling process.

The Blocking formula used in this function is that described in the 'Probability of Blockage at a call arrival rate', not that described in the 'Probability of Blockage for a GOS'.

Understanding Traffic Reports

When a traffic model is selected and one of its formulae is used to perform calculations, a report is presented that resembles the sample Traffic Analyzer report below.
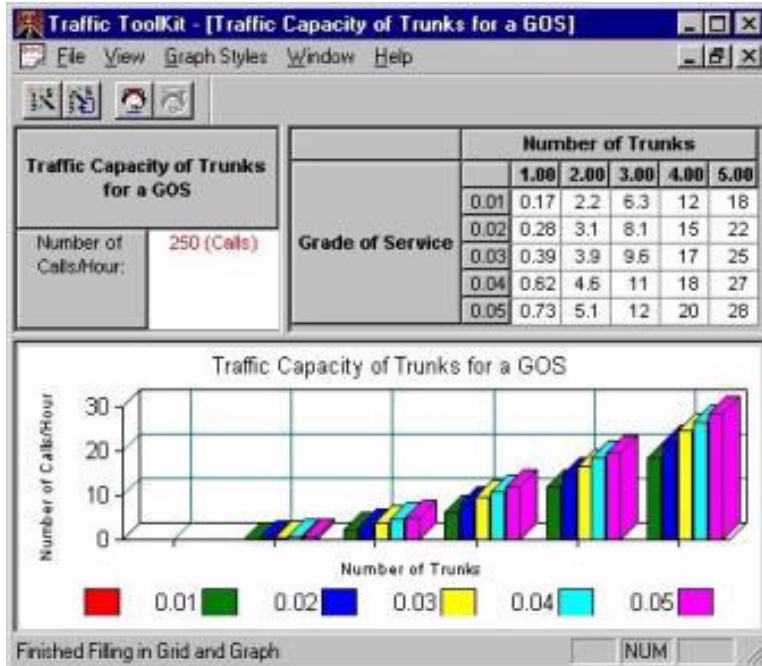
Each report provides an example of the calculation that corresponds to the calculator. All reports contain the following three sections.

- The top left hand side of the report provides a brief explanation of the calculation performed, and any relevant criteria. For example in the above analysis, the report displays that the calculation performed is "Traffic Capacity of Trunks for a GOS" and the calculation is based on the criteria of 250 calls per hour.

- The top right hand side of the report contains the results of the calculation in the form of a table. The example above displays the Grade Of Service required by the Number Of Trunks available. The data in this table corresponds to the graph displayed below, in the bottom half of the report.

- The lower section of the report contains a chart or graph produced using the parameters, data, and results from the table in the top-right section.

Recalculating a Traffic Analysis

You can quickly change the parameters of an existing traffic analysis calculation by using the Recalculation Wizard.

Use the following steps to recalculate the traffic analysis
.
1. Click the Recalculation Wizard button.
2. Enter the new parameters in the dialogs as they are presented.
3. At the final dialog, click Finish to create your analysis graph.

Switching Between Line, Bar, and Pie Charts

By default, all analysis data is displayed in a Simple Line Chart. If your analysis lends itself to presentation in another chart style, you can easily switch to another of the sixteen available styles.

Use the following steps to present the data as a line chart.

1. Use the Calculation Wizard to produce a Simple Line Chart of your data.
2. Click Graph Styles, Line Charts
3. Choose one of the four styles of line charts from the flyout list.

Use the following steps to present the data as a bar chart.

1. Use the Calculation Wizard to produce a Simple Line Chart of your data.
2. Click Graph Styles, Bar Charts
3. Choose one of the ten styles of bar charts from the flyout list.

Use the following steps to present the data as a pie chart.

1. Use the Calculation Wizard to produce a Simple Line Chart of your data.
2. Click Graph Styles, Pie Charts
3. Choose one of the two styles of pie charts from the flyout list.

Calculating Staffing Requirements

The staffing option performs calculations with custom input parameters, and produces reports. The Staffing window is divided into three sections, the Traffic Model Information panel, the Data Table panel and the Graph panel.

Traffic Model Information Panel

The Traffic Model Information panel contains 5 boxes. The first four of these allow the entry of parameters. The fifth box, Agts Required, contains the number of agents required. This value is based on the values entered in the previous four boxes. The dialog box is initially filled with default values for all entries; enter data as single values or within a range.

Traffic Model Information	
Avg. Calls/Hour:	250
Avg. Talk Time (sec):	70
Serv. Goal (%):	80
TSF Time (sec):	20
Agts Required:	7

Data Table Panel

The Average Calls/Hour, Average Talk Time, Service Goal, TSF Time, and Agents Required can be edited in the Traffic Model Information Block. Once the values are entered, the probability of queuing, probability of delay, average delay time, and average queue depth in the Data Table panel is updated in text format and the Graph panel is updated in graphical format. An example of these variables in the Data Table panel is shown below.

Agents	Prob. of Queueing (%)	Prob. of Delay (%)	Avg Delay Time (sec)	Avg Queue Depth (calls)
4	100.00	100.00	1000.00	1000.00
5	93.13	89.51	469.37	32.59
6	53.86	38.90	33.10	2.30
7	29.19	15.84	9.55	0.66
8	14.77	6.02	3.29	0.23
9	6.96	2.13	1.18	0.08
10	3.05	0.70	0.42	0.03

Graph Panel

An example of the variables displayed in graph format is shown below.
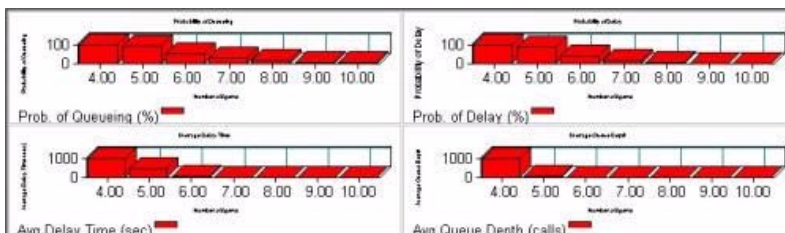
Using the Cost Justification Guide

It is essential to understand the cost components and structure of a customer interaction center. The Traffic Analyzer aids in justifying cost requirements to senior management, and assists in the overall management and operation of the customer interaction center with the Cost Justification Guide.

The guide describes how to calculate cost components using hypothetical cost figures. The cells in the tables of the guide can be edited costs entered that correspond to the customer interaction center. The guide provides various suggestions for reducing customer interaction center operating costs and for increasing customer interaction center revenues.

To open the Cost Justification Guide, click the Cost Justification button on the toolbar. The Cost Justification Guide provides a model for understanding the cost structure of a customer interaction center. To help illustrate the model, an example of a hypothetical customer interaction center's cost structure is provided. This is important to understand because the basis for cost justification comes from projecting how features of the equipment will impact the cost structure of the customer interaction center.

The Cost Justification Wizard includes the following sections: Call Center Cost Dynamics, Load Labor Costs, Equipment and Automation Costs, Transmission Costs, Reducing Call Center Costs, and Increasing Call Center Revenue. Continue for descriptions of each section of the Cost Justification Wizard.

Call Center Cost Dynamics

Your total customer interaction center costs include Loaded Labor Costs, Equipment and Automation Costs, and Transmission Costs. The relative proportion of each cost is illustrated in the customer interaction center Cost Dynamics chart.

Load Labor Costs

Customer interaction center load labor costs are calculated from the following cost components:

- Agent cost per hour
- Facility cost per agent per hour
- Supply cost per agent per hour
- Management and support staff cost per hour

Equipment and Automation Costs

Customer interaction center Equipment and Automation costs may include the ACD system, the computer system, and the furniture used by employees. Equipment and Automation costs are measured in cost per workstation units.

Transmission Costs

Transmission Costs include the cost of both voice and data transmission.

Reducing Call Center Costs

Customer interaction center managers must justify the costs of equipment features by identifying the operational savings they provide. Cost justification examples are provided for the following customer interaction center features:

- Delayed Answer
- Agent Telephone
- Wrap-Up Data Entry
- Voice Response

Increasing Call Center Revenue

Total annual revenues may significantly increase with the use of an ACD system. Your potential increased revenue can be determined using the Increasing Call Center Revenue Worksheet.

TASKE Agent Desktop

The TASKE Agent Desktop is a PC-based version of TASKE WallSign that is only available through an Agent installation of the TASKE ACD ToolBox. Using the Agent Desktop application, agents view current call center conditions in a sizable, on-screen window that displays user-specified, real-time call center data on the computer desktop. By continuously updating agents with real-time data on call activity, the TASKE Agent Desktop is an important tool in maintaining call center service levels.

The TASKE Agent Desktop displays queue status information, call center performance parameters, system time and other measures for Queues or Queue Groups. Statistics are displayed in cells that change color when call traffic exceeds pre-defined thresholds, alerting agents to take action before potential problems arise.

The Agent Desktop interface is a table that floats on the Windows desktop or docks to one of its edges. On the surface, the Agent Desktop application window appears to have no control mechanisms. **To access the program features and functionality, right-click anywhere in the application window to launch the program menu.**

The application window is sizable by clicking and holding the left mouse button on the border of the window, and dragging until the desired window size is obtained. View the application window horizontally, vertically, or as a grid, with user-defined dimensions. When viewed as a grid, the Agent Desktop window is only viewable as a floating window. When viewed horizontally or vertically, users have the ability to dock the application window to any edge of the Windows Desktop. The docking feature resizes all other application windows, allowing agents to view call and queue statistics while working in other applications.

To view the Agent Desktop window when the application is running, but the window is hidden from view, double-click the Agent Desktop icon in the Windows system tray.

Starting Agent Desktop

The Agent Desktop application is opened from the Windows desktop. Use one of the following methods to open the application.

Opening the Agent Desktop Using the Start Button

Use the following steps to open the Agent Desktop application using the Start button on the Windows desktop.
1. Click Start on the toolbar of the Windows desktop.
2. Select Programs from the menu.
3. Select the TASKE folder in the list of programs.
4. Select Agent Desktop from the list of TASKE applications to open the Agent Desktop application.

Opening the Agent Desktop from the TASKE Program Folder

Use the following steps to open the Agent Desktop application from the TASKE ToolBox program folder.
1. Double-click the TASKE ToolBox folder icon on the Windows desktop to open the TASKE ToolBox folder.
2. Double-click the Agent Desktop icon in the folder to open the Agent Desktop application.

Using the Agent Desktop Interface

On the surface, the Agent Desktop application window appears to have no control mechanisms. **To access the program features and functionality, right-click anywhere in the application window to launch the program menu.** By default, when the Agent Desktop application starts, it automatically opens the settings file that was used last. However, in the event that a settings file was not open when the application closed, or it is the first time opening the application after installation, the application window is blank when the application starts.

Agent Desktop - No Settings File Open

Agent Desktop - Settings File Open

New Settings
Open Settings...
Save Settings
Save Settings As...

Add Variable For ▶
Delete Variable
Edit Variable
Change Display Order...

✓ Undock
Dock ▶
View ▶
Change Font...
Always On Top
Display Variables ▶

Chat ▶

Restore
Hide

Help: Contents
Help: Chat Contents
About Agent Desktop...

Exit
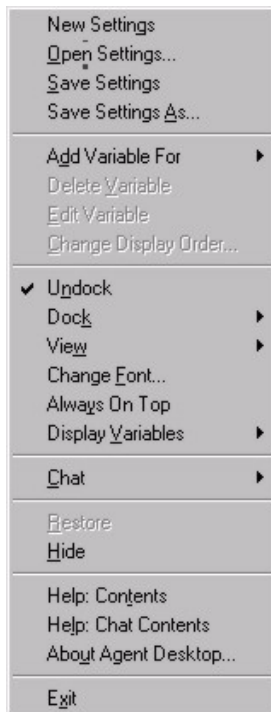
Because the Agent Desktop application must share the PC desktop with other applications, it is very important that it maximize the workspace available. To aid in the maximization of workspace, the application controls are situated in a pop-up menu that is accessed by right-clicking in the application window or by right-clicking the Agent Desktop icon in the Windows system tray. The menu provides access to all of the features and functionality of the application.

Adjusting the Window Size and Position

As long as the Agent Desktop is in a floating state, meaning that it is not docked to the PC desktop, it can be resized and moved to any location on the PC desktop. Adjust the Agent Desktop window to be as small as a few pixels or as large as the full desktop. As the window size is adjusted, the font size is automatically adjusted to accommodate the new window size.

To adjust the window size, move the cursor to the border of the Agent Desktop window. When the mouse pointer becomes a double-headed arrow, click and hold the left mouse button. Drag the mouse until the Agent Desktop reaches the desired size and release the mouse button.

To re-position the Agent Desktop window on the PC desktop, move the mouse pointer to any position within the Agent Desktop window. Click and hold the left mouse button. Drag the Agent Desktop window to the desired position and release the mouse button.

Agent Desktop Display Window: Hide/Restore Versus Always on Top

Use the Hide/Restore and Always on Top options to control the display of the Agent Desktop window.

Hide/Restore

Select Hide from the program menu to minimize the Agent Desktop application. If the application window is already hidden, the Hide menu option is not available for selection. When hidden the application is still running in the background, but is not visible.

There are two methods for viewing the Agent Desktop window when it is hidden:

 a. Double-click the Agent Desktop icon in the Windows system tray.
 b. Right-click the Agent Desktop icon in the Windows system tray and select Restore from the menu.

Always on Top

Select Always on Top from the program menu to force the Agent Desktop application window to the forefront of the PC desktop at all times. This means that the application window can never be covered by another application. When the Always on Top option is selected in the program menu, a check mark is present beside the menu item.

Creating, Saving, and Opening Agent Desktop Settings

A settings file is a file that contains the user-defined display parameters for a group of statistics selected by the user. Saving the display settings allows the user to open the settings file and view the statistics, rather than adding the variables to the window each time the application is started. Several settings files may be required to suit different users, shifts, and situations. Create any number of settings files to serve every user, every shift, and every situation.

Creating a New Settings File

Use the following steps to create a new settings file.

 1. Right-click anywhere within the Agent Desktop window to open the program menu.
 2. Select New Settings from the menu. This action clears the window of any variables currently displayed or closes the settings file that is open. The user is prompted to save the current settings before any variables are cleared or a settings file is closed.
 3. Add the desired variables to the application window.
 4. Save the new settings file.

Saving a New Settings File

Use the following steps to save a new settings file.

 1. Define the desired variables for display in the Agent Desktop window.
 2. Right-click anywhere within the Agent Desktop window to open the program menu.

3. Select Save Settings As... from the menu to open the Save As dialog box.
4. Select the desired location for the settings file on the PC or network from the Save in: drop-down list. This list provides the available PC and network locations for saving the file. The default location for Agent Desktop settings files is TASKE/Prefs/AgentDesktop.
5. Input a name for the settings file in the File name: field.
6. Ensure the file type in the Save as type: field is: Settings File (*.adt).
7. Click OK to save the new settings file.

Saving an Existing Settings File

Use the following steps to save an existing settings file.

1. Change the variable display as desired in the Agent Desktop window.
2. Right-click anywhere within the Agent Desktop window to open the program menu.
3. Select Save Settings... from the menu to save the file using the same name and the same location. If the file is new, the Save Settings... option opens the Save As dialog box, prompting the user to input the file name and location.

Opening a Settings File

Use the following steps to open a settings file.

1. Right-click anywhere within the Agent Desktop window to open the program menu.
2. Select Open Settings... from the menu to open the Open dialog box.
3. Select the location of the settings file on the PC or network from the Look in: drop-down list. This list provides the available PC and network locations for saving the file. The default location for Agent Desktop settings files is TASKE/Prefs/AgentDesktop.
4. Select the desired setting file from the list of files.
5. Click Open to open the settings file in the Agent Desktop window.

Adding, Editing, and Deleting ACD Variables

The Agent Desktop receives real-time, statistical ACD information, or ACD variable information, from the Information Server. To display this information in the Agent Desktop application window, the user must define each ACD variable and its display parameters. The display parameters include setting threshold ranges and the corresponding colors for each. Using the thresholds and the colors, the cell for an ACD variable is able to change color according to the current threshold range for the ACD variable. This color change alerts agents to changes in the conditions of the customer interaction center.

Adding ACD Variables to the Agent Desktop Window

Use the following steps to define the display settings for an ACD variable and add it to the Agent Desktop window.

1. Right-click anywhere within the Agent Desktop window to open the program menu.
2. Select Add Variable For from the menu. A sub-menu opens displaying a list of the available Queues and Queue groups.
3. Select a Queue or Queue Group from the list to open the Background/Foreground Colors for ACD Statistic dialog box.
4. Select a statistic (ACD variable) from the ACD Statistic drop-down list.
5. Input a name for the ACD variable in the ACD Statistic Name field. A default name should already be present in this field. To accept the default name, do not enter anything in the field.
6. Define the ACD variable threshold ranges and colors. Define color combinations for up to three threshold ranges.
7. Click OK to accept the settings for the new ACD variable and display in the ACD variable in the Agent Desktop window.

Editing ACD Variables

Use the following steps to edit the name or display parameters of an ACD statistic.

1. Right-click anywhere within the Agent Desktop window to open the program menu.
2. Select Edit Variable from the menu. A sub-menu opens displaying a list of the defined ACD variables by Queue/Group.
3. Select an ACD variable from the list to open the Background/Foreground Colors for ACD Statistic dialog box.
4. Change the ACD variable name as desired.
5. Change the ACD variable threshold ranges and colors as desired.
6. Click OK to accept the changes and close the dialog box.

Deleting ACD Variables

Use the following steps to delete an ACD variable. This action removes the ACD variable from the Agent Desktop window.

1. Right-click anywhere within the Agent Desktop window to open the program menu.
2. Select Delete Variable from the menu. A sub-menu opens displaying a list of the defined ACD variables by Queue/Group.
3. Select the ACD variable to delete from the list. The variable is immediately removed from the Agent Desktop window.

Defining Thresholds for ACD Variables

The display parameters for ACD variables include setting threshold ranges and the corresponding colors for each. Using the thresholds and the colors, the cell for an ACD variable is able to change color according to the current threshold range for the ACD variable. This color change alerts agents to changes in the conditions of the customer interaction center.

Use the following steps to define the three threshold ranges and the corresponding colors for an ACD variable.

1. Right-click anywhere within the Agent Desktop window to open the program menu.
2. Perform one of the following actions to open the Background/Foreground Colors for ACD Statistic dialog box.
   a. If the process involves adding a new ACD variable, select Add Variable For from the menu. A sub-menu opens displaying a list of the available Queues and Queue groups. Select a Queue or Queue Group from the list to open the Background/Foreground Colors for ACD Statistic dialog box. In this case, the user must select an ACD statistic and define the ACD variable name prior to defining the thresholds and color ranges.
   b. If the process involves editing an existing ACD variable , Select Edit Variable from the menu. A sub-menu opens displaying a list of the defined ACD variables by Queue/Group. Select an ACD variable from the list to open the Background/Foreground Colors for ACD Statistic dialog box.

3. Locate the Colors and Thresholds for ACD Statistics area of the dialog box. Notice that only the two middle threshold values are editable. The top value defines the minimum value for the statistic and the bottom value defines the maximum value for the statistic. Depending on the type of ACD Statistic selected, the threshold values may be in a time format or a numeric format.

4. Input the threshold value in the field between Range 1 and Range 2 to define the first threshold range. This threshold range includes all values between the minimum value and the value input by the user in the first editable field.

```
┌──────────┐
│  00:00   │
└──────────┘
  |---Range 1 =====>
┌──────────┐
│  03:00   │
└──────────┘
  |---Range 2 =====>
┌──────────┐
│  07:00   │
└──────────┘
  |---Range 3 =====>
┌──────────┐
│  99:99   │
└──────────┘
```

5. Input the threshold value in the field between Range 2 and Range 3. This defines both the second and third threshold ranges.
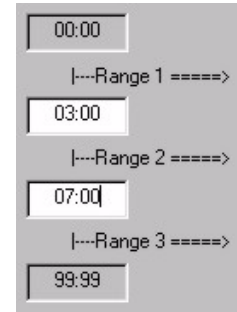
   a. The second threshold range includes all values between the first user-defined threshold value and the second user defined threshold value.
   b. The third threshold range includes all values between the second user-defined threshold value and the maximum value.

6. If desired, click the Background color box in the Colors for Range 1 section to open the Color dialog box and change the default background color for the ACD variable cell in the Agent Desktop window.
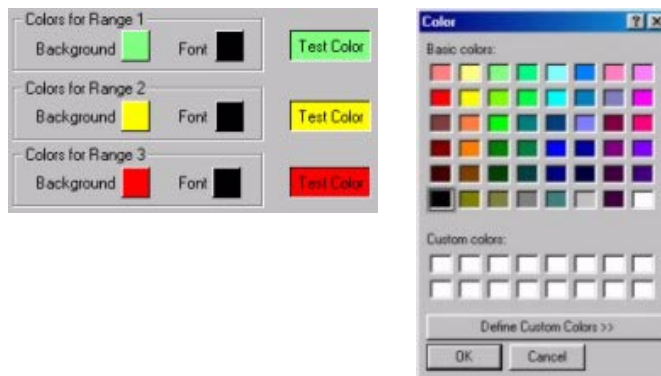
7. Select the desired color for the background of the ACD variable cell in the Agent Desktop window.
8. Click OK to accept the color choice and close the Color dialog box.
9. If desired, click the Font color box in the Colors for Range 1 section to open the Color dialog box and change the default font color for the text in the ACD variable cell.
10. Click OK to accept the color choice and close the Color dialog box.
11. If desired, repeat steps 7 to 11 in the Colors for Range 2 and the Colors for Range 3 sections.
12. Click OK to accept the thresholds and color ranges and close the Background/Foreground Colors for ACD Statistic dialog box.

Filtering Cell Information

Each cell in the Agent Desktop window can display up to six items. These items are:

- ✔ Icon
- Pilot (Group) ID
- ✔ Pilot (Group) Full Name
- Pilot (Group) Nick Name
- ✔ Variable Name
- ✔ Value
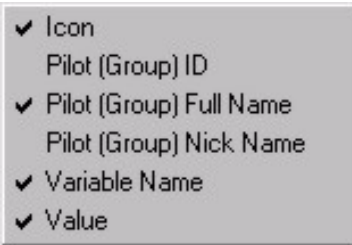
- • a state icon
- • the Queue/Group ID
- • the Queue/Group name
- • the Queue/Group nick name
- • the ACD variable name
- • the value of the ACD variable.

Users can choose to display all or none of these items. By default, the state icon, Queue/Group ID, Queue/Group name, the ACD variable name, and the ACD variable value are displayed. The information selected for display is selected for all cells, these settings cannot be defined for individual cells in the Agent Desktop window.

Selecting Cell Information for Display

Use the following steps to select or de-select cell information for display.

1. Right-click anywhere within the Agent Desktop window to open the program menu.
2. Select View from the menu. A sub-menu opens displaying the list of items available for display. A check mark beside an item in the list means that the information is already selected for display.
3. Select an item from the list.
   a. Selecting an item with a check mark de-selects that item, meaning that the information is removed from the cells.
   b. Selecting an item without a check mark selects that item, meaning that the information is added to the cells of the Agent Desktop.

Docking the Agent Desktop Window to the PC Desktop

Dock the Agent Desktop window to the PC desktop in a similar manner to any other Windows application. A docked application window affixes itself to a particular location on the PC desktop and cannot be moved unless it is undocked. The Agent Desktop window can dock to any edge of the PC desktop, meaning the top, bottom, right, or left of the screen. All other applications resize to fit in the remaining desktop space. The only exception to this applies to the grid display. When displayed as a grid, the Agent Desktop window cannot be docked to the Windows Desktop.

Docking the Agent Desktop Window

Use the following steps to dock the Agent Desktop window to the PC Desktop.

1. Right-click anywhere within the Agent Desktop window to open the program menu.
2. Select Dock from the menu. A sub-menu opens displaying the list of window orientations available. These are Left, Right, Top, and Bottom.
3. Select a window orientation from the menu. The Agent Desktop window docks to the selected side of the PC desktop, and resizes/moves all other desktop applications to fit.

Undocking the Agent Desktop Window

Use the following steps to undock the Agent Desktop window from the PC Desktop.

1. Right-click anywhere within the Agent Desktop window to open the program menu.
2. Select Undock from the menu. The Agent Desktop undocks from the selected side of the PC desktop, and returns to its original state of floating.

Changing the Variable Display

By default, any variables added to the Agent Desktop are displayed horizontally in the order they are created. Users can change the order of the ACD Variables in the Agent Desktop window as well as change the orientation of the application window on the PC desktop. There are three views for the Agent Desktop. These are Vertical, Horizontal, and Grid.

Changing the Display Order of Variables

Use the following steps to change the display order of the ACD variables in the Agent Desktop window.

1. Right-click anywhere within the Agent Desktop window to open the program menu.
2. Select Change Display Order... from the menu to open the Change Variable Order dialog box.
3. Choose an ACD variable from the list of ACD variables.
4. Change the order of the ACD variable in the list using one of the following methods.
   a. Click the ACD variable to move and drag it to the desired location in the list.
   b. Select the ACD variable to move and click the up/down arrows in the top, left corner of the dialog box to move the ACD variable through the list.
5. Click OK to accept the order of the variables and close the dialog box.

Displaying Variables Horizontally

Use the following steps to display the variables in the Agent Desktop window horizontally.

1. Right-click anywhere within the Agent Desktop window to open the program menu.
2. Select Display Variables from the menu. A sub-menu opens displaying a list of the orientation settings for the Agent Desktop window..
3. Select Across from the sub-menu. The variables automatically rearrange to a horizontal configuration within the Agent desktop.

Displaying Variables Vertically

Use the following steps to display the variables in the Agent Desktop window vertically.

1. Right-click anywhere within the Agent Desktop window to open the program menu.
2. Select Display Variables from the menu. A sub-menu opens displaying a list of the orientation settings for the Agent Desktop window..
3. Select Downward from the sub-menu. The variables automatically rearrange to a vertical configuration within the Agent desktop.

Displaying the Agent Desktop as a Grid

Use the following steps to display the variables in the Agent Desktop window in a grid formation. It is important to note that the Agent Desktop cannot be docked when it is displayed as a grid.

1. Right-click anywhere within the Agent Desktop window to open the program menu.
2. Select Display Variables from the menu. A sub-menu opens displaying a list of the orientation settings for the Agent Desktop window..
3. Select Grid from the sub-menu open the Agent Desktop Grid Setting dialog box.
4. Input the number of rows and columns for the grid.
5. Click OK. The variables automatically rearrange to the defined grid configuration within the Agent desktop.

Changing the Font

The Agent Desktop uses the same font for all variables displayed in the cells of the application window. The font is automatically sized to fit the window. Change the font to any installed font on the PC. The standard Windows Font dialog box allows you to change the font used to display the ACD variables in the Agent Desktop Window.
Use the following steps to change the font in the cells of the Agent Desktop window.

1. Right-click anywhere within the Agent Desktop window to open the program menu.
2. Select Change Font... from the menu to open the Font dialog box. .
3. Select a font from the Font list of installed fonts. The sample section of the dialog box provides a preview of the font selected in the list.
4. Select a style from the Font Style list. The sample section of the dialog box provides a preview of the selected font with the selected style applied.
5. Click OK to select the font settings and close the dialog box.

Exiting from the Agent Desktop Application

Use the following steps to exit from the Agent Desktop application.

1. Right-click anywhere within the Agent Desktop window to open the program menu.
2. Select Exit from the menu. If the current settings are not saved, the application prompts the user to save the settings. Otherwise, the application window closes and the program shuts down.

TASKE Search

To effectively manage a call center, supervisors require accurate and current information about all activities. The primary activities include handling telephone calls and responding to telephone inquiries. A supervisor requires detailed information regarding the quantity, distribution, and type of telephone calls handled.

The IWATSU ADIX system tracks call center activities and produces real-time event records providing information about all the calls made and received. Every inbound and outbound call results in the generation of a basic real-time event record and several situations cause the creation of multiple records for the same call. Additional records of interest are generated whenever an unsupervised transfer to a Pilot is performed or when a call is recalled out of an ACD queue. It is obvious that a single day in a typical call center that receives thousands of calls a day produces a vast amount of data.

In some situations it is necessary to examine the raw event records from the PBX. The TASKE Search utility allows users to extract specific real-time event records and to save them as a .txt file readable by word processing and text editing software applications. Examining this smaller, and more manageable, number of records simplifies the task of extracting the required information.

To extract the required records from the mass of records created in a day, the TASKE Search application provides a powerful and flexible search mechanism that allows users to specify call criteria. The search criteria is used to filter the records and produce an output of real-time event records for those calls that match the specified conditions. The action of the Search program is exclusive and not inclusive, meaning that records failing to match the required criteria are excluded.

The Search program uses two filtering methods to find records: an Event Filter and Call Type Filter. The Event Filter is used to search for individual records, while the Call Type Filter is used to search for specific types of calls.

Using the Search Interface

The control and use of the TASKE Search utility is exercised through the user interface. The TASKE Search interface consists of the Main Window, the Information Window, the Information Tabs, and the Menu Bar.

Main Window

The Main Window acts as a shell for five sub-windows that present call event information. The sub-windows housed by the Main Window are the PBX file window, the Event Filtered search window, the Call Type search window, the Explanation window, and the Sorted window. The PBX file window is the basis for the remaining four windows. This window contains all call event records for

the selected day. The information in the Event Filtered window, the Call Type window, the Explanation window, and the Sorted window are the result of conducting searches on the PBX file, requesting an explanation for the call events, or sorting the event records contained in the PBX file. Creating a Filter By Events opens the Event Filtered search window that contains the search results and creating a Filter By Call Type opens the Call Type search window that contains the search results. The Explanation window changes the view of the PBX file window to include a record description with each call event record. The Sorted window sorts the event records in the PBX file by the call ID. Switch between the windows using the Information Tabs located at the base of the Main Window.

Information Window

The Information Window opens when a search is conducted or an explanation of call records is requested. The Information Window provides a description of the type of information in the Main Window. The content of the Information Window varies according to the sub-window selected in the Main Window. By default, the Information Window is docked vertically, on the right side of the Search program interface, but its position is variable. Dock the Information Window to the left side of the interface, horizontally, to the top or bottom of the interface, or view it as a floating window. To re-situate the Information Window in the Search interface, use the mouse to drag the window to the desired screen position and drop it in the new position.

Information Tabs

The Information Tabs are located at the base of the Main Window. Use these tabs to select a window for viewing within the Main Window. Selection of a window using the Information Tabs also affects the content of the Information Window. The availability of the Information Tabs depends on the windows that are open in the Main Window. These tabs are the PBX Data tab, the Explanation tab, the Sorted tab, the Event Filtered tab, and the Calls Filtered tab.

Menu Bar and Toolbars

The Menu Bar and Toolbar span the top of the TASKE Search interface. The Menu Bar provides keyboard or mouse access to the functions of the TASKE Search utility. The Toolbars provide one-click shortcuts to a number of the functions accessed via the Menu Bar. The Menu Bar contains six menus: File, Edit, View, Tools, Window, and Help.

Opening PBX files

To begin using the TASKE Search utility, open a PBX file. The Search program opens standard PBX files (.pbx) and compressed files (.zip).

Use the following steps to open a PBX file.

1. Choose Open from the File menu.
2. Select a PBX file to open from the \\taske\SiteData\Smdr\ directory.
3. Click Open.

The PBX Data window opens in the Main Window. The window contains the event records for the selected day.

The PBX file naming convention includes the date. For example, IW991012.pbx was created on October 12, 1999.

Printing Search Information

Preview and print the search results for each window individually. The printed page includes a header with the window name, date and time and a footer that includes the page number.

Print Preview from the Main Window

Use the following steps to use the Print Preview option to preview and print the search results from the Main Window.

1. Select the Information Tab of the window to preview and print.
2. Select Print Preview from the File menu to open a print preview of the selected window.
3. Use the Next Page, Prev Page, One/Two Page, Zoom In, and Zoom Out buttons to view the search results.
4. Click Print to open the Print dialog box and print the search results or Close to exit the print preview window.

Printing the Main Window Contents

Use the following steps to print the contents of the Main Window.

1. Select the Information Tab of the window to print.
2. Click ⎙ on the Toolbar or select Print from the File menu to open the Print dialog box.
3. Select the printer, print range, and the number of copies.
4. Click OK.

Printing the Information Window Contents

Use the following steps to print the contents of the Information Window.

1. Select Print Info Window from the File menu or click 🖨 on the Search Toolbar to open the Print dialog box.
2. Select the printer, print range, and the number of copies.
3. Click OK.

Copying Information to the Clipboard

Copy the event records from any of the windows open in the Main Window to the Windows Clipboard. From the Windows Clipboard, the information is available for pasting into other applications.

Use the following steps to select several successive records and copy the selection to the Clipboard.

1. Select the Information Tab of the window containing the records to copy in the Main Window.
2. Drag the mouse pointer from the beginning of the first record to the end of the last record to copy.
3. Click 📋 or select Copy from the Edit menu to copy the selected records to the Clipboard.

Use the following steps to select several non-successive records and copy the selection to the Clipboard.

1. Select the Information Tab of the window containing the records to copy in the Main Window.
2. Drag the mouse pointer from the beginning of a record to the end of the record.
3. Repeat step 2 until all required records are highlighted.
4. Click 📋 or select Copy from the Edit menu to copy the selected records to the Clipboard.

Saving Search Information

Save the results of a search filter as a text file for use with text editing or word processing software applications.

Use the following steps to save information from the <u>Main Window</u> as a .txt file.

1. Select the Information Tab of the window to save.
2. Click 🖫 or select Save As from the File menu to open the Main Window - Save As dialog box.
3. Choose the destination directory and type a name for the file.
4. Click Save.

Use the following steps to save information from the <u>Information Window</u> as a .txt file.

1. Click 🔢 or select Save Info Window from the File menu to open the Info Window - Save As dialog box.
2. Choose the destination directory and type a name for the file.
3. Click Save.

Using the Search Commands

The commands of the Search applications are available through the menus of the menu bar. For speed and convenience, many of these commands are also provided on the toolbar.

Using the File Menu

The File menu consists of the following commands:

Menu Bar Command	Toolbar Button	Description
Open	📂	The Open command provides the Open dialog box where A PBX file is selected for viewing in the TASKE Search interface. PBX files are found in \\taske\smdr\ on the PC.
Close	N/A	The Close command closes the selected window. To close a window, select the desired information tab to display the window and choose Close from the File menu. The File Info tab is the only information tab that does not accept the Close command.
Save As	🖫	The Save As command is used to save the data in the currently selected Main Window tab as a text file (.txt).

Menu Bar Command	Toolbar Button	Description
Print Preview	N/A	The Print Preview command displays how the currently selected Main Window tab will look when printed. View multiple pages, magnify or reduce the size of the page on the screen, or print the current page.
Print		The Print command sends the currently selected Main Window tab to the printer. The Print dialog box specifies the print options before printing.
Save Info Window		The Save Info Window command is used to save the data in the currently selected Information Window tab as a Text file (.txt). The Save Info Window command is only available when the Information Window is open.
Print Info Window		The Print Info Window command sends the currently active information window to the printer. The Print dialog box specifies the print options before printing. The Print Info Window command is only available when the Information Window is open.
Exit		The Exit command closes the current search session without saving and shuts down the Search utility. The Exit button is located in the right corner of the Title Bar, directly above the Menu Bar.

Using the Edit Menu

The Edit menu consists of the following commands:

Menu Bar Command	Toolbar Button	Description
Copy		The Copy command sends the current selection to the Windows clipboard. From the clipboard the selection is available to other applications. The Copy command is only available when records are selected from any of the windows accessed through the Main Window.

Using the View Menu

Use the features of the View menu to customize the Search interface or to refresh the display.

Menu Bar Command	✔ File Toolbar
Toolbar Button	N/A
Description	The File Toolbar command enables or disables the toolbar view. A check mark indicates the view of the File Toolbar is on. The absence of a check mark indicates the view of the toolbar is off. The toolbar provides quick access to file related commands.

Menu Bar Command	✔ Search Toolbar
Toolbar Button	N/A
Description	The Search Toolbar command enables or disables the toolbar view. A check mark indicates the view of the Search Toolbar is on. The absence of a check mark indicates the view of the toolbar is off. The toolbar provides quick access to search and display related commands.

Menu Bar Command	✔ Status Bar
Toolbar Button	N/A
Description	The Status Bar displays program status information and information on the selected window.

Menu Bar Command	✔ <u>W</u>orkbook Mode
Toolbar Button	N/A
Description	Enabling the Workbook Mode displays the Information Tabs at the base of the Main Window. Disabling the Workbook Mode hides the Information Tabs and the Window menu on the Menu Bar must be used for window selection.

Menu Bar Command	✔ <u>I</u>nfo Window
Toolbar Button	🔲
Description	Enabling the Info Window menu item displays the Information Window. Disabling this option hides the Information Window and the Main Window uses real estate reserved for the Information Window.

Menu Bar Command	Refresh Display
Toolbar Button	🔲
Description	The Refresh Display command redraws all windows after changes made to fonts or colors.
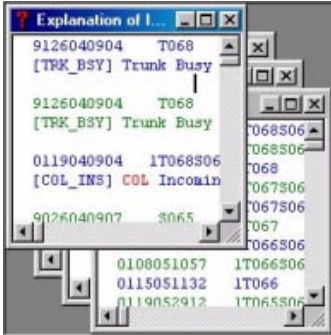
Using the Tools Menu
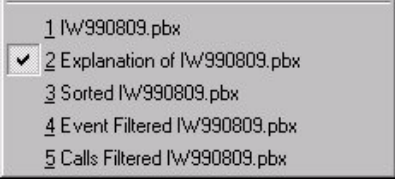
The Tools menu consists of the following commands:

Menu Bar Command	Toolbar Button	Description
Sort By Call ID		The Sort By Call ID command automatically sorts the telephone system data by Call ID. The Sorted window opens in the Main Window, containing the filtered data. This function is only available when the PBX Data tab is selected in the Main Window.
Explain Records		The Explain Records command opens the Explanation window in the Main Window. The Explanation window changes the view of the PBX file window to include a record description with each call event record.
Filter By Events		The Filter By Events command opens the Event Filter dialog box. Define search parameters for the type of event data to search for, including ACD, ICM, and COL events. This function is only available when the PBX data tab is selected in the Main Window.
Filter By Call Type		The Filter By Call Type command opens the Call Type Filter dialog box. Define search parameters for call types, including: Calls Answered, Abandoned, Interflowed, and Overflowed. This function is only available when the PBX data tab is selected in the Main Window.
Preferences		Use the Preferences command to customize fonts, display colors, and define keywords in the Keyword list.

Using the Window Menu

The Window menu contains selections that switch between and arrange the sub-windows of the Main Window.

Menu Bar Command	Toolbar Button	Description
Cascade	N/A	The Cascade command layers the open windows in the Main Window.
Tile	N/A	The Tile command uses the Main Window area to display all of the open windows simultaneously.
Arrange Icons	N/A	The Arrange Icons command automatically arranges the Title Bars of the minimized windows in the Main Window.

Menu Bar Command	Toolbar Button	Description
Select Window	N/A	The Window Menu displays the windows that are open in the Main Window. Only those that are open appear on the menu. Use the list to switch between the windows. A check mark next to an item indicates the current window selection. 1 IW990809.pbx ✓ 2 Explanation of IW990809.pbx 3 Sorted IW990809.pbx 4 Event Filtered IW990809.pbx 5 Calls Filtered IW990809.pbx

Using the Help Menu

The Help menu consists of the following commands:

Menu Bar Command	Toolbar Button	Description
Help Contents	?	The Help Contents command opens the online help file for the TASKE Search utility.
About Search Tool	N/A	The About Search Tool command opens the About Search Tool dialog box where version and copyright information is available for the TASKE Search utility.

Understanding Call Event Records

The TASKE Search utility provides a means for call center supervisors to view call center activity directly from the records produced by the PBX. These records, though somewhat cryptic, provide comprehensive call center information that is searchable. By creating search filters, supervisors view only the records that conform to the defined search criteria.

Deciphering the information included in a call event record is a difficult task when viewing records directly from the PBX. A call event record is a record that describes an event occurring within the PBX and its associated phone system. There are three event types, ACD events, COL events, and ICM events. The content of call records depends on the events the records are reporting.

The first three fields in all event records are the same regardless of the event type. These fields are the event code, the time, and the call ID. The remaining information in an event record is event specific.

Event Code - each event has a unique identifier known as an event code. The code is a four-digit hexadecimal number, meaning that it can include numerical characters from 0 to 9 and alpha characters from A to F.

Event Time - the event time is the second field in an event record. This field presents the time the event occurred using the format of the 24-hour clock. No separators are used to differentiate between hours, minutes, and seconds, making 10:45:20 PM appear as 224520.

Call ID - the call ID is the third field in an event record. The call ID is a number assigned to a call when it enters the system. If an event occurs that is unrelated to a call, this field is blank. For those records related to calls, the call ID is any number from 1 to 9999. The call ID follows a call from its inception to its termination. When the call is terminated, the call ID is available for reuse by new calls entering the system.

Identifying ACD Events

ACD events refer to calls handled through the ACD (Automatic Call Distribution) queue. Following are descriptions for all of the ACD event records. These descriptions include the event code, the event title, and a description of the information the event presents in the format it is presented. The Format section of the event descriptions provide a number in parentheses for each field in the record. These numbers indicate the maximum number of characters for the field.

Event Code:	**3307**
Event:	ACD Hold Pickup
Format:	Event Code (4), Time (6), Call ID (4), Trunk/Station Number (4), Station Number Picking Up (4), Blank Field (4), ACD Group Number (4)

Event Code:	**3308**
Event:	ACD Incoming Pickup
Format:	Event Code (4), Time (6), Call ID (4), Trunk/Station Number (4), Station Number Picking Up (4), Blank Field (4), ACD Group Number (4)

Event Code:	**330B**
Event:	ACD Barge In
Format:	Event Code (4), Time (6), Call ID (4), Trunk/Station Number (4), Station Number Barging In (4), Blank Field (4), ACD Group Number (4)

Event Code:	**330C**
Event:	ACD Line Hold
Format:	Event Code (4), Time (6), Call ID (4), Trunk/Station Number (4), Station Number Holding (4), Blank Field (4), ACD Group Number (4)

Event Code:	**330D**
Event:	ACD Camp-on
Format:	Event Code (4), Time (6), Call ID (4), Trunk/Station Number (4), Originating Station Number (4), Receiving Station Number (4), ACD Group Number (4)

Event Code:	**330E**
Event:	ACD Transfer
Format:	Event Code (4), Time (6), Call ID (4), Trunk/Station Number (4), Originating Station Number (4), Receiving Station Number (4), ACD Group Number (4)
Event Code:	**3315**
Event:	ACD Line Disconnect
Format:	Event Code (4), Time (6), Call ID (4), Trunk/Station Number (4), Blank Field (4), Blank Field (4), ACD Group Number (4)
Event Code:	**331A**
Event:	ACD Incoming Call End
Format:	Event Code (4), Time (6), Call ID (4), Trunk/Station Number (4), Blank Field (4), Blank Field (4), ACD Group Number (4)
Event Code:	**333D**
Event:	ACD Reply
Format:	Event Code (4), Time (6), Call ID (4), Trunk/Station Number (4), Blank Field (4), Blank Field (4), ACD Group Number (4)
Event Code:	**3347**
Event:	ACD Holding Status Change
Format:	Event Code (4), Time (6), Call ID (4), Trunk/Station Number (4), Hold Type (4), Blank Field (4), ACD Group Number (4)
Event Code:	**3350**
Event:	ACD Originating Call
Format:	Event Code (4), Time (6), Call ID (4), Trunk/Station Number (4), Blank Field (4), Blank Field (4), ACD Group Number (4)
Event Code:	**3370**
Event:	ACD Queue
Format:	Event Code (4), Time (6), Call ID (4), Trunk/Station Number (4), Priority (4), Blank Field (4), ACD Group Number (4)
Event Code:	**3371**
Event:	ACD Priority
Format:	Event Code (4), Time (6), Call ID (4), Trunk/Station Number (4), New Priority (4), Blank Field (4), ACD Group Number (4)

Event Code: **3372**

Event: ACD Expansion

Format: Event Code (4), Time (6), Call ID (4), Trunk/Station Number (4), Expanded ACD Group Number (4), Blank Field (4), ACD Group Number (4)

Event Code: **3373**

Event: ACD Distribution

Format: Event Code (4), Time (6), Call ID (4), Trunk/Station Number (4), Station Number Distributed (4), Agent ID Distributed (4), ACD Group Number (4)

Event Code: **3374**

Event: ACD Intercept

Format: Event Code (4), Time (6), Call ID (4), Trunk/Station Number (4), Blank Field (4), Blank Field (4), ACD Group Number (4)

Event Code: **3375**

Event: ACD Help

Format: Event Code (4), Time (6), Call ID (4), Trunk/Station Number (4), Calling Station Number (4), Called Station Number (4), ACD Group Number (4)

Event Code: **3376**

Event: ACD Help Pickup

Format: Event Code (4), Time (6), Call ID (4), Trunk/Station Number (4), Station Number Picking Up (4), Blank Field (4), ACD Group Number (4)

Event Code: **337B**

Event: ACD Forward

Format: Event Code (4), Time (6), Call ID (4), Trunk/Station Number (4), Forwarding Destination (4), Blank Field (4), ACD Group Number (4)

Event Code: **3380**

Event: ACD Help Cancel

Format: Event Code (4), Time (6), Call ID (4), Trunk/Station Number (4), Station Number Canceling (4), Blank Field (4), ACD Group Number (4)

Event Code: **33E2**

Event: ACD Partial Disconnect from Conference

Format: Event Code (4), Time (6), Call ID (4), Trunk/Station Number (4), Station Number Dropped (4), Blank Field (4), ACD Group Number (4)

Event Code: **33E3**

Event: ACD Recall

Format: Event Code (4), Time (6), Call ID (4), Trunk/Station Number (4), Station Number Recalled (4), Blank Field (4), ACD Group Number (4)

Event Code: **33E4**

Event: ACD Monitor

Format: Event Code (4), Time (6), Call ID (4), Trunk/Station Number (4), Station Number Monitoring (4), Blank Field (4), ACD Group Number (4)

Event Code: **0921**

Event: Account Code Registration Executed

Format: Event Code (4), Time (6), Call ID (4), Station Number (4), Account Code (4), Account Code (4), Account Code (4)

Event Code: **3385**

Event: ACD Emergency Record

Format: Event Code (4), Time (6), Call ID (4), Trunk/Station Number (4), Station Number Operating (4), Blank Field (4), ACD Group Number (4)

Event Code: **3426**

Event: ACD Agent Busy

Format: Event Code (4), Time (6), Blank Field (4), Station Number (4), Blank Field (4), Agent ID (4)

Event Code: **3427**

Event: ACD Agent Idle

Format: Event Code (4), Time (6), Blank Field (4), Station Number (4), Blank Field (4), Agent ID (4)

Event Code:	**347D**
Event:	ACD Agent Not Available Start
Format:	Event Code (4), Time (6), Blank Field (4), Station Number (4)
Event Code:	**347E**
Event:	ACD Agent Not Available End
Format:	Event Code (4), Time (6), Blank Field (4), Station Number (4)
Event Code:	**3530**
Event:	ACD Call Wrap-up Start
Format:	Event Code (4), Time (6), Blank Field (4), Station Number (4)
Event Code:	**3532**
Event:	ACD Call Wrap-up End
Format:	Event Code (4), Time (6), Blank Field (4), Station Number (4)
Event Code:	**3621**
Event:	ACD Mode Change Registration Executed
Format:	Event Code (4), Time (6), Blank Field (4), ACD Mode (4), Blank Field (4), Blank Field (4), ACD Group Number (4)
Event Code:	**3721**
Event:	Qualification Code Registration Executed
Format:	Event Code (4), Time (6), Blank Field (4), Station Number Executing (4), Qualification Code (4)
Event Code:	**3821**
Event:	Agent Login
Format:	Event Code (4), Time (6), Blank Field (4), Station Number Executing (4), Agent Priority (4), Agent ID (4), ACD Group Number (4)
Event Code:	**3822**
Event:	Agent Logout
Format:	Event Code (4), Time (6), Blank Field (4), Station Number Executing (4), Blank Field (4), Agent ID (4), ACD Group Number (4)

Event Code: **3921**

Event: Supervisor Login

Format: Event Code (4), Time (6), Blank Field (4), Station Number Executing (4), Blank Field (4), Supervisor ID (4), ACD Group Number (4)

Event Code: **3922**

Event: Agent Logout

Format: Event Code (4), Time (6), Blank Field (4), Station Number Executing (4), Blank Field (4), Supervisor ID (4), ACD Group Number (4)

Event Code: **4121**

Event: ACD Call Sequence Change

Format: Event Code (4), Time (6), Blank Field (4), Station Number Operating (4), Sequence Mode (4), New Sequence Number (4), ACD Group Number (4)

Identifying COL Events

COL events refer to inbound and outbound calls involving a central office line. Following are descriptions for all of the COL event records. These descriptions include the event code, the event title, and a description of the information the event presents in the format it is presented. The Format section of the event descriptions provide a number in parentheses for each field in the record. These numbers indicate the maximum number of characters for the field.

Event Code: **0101**

Event: Outgoing Seizure

Format: Event Code (4), Time (6), Call ID (4), Trunk Number (4), Station Number (4)

Event Code: **0107**

Event: Hold Pickup

Format: Event Code (4), Time (6), Call ID (4), Trunk Number (4), Station Number (4)

Event Code:	**0108**
Event:	Incoming Pickup
Format:	Event Code (4), Time (6), Call ID (4), Trunk Number (4), Station Number (4)
Event Code:	**010B**
Event:	Barge In
Format:	Event Code (4), Time (6), Call ID (4), Trunk Number (4), Station Number (4)
Event Code:	**010C**
Event:	Line Hold
Format:	Event Code (4), Time (6), Call ID (4), Trunk Number (4), Station Number (4), Hold Type (4)
Event Code:	**010D**
Event:	Camp-on
Format:	Event Code (4), Time (6), Call ID (4), Trunk Number (4), Originating Station Number (4), Receiving Station Number (4)
Event Code:	**010E**
Event:	Transfer
Format:	Event Code (4), Time (6), Call ID (4), Trunk Number (4), Originating Station Number (4), Receiving Station Number (4)
Event Code:	**010F**
Event:	Line Add-on
Format:	Event Code (4), Time (6), Call ID (4), Trunk Number (4), Adding Station Number (4), Station Number Added (4)
Event Code:	**0112**
Event:	Outgoing Dialing
Format:	Event Code (4), Time (6), Call ID (4), Trunk Number (4), Number Dialed (4), Number Dialed (4), Number Dialed (4)
Event Code:	**0115**
Event:	Line Disconnect
Format:	Event Code (4), Time (6), Call ID (4), Trunk Number (4)

Event Code: **0119**

Event: Incoming Call Start

Format: Event Code (4), Time (6), Call ID (4), Trunk Number (4), Station Number (4)

Event Code: **011A**

Event: Incoming Call End

Format: Event Code (4), Time (6), Call ID (4), Trunk Number (4), Station Number (4)

Event Code: **0147**

Event: Holding Status Change

Format: Event Code (4), Time (6), Call ID (4), Trunk Number (4), Hold Type (4)

Event Code: **014C**

Event: Incoming Call to Pilot

Format: Event Code (4), Time (6), Call ID (4), Trunk Number (4), Station Number Old Ringing (4), Station Number Ringing (4)

Event Code: **0152**

Event: Call Forward No Answer

Format: Event Code (4), Time (6), Call ID (4), Trunk Number (4), Forward From Station Number (4), Forward To Station Number (4)

Event Code: **01E2**

Event: Partial Disconnect from Conference

Format: Event Code (4), Time (6), Call ID (4), Trunk Number (4), Station Number (4)

Event Code: **01E3**

Event: Recall

Format: Event Code (4), Time (6), Call ID (4), Trunk Number (4), Station Number (4)

Event Code: **01E4**

Event: Line Monitoring

Format: Event Code (4), Time (6), Call ID (4), Trunk Number (4), Station Number (4)

Event Code: **01E5**

Event: Outgoing Dialing End

Format: Event Code (4), Time (6), Call ID (4), Trunk Number (4), Number Dialed (4), Number Dialed (4), Number Dialed (4)

Event Code: **9126**

Event: Trunk Busy

Format: Event Code (4), Time (6), Call ID (4), Station Number (4)

Event Code: **9127**

Event: Trunk Idle

Format: Event Code (4), Time (6), Call ID (4), Station Number (4)

Event Code: **4086**

Event: Number Identification Start

Format: Event Code (4), Time (6), Call ID (4), Station Number (4), Information (12)

Event Code: **40E5**

Event: Number Identification Stop

Format: Event Code (4), Time (6), Call ID (4), Station Number (4), Information (12)

Event Code: **4819**

Event: Abandoned Call Status

Format: Event Code (4), Time (6), Call ID (4), Trunk Number (4)

Identifying ICM Events

ICM events refer to internal calls. Following are descriptions for all of the ICM event records. These descriptions include the event code, the event title, and a description of the information the event presents in the format it is presented. The Format section of the event descriptions provide a number in parentheses for each field in the record. These numbers indicate the maximum number of characters for the field.

Event Code: **0207**

Event: Hold Pickup

Format: Event Code (4), Time (6), Call ID (4), Blank Field (4), Station Number (4)

Event Code:	**0208**
Event:	Incoming Pickup
Format:	Event Code (4), Time (6), Call ID (4), Blank Field (4), Station Number (4)
Event Code:	**020B**
Event:	Barge In
Format:	Event Code (4), Time (6), Call ID (4), Blank Field (4), Station Number (4)
Event Code:	**020C**
Event:	Line Hold
Format:	Event Code (4), Time (6), Call ID (4), Blank Field (4), Station Number (4)
Event Code:	**020D**
Event:	Camp-on
Format:	Event Code (4), Time (6), Call ID (4), Blank Field (4), Originating Station Number (4), Receiving Station Number (4)
Event Code:	**020E**
Event:	Transfer
Format:	Event Code (4), Time (6), Call ID (4), Blank Field (4), Originating Station Number (4), Receiving Station Number (4)
Event Code:	**020F**
Event:	Line Add-on
Format:	Event Code (4), Time (6), Call ID (4), Blank Field (4), Adding Station Number (4), Station Number Added (4)
Event Code:	**0215**
Event:	Line Disconnect
Format:	Event Code (4), Time (6), Call ID (4)
Event Code:	**0219**
Event:	Incoming Call Start
Format:	Event Code (4), Time (6), Call ID (4), Blank Field (4), Station Number (4)
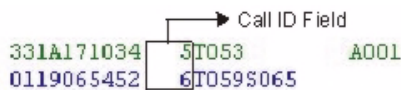
Event Code:	**021A**
Event:	Incoming Call End
Format:	Event Code (4), Time (6), Call ID (4), Station Number (4)
Event Code:	**0247**
Event:	Holding Status Change
Format:	Event Code (4), Time (6), Call ID (4), Blank Field (4), Hold Type (4)
Event Code:	**024C**
Event:	Incoming Call to Pilot
Format:	Event Code (4), Time (6), Call ID (4), Blank Field (4), Station Number Old Ringing (4), Station Number Ringing (4)
Event Code:	**0250**
Event:	Originating Call
Format:	Event Code (4), Time (6), Call ID (4), Blank Field (4), Calling Station Number (4), Called Station Number (4)
Event Code:	**0252**
Event:	Call Forward No Answer
Format:	Event Code (4), Time (6), Call ID (4), Blank Field (4), Forward From Station Number (4), Forward To Station Number (4)
Event Code:	**02E2**
Event:	Partial Disconnect from Conference
Format:	Event Code (4), Time (6), Call ID (4), Blank Field (4), Station Number (4)
Event Code:	**02E3**
Event:	Recall
Format:	Event Code (4), Time (6), Call ID (4), Blank Field (4), Station Number (4)

Event Code:	**02E4**
Event:	Line Monitoring
Format:	Event Code (4), Time (6), Call ID (4), Blank Field (4), Station Number (4)
Event Code:	**9026**
Event:	Station Busy
Format:	Event Code (4), Time (6), Call ID (4), Station Number (4)
Event Code:	**9027**
Event:	Station Idle
Format:	Event Code (4), Time (6), Call ID (4), Station Number (4)
Event Code:	**0A33**
Event:	Forward Activate
Format:	Event Code (4), Time (6), Blank Field (4), Station Number (4)
Event Code:	**0A34**
Event:	Forward Deactivate
Format:	Event Code (4), Time (6), Blank Field (4), Station Number (4)
Event Code:	**0D33**
Event:	DND Activate
Format:	Event Code (4), Time (6), Blank Field (4), Station Number (4)
Event Code:	**0D34**
Event:	DND Deactivate
Format:	Event Code (4), Time (6), Blank Field (4), Station Number (4)

Sorting Records by Call ID

The call ID is a number from 1 to 9999 that is assigned to a call when it enters the system. The number follows the call from its inception to its termination. When the call is terminated, the call ID is available for reuse by new calls entering the system.

The call ID occupies the third field in call event records. The number assigned for the call ID is right justified in the call ID field and depending on the number assigned for the call ID, the field may display one to four digits. For instance, the call ID field displays three blank spaces and a 3 for a call ID of three. If an event record is not associated with a call the field is blank.

Sorting call records by call ID displays the events that occur within a call chronologically, however, the calls themselves are not displayed chronologically. Because the call IDs are reused, the Sorted window displays all calls with a call ID of 1 before displaying the calls with a call ID of 2 and so on, up to 9999. To find the beginning and ending of a call, look for the event codes that identify these events. Every event between the events describing the inception and termination of a call describe the call activity.

Sort call event records using the Sort By Call ID command. This command can only be used from the PBX file window that contains all of the event records in the open .pbx or .zip file. This means that when the records are sorted by call ID, the Sorted window contains all records in the file except those that are not associated with a call.

Opening the Sorted Window

The call ID is a number from 1 to 9999 that is assigned to a call when it enters the system. The number follows the call from its inception to its termination. When the call is terminated, the call ID is available for reuse by new calls entering the system. Sort call event records using the Sort By Call ID command. This command can only be used from the PBX file window that contains all of the event records in the open .pbx or .zip file.

Use the following steps to sort call event records by call ID.

1. Click the PBX Data tab in the Main Window to view the PBX file window.
2. Click ⬛ or select Sort By Call ID from the Tools menu to open the Sorted window and view the sorted records.

Completing these steps when a Sort By Call ID has already been performed simply changes the view from the PBX file window to the Sorted window without performing the sort again.

Explaining Call Records

The Explanation window displays the call event records in the open .pbx or .zip file with event descriptions. In the Explanation window all event records encompass two lines. The first line includes the record contents as displayed in the PBX file window. The second line includes the record association in square brackets and the translation of this association in understandable terminology.

```
010C061420   3T053S099   3
[COL_HLD] COL Hold Activate
```

Open the Explanation window using the Explain Records command. This command can only be used from the PBX file window that contains all of the event records in the open .pbx or .zip file.

Opening the Explanation Window

The Explanation window displays the call event records in the open .pbx or .zip file with event descriptions. Open the Explanation window using the Explain Records command. This command can only be used from the PBX file window that contains all of the event records in the open .pbx or .zip file.

Use the following steps to sort call event records by call ID.

1. Click the PBX Data tab in the Main Window to view the PBX file window.
2. Click ❓ or select Explain Records from the Tools menu to open the Explanation window and view the records with the event descriptions.

Completing these steps when the Explain Records operation has already been performed simply changes the view from the PBX file window to the Explanation window without performing the operation again.

Filtering Call Records by Event

An Event Filter provides event related search results based on user-defined search parameters. The search parameters are defined in the Event Filter dialog box.

Use the following steps to open the event filter dialog box.

1. Click the PBX data tab in the Main Window to display the PBX file window.
2. Click ▼ or select Filter By Events from the Tools menu.
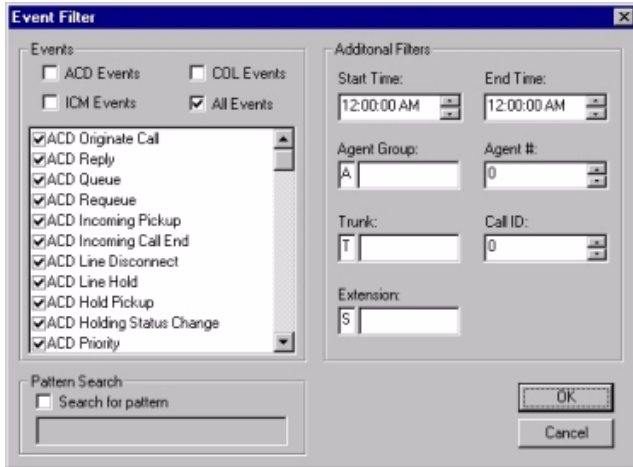
Using the Event Filter dialog box, select the events to include in the search filter. The events are categorized by type: ACD, ICM, and COL events. Include all of the events in the search filter or use any combination of the 72 events available in the list of events. To further refine the search results, use the Pattern Search option or the Additional Filters section of the dialog box. The Pattern Search option searches for the occurrence of specific alphanumeric patterns in the call records. Using the Additional Filters section define a range of time to include only the records occurring within that time period and, if desired, identify a specific agent group, agent number, trunk, extension, and call ID to search for records including those entities.

Selecting Events

When performing an Event Filter search, identify the events to include in the search filter. Use the Events section of the Event Filter dialog box to select the events. Select individual events in the events list or select events by type.
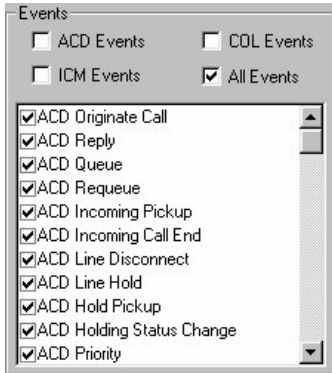
The events are categorized by type: ACD, ICM, and COL events. Include all of the events in the search filter or use any combination of the 72 events available in the list of events.

Enabling a check box for an event type automatically enables all of the check boxes for that event type in the event list. Enable the All Events check box to enable the check boxes for all events in the event list. Disabling an event type disables the check boxes for those events in the event list. For instance, enabling the check boxes for ACD Events and ICM Events automatically enables the check boxes for those event types in the event list. At the same time, all of the check boxes for the COL Events are disabled and excluded from the search filter.

Use the following steps to select events for an event filter.

1. Enable the check boxes of the event types to include in the filter.
2. Enable the check boxes of any additional events to include in the filter from the event list.
3. Disable the check boxes of any events to exclude from the filter from the event list.
4. Set any additional search parameters in the Pattern Search or Additional Filters sections of the dialog box.
5. Click OK.

The events in the event list are listed according to the event types. ACD events are first, COL events are second, and ICM events are third.

Searching for a Pattern

Use the Pattern Search section of the Event Filter dialog box to search for a specific alphanumeric string of characters occurring in call records. For instance, input T067S065 to find records where these alphanumeric characters appear together. The search results of this search filter will include all of events selected from the event list that include trunk number 067 (T067) and extension number 065 (S065) appearing together.

Use the .. and ? wildcards when unsure of the specific character string. The ? wildcard is a place filler. For each ? used, there must be a value to fill the space. For example, entering 11??092 matches any record that has 11, followed by any two characters, and 092. The .. wildcard is similar to the ? wildcard, except there is no limit to the number of characters the .. represent. For example, entering 11..092 matches any record that has a 11, followed by any number of characters, and 092.

Use the following steps to search for a pattern in call records.

1. Enable the Search for Pattern check box.
2. Input the pattern. Note that the alpha characters are case sensitive.
3. Select the events to include in the search filter.
4. Click OK.

Enabling the Pattern Search disables the Additional Filters section of the dialog box. These filters cannot be used simultaneously.

Using Additional Filters

Use the Additional Filters section of the Event Filter dialog box to refine an Event Filter based on the time events occurred and the entities involved in the events.

Use the Start Time and End Time boxes to define the time range of the events to include in the filter. For instance, setting a start time of 8:00:00 AM and an end time of 5:00:00 PM will result in a search filter that includes all records for the selected events that occurred between 8 AM and 5 PM.

To search for records that include specific entities, use the Agent Group, Agent #, Trunk, Call ID, and Extension boxes to input the identification numbers of the entities to include in the search filter. Normally only one or two of these entities are included in a search filter. This is because the search filter returns only records that include all of the defined entities.

Use the following steps to set the time range.

1. Click the hour field in the Start Time box and input a number from 1 to 12.
2. Click the minute field in the Start Time box and input a number from 00 to 59.
3. Click the seconds field in the Start Time box and input a number from 00 to 59.
4. Click the AM/PM field in the Start Time box and input A or AM or P for PM.
5. Repeat steps 1 to 4 in the End Time box, making the End Time later than the Start Time.
6. Select the events to include in the search filter.
7. Click OK.

Use the following steps to identify specific entities.

1. Click the input box of the desired entity.
2. Input a value. Use numeric characters only.
3. Repeat steps 1 and 2 for any additional entities to include in the search filter.

Enabling the Pattern Search disables the Additional Filters section of the dialog box. These filters cannot be used simultaneously.

Filtering Call Records by Call Type

A Call Type Filter provides call handling related search results based on user-defined search parameters. The search parameters are defined in the Call Type Filter dialog box.

Use the following steps to open the call type filter dialog box.

1. Click the PBX data tab in the Main Window to display the PBX file window.
2. Click ![icon] or select Filter By Call Type from the Tools menu.
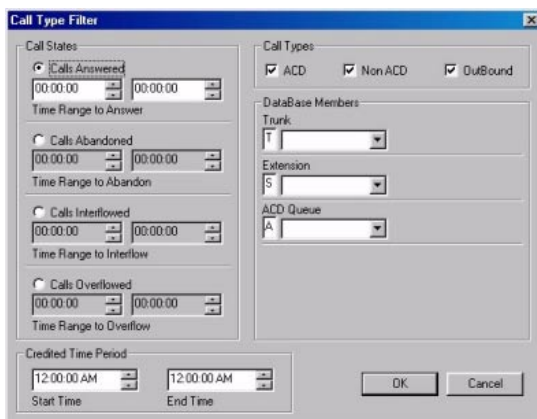
Using the Call Type Filter dialog box, define the call handling search parameters to include in the search filter. The Call Type Filter dialog box is comprised of four sections: Call States, Include Records Between, Call Types, and DataBase Members. Use the Call States section to include a call state in the search filter and to define a time range for the state. Use the Include Records Between section to establish a time of day time range for the events. Use the Call Types section to select the types of calls to include in the search filter. Use the DataBase Members section to search for call records handled by specific entities within the system. After defining all of the required search parameters in the four sections of the dialog box, click OK to proceed with the search operation.

Selecting the Call State

The Call States section of the Call Type Filter dialog box narrows the search by Calls Answered, Abandoned, Interflowed, or Overflowed. For each Call Type Filter operation, only one call state can be used. When selecting a call state to include in a Call Type Filter, define a time range for the call state. For instance, selecting the Calls Answered state and defining a time range of 00:01:30 to 00:05:00 results in a search filter that includes the calls that were answered after waiting a minimum of one minute and thirty seconds, but not more than five minutes.

Use the following steps to select a call state and define a time frame.

1. Select the radio button of the desired call state.
2. Click the hour field in the first time box and input a number from 1 to 23.
3. Click the minute field in the first time box and input a number from 00 to 59.
4. Click the seconds field in the first time box and input a number from 00 to 59.
5. Repeat steps 2 to 4 in the second time box, to set the upper end of the time range.
6. Define any additional parameters to include in the search filter in the Include Records Between, Call Types, and DataBase Members sections of the dialog box.
7. Click OK.

Selecting the Time Period

Use the Start Time and End Time boxes in the Include Records Between section of the Call Type Filter dialog box to define the time range of the events to include in the filter. For instance, setting a start time of 9:00:00 AM and an end time of 5:00:00 PM results in a search filter that includes records between 9 AM and 5 PM.

Use the following steps to set the time range.

1. Click the hour field in the Start Time box and input a number from 1 to 12.
2. Click the minute field in the Start Time box and input a number from 00 to 59.
3. Click the seconds field in the Start Time box and input a number from 00 to 59.
4. Click the AM/PM field in the Start Time box and input A or AM or P for PM.
5. Repeat steps 1 to 4 in the End Time box, making the End Time later than the Start Time.
6. Define any additional parameters to include in the search filter in the Call States, Call Types, and DataBase Members sections of the dialog box.
7. Click OK.

Selecting the Call Type

Use the Call Types section of the Call Type Filter dialog box to select the call types to include in the search filter. There are three call types: ACD, Non ACD, and OutBound. To obtain search results select at least one call state.
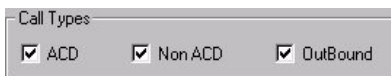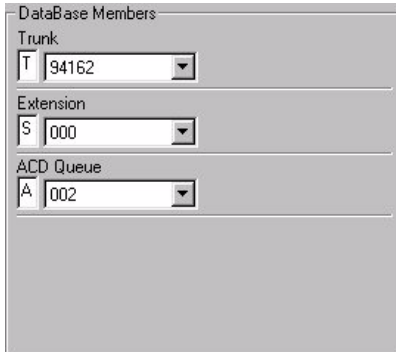
Use the following steps to select the call types to include in a search filter.

1. Enable the check boxes of the call types to include in the search filter.
2. Disable the check boxes of the call types to exclude from the search filter.
3. Define any additional parameters to include in the search filter in the Call States, Include Records Between, and DataBase Members sections of the dialog box.
4. Click OK.

Selecting Database Members

The Database Members section of the Call Type Filter dialog box narrows the search by searching for events based on specific entities handling the calls. These entities are trunks, extensions, or ACD queues. Normally only one or two of these entities are included in a search filter. This is because the search filter returns only records that include all of the defined entities.

Use the following steps to identify specific entities for a call type search filter.

1. Click ⯆ for the desired type of entity.
2. Select the entity from the drop-down list.
3. Repeat steps 1 and 2 for any additional entities to include in the search filter.
4. Define any additional parameters to include in the search filter in the Call States, Include Records Between, and Call Types sections of the dialog box.
5. Click OK.

TASKE Chat

TASKE Chat is a feature that is accessible through the ACD Monitor and Agent Desktop applications. Chat provides agents and supervisors with the ability to communicate using PCs over the local area network. Agent chat sessions are conducted on a one-to-one basis. Supervisor chat sessions are also conducted on a one-to-one basis, but supervisors also have the ability to broadcast messages to everyone logged into TASKE Chat at the local site.

When an agent or supervisor is logged into Chat an icon is present in the Windows System Tray. The icon displayed depends on the state of the Chat application. The table below illustrates the icons that may represent the Chat application in the Windows system tray and explanations for their presence.

Symbol	Description
	This icon represents the Chat application in the Windows system tray when the agent or supervisor is logged into Chat and there are no individuals requesting chats or unread messages.
	This icon represents the Chat application in the Windows system tray when the agent or supervisor is logged into Chat and there is one or more individuals requesting a chat or there are unread messages for the agent or supervisor.
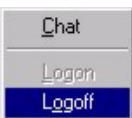
Use the Chat icon in the Windows System Tray to open the Chat window and access the Chat functions. To open the window using the icon in the System Tray, right-click on the icon and select Chat from the menu.

Logging Into and Out of Chat from the ACD Monitor

Supervisors are automatically logged into Chat when the ACD Monitor application is launched, but the TASKE Chat application window is not opened. Supervisors can log-off the Chat application and log back in without exiting and restarting the ACD Monitor.

Logging Out of Chat

There are three methods for logging out of the Chat application.

Method	Description
Logoff / Close	1. Select Logoff from the Chat menu at the top of the TASKE Chat application window. The application window closes and the user is logged out.
(Chat icon)	2. Right-click the Chat icon in the Windows system tray. When a user is logged into the Chat application an icon is visible in the Windows system tray. Right-click this icon to produce a menu. Select Logoff from the menu to log out of the Chat application and close the TASKE Chat window.
Chat / Logon / Logoff	3. Select Logoff from the Chat menu of the ACD Monitor application. The TASKE Chat application window closes and the user is logged out.

Logging into Chat
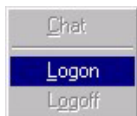
To log into Chat from the ACD Monitor, select Logon from the Chat menu. The user is logged into the Chat application but the TASKE Chat window does not open. The presence of the Chat icon in the Windows system tray indicates that the user is logged on.

Opening the Chat Window from the ACD Monitor

To open the TASKE Chat window from the ACD Monitor, the user must already be logged into the Chat application. Once logged into the Chat application, the TASKE Chat window can be opened using one of two methods.
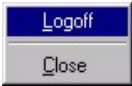
Method	Description
Chat / Logon / Logoff	1. Select Chat from the Chat menu of the ACD Monitor application. This menu option is not available if the user is not logged into the Chat application.
(icon)	2. Right-click on the Chat icon in the Windows system tray. When a user is logged into the Chat application an icon is visible in the Windows system tray. Right-click on this icon to produce a menu. Select Chat from the menu to open the TASKE Chat window.

Logging Into and Out of Chat from the Agent Desktop

Agents are automatically logged into Chat when the Agent Desktop application is launched, but the TASKE Chat application window is not opened. Agents can log-off the Chat application and log back in without exiting and restarting the Agent Desktop.

Logging Out of TASKE Chat

There are three methods for logging out of the Chat application from the Agent Desktop.

Method	Description
Logoff / Close	1. Select Logoff from the Chat menu at the top of the TASKE Chat application window. The TASKE Chat application window closes and the user is logged out.
(icon)	2. Right-click on the Chat icon in the Windows system tray. When a user is logged into the Chat application an icon is visible in the Windows system tray. Right-click on this icon to produce a menu. Select Logoff from the menu to log out of the Chat application and close the TASKE Chat window.
Chat / Logon / Logoff	3. Select Logoff from the Chat sub-menu of the Agent Desktop application. The TASKE Chat application window closes and the user is logged out.

Logging into TASKE Chat
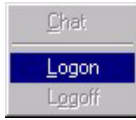
To log into Chat from the Agent Desktop, select Logon from the Chat menu. The user is logged into the Chat application but the TASKE Chat window does not open. The presence of the Chat icon in the Windows system tray indicates that the user is logged on.

Opening the Chat Window from Agent Desktop

To open the Chat window from the Agent Desktop, the user must already be logged into the Chat application. Once logged into the Chat application, the TASKE Chat window can be opened using one of two methods.

Method	Description
	1. Select Chat from the Chat sub-menu of the Agent Desktop application. This menu option is not available if the user is not logged into the Chat application.
	2. Right-click on the Chat icon in the Windows system tray. When a user is logged into the Chat application an icon is visible in the Windows system tray. Right-click on this icon to produce a menu. Select Chat from the menu to open the TASKE Chat window.

Using the Chat Interface

The Chat window is opened from within the ACD Monitor or Agent Desktop applications. A user must be logged into Chat before the Chat application window can be opened. The application window consists of a menu bar and three panels.
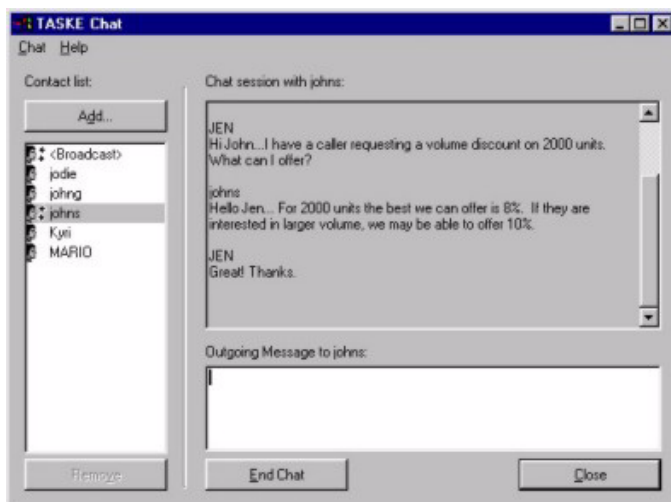
Menu Bar

The menu bar in the Chat window contains two menus. These menus are Chat and Help.

The Chat menu contains two options: Logoff and Close. Select Logoff to log-off the Chat Server and close the Chat application window. The user will no longer be available to send or receive chat requests. Select Close to close the Chat application window without logging out of the Chat Server. The user is still available to accept chat requests.

The Help menu contains one option: Contents. Select Contents to open the online help for the TASKE Chat application.

Contact Panel

The Contact Panel in the Chat window spans the left side of the application window. This area is responsible for initiating chat requests, controlling multiple chat sessions, maintaining the list of frequently called contacts, and accessing the list of all available contacts.

Chat Panel

The Chat Panel in the Chat window is located in the upper, right quadrant of the application window. This area displays the text for both parties involved in a chat session. Each time a message is posted by one of the parties, it is instantly displayed in the Chat Panel with the name of the individual posting the message. If multiple chat sessions are occurring simultaneously, the user selects the contact name from the Contact List to display the messages posted for that conversation in the Chat Panel. The heading for the Chat Panel states "Chat session with *Name of Individual*" to indicate the identity of the other party.

Outgoing Message Panel

The Outgoing Message panel in the Chat window is located in the lower, right quadrant of the application window. This is the input area for typing and posting outgoing messages. The heading for the Outgoing Message Panel states "Outgoing Message to *Name of Individual*" to indicate the intended recipient of the message.

Maintaining the Contact List

The Contact Panel in the TASKE Chat window consists of a Contact List and the tools required to maintain the list. The Contact List is required to initiate and accept chat requests, switch between concurrent chat sessions, and to end chat sessions.
The Contact List contains the names and chat availability status of those added to the list by the user and those who have requested a chat from the user. The list is maintained using the Add... and Remove buttons.

Adding Contacts to the Contact List

Contacts are added to the Contact List in one of two ways. The first method is through a chat request. When an individual who is not on the Contact List requests a chat, the name of the individual is automatically added to the Contact List. The name of the individual must be selected to accept or reject the chat request. The second method for adding a contact to the Contact List is to manually add an individual's name from the Add to Contact List dialog box.

Use the following steps to add a contact to the Contact List using the Add to Contact List dialog box.

1. Click Add... on the Contact panel to open the Add to Contact List dialog box.
2. Select a contact from the list by clicking on the name of the individual. A contact is selected when the name of the individual is highlighted in blue.
3. Click Add Contact to add the contact name to the Contact List. If the name is already on the list it will not be added a second time.

To quickly find a contact in the Add to Contact List dialog box, type the name of the contact in the 'Search for:' box to have the list scroll to that name.
The Add to Contact List dialog box displays only those agents and supervisors currently logged into Chat through the ACD Monitor or the Agent Desktop.

Removing Contacts from the Contact List

The Contact List can contain an unlimited number of contacts, however, it is most efficiently used as a list of most frequently called contacts. When unwanted contacts are cluttering the Contact List, remove them using the Remove button.

Use the following steps to remove unwanted contacts from the Contact List.

1. Select the name of the contact to remove from the Contact List.
2. Click Remove. The name of the contact is removed from the list.

Understanding Contact Status Symbols

Icons beside the names of the individuals in the Contact List illustrate the status of the individuals. The table below provides the icons and explanations of their meanings.

Symbol	Description
	The individual is logged into Chat and is available to participate in a chat session.
	The individual is not logged into Chat and cannot participate in a chat session.
	A call is pending with this individual, but the chat request has not been accepted or rejected.
	The individual is requesting a chat session.
	A chat is in session with this individual. The name of the individual in the Contact List is displayed in bold whenever an unread message is posted.

Requesting a Chat

To request a chat with another individual, the name of the individual must be on the Contact List and the contact must be logged into Chat. The icon beside the individual's name in the Contact list indicates the availability of the individual to accept a chat:

Icon	Description
	The individual is logged into Chat and is available to participate in a chat session.
	The individual is not logged into Chat and cannot participate in a chat session.

To Send a Chat Request to an Individual

Use the following steps to request a chat session with another individual who is logged into Chat.

1. Select the name of the individual to contact in the Contact List. The Request a Chat button appears below the Outgoing Message Panel.

2. Click Request a Chat. The Chat Panel displays the name of the requester and a "Call pending..." message. The icon beside the name of the individual being contacted indicates that a call is pending.

Icon	Description
	A call is pending with this individual, but the chat request has not been accepted or rejected.

3. If the individual accepts the chat request, the Chat Panel displays the name of the individual accepting the chat request and a "Chat call was accepted." message. The icon beside the name of the individual accepting the chat request indicates that a chat is in session.

Icon	Description
	A chat is in session with this individual. The name of the individual in the Contact List is displayed in bold whenever an unread message is posted.

If the individual rejects the chat request, the Chat Panel displays the name of the individual rejecting the chat request and a "Chat call was rejected." message.

Accepting or Rejecting a Chat Request

A chat request from another party is recognized in two ways.

1. The Chat window comes to the forefront of all other applications and the Chat Request dialog box pops up indicating who is requesting the chat.

2. The name of the individual requesting a chat is automatically selected in the Contact List and the icon indicates that a chat request is pending.

Icon	Description
	The individual is requesting a chat session.

To Accept a Chat Request

Use the following step to accept a chat request.

1. Click Accept in the Chat Request dialog box. The Chat Panel displays the name of the individual accepting the chat request and a "Chat call was accepted." message. The icon beside the name of the individual who requested the chat indicates that a chat is in session.

Icon	Description
	A chat is in session with this individual.

To Reject a Chat Request

Use the following step to reject a chat request.

1. Click Reject in the Chat Request dialog box. The Chat Panel displays the name of the individual rejecting the chat request and a "Chat call was rejected." message. The icon beside the name of the individual who requested the chat returns to the logged in and available state.

Icon	Description
	The individual is logged into Chat and is available to participate in a chat session.

Broadcasting a Message - Supervisors Only

Supervisors can broadcast messages to all individuals logged into Chat. Agents can respond to a broadcast message, but they cannot send a broadcast message. This is a useful feature for reaching all agents quickly.

To Broadcast a Message

Use the following steps to send a broadcast message. Broadcast messages can only be sent by Supervisors using the ACD Monitor to access Chat.

1. Select <Broadcast> from the Contact List.

Icon	Description
<Broadcast>	The contact ID for all individuals logged into Chat.

2. Type the message in the Outgoing Message Panel and press Enter to send the message.
3. The Chat Panel displays the name of the individual sending the broadcast message and the message text.

To type more than one line of text in the Outgoing Message Panel, use CTRL+Enter to move to the next line. When ready to send the message, simply press Enter.

Receiving Broadcast Messages

Supervisors can broadcast messages to all individuals logged into Chat; agents and other supervisors. For supervisors, broadcast messages are received in the ACD Monitor dialog box. For agents, broadcast messages are received in the Agent Desktop dialog box.

Clicking OK in the dialog box acknowledges receipt of the message and the message is posted on the Chat Panel. To review these messages, select <Broadcast> from the Contact List.

Conducting a Chat Session

Although an individual can participate in several chat sessions simultaneously, each chat session is conducted on a one-to-one basis. Conversing with another individual in a chat session consists of sending and receiving messages that are posted on the Chat Panels of both parties. After a chat request is accepted, the parties involved are free to send and receive messages.

To Send an Outgoing Message

Use the following steps to send a message to the selected individual.

1. Select the name of the other participant in the chat from the Contact List.
2. Type the message in the Outgoing Message Panel.
3. Press Enter to send the message. The sender's name and the message are posted on the Chat Panel for both the sender and receiver of the message.

To type more than one line of text in the Outgoing Message Panel, use CTRL+Enter to move to the next line. When ready to send the message, simply press Enter.

Receiving Incoming Messages

Incoming messages are immediately posted to the Chat Panel of the individual receiving the message. If the receiver does not have the sender's name selected in the Contact List, the sender's name is displayed in bold print in the Contact List to indicate that an unread message is waiting. Select the name of the sender in the Contact List to display the Chat Panel for the sender and read the message.

Switching between Chat Sessions

An individual can conduct an unlimited number of chat sessions simultaneously. The Contact List provides the means for switching between the conversations.

To display the chat session for a particular individual, simply click that person's name in the Contact List. Once the individual is selected a user can read a message, post a message, or end the chat.

After a chat is ended, the conversation is not erased unless the user logs out of Chat. To review a conversation that has ended, click on the name of the individual involved in the chat and read the messages in the Chat Panel.

Save Time Using Copy and Paste

In many cases it may be necessary to repeat the same message to many people, without broadcasting the message to everyone, or to make a quick correction to a message that has already been sent to another individual. The Chat application provides a Copy feature for the Chat Panel and a Paste feature for the Outgoing Message Panel that allows users to copy information from the Chat Panel and paste it into the Outgoing Message Panel. Using these features a user can send the same message to several people without retyping the message or make a quick correction to a sent message and resend it with the correct information.

Copying Text in the Chat Panel

The image below illustrates the process of copying the text in the Chat Panel. In the image, Jen has sent some new pricing information to the staff. Unfortunately, she has provided the wrong unit ranges for the pricing. Instead of retyping this message, Jen can simply copy the text in the Chat Panel, paste it into the Outgoing Message Panel, make the correction, and resend the message without retyping all of the text.

TASKE Call Center Management Tools
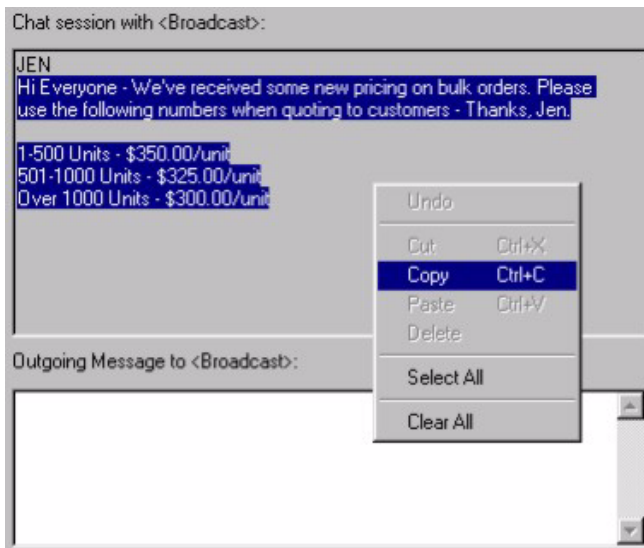
There are two methods for selecting and copying the text in the Chat Panel. These are to select and copy all of the text in the Chat Panel or to select and copy only the desired text in the Chat Panel.

Method	Description
Selecting All Text	1. Click anywhere in the Chat Panel. 2. Right-click to open the pop-up menu. 3. Choose Select All from the menu. All text in the window is selected. Selected text is highlighted in blue. 4. Right-click to open the pop-up menu. 5. Select Copy from the menu to copy the text.
Selecting Specific Text	1. Click at the beginning of the desired text in the Chat Panel and do not release the mouse button. 2. Drag the mouse to the end of the desired text and release the mouse button. The desired text should be highlighted in blue. 3. Right-click to open the pop-up menu. 4. Select Copy from the menu to copy the text.

As an alternative to selecting Copy from the menu in the steps above, Cut can also be used. Selecting Cut removes the selected text from the Chat Panel, but still pastes the text into the Clipboard, making it available to paste into the Outgoing Message Panel.

Do not select Clear All from the menu for a Cut/Copy and Paste function. The Clear All option simply clears the text from the Chat Panel without pasting it into the Clipboard. This does not make the text available for pasting into the Outgoing Message Panel.

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Pasting Text into the Outgoing Message Panel

The image below illustrates the process of pasting the text from the Chat Panel into the Outgoing Message Panel. This image continues with the previous example. Jen has already copied the desired text in the Chat Panel and she is now pasting the text into the Outgoing Message Panel. Once the information is in the Outgoing Message Panel, she will edit the message and resend it with the correct information.
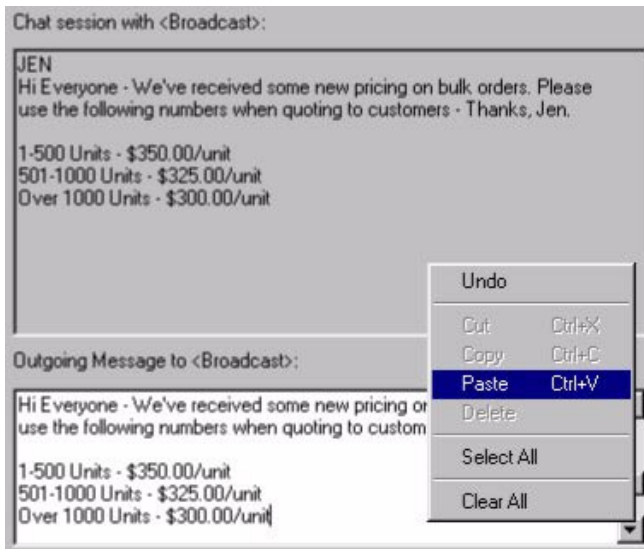
Use the following steps to paste text into the Chat Panel.

1. Click in the Outgoing Message Panel.
2. Right-click to open the pop-up menu.
3. Select Paste from the menu. The text copied/cut from the Chat Panel is pasted into the Outgoing Message Panel.

Ending a Chat Session

A chat session can be terminated by either party involved in the chat.

To Terminate a Chat Session with an Individual

Use the following steps to end a chat session with another individual.

1. Select the name of the individual in the Contact List. Assuming a chat is in session with the individual, the End Chat button is present below the Outgoing Message Panel.

Icon	Description
	A chat is in session with this individual.

2. Click End Chat. The Chat Panel displays the name of the individual ending the chat and a "Chat call ended." message. The icon beside the name of the individual who was involved in the chat session returns to the logged in and available state.

Icon	Description
	The individual is logged into Chat and is available to participate in a chat session.

When a Chat Session is Terminated by the Other Party

When a chat session is terminated by the other party, the Chat Panel displays the name of the individual ending the chat and a "Chat call ended." message. The icon beside the name of the individual who was involved in the chat session returns to the logged in and available state.

Icon	Description
	The individual is logged into Chat and is available to participate in a chat session.

TASKE WallSign

WallSign Administrator and WallSign Server are two applications in the TASKE Call Center Management Tools suite of applications. These applications provide a communication link with one or more Spectrum© reader boards and act as the interface for the configuration and management of messages displayed on the reader boards.

Using the WallSign applications, build sign plans that play messages based on the call center conditions, the time of day, user-defined special days, the day of the week, and the location of a reader board within the call center. Additionally, use the Quick Messages feature to create and save messages that override the sign plan messages when information needs to be conveyed quickly to agents.

Reader board messages can include text, call center statistics, colors, effects, and graphics. Several graphics are provided with the WallSign Administrator and a graphics editor is also available for the creation of user-defined graphics.

The two WallSign applications work together to produce messages and drive the reader boards. Using WallSign Administrator, reader board messages are configured and managed. Meanwhile, the WallSign Server is a background application that analyzes the sign plan and communicates the appropriate message to the Spectrum reader boards based on the conditions specified in the sign plan.

The TASKE WallSign applications run on both Windows 98 and NT platforms. Available for use in single-site call centers or in enterprise situations where a call center has several sites in different locations, WallSign allows reader board messages to be distributed to reader boards at call center locations across the globe.

Call centers using several reader boards establish a sign network. Up to five Spectrum reader boards can be networked from a PC equipped with the WallSign Server. In turn, each of these PCs has access to the reader boards on other PCs through the local call center network. The WallSign Server must be installed on each PC that is physically connected to one or more reader boards. The WallSign Administrator can be installed on any network connected PC for the configuration and management of sign plans. In an enterprise enabled call center, reader board messages can be distributed across the enterprise network and displayed on reader boards at other sites, but the messages must be configured and managed through the local network.

The WallSign Server

To play the sign plan messages and quick messages created in the WallSign Administrator, a communication link is required between the TASKE WallSign Server and the reader boards. An application that is invisible to the user, the WallSign Server stores the sign plan and interfaces with the TASKE Information Server to determine which message should be played based on the current date, time, and call

center conditions. The WallSign Server must be running on a PC that is physically connected to one or more reader boards for messages to be displayed on those reader boards.
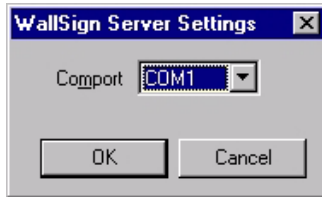
The WallSign Administrator

The TASKE WallSign Administrator is the user interface for the construction and configuration of reader board messages. Containing real-time statistics, special effects, graphics, color, and formatting, reader board messages are played based on the current call center conditions, the date, the time, and the location of the reader board. To add this type of complexity to reader board messages, it is necessary to define the messages together with the conditions required for them to play.

Using the WallSign Administrator configure and manage reader board messages and their parameters using sign plans. A sign plan creates associations between messages and call center conditions, dates, times, and reader boards. The components of a sign plan are created separately in the WallSign Administrator.

A sign plan contains all of the components required for a message to be played. Messages are played on a reader board when all of the conditions for the message are true throughout the sign plan. Each sign plan component has a dedicated window provided in the display area and accessed from the Main Control Panel.

The sign plan components are:
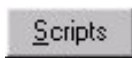
ACD Variables	**Messages**	**Decisions**	**Special Days**
Variables	Messages	Decisions	
Day Plans	**Scripts**	**Signs**	
Day Plans	Scripts	Signs	

Overriding A Sign Plan with Quick Messages

The Quick Messages window is the interface for creating, modifying, and controlling messages that can override or alternate with the preset messages of a sign plan. Quick messages are often used in times of emergency or service alerts.

Quick messages are constructed using the same tools as the Messages window. As with the preset messages of a sign plan, quick messages can contain text, ACD variables, color, graphics, special effects, and character formatting.

Creating Custom Graphics

Use the Graphics window to create custom graphic images to include in your reader board messages. The record edit area of the Graphics window contains a color palette and a simulation of a reader board. Each of the gray dots on the reader board represent an LED. Filling these LEDs with color produces the image. Include the graphics in sign plan messages and quick messages.

WallSign Startup and Shutdown

For WallSign configuration, only the WallSign Administrator must be running. For the communication of messages to reader boards the WallSign Server must be running on a PC that is directly connected to one or more reader boards.

Starting the WallSign Administrator

Use the following steps to start the WallSign Administrator application.

1. Double-click the TASKE ToolBox icon on the desktop of the PC to open the TASKE ToolBox folder.

2. Double-click the WallSign Administrator icon to start the WallSign Administrator and open the application window.

WallSign Administrator

Starting the WallSign Server

When the WallSign Server is started an icon appears in the taskbar of the PC's desktop and the WallSign Server light on the Main Control Panel of the WallSign Administrator turns green to indicate the establishment of communication.

1. Double-click the TASKE ToolBox icon on the desktop of the PC to open the TASKE ToolBox folder.

2. Double-click the WallSign Server icon to start the WallSign Server.

WallSign Server

Shutting Down the WallSign Administrator

Use the following steps to shut down the WallSign Administrator application.

1. Click File on the menu bar to open the File menu.
2. Select Exit from the File menu.

Shutting Down the WallSign Server

Use the following steps the shut down the WallSign Server application.

1. Right-click on the WallSign Server icon on the taskbar of the Windows desktop.
2. Select Shutdown from the pop-up menu.
3. Click the Yes button to confirm.

Using the WallSign Server

The WallSign Server is the communication link between the sign plans of the WallSign Administrator and the Spectrum reader boards. The WallSign Server runs in the background, transmitting the sign plan configuration to the reader boards. The WallSign Server must be running on a PC that is physically connected to one or more reader boards for messages to be displayed on those reader boards.

 To indicate that the WallSign Server is running, an icon appears in the Windows System Tray. Right-clicking on the icon produces a pop-up menu with three options.
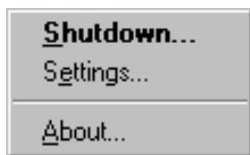
Shutdown... - select Shutdown... to close the TASKE WallSign Server application and terminate the connection with the Spectrum reader board. Selection of the Shutdown... option produces a dialog box asking the user to confirm the closure of the application. Click Yes to close the application.

Settings... - select Settings... to change the communication port the WallSign Server is using to communicate with the Spectrum reader board. Selection of the Settings... option produces the WallSign Server Settings dialog box. To change the communication port the WallSign Server is using, select the desired communication port from the Comport drop-down menu and click OK.

About... - Select About... to view the lock, version, and copyright information for the TASKE WallSign Server application. Click OK to exit the dialog box.

Using the WallSign Administrator

The TASKE WallSign Administrator is the interface for configuring and managing reader board messages and their parameters using sign plans. A sign plan creates associations between messages and call center conditions, dates, times, and reader boards. The components of a sign plan are created separately in the WallSign Administrator.

A sign plan contains all of the components required for a message to be played. Messages are played on a reader board when all of the conditions for the message are true throughout the sign plan. Each sign plan component has a dedicated window that is viewed in the display area and accessed from the Main Control Panel.

Sign Plan Components

There are seven sign plan components that work together to display messages and customer interaction center conditions on reader boards. The sign plan components act like steps in a ladder. Each component is linked to another, and to create the proper linking, the components of the sign plan must be created using a top-down approach. This means that the ACD variables must be defined first and the reader boards last. Messages are played on a reader board when all of the conditions for the message are true throughout the sign plan. ACD variables and special days are not required in a sign plan. All other components must be present.

ACD Variables - use the ACD Variables window to define call center statistics for use in reader board messages. An ACD variable is a real-time or recent historical call center statistic that can be included in a reader board message.

Messages - use the Messages window to combine text, ACD variables, graphics, effects, color, and formatting to produce the text and effects seen on reader boards.

Decisions - use the Decisions window to create decision trees. A decision tree is comprised of a default decision and optionally, one or more conditional decisions. A conditional decision is a statement that defines the state an ACD variable must be in before its associated message can be played on a reader board. A default decision is not associated with ACD variables and it is the decision used when the current call center conditions do not meet the requirements of the conditional decisions.

Days - use the Days window to define special days within the year that require unique messages due to specific events.

Day Plans - use the Day Plans window to partition a 24-hour period and apply a decision tree to each partition. This process breaks the call center day into segments and allows different messages to be applied to different times of the day.

Scripts - use the Scripts window to apply day plans to the days of the week and special days. This process produces associations between the day, the time of day, and the call center conditions by creating a link between a script, a day plan, and a decision tree.

Signs (reader boards) - use the Signs window to assign addresses and scripts to the reader boards in the call center. The address assigned to a reader board in the WallSign Administrator must equal the address setting in the reader board to establish a communication link between the reader board and the WallSign Server. The assignment of a script to a reader board creates a link between the reader board and the day plan, decision trees, and messages used in the script.

Just as it is important to create a sign plan in the proper order, the elements of a sign plan must also be deleted in the proper order. Sign plan elements must be deleted in the reverse order of their creation. This is because sign plan components reference one another and all references to a component must be removed prior to deleting a sign plan component.

Using the Menu Bar

The menu bar contains five menus that provide keyboard or mouse access to the functions of the WallSign Administrator. The menus are File, Edit, View, Tools, and Help.

File Menu

Use the File menu to exit the ACD Monitor application. The table below outlines the functionality of the File menu option.

Option	Shortcut	Description
Settings...	N/A	Use the Settings... option on the File menu of the WallSign Administrator application to open the Configuration dialog box where the communication paths to the WallSign Server and the TASKE WallSign Database are configured.
Exit	N/A	Closes the WallSign Administrator application. This action does not close the WallSign Server application.

Edit Menu

Use the Edit menu to create new elements, update existing elements, and delete elements for the selected window.

Option	Shortcut	Description
New	N/A	Selecting the New option from the Edit menu creates a new sign plan element for the window selected in the Main Control Panel. This option on the Edit menu has the same effect as clicking the New button on the toolbar in the open window of the display area.
Update	N/A	Selecting the Update option from the Edit menu saves the changes to the sign plan element in the window selected from the Main Control Panel. This option on the Edit menu has the same effect as clicking the Update button on the toolbar in the open window of the display area.
Delete	N/A	Selecting the Delete option from the Edit menu deletes the selected sign plan element from the window selected in the Main Control Panel. This option on the Edit menu has the same effect as clicking the Delete button on the toolbar in the open window of the display area.

View Menu

The View menu provides keyboard or mouse access to various sections of the ACD Monitor interface. The table below outlines the functionality of the View menu options.

Option	Shortcut	Description
Variables	N/A	Select this option to display the ACD Variables window.
Graphics	N/A	Select this option to display the Graphics window.
Messages	N/A	Select this option to display the Messages window.
Quick Messages	N/A	Select this option to display the Quick Messages window.
Decisions	N/A	Select this option to display the Decisions window.
Day Plans	N/A	Select this option to display the Day Plans window.
Scripts	N/A	Select this option to display the Scripts window.
Days	N/A	Select this option to display the Days window.
Signs	N/A	Select this option to display the Signs window.
Config Mode	N/A	Select this option to switch to the Configuration mode.
View Mode	N/A	Select this option to switch to the View Mode.
Next Window	F2	Move the window focus to the next section of the WallSign Administrator interface. Use the arrow keys to move throughout the elements of a window section and the Enter key to select.
Previous Window	Shift+F2	Move the window focus to the previous section of the WallSign Adminstrator interface. Use the arrow keys to move throughout the elements of a window section and the Enter key to select.

Tools Menu

Use the Tools menu to perform configuration and testing procedures.

Option	Shortcut	Description
Reset Sign...	N/A	The Reset Sign... option on the Tools menu clears the RAM (random access memory) on a reader board. Selection of the Reset Sign... option opens the Reset Sign dialog box where the address of the reader board being reset is entered. Clicking OK resets the selected reader board. When a reader board is reset, the last message displayed is displayed again. The reset function is used to verify that the Sign Service is communicating with the selected reader board.
Send Test Message...	N/A	Test messages are used to test the communication between the WallSign Server and the selected reader board(s). The Send Test Message... menu option opens the Send Test Message dialog box.
Get Sign Version...	N/A	The Get Sign Version... menu option opens the Get Version Information For Sign dialog box. To obtain the part number and the release date of the reader board chip for a particular reader board, input the address of the reader board in the Sign Address field using the up and down arrow buttons. The reader board information is returned in the Sign Version Information dialog box. Click Close to close the dialog box.
Set Sign Date / Time From PC...	N/A	The Set Sign Date/Time From PC menu option opens the Set Sign Date/Time From PC dialog box. Enter the address of the reader board that requires time and date synchronization in the Sign Address field using the up and down arrow buttons. Click OK to synchronize the time and date of the reader board with the time and date of the PC.
Configure Tones...	N/A	The Configure Tones... menu option opens the Configure Sign Tone dialog box. Use this dialog box to customize the tones that the reader board emits.

Help Menu

Use the Help menu to access the online help for WallSign. Additionally, use this menu to view version and copyright information for the application.

Option	Shortcut	Description
Contents	F1	Select Contents to access the Online Help for the WallSign application.
About Sign...	N/A	The About Sign... menu option opens the About TASKE Sign dialog box. This dialog box provides the software release number, the software version number, and the copyright information. Click OK to exit the dialog box

Using the Main Control Panel

The Main Control Panel spans the left side of the WallSign Administrator interface. This area of the interface has two functions: Mode selection and Window selection.

Mode Selection

Clicking the Config and View buttons toggle the TASKE WallSign Administrator program between the configuration mode and the view mode. The configuration mode enables users to create and edit sign plan components, graphics, and quick messages using the windows of the display area. The view mode changes these windows to read-only, real-time displays. In the view mode, the elements that are currently being used to display the message on the reader board are presented in the record area.

Window Selection

The Main Control Panel contains buttons to access the windows of the sign plan components, the quick messages window, and the graphics window. Selection of a button opens its corresponding window in the display area. The windows are:

The display area of the WallSign Administrator interface is the large area to the right of the Main Control Panel. The window selection buttons of the Main Control Panel determine the contents of the display area. Each window selection button opens a window that is displayed in the display area. These windows are the interface for creating and editing the elements of a sign plan, graphics, and quick messages in the configuration mode and the real-time display of these items in the view mode.

Selecting a Mode in the WallSign Administrator

The TASKE WallSign Administrator operates in one of two modes. These modes are configuration and view. To switch between the modes, use the Config and View buttons on the Main Control Panel.

The primary difference between the configuration mode and the view mode is functionality, not the appearance of the program window. The display area of the TASKE WallSign Administrator is a pane that displays one of nine windows. Switch between the windows using the window selection buttons on the Main Control Panel. These windows provide the interface for creating, managing, and viewing sign plan elements, user-defined graphics, and quick messages.

The only difference in appearance between the two modes occurs in the record area of the display area pane. In the configuration mode, the record area provides a detailed list of all defined elements for that window. In the view mode, the record area displays the element that the WallSign Server is currently transmitting to the reader board.

Configuration Mode

The configuration mode is the interface for the creation and management of sign plan elements, graphics, and quick messages. When in the configuration mode, each window accessed from the Main Control Panel displays its existing elements. Use the window in the configuration mode to create new elements and edit the existing elements.

View Mode

The view mode is a read-only, real-time display. When in the view mode, the windows accessed from the Main Control Panel display the element that is currently being used by the Wall Sign application to display the message on the reader board. This option is only available after configuration is complete and the WallSign Server is started.

The View mode is disabled if the WallSign Server is not running. This is because there is no real-time data available for display when the WallSign Server is not running.

Configuring Communication Paths

Use the Settings... option on the File menu of the WallSign Administrator application to open the Configuration dialog box where the communication paths to the WallSign Server and the TASKE WallSign Database are configured.
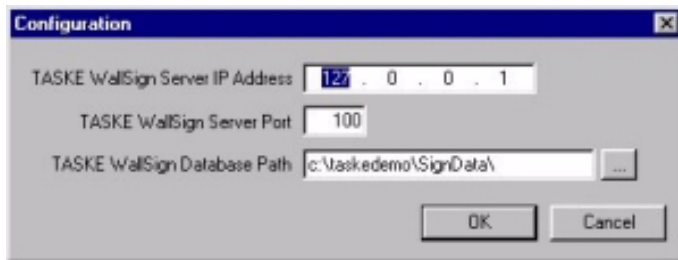
TASKE WallSign Server IP Address - use this field to view or edit the IP address of the TASKE WallSign Server. If the address of the WallSign Server has changed, it may be necessary to 'ping' the new WallSign Server to learn its IP address. To 'ping' the new WallSign Server, access a DOS prompt and type: ping *WallSign Server PC network name*.

TASKE WallSign Server Port - the TASKE WallSign Server port is the port that receives information from the WallSign Server. This is a virtual number that is a connection ID. By default TASKE uses 100 for the connection ID. This means that any communication received by the PC with a connection ID of 100 is recognized as TASKE WallSign Server data.

TASKE WallSign Database Path - the TASKE WallSign Database Path is the network path the PC uses to find the TASKE WallSign Database. Click the ⊡ button to access the established network connections and the Network Neighborhood and change the path if the path information is incorrect.

Sending Test Messages to Reader Boards

Test messages are used to test the communication between the WallSign Server and the selected reader board(s). The Send Test Message... menu option on the Tools menu opens the Send Test Message dialog box.

Enter the text of the test message in the Message field and input the address of the reader board in the Sign Address field using the up and down arrow buttons. A Sign Address of 0 plays the test message on all reader boards. Click OK to display the test message on the selected reader board.

The Send Test Message dialog box closes and the Sign dialog box opens indicating the test message is playing. To stop the test message, click OK.

Configuring the Sign Tone

Select Configure Tones... from the Tools menu to open the Configure Sign Tone dialog box. Use this dialog box to customize the sounds emitted from the reader boards. Enable or disable the playing of tones for a message in the Decisions window.

Sign Address - input the address of the sign where the sounds will play. Setting a sign address of 0 changes the sounds for all reader boards.

Tone Options - select one of three options. The available options are: Continuous Tone, Three Beeps, and Programmable Tone.

    a. Continuous Tone - plays a single tone each time the message is played.
    b. Three Beeps - plays three tones each time the message is played.
    c. Programmable Tone - enables the Tone Frequency, Duration, and Repeat fields for the setup of a customizable tone.

Tone Frequency - this field is only active when Programmable Tone is selected in the Tone Options field. Input a number to determine the pitch of the tone. The higher the number, the higher the pitch of the tone.

Duration - this field is only active when Programmable Tone is selected in the Tone Options field. Input a number between 0.1 and 1.5 to determine the amount of time, in seconds, that the tone will play.

Repeat - this field is only active when Programmable Tone is selected in the Tone Options field. Input a number in this field to determine the number of times the tone will play each time the message is played.

Using the ACD Variables Window

The ACD Variables window is accessed by clicking the Variables button on the Main Control Panel. An ACD variable is a real-time or recent historical customer interaction center statistic that can be included in a reader board message.

Each ACD variable included in a reader board message must be defined using the ACD Variables window. This window allows the definition of new ACD variables, the modification of ACD variables already defined, and the deletion of ACD variables that are no longer needed.

Components of the ACD Variables Window

The ACD Variables window is comprised of three sections: the record area, the toolbar, and the record edit area.

Record Area

The record area of the ACD Variables window lists the defined ACD variables. Select an ACD variable from the list for editing or deletion. When selected, an ACD variable is highlighted in blue and its details can be viewed and edited in the record edit area.

Toolbar

The toolbar in the ACD Variables window is used to create and name new ACD variables, edit existing ACD variables, and delete ACD variables that are no longer needed.

Variable Name - each ACD variable must be assigned a user-defined name. Type a name in the Variable Name field on the toolbar of the ACD Variables window to identify the ACD variable throughout each section of the WallSign Administrator.

New - click the New button on the toolbar of the ACD Variables window to define a new ACD variable. This action clears the fields of the record edit area.

Delete - the Delete button on the toolbar of the ACD Variables window deletes the ACD variable selected in the record area of the window. It is only possible to delete ACD variables that are not referenced elsewhere in the sign plan. If an ACD variable is referenced anywhere else in a sign plan, all references must be removed prior to deleting the ACD variable.

Update - click the Update button to save changes to an ACD variable.

Record Edit Area

The record edit area of the ACD Variables window provides the parameters for the definition of the ACD variables for the reader board messages. This area is used to define new ACD variables and to edit the ACD variables already defined.

ACD Variable - the ACD Variable field contains a drop-down list of the ACD statistics that can be included in a reader board message.

ACD Group - the ACD Group field provides a drop-down list of all defined Queues and Queue Groups. Select a Queue or Queue Group to associate it with the ACD variable.

Field Length - the field length of an ACD variable is the number of characters reserved for the ACD variable in the reader board message. Set the Field Length from 2 to 8 characters. It is important to specify a field length that is realistic. For example, if the value for the Calls Answered - Last 12 Hours ACD variable is expected to exceed 1000, then the field length should be set to 4. If the field length is not long enough to accommodate the entire value, the value will be truncated.

Alignment - choose an alignment button to position the ACD variable to the left, center, or right of its field.

Variable Color - select the Same As Message Text radio button in the record edit area of the ACD Variables window to have the ACD variable appear the same color as the message text on the reader board. Select the Dependant on

Threshold radio button in the record edit area of the ACD Variables window to define a color range for the display of the ACD variable on the reader board. The color of the ACD variable is dependant on the value of the ACD variable, based on user-defined thresholds.

Setting the ACD Variable Color

The color of the ACD variable text in a message can be set to be the same as the message text or to change depending on the threshold values.

Same As Message Text – select the Same As Message Text radio button in the record edit area of the ACD Variables window to have the ACD variable appear the same color as the message text on the reader board. Nothing further is required for defining the ACD variable color when this radio button is selected.

Dependant on Threshold – select the Dependant on Threshold radio button to define a color range for the display of the ACD variable on the reader board. The color of the ACD variable is dependant on the value of the ACD variable, based on user-defined thresholds. When this radio button is selected, the thresholds and their associated colors must be defined.

To define the color thresholds, select a color for each threshold from the drop-down lists in the three color boxes. To set the threshold values, input the values for the thresholds from 0 to x and from x to infinity, where x equals the value of the ACD variable you are defining. The values are input in the two boxes located to the right of the color boxes.
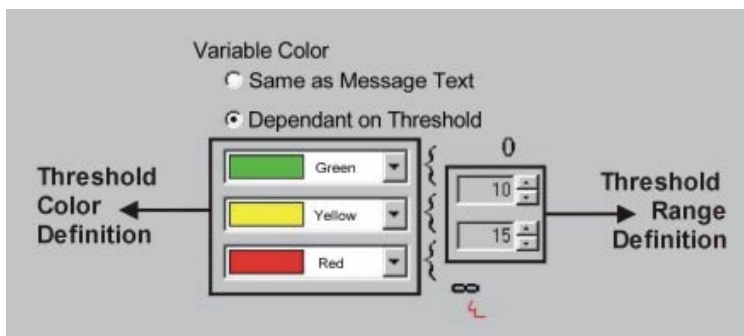
Defining ACD Variables

The ACD Variables window provides an interface for defining the ACD variables that are used in reader board messages. Use the following steps to define an ACD Variable.

1. Click Config to switch to the Configuration mode.
2. Click the Variables button on the Main Control Panel to display the ACD Variables window.
3. Click New on the toolbar.
4. Type a variable name.
5. Select an ACD variable.
6. Select an ACD group.
7. Define a field length.
8. Set the alignment.
9. Select a color option for the ACD variable.
10. Click Update on the toolbar to save the new ACD variable.

Deleting ACD Variables

The Delete button on the toolbar of the ACD Variables window deletes the ACD variable selected in the record area of the window. It is only possible to delete ACD variables that are not referenced elsewhere in the sign plan. If an ACD variable is referenced anywhere else in a sign plan, all references must be removed prior to deleting the ACD variable.

Use the following steps to delete an ACD variable.

1. Select the ACD variable to delete in the record area of the ACD Variables window.
2. Click the Delete button on the toolbar.
3. Click Yes in the Sign dialog box to acknowledge the deletion.
4. If the ACD variable is not referenced anywhere else in the sign plan, the ACD variable is deleted immediately. If the Sign dialog box opens with the statement:

> The selected element(s) cannot be deleted because they are being referenced by another part of the system.

click OK and search the sign plan for references to the ACD variable and delete them before attempting to delete the ACD variable again.

Using the Messages and Quick Messages Windows

The Messages Window is the interface for the construction of reader board messages. Message construction is the second step in the creation of a sign plan after the definition of the ACD variables. Reader board messages can contain text, ACD variables, color, graphics, special effects, and character formatting.

Click the lightning bolt button to access the Quick Messages window. This window is the interface for creating, modifying, and controlling messages that can override or alternate with the preset messages of a sign plan. Quick messages are often used in times of emergency or service alerts. Quick messages are constructed using the same tools as the Messages window. As with the preset messages of a sign plan, quick messages can contain text, ACD variables, color, graphics, special effects, and character formatting.

Messages and quick messages are created using text and using the tools of the record edit area. Simply click the buttons or make menu selections to add ACD variables, color, graphics, and effects to your message text. When one of these components is added to a message, the appropriate code for the component is added to the message string.

When special effects, graphics, and formatting are incorporated into a reader board message, it is important to properly place these components around the message text and ACD variables to achieve the intended effect on the reader board.

Components of the Messages and Quick Messages Windows

Both the Messages and Quick Messages windows are comprised of three sections: the record area, the toolbar, and the record edit area.

Record Area

The record area of the Messages window lists the existing reader board messages. Select a message from the list for editing or deletion. When selected, a message is highlighted in blue and its details can be viewed and edited in the record edit area.

Toolbar

The toolbar in the Messages and Quick Messages windows are used to create
and name new reader board messages, edit existing messages, and delete
messages no longer needed. In addition, the toolbar in the Quick Messages
window provides the tools for starting and stopping the play of quick messages
on the reader boards.

Messages Toolbar

Message Name [Agents On]   [New]   [Delete]   [Update]

Quick Messages Toolbar

Quick Message Name [Closing Early Due to Sn] [Start] [Stop] [New] [Delete] [Update]

Message / Quick Message Name - each message/quick message must be
assigned a user-defined name. This is done in the Message Name field on the
toolbar of the Messages window or in the Quick Message Name field on the
toolbar of the Quick Messages window. The names are used to identify the
messages throughout the WallSign Administrator. For this reason, the names
must be descriptive in nature.

New - the New button on the toolbar allows for the construction of a new
message. After clicking the New button, name the new message and construct
the message in the record edit area. When finished, save the message by
clicking the Update button.

Delete - the Delete button on the toolbar deletes the message selected in the
record area of the window. It is only possible to delete messages that are not
referenced elsewhere in the sign plan. If a message is referenced anywhere else
in a sign plan, all references must be removed prior to deleting the message.
Quick messages are never referenced within the sign plan and can be deleted at
any time.

Update - click the Update button to save changes to a message.

Start - this option is only available on the toolbar of the Quick Messages window.
The Start button starts the display of the selected quick message on one or more
reader boards. Clicking the Start button opens the Select Signs dialog box where
the reader boards are selected for the quick message.

Stop - this option is only available on the toolbar of the Quick Messages window.
the Stop button on the toolbar of the Quick Messages window stops the display
of the quick message on one or more reader boards. Clicking the Stop button
opens the Select Signs dialog box where the reader boards are selected for the
quick message.

Record Edit Area

The record edit area of the Messages and Quick Messages windows provide the platform and the tools for the construction of reader board messages. This area is used to define new reader board messages and to edit the messages that have already been created. The white section of the record edit area is the message platform. This section is where the message is created by typing the message text directly into the message platform and inserting formatting codes using the tools below.
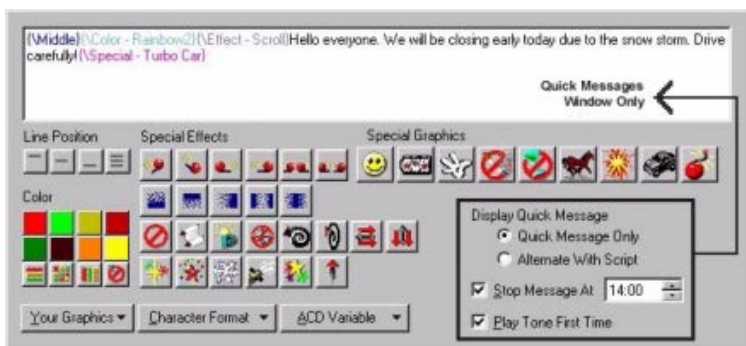
Message Platform - the message platform is located in the record edit area. This is where the message text, ACD variables, effects, graphics, and character formatting are added or edited.

Line Position - the line position buttons are used to select the vertical alignment of the message text on the reader board. The vertical alignment options are top, middle, bottom, and fill.

Color - the Color buttons are used to specify the color of the message text. Click the solid color buttons and begin typing the message text in that color. Use the rainbow buttons, the color mix button, and the auto color button to insert code into the message that determines the color of the message text.

Special Effects - the special effects buttons are used to define how a message moves across the reader board. If none of the options are specified, the automode option is automatically selected. Automode produces a random selection of the available special effects. Special effects must be placed before the message text or ACD variable they are intended to affect.

Special Graphics - the special graphics buttons are used to insert the graphics provided with the WallSign Administrator into reader board messages. Clicking one of the Special Graphics buttons inserts the code for the graphic into the message.

Your Graphics - clicking the Your Graphics button produces a drop-down list that contains the names of the reader board illustrations created in the Graphics window. Selection of a graphic from the list inserts the graphic in the reader board message.

Character Format - the Character Format button is used to insert call information in a message and specify character attributes such as character spacing, width, height and the speed at which characters are scrolled across the screen. Most of the character formatting options place both an on tag and an off tag in the message. It is important to place the text requiring the formatting between the two tags.

ACD Variable - the ACD Variable button produces a drop-down list that contains the names of all defined ACD variables. Selection of an ACD variable from the list includes it in the reader board message.

Display Quick Message - these options are only available on the Quick Messages window. This is the only difference between the Messages and Quick Messages windows. The Display Quick Message section in the record edit area of the Quick Messages window provides display options for the quick messages:

a. Enable the Quick Message Only radio button to have the quick message replace the script and its associated messages.
b. Enable the Alternate With Script radio button to have the reader board alternate between the quick message and the messages associated with the script.
c. Enable the Stop Message At check box and enter a time in the field next to it to have the quick message stop playing at a specific time.
d. Enable the Play Tone First Time check box to have the reader board emit a beep prior to displaying the quick message.

Building Messages and Quick Messages

Use the Messages window to construct reader board messages. The positioning of the message components depends on how the message is to play on a reader board. Formatting and effects must be positioned in the message before the message text or the ACD variable it is supposed to affect.

The following steps are suggestions for the order in which a reader board message can be constructed. As the message is constructed, its components are visible in the message platform.

1. Click the Config button to switch to the Configuration mode.
2. Click the Messages button on the Main Control Panel to display the Messages window, or click the lightning bolt icon on the Main Control Panel to display the Quick Messages window.
3. Click New on the toolbar.
4. Type a message name.
5. Select the line position.
6. Select a special effect.
7. Select a color for the message text.
8. Add character formatting, if desired.
9. Type the message text in the message platform. If character formatting is present, ensure that the message text appears between the character formatting tags if both an on and an off tag are present.
10. Select an ACD variable, if desired. Logically position the ACD variable in the message text where its value will make sense when played on a reader board.
11. Select a special graphic or select a user defined graphic by clicking the Your Graphics button. Position the graphic as it should appear with the message text.
12. If creating a quick message, select the desired display options for playing the quick message.
13. Click Update on the toolbar to save the new message or quick message.

Selecting the Line Position

The line position buttons are used to select the vertical alignment of the message text on the reader board. The vertical alignment options are top, middle, bottom, and fill. Selecting the top, middle, or bottom options means that the message text will only occupy the selected line on the reader board. Selecting the fill option means that the message text enters the reader board from the top, left corner and is able to occupy all three lines when the message is long enough to fill the reader board.

Click a line position button to insert code into the message that determines the line position of the message text on the Spectrum reader board.

Button	Code In Message	Description
	{\Top}	The text following the code appears on the top line of the reader board.
	{\Middle}	The text following the code appears on the middle line of the reader board.
	{\Bottom}	The text following the code appears on the bottom line of the reader board.
	{\Fill}	The text following the code fills all three lines of the reader board.

Adding Special Effects

The special effects buttons are used to define how a message moves across the reader board. If none of the options are specified, the automode option is automatically selected. Automode produces a random selection of the available special effects. Special effects must be placed before the message text or ACD variable they are intended to affect. The available effects are:

Button	Code In Message	Description
	{\Effect - Roll Up}	Roll Up
	{\Effect - Roll Down}	Roll Down
	{\Effect - Roll Left}	Roll Left
	{\Effect - Roll Right}	Roll Right
	{\Effect - Roll In}	Roll In
	{\Effect - Roll Out}	Roll Out
	{\Effect - Wipe Up}	Wipe Up
	{\Effect - Wipe Down}	Wipe Down
	{\Effect - Wipe Left}	Wipe Left
	{\Effect - Wipe In}	Wipe In
	{\Effect - Wipe Out}	Wipe Out
	{\Effect - Auto Mode}	Automode (randomly selects special effects)
	{\Effect - Scroll}	Scroll
	{\Effect - Flash}	Flash
	{\Effect - Hold}	Hold
	{\Effect - Rotate Left}	Rotate Left
	{\Effect - Compress Rotate}	Compress Rotate

Button	Code In Message	Description
	{\Effect - Switch}	Switch
	{\Effect - Interlock}	Interlock
	{\Effect - Twinkle}	Twinkle
	{\Effect - Sparkle}	Sparkle
	{\Effect - Snow}	Snow
	{\Effect - Spray}	Spray
	{\Effect - Starburst}	Starburst
	{\Effect - Slide}	Slide

Adding Special Graphics

The special graphics buttons are used to insert the graphics provided with the WallSign Administrator into reader board messages. Clicking one of the Special Graphics buttons inserts the code for the graphic into the message. The special graphics included with the WallSign Administrator are:

Button	Code In Message	Description
	{\Special - Welcome}	Scroll Welcome
	{\Special - Slot}	Slot Machine
	{\Special - Thank You}	Script Thank You
	{\Special - No Smoking}	No Smoking
	{\Special - Don't Drink & Drive}	Don't Drink and Drive
	{\Special - Animal Running}	Running Animal
	{\Special - Fireworks}	Fireworks
	{\Special - Turbo Car}	Turbo Car
	{\Special - Cherry Bomb}	Cherry Bomb

Adding Character Formatting

The Character Format button is used to insert call information in a message and specify character attributes such as character spacing, width, height and the speed at which characters are scrolled across the screen. The Character Format button produces a menu that contains three sub menus. These menus are Insert, Speed, and Effects. Most of the character formatting options place both an on tag and an off tag in the message. It is important to place the text requiring the formatting between the two tags.

The Character Format button produces a pop-up menu with three sub-menus. The sub-menus contain character formatting options that, when selected, insert code into a message. The code affects the appearance of the text characters following the code. It is important to note that some reader boards do not have

the capability to adjust character width and height. A question mark displayed by the reader board indicates this hardware limitation.

Insert Menu		
Menu Option	**Code In Message**	**Description**
Call Time	{\Format - Call Time}	Inserts the call time in the message.
Call Date	{\Format - Call Date}	Inserts the date in the message.
Next Line	{\Format - Next Line}	Inserts a carriage return <CR>.
No Hold	{\Format - No Hold}	Prevents pausing between format changes.

Speed Menu		
Menu Option	**Code In Message**	**Description**
Speed 1 - Slowest	{\Format - Speed 1}	The rate at which characters are displayed on the reader board. Speed 1 is the slowest and Speed 5 is the fastest.
Speed 2	{\Format - Speed 2}	The rate at which characters are displayed on the reader board. Speed 1 is the slowest and Speed 5 is the fastest.
Speed 3	{\Format - Speed 3}	The rate at which characters are displayed on the reader board. Speed 1 is the slowest and Speed 5 is the fastest.
Speed 4	{\Format - Speed 4}	The rate at which characters are displayed on the reader board. Speed 1 is the slowest and Speed 5 is the fastest.
Speed 5 - Fastest	{\Format - Speed 5}	The rate at which characters are displayed on the reader board. Speed 1 is the slowest and Speed 5 is the fastest.

Effects Menu		
Menu Option	**Code In Message**	**Description**
Double High On	{\Format - Double High On}{\Format - Double High Off}	Doubles the height of the text between the tags.
True Descender On	{\Format - True Descender On}{\Format - True Descender Off}	Causes the character with sections descending beyond the text baseline, such as lower case y and g, to be displayed below the baseline of the text.
Character Flash On	{\Format - Flash On}{\Format - Flash Off}	Causes the characters between the tags to flash.
Double Stroke On	{\Format - Double Stroke On}{\Format - Double Stroke Off}	Allows the characters two columns of pixels.
Double Wide On	{\Format - Double Wide On}{\Format - Double Wide Off}	Stretches the character to double its regular width.
Fixed Width On	{\Format - Fixed Width On}{\Format - Fixed Width Off}	All of the characters in the message are the same width.
Fancy On	{\Format - Fancy On}{\Format - Fancy Off}	Adds serifs to the font.
Wide Character On	{\Format - Wide Char On}{\Format - Wide Char Off}	Makes the characters between the tags wider.
Full Height Fancy	{\Format - Full Height Fancy}	Widens, heightens, and adds serifs to the characters.
Full Height Standard	{\Format - Full Height Std}	Heightens the characters without widening and adding serifs.
Seven High Standard Character	{\Format - 7 High Std Char}	Characters are seven pixels in height.
Five High Standard Character	{\Format - 5 High Std Char}	Characters are five pixels in height.

Effects Menu		
Menu Option	**Code In Message**	**Description**
Proportional Character Spacing	{\Format - Proportional Character Spacing}	The spacing between characters varies according to the size of the characters.
Fixed Character Spacing	{\Format - Fixed Character Spacing}	Character spacing is uniform, regardless of character size.

Adding Color to a Message

The Color buttons are used to specify the color of the message text. A different color can be used for each character of the message text. Unless otherwise specified in the ACD Variables window, the color selection also applies to the ACD variables. However, the characters of the ACD variable must all share the same color. Some Spectrum Sign types provide more color choices than others, as outlined in the literature from Spectrum Corporation.

Click the solid color buttons and begin typing the message text in that color. Use the rainbow buttons, the color mix button, and the auto color button to insert code into the message that determines the color of the message text.

Button	**Code In Message**	**Description**
■	None	Select the red color button to type the message text in red.
■	None	Select the green color button to type the message text in green.
■	None	Select the dark yellow color button to type the message text in dark yellow.
■	None	Select the dark red color button to type the message text in dark red.
■	None	Select the dark green color button to type the message text in dark green.
■	None	Select the black color button to type the message text in black.
■	None	Select the orange color button to type the message text in orange.
■	None	Select the yellow color button to type the message text in yellow.

Button	Code In Message	Description
	{\Color - Rainbow 1}	Inserts code into the message that makes the message text appear in multiple colors.
	{\Color - Rainbow 2}	Inserts code into the message that makes the message text appear in multiple colors.
	{\Color - Color Mix}	Uses all of the colors allowable by the reader board. Each character is a different color. When all of the colors have been used, the pattern is repeated.
	None	Randomly selects colors for the message text.

Quick Message Display Options

The Display Quick Message section in the record edit area of the Quick Messages window provides display options for the quick messages.
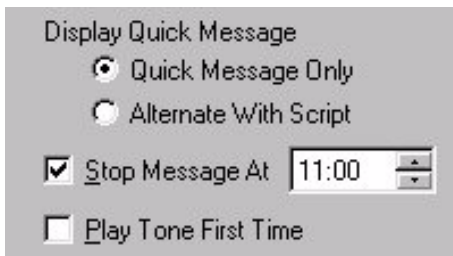
Quick Message Only / Alternate With Script

Enable the Quick Message Only radio button to have the quick message replace the script and its associated messages currently playing on the reader board. Enable the Alternate With Script radio button to have the reader board alternate between the quick message and the messages associated with the script that is currently in use.

Stop Message At

Enable the Stop Message At check box and enter a time in the field next to it to have the quick message stop playing at a specific time. The time must be entered in 24-hour format using the up and down arrows in the field.

Play Tone First Time

Enable the Play Tone First Time check box to have the reader board emit a beep prior to displaying the quick message. The beep is only produced when the message is first played.

Starting and Stopping Quick Messages

The Start button starts the display of the selected quick message on one or more reader boards. Clicking the Start button opens the Select Signs dialog box. Select a single reader board from the list or enable the Send Command To All Signs check box to send the quick message to all reader boards in the sign network. Click OK to begin displaying the quick message.

The Stop button on the toolbar of the Quick Messages window stops the display of the quick message on one or more reader boards. Clicking the Stop button opens the Select Signs dialog box.

Select a single reader board from the list or enable the Send Command To All Signs check box to stop the quick message from playing on all reader boards in the sign network. Click OK to stop displaying the quick message.

Deleting Messages and Quick Messages

The Delete buttons on the toolbars of both the Messages and Quick Messages windows are used to delete reader board messages.

Deleting Messages

Use the following steps to delete a message from the Messages window. A message cannot be deleted if it is referenced anywhere else in the sign plan. All references to the message must be deleted before the message can be deleted.
   1. Select the message to delete in the record area of the Messages window.
   2. Click the Delete button on the toolbar.
   3. Click Yes in the Sign dialog box to acknowledge the deletion.
   4. If the message is not referenced anywhere else in the sign plan, the message is deleted immediately. If the Sign dialog box opens with the statement:

   > The selected element(s) cannot be deleted because they are being referenced by another part of the system.

   click OK and search the sign plan for references to the message and delete them before attempting to delete the message again.

Deleting Quick Messages

Use the following steps to delete a message from the Quick Messages window.

   1. Select the quick message you want to delete in the record area of the Quick Messages window.
   2. Click Delete on the toolbar.
   3. Click Yes in the Sign dialog box to acknowledge the deletion.

Using the Decisions Window

The Decisions window provides an interface for the creation and modification of decision trees. A decision tree is comprised of one or more decisions. Two types of decisions are found in a decision tree: conditional and default. A conditional decision is a statement that defines the state an ACD variable must be in before its associated message can be played on a reader board. A default decision is the decision used when the current customer interaction center conditions do not meet the requirements of the conditional decisions.

The decisions of a decision tree are prioritized in the order of their importance. The high priority decisions are at the top of the decision tree and the mandatory default message is always at the bottom of the decision tree. The WallSign Server searches through the decisions of a decision tree, looking for a decision that matches the current customer interaction center conditions. If none of the conditional decisions match the current conditions, the default decision is used and its associated message is played on the reader board.

Decisions Window Components

The Decisions window is comprised of three sections: the record area, the toolbar, and the record edit area.

<u>Record Area</u>

The record area of the Decisions window lists the defined decision trees. Select a decision tree from the list for editing or deletion. When selected, a decision tree is highlighted in blue and its details can be viewed and edited in the record edit area.
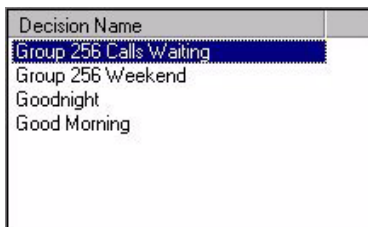
Toolbar

The toolbar in the Decisions window is used to create and name new decision trees, edit existing decision trees, and delete decision trees no longer needed.

Decision Name - each decision tree must be assigned a user-defined name. This is done in the Decision Name field on the toolbar of the Decisions window. The decision tree names are used to identify the decision trees throughout the WallSign Administrator. For this reason, the names must be descriptive in nature.

New - the New button on the toolbar of the Decisions window allows for the creation of a new decision tree. After clicking the New button, name the new decision tree and add the required decisions. When finished, save the decision tree by clicking the Update button.

Delete - the Delete button on the toolbar of the Decisions window deletes the decision tree selected in the record area of the window. It is only possible to delete decision trees that are not referenced elsewhere in the sign plan. If a decision tree is referenced anywhere else in a sign plan, all references must be removed prior to deleting the decision tree.

Update - click the Update button to save changes to a decision tree.

Record Edit Area

The record edit area of the Decisions window provides the tools and the platform for defining the decisions of a decision tree. This area is used to define new decisions and to edit the decisions already defined for the decision tree.

Decision Tree Platform - the decision tree platform is the table located in the record edit area of the Decisions window. This is where the decisions are defined, edited, and prioritized within the decision tree.

Play Message - click the Play Message field to access a drop-down list that contains the names of all messages created in the Messages window. Select a message from the list to associate it with the decision.

IF ACD Variable - click the IF ACD Variable field to access a drop-down list that contains the names of all ACD variables defined in the ACD Variables window. Select an ACD variable from the list to associate it with the decision.

Condition - click the Condition field and select a condition for the ACD variable. Select Above, Below, In, or Out from the list. These adjectives refer to the range of values in the Min and Max fields. The value of the ACD variable must fall within the range of the selected condition to play the message associated with the decision. If Above is selected, data cannot be input in the Max field because the range is any value above the minimum value specified. If Below is selected, data cannot be input in the Min field because the range is any value below the maximum value specified. Values are accepted by both the Min and Max field if either In or Out is selected.

Min / Max - type values in the Min and Max fields to define a range for the value of the ACD variable. When the value of the ACD variable falls within the range specified by the Min, Max, and Condition fields, the message associated with the decision will play on the reader board. The availability of the Min and Max fields is dependant upon the condition specified in the Condition field.

Sec - the Sec field is used to specify the minimum number of seconds a conditional decision must be true before its associated message will play.

Play Tone - enable the Play Tone check box to have the reader board emit a beep prior to displaying the message associated with the decision. The beep is only produced when the message is first played. It will not be heard if the message is repeated on the reader board.

Complete Decision - the Complete Decision field displays the decision in plain language after the update button on the toolbar is clicked.

 - click the add entry button in the record edit area of the window to add a new entry to the decision.

 - click the delete entry button in the record edit area to delete the selected entry from the record edit area.

 - the up and down arrow buttons in the record edit area of the Decisions window promote and demote the selected decision within the decision tree. The priority of a conditional decision cannot be lower than that of the default decision in a decision tree.

Defining Decision Trees

Use the Decisions window to create decision trees that play messages based on the current customer interaction center conditions. To do this, apply a message to each decision along with an ACD variable and a set of conditions that the ACD variable must be experiencing for the message to play.

Use the following steps to define a decision tree.

1. Click the Config button on the Main Control Panel to switch to the Configuration mode.
2. Click the Decisions button on the Main Control Panel to display the Decisions window.
3. Click New on the toolbar.
4. Type a Name for the decision tree.
5. Click the Play Message field in the default decision and select a message.
6. Click to add a decision to the decision tree.
7. Click the down-arrow in the Play Message field. Select a message from the drop-down list to associate the message with the new decision.
8. Click the down-arrow in the If ACD Variable field. Select an ACD variable from the list.
9. Click the down-arrow in the Condition field. Select the condition the ACD variable must be in to play the message.
10. Input a value in the Min field to define the minimum value for the ACD variable condition.
11. Input a value in the Max field (if applicable) to define the maximum value for the ACD variable condition.
12. Input a value in the Sec field to indicate the number of seconds the ACD variable must be in the defined condition before the message will play.
13. Enable the Tone check box to have the reader board emit a tone when the message associated with the decision is first played.
14. Repeat steps 6 to 13 to add additional decisions to the decision tree.
15. Click Update on the toolbar to save the new decision tree and add it to the list in the record area.

Default and Conditional Decisions

Conditional decisions are created by defining the ACD queue conditions that must be in effect for a message to play. This is done by associating a message with an ACD variable and then specifying the conditions the ACD variable must be experiencing in order for the message to play. Each message and ACD variable association is one decision within a decision tree. The order the decisions are listed within a decision tree identifies their priority within the decision tree.

For example, if decision 2 is satisfied, a message for decision 2 will continue to be played until either:

    a. decision 2 is no longer satisfied because the value of the performance variable has fallen/risen within acceptable service limits and the default decision is used, or

    b. decision 1 is satisfied. A message for the higher priority decision will interrupt a message for the second decision.

Default decisions are used when the current call center conditions do not match any of the conditions specified in the conditional decisions. Unlike the conditional decisions, default decisions cannot be associated with ACD variables. Every decision tree must contain a default decision. In a decision tree, the default decision is always the lowest priority decision.

Deleting A Decision Tree

The Delete button on the toolbar of the Decisions window deletes the decision tree selected in the record area of the window. It is only possible to delete decision trees that are not referenced elsewhere in the sign plan. If an decision tree is referenced anywhere else in a sign plan, all references must be removed prior to deleting the decision tree.

Use the following steps to delete a decision tree from the Decisions window.

1. Select the decision tree to delete in the record area of the Decisions window.
2. Click the Delete button on the toolbar.
3. Click Yes in the Sign dialog box to acknowledge the deletion.
4. If the message is not referenced anywhere else in the sign plan, the message is deleted immediately. If the Sign dialog box opens with the statement:

        The selected element(s) cannot be deleted because they are being referenced by another part of the system.

    click OK and search the sign plan for references to the decision tree and delete them before attempting to delete the decision tree again.

Using the Days Window

The Days window is accessed by clicking the calendar button on the Main Control Panel. This window is used to identify special days that require unique messages. Special days are included in scripts. The scripts associate with messages through the assignment of a day plan.

The WallSign Administrator is provided with a number of pre-defined special days. These days encompass the major holidays and events in a year. Add these pre-defined special days to a script for use in a sign plan, or use the Days window to define any additional days the customer interaction center requires.

Days Window Components

The Days window is comprised of three sections: the record area, the toolbar, and the record edit area.

<u>Record Area</u>

The record area of the Days window lists the defined special days that require specific messages. Select a special day from the list for editing or deletion. When selected, a special day is highlighted in blue and its details can be viewed and edited in the record edit area.

Day Name	Day Type	Date	Number Of Days	Description
Christmas	Specific	25 December	1	Christmas Day
Boxing Day	Specific	26 December	1	Boxing Day
Canada Day	Specific	29 June	3	Canada's Birthday
Civic Holiday	Specific	1 August	1	Civic Holiday
Easter	Reference	Last Sunday of March	1	Easter Sunday
Good Friday	Reference	Last Friday of March	1	Good Friday
Independence Day	Specific	4 July	1	Independence Day
Labour Day	Specific	30 August	4	Labour Day Weekend
Lincoln's Birthday	Specific	12 February	1	Lincoln's Birthday
Memorial Day	Reference	Last Monday of May	1	Memorial Day

<u>Toolbar</u>

The toolbar in the Days window is used to create and name new special days, edit existing special days, and delete special days no longer needed.

Day Name | Agent Training | New | Delete | Update

Day Name - each special day or group of days must be assigned a user-defined name. This is done in the Day Name field on the toolbar of the Days window. The names for the special days are used to identify the dates throughout the WallSign Administrator. For this reason, the names must be descriptive in nature.

New - the New button on the toolbar of the Days window allows for the definition of a new special day. After clicking the New button, name the new special day and define the dates for the period in the record edit area. When finished, save the new special day by clicking the Update button.

Delete - the Delete button on the toolbar of the Days window deletes the special day or group of days selected in the record area of the window. It is only possible to delete special days that are not referenced elsewhere in the sign plan. If a special day is referenced anywhere else in a sign plan, all references must be removed prior to deleting the day or group of days.

Update - click the Update button to save changes to a special day or a group of special days.

Record Edit Area

The record edit area of the Days window is the interface for the definition of a special day. This area is used to define new special days and to edit the special days already defined.

Date is Specific - a special day is defined as a specific date when it applies to a particular calendar date. For instance, Christmas is a specific date because it falls on the 25th of December every year.

Date is Reference - a special day is defined as a reference date when it applies to an event that falls on the same day of the week, in the same month, every year. A date like Father's Day is considered to be a reference date because it is defined by its occurrence on the third Sunday in June each year.

Description - the Description field in the record edit area of the Days window is an optional field where a description for the special day is entered. This field allows you to elaborate on the name of the special day for easier identification.

Defining Special Days

Use the Days window to define special days or groups of days throughout the year that require specific messages. Special dates can refer to specific calendar dates or to a reference period within a month, such as the third Thursday of February.

Use the following steps to define a special day.

1. Click the Config button on the Main Control Panel to switch to Configuration mode.
2. Click the calendar button on the Main Control Panel to display the Days window.
3. Click New on the toolbar.
4. Type a Name for the day or group of days.
5. Define the date as a specific date or a reference date.
6. Click in the Description field and type a description for the day or group of days.
7. Click Update on the toolbar to save the special day or group of days.

Defining Specific Dates

A special day is defined as a specific date when it applies to a particular calendar date. For instance, Christmas is a specific date because it falls on the 25th of December every year.

Use the following steps to define a specific day or group of days.

1. Enable the Specific radio button to define a specific calendar date or a group of dates.
2. Click on the numeric day of the month and use the up and down arrows to select the day of the month.
3. Click on the month and use the up and down arrows to select the month.
4. Use the up and down arrows in the day(s) field to define the number of days the period encompasses, beginning with the selected date.

Defining Reference Dates

A special day is defined as a reference date when it applies to an event that falls on the same day of the week, in the same month, every year. A date like Father's Day is considered to be a reference date because it is defined by its occurrence on the third Sunday in June each year.

Use the following steps to define a reference day or group of days.

1. Enable the Reference radio button to define a reference date or group of dates within a month.
2. Click the reference field to select the reference day within the month. The selections in this list are First, Second, Third, Fourth, or Last. These adjectives refer to specific days of the week within a specific month. For instance, it may be referring to the first Friday in June.
3. Click on the day of the week and use the up and down arrows to select a day.
4. Click on the month and use the up and down arrows to select a month.
5. Use the up and down arrows in the day(s) field to define the number of days the period will encompass, beginning with the selected date.

Deleting Special Days

The Delete button on the toolbar of the Days window deletes the special day selected in the record area of the window. It is only possible to delete special days that are not referenced elsewhere in the sign plan. If a special day is referenced anywhere else in a sign plan, all references must be removed prior to deleting the special day.

Use the following steps to delete a special day.

1. Select the special day to delete in the record area of the Days window.
2. Click the Delete button on the toolbar.
3. Click Yes in the Sign dialog box to acknowledge the deletion.
4. If the special day is not referenced anywhere else in the sign plan, it is deleted immediately. If the Sign dialog box opens with the statement:

   The selected element(s) cannot be deleted because they are being referenced by another part of the system.

   click OK and search the sign plan for references to the special day and delete them before attempting to delete the special day again.

Using the Day Plans Window

The Day Plans window is accessed by clicking the Day Plans button on the Main Control Panel. This window is used to partition a 24-hour period and apply a decision tree to each partition. This process breaks the customer interaction center day into segments and allows different messages to be applied to different times of the day.

Once defined, the day plans are applied to specific days of the week or special days in the Scripts window. A default day plan is automatically created in the Day Plans window. The default day plan cannot be renamed, but time segments and decision trees can be applied.

Day Plans Window Components

The Day Plans window is comprised of three sections: the record area, the toolbar, and the record edit area.

<u>Record Area</u>

The record area of the Day Plans window lists the defined day plans. Select a day plan from the list for editing or deletion. When selected, a day plan is highlighted in blue and its details can be viewed and edited in the record edit area.
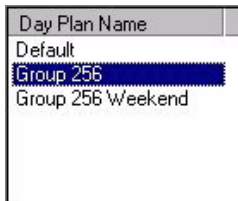
<u>Toolbar</u>

The toolbar in the Day Plans window allows you to create and name new day plans, edit existing day plans, and delete day plans no longer needed.

Day Plan Name - each day plan must be assigned a user-defined name. This is done in the Day Plan Name field on the toolbar of the Day Plans window. The day plan names are used to identify the day plans throughout the WallSign Administrator. For this reason, the names must be descriptive in nature.
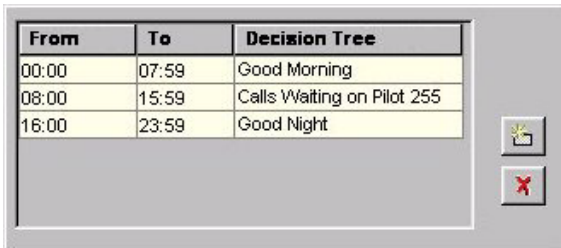
New - the New button on the toolbar of the Day Plans window allows for the definition of a new day plan. After clicking the New button, name the new day plan and define its parameters. When finished, save the new day plan by clicking the Update button.

Delete - the Delete button on the toolbar of the Day Plans window deletes the day plan selected in the record area of the window. It is only possible to delete day plans that are not referenced elsewhere in the sign plan. If a day plan is referenced anywhere else in a sign plan, all references must be removed prior to deleting the day plan.

Update - click the Update button to save changes to a day plan.

Record Edit Area

The record edit area of the Day Plans window is the interface for defining the time segments of a day plan. This area is used to define new time segments, delete time segments, and to edit the existing time segments of a day plan.

From	To	Decision Tree
00:00	07:59	Good Morning
08:00	15:59	Calls Waiting on Pilot 255
16:00	23:59	Good Night

Day Plans Platform - the day plans platform is located in the record edit area of the Day Plans window. This area provides a table where the time segments of the day plans are displayed with their associated decision trees. Click on the hour or minute field of a time segment in either the From or To columns of the table to edit the time. Click the down-arrow in the Decision Tree column to assign a decision tree to the time segment.

From - the From column in the record edit area of the Day Plans window defines the starting time for a day plan time segment. The time in the From column for the first time segment of a day plan must be 00:00. Each day plan must encompass a 24-hour period, beginning with 00:00 and ending with 23:59. To set the starting hour of a time segment, click the hour field in the From column and type a value between 00 and 23. To set the starting minute of a time segment, click the minute field in the From column and type a value between 00 and 59.

To - the To column in the record edit area of the Day Plans window defines the ending time for a day plan time segment. The time in the To column for the last time segment of a day plan must be 23:59. Each day plan must encompass a 24-hour period, beginning with 00:00 and ending with 23:59.To set the ending hour

of a time segment, click the hour field in the To column and type a value between 00 and 23. To set the ending minute of a time segment, click the minute field in the To column and type a value between 00 and 59.

Decision Tree - applying decision trees to the time segments of a day plan creates an association between the time of day and the customer interaction cent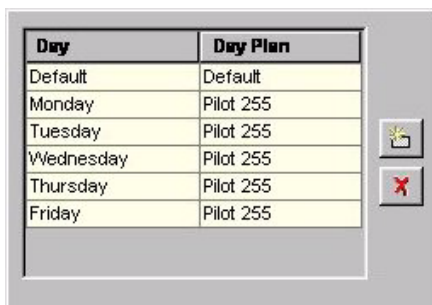er conditions. The WallSign Server searches the day plan configuration for a time segment that matches the current time. It then searches the decision tree associated with the time segment for ACD variables that match the current customer interaction center conditions.

- click the add entry button in the record edit area of the window to add a new entry to the day plan.

- click the delete entry button in the record edit area to delete the selected entry from the record edit area.

Defining Day Plans

Use the Day Plans window to apply decision trees to specific segments of a 24-hour period. A day plan must begin with 00:00 and end with 23:59. The minimum size of a day plan segment is 1 minute while the maximum size is 24-hours. A default day plan is automatically created in the Day Plans window.

Use the following steps to define a new day plan with three time segments.

1. Click the Config button on the Main Control Panel to switch to Configuration mode.
2. Click the Day Plans button on the Main Control Panel to display the Day Plans window.
3. Click New on the toolbar.
4. Type a Name for the day plan.
5. Click the add entry button twice to add a second and third time segment to the day plan.
6. Set the start time for each time segment in the From column.
7. Set the end time for each time segment in the To column.
8. Select a decision tree for each time segment from the Decision Tree column.
9. Click Update on the toolbar to save the new day plan and add it to the list in the record area.

Deleting a Day Plan

The Delete button on the toolbar of the Day Plans window deletes the day plan selected in the record area of the window. It is only possible to delete a day plan that is not referenced elsewhere in the sign plan. If a day plan is referenced anywhere else in a sign plan, all references must be removed prior to deleting the day plan.

Use the following steps to delete a day plan from the Day Plans window.

1. Select the day plan you want to delete in the record area of the Day Plans window.
2. Click the Delete button on the toolbar.
3. Click Yes in the Sign dialog box to acknowledge the deletion.
4. If the day plan is not referenced anywhere else in the sign plan, it is deleted immediately. If the Sign dialog box opens with the statement:

   The selected element(s) cannot be deleted because they are being referenced by another part of the system.

click OK and search the sign plan for references to the day plan and delete them before attempting to delete the day plan again.

Using the Scripts Window

The Scripts window is accessed by clicking the Scripts button on the Main Control Panel. This window is used to apply day plans to the days of the week and to special days. This process produces associations between the day of the week, the time of day, and the customer interaction center conditions by creating a link between a script, a day plan, and a decision tree.

The first entry in every script is the default entry. The default day plan is automatically applied to the default script entry, but any existing day plan can be used with the default script. The default script entry is used when no other script entries are present, or when the existing script entries do not apply to the current conditions.

Scripts Window Components

The Scripts window is comprised of three sections: the record area, the toolbar, and the record edit area.

Record Area

The record area of the Scripts window lists the defined scripts. Select a script from the list for editing or deletion. When selected, a script is highlighted in blue and its details can be viewed and edited in the record edit area.

Script Name	
Group 256 Weekday Script	
Group 256 Weekend Script	

Toolbar

The toolbar in the Scripts window is used to create and name new scripts, edit existing scripts, and delete scripts no longer needed.

Script Name - each script must be assigned a user-defined name. This is done in the Script Name field on the toolbar of the Scripts window. The script names are used to identify the scripts throughout the WallSign Administrator. For this reason, the names must be descriptive in nature.

New - the New button on the toolbar of the Scripts window allows for the creation of a script. After clicking the New button, name the new script and add the required days and day plans. When finished, save the script by clicking the Update button.

Delete - the Delete button on the toolbar of the Scripts window deletes the script selected in the record area of the window. It is only possible to delete scripts that are not referenced elsewhere in the sign plan. If a script is referenced anywhere else in a sign plan, all references must be removed prior to deleting the script.

Update - click the Update button to save changes to a script.

Record Edit Area

The record edit area of the Scripts window provides the interface for the application of day plans to the days of the week or to special days. Together, these days and their associated day plans create a script. The record edit area is used to add days to a script and to edit the days that have already been defined for an existing script.

Script Platform - the script platform is located in the record edit area of the Scripts window. This area provides a table that displays the script entries. To edit or delete a script entry, other than the default entry, select the script entry from the table by clicking in one of its table fields.

Day - the Day column of the Scripts window assigns days of the week or special days to script entries. Click the down-arrow in each row of the Day column and select a weekday or special day from the drop-down list. Each day in the list can only appear in a script once.

Day Plan - the Day Plan column of the Scripts window assigns day plans to the script entries. Click the down-arrow in each row of the Day Plan column and select a day plan from the drop-down list.

- click the add entry button in the record edit area of the window to add a new entry to the script.

- click the delete entry button in the record edit area to delete the selected entry from the record edit area.

Defining a Script

Use the Scripts window to create scripts that apply day plans to the days of the week or to special days. When a new script is created, a default entry is automatically added that uses the default day plan. Use each day of the week or special day only once in each script.

Use the following steps to define a new script.

1. Click the Config button to choose Configuration mode and click the Scripts button on the Main Control Panel.
2. Click New on the toolbar.
3. Type a Name for the new script.
4. Click the add entry button to add a new script entry.
5. Click in the Day column for the entry and select a day of the week.
6. Click in the Day Plan column for the entry and select a day plan.
7. Repeat steps 4 to 6 to define additional script entries.
8. Click the Update button on the toolbar to save the new script.

Deleting a Script

The Delete button on the toolbar of the Scripts window deletes the script selected in the record area of the window. It is only possible to delete scripts not referenced elsewhere in a sign plan. If a sign references the script in the Signs window, the reference must be deleted from the Signs window prior to deleting the script.

Use the following steps to delete a script from the Scripts window.

1. Select the script to delete in the record area of the Scripts window.
2. Click the Delete button on the toolbar.
3. Click Yes in the Sign dialog box to acknowledge the deletion.
4. If the script is not referenced anywhere else in the sign plan, the script is deleted immediately. If the Sign dialog box opens with the statement:

> The selected element(s) cannot be deleted because they are being referenced by another part of the system.

click OK and search the sign plan for references to the script and delete them before attempting to delete the script again.

Using the Signs Window

The Signs window is the final stop in the creation of a sign plan. Access the Signs window by clicking the Signs button on the Main Control Panel. This window is used to assign addresses and scripts to individual reader boards. The reader board address in the TASKE WallSign Administrator must equal the address setting in the reader board. Matching the two addresses is essential in establishing a communication link between the reader board and the software.

The assignment of a script to a reader board creates a link between the reader board and the sign plan. When a script is assigned to a reader board it is linking the reader board to its associated day plan, decision trees, and messages. Using the sign plan components the WallSign Server is capable of determining which message to play based on the location of the reader board, the day of the week, the time of the day, and the customer interaction center conditions.

When several reader boards are linked together, it creates a sign network. A sign network is a group of two to five reader boards that are controlled by a TASKE PC running the WallSign Server. The reader boards are connected in a daisy-chain fashion. The reader board that is directly connected to the TASKE PC is known as the master reader board. The rest of the reader boards in the network are known as slave reader boards.

Signs Window Components

The Signs window is comprised of three sections: the record area, the toolbar, and the record edit area. The functionality of each of these sections is very specific.

Record Area

The record area of the Signs window lists the defined reader boards. Select a reader board from the list for editing or deletion. When selected, a reader board is highlighted in blue and its details can be viewed and edited in the record edit area.

Toolbar

The toolbar in the Signs window is used to define and name new reader boards, edit the setup of existing reader boards, and delete the setup of reader boards no longer needed.

Sign Name | Sales Department Sign | [New] [Delete] [Update]

Sign Name - each reader board must be assigned a user-defined name. This is done in the Sign Name field on the toolbar of the Signs window. The reader board names are used to identify the signs throughout the WallSign Administrator. For this reason, the names must be descriptive in nature.

New - the New button on the toolbar of the Signs window allows for the addition of a reader board. After clicking the New button, name the new reader board, set its address, and assign a script. When finished, save the reader board setup by clicking the Update button.

Delete - the Delete button on the toolbar of the Signs window deletes the setup of the reader board selected in the record area of the window.

Update - click the Update button to save changes to the sign address or script assignment.

Record Edit Area

The record edit area of the Signs window provides the interface for addressing reader boards and assigning scripts to each. Use this area to address and assign scripts to new reader boards and to edit the addresses and script assignments of existing reader boards.

Sign Address | Script
0 | Group 256 Weekday Sc ▼
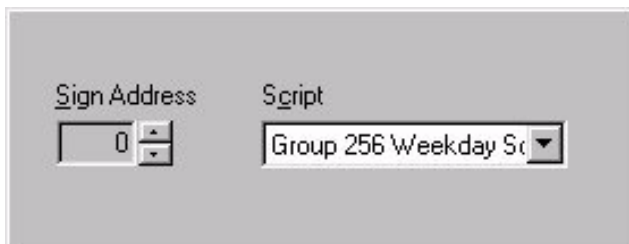
Sign Address - the Sign Address field in the record edit area of the Signs window defines the address of a reader board. Use the up and down arrows to set the address from 00 to 99. Ensure that the address setting in the reader board and the address setting in the WallSign Administrator match. For information on setting the address on the Spectrum reader board, refer to the Spectrum Corporation documentation.

Script - the Script field in the record edit area of the Signs window assigns a script to the reader board. Use the down-arrow to view a list of all defined scripts. Select a script from the list to assign it to the reader board.

Defining A Sign (Spectrum Reader Board)

Use the Signs window to associate a Spectrum reader board with a message or a group of messages. To add a reader board to your TASKE system it must be named, addressed, and assigned a script. The assignment of a script to a reader board completes a sign plan. The script associates messages and all of their conditions with a particular reader board.

Use the following steps to add a reader board to the TASKE system.

1. Click the Config button on the Main Control Panel to switch to the Configuration mode.
2. Click the Signs button on the Main Control Panel to display the Signs window.
3. Click New on the toolbar.
4. Type a Name for the reader board.
5. Select an Address for the reader board from 00 to 99.
6. Click the Script field and select a script.
7. Click the Update button on the toolbar to save the settings for the reader board.
8. Follow the instructions from Spectrum Corporation and address the reader board to match the address of the reader board in the WallSign Administrator.

Deleting a Sign

The Delete button on the toolbar of the Signs window deletes the sign selected in the record area of the window. It is only possible to delete signs that are not referenced elsewhere in a sign plan. If a sign is referenced anywhere in a sign plan, the reference must be deleted from the Signs window prior to deleting the sign.

Use the following steps to delete a sign from the Signs window.

1. Select the sign to delete in the record area of the Signs window.
2. Click the Delete button on the toolbar.
3. Click Yes in the Sign dialog box to acknowledge the deletion.
4. If the sign is not referenced anywhere else in the sign plan, the sign is deleted immediately. If the Sign dialog box opens with the statement:

   The selected element(s) cannot be deleted because they are being referenced by another part of the system.

   click OK and search the sign plan for references to the sign and delete them before attempting to delete the sign again.

Using the Graphics Window

Use the Graphics window to create custom graphic images. Include the images in reader board messages and quick messages, as a replacement to, or as an accompaniment to the images provided with the WallSign application. To view the Graphics window, click the color palette button on the Main Control Panel.

The record edit area of the Graphics window contains a color palette and a simulation of a reader board. Each of the gray dots on the reader board represent an LED. Filling these LEDs with color produces the image. Include the graphics in the messages of the Messages window for the sign plan or in quick messages through the Quick Messages window.

Graphics Window Components

The Graphics window is comprised of three sections: the record area, the toolbar, and the record edit area.

Record Area

The record area of the Graphics window lists the existing user-defined graphics . Select a graphic from the list for editing or deletion. When selected, a graphic is highlighted in blue and it can be viewed and edited in the record edit area.
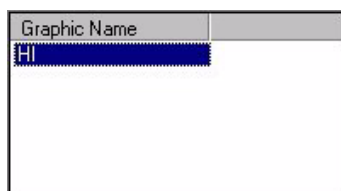
Toolbar

The toolbar in the Graphics window is used to create and name new reader board graphics, edit existing graphics, and delete graphics no longer needed. In addition, the toolbar provides the tools for defining the dimensions of the graphic on the reader board, clearing graphics from the drawing platform in the record edit area, and testing graphics on the reader boards.

Graphic Name - each user-defined graphic must be assigned a name. This is done in the Graphic Name field on the toolbar of the Graphics window. The graphic names are used to identify the user-defined graphics throughout the WallSign Administrator. For this reason, the names must be descriptive in nature.

Dimensions - the Dimensions... button is used to specify the dimensions of a graphic on a reader board. The dimensions are measured by the number of LEDs high by the number of LEDs wide. The size of reader boards vary between models, therefore, it is important to know the number of LEDs on the reader board prior to setting the dimensions.

Clear - use the Clear button to clear the drawing platform.

Test - the Test... button displays the graphic on the selected reader board. Clicking the Test... button opens the Test Graphic to Sign dialog box. Use the up and down arrows of the Sign Address field to select the address of the reader board testing the graphic. Click OK to display the graphic on the reader board.

New - the New button on the toolbar of the Graphics window allows for the creation of a new reader board graphic. Clicking the New button automatically clears the drawing platform in anticipation of the new graphic. Name the new graphic, set the dimensions, and begin drawing, using the colors of the color palette. When finished, save the graphic by clicking the Update button.

Delete - the Delete button on the toolbar of the Graphics window deletes the graphic selected in the record area of the window. It is only possible to delete graphics that are not referenced elsewhere in the sign plan. If a graphic is referenced anywhere else in a sign plan, all references must be removed prior to deleting the graphic.

Update - click the Update button to save changes to a custom graphic.

Record Edit Area

The record edit area of the Graphics window provides the platform and the tools for the creation of reader board graphics. This area is used to create new reader board graphics and to edit the existing graphics. The color palette provides the drawing tools for the creation of the graphics, while the drawing platform provides a drawing area that is a simulation of a reader board for realistic graphic creation.
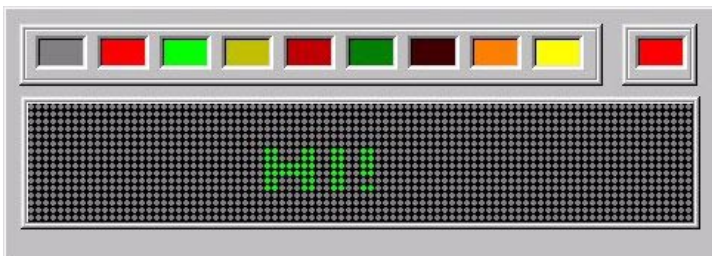
Color Palette - the color palette in the record edit area of the Graphics window provides the drawing colors for the creation of the user-defined reader board graphics. Click on a color in the color palette. The selected color is displayed in

the color selection box to the right of the color palette. After selecting a color, fill in the gray dots of the drawing area to create the graphic. Switch colors where applicable and use gray to erase any errors.

Drawing Platform - the drawing platform in the record edit area of the Graphics window is the area where user-defined graphics are created. The drawing platform is a simulation of a reader board. Each gray dot in the drawing platform represents an LED that can be filled with color using the colors of the color palette.

Creating Custom Graphics

Use the Graphics window to create custom graphic images to include in the reader board messages. The record edit area of the Graphics window contains a color palette and a simulation of a reader board. Each of the gray dots on the reader board represent an LED. Filling these LEDs with color produces the image.

<u>Creating a New Graphic</u>

Use the following steps to create a new graphic.

1. Click the Config button to enable the Configuration mode.
2. Click the color palette button on the Main Control Panel to display the Graphics window.
3. Click New on the toolbar.
4. Type a Name for the graphic.
5. Click the color you want to use first.
6. Click a gray dot on the simulated reader board to fill the dot with the selected color.
7. Continue filling the dots to create the image, changing colors where required. To erase a mistake, use the gray color to fill the dot with its original color.
8. Click the Update button on the toolbar to save the new graphic.

Dimensions

The Dimensions... button is used to specify the dimensions of a graphic on a reader board. The dimensions are measured by the number of LEDs high by the number of LEDs wide. The size of reader boards vary between models, therefore, it is important to know the number of LEDs on the reader board prior to setting the dimensions. The graphic will not function properly if the dimensions are larger than the number of LEDs that physically exist on the reader board.
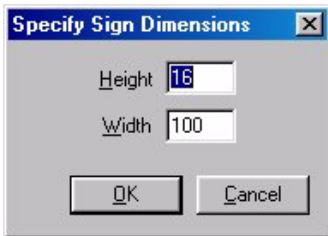
To set the dimensions of a graphic, click Dimensions... to open the Specify Sign Dimensions dialog box. Input values for the number of LEDs in height and width and click OK.

Making the dimensions larger than the graphic does not distort the graphic. It simply determines how much real estate the graphic will require on the reader board. For instance, to display a graphic at the same time as the message text set the dimensions to accommodate the size of the graphic, but no larger. However, to display the graphic by itself on the reader board and have the message text precede or follow the graphic, make the graphic dimensions large enough to occupy the entire reader board.

If the graphics created for the Reader Board are not displayed properly on the Spectrum Reader Board, try setting the dimensions to a slightly smaller size.

Using the Color Palette and Drawing Platform

The color palette and drawing platform in the record edit area of the Graphics window provide the tools for creating custom graphics.

Using the Color Palette

The color palette in the record edit area of the Graphics window provides the drawing colors for the creation of the user-defined reader board graphics. Click on a color in the color palette. The selected color is displayed in the color selection box to the right of the color palette. After selecting a color, fill in the gray dots of the drawing area to create the graphic. Switch colors where applicable and use gray to erase any errors.

Some models of the Spectrum reader boards do not support all of the colors provided in the color palette. Consult the Spectrum Corporation documentation for information on the colors supported.

Using the Drawing Platform

The drawing platform in the record edit area of the Graphics window is the area where user-defined graphics are created. The drawing platform is a simulation of a reader board. Each gray dot in the drawing platform represents an LED that can be filled with color using the colors of the color palette.
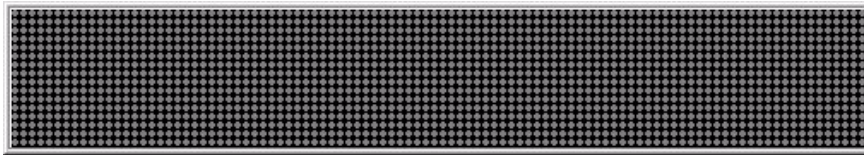
Deleting Custom Graphics

The Delete button on the toolbar of the Graphics window deletes the graphic selected in the record area of the window. It is only possible to delete graphics that are not referenced in a sign plan. If a graphic is referenced anywhere in a sign plan, all references must be removed prior to deleting the graphic.

Use the following steps to delete a graphic from the Graphics window.

1. Select the graphic to delete in the record area of the Graphics window.
2. Click the Delete button on the toolbar.
3. Click Yes in the Sign dialog box to acknowledge the deletion.
4. If the graphic is not referenced anywhere else in the sign plan, it is deleted immediately. If the Sign dialog box opens with the statement:

> The selected element(s) cannot be deleted because they are being referenced by another part of the system.

click OK and search the sign plan for references to the graphic and delete them before attempting to delete the graphic again.

TASKE Voice ToolBox

TASKE Voice ToolBox is an application of the TASKE ToolBox that works in conjunction with Dialogic® voice cards to provide a call center with intelligent voice messaging capabilities.

Using the Voice ToolBox application a call center is able to:

- Route multiple messages to multiple answering points. Play messages that are of interest to callers and their position within the call center queues. For instance, play technical support messages in the technical support queue and play sales messages in the sales queue.
- Incorporate variables into messages that change the message content based on the current call center conditions, the time of day, day of the week, or user defined special day.
- Accept routing instructions from callers using DTMF (dual-tone-multi-frequency). This means callers can route themselves to the desired destination using their keypad and the options provided in the message.
- Create messages using the sound files provided with the Voice ToolBox or create custom messages specific to the call center by creating .wav files and incorporating them into messages.

The Voice ToolBox consists of two programs: TASKE Voice Administrator and TASKE Voice Server.

Voice Administrator Icon   **Voice Server Icon**

The Voice Administrator is the Voice ToolBox user interface for configuring voice channels and defining voice plans. The Voice Server is the communication link between the Voice ToolBox application and the voice channels. Operating in the background, the Voice Server stores the voice plans, interfaces with the TASKE Information Server to determine the current call center conditions, and distributes the appropriate messages to the appropriate voice channels based on the conditions defined in the voice plan.

It is not necessary to have both Voice ToolBox applications running concurrently. Because the Voice Server stores the voice plans, the Voice Administrator only needs to be started for configuration changes or to play quick messages. The Voice Administrator is required to play quick messages because the control of these messages is accessed via the Voice Administrator interface.

Controlling Media Using Voice Plans

A voice plan contains all of the components required to communicate and play audio messages created with the Voice ToolBox through a Dialogic card. Use the windows of the Voice Administrator application to create voice plans.

A voice plan plays recorded media through one or more voice channels. These channels are able to accept DTMF digits (dual-tone-multi-frequency digits, also known as touch-tone) from the caller and route the caller to the desired area of the call center. Creating voice plans that suit the needs of the call center require planning. Create voice plans using a top-down approach. This means the creation of a voice plan must begin with the creation of the messages and finish with the channel definition. This approach is necessary to develop the links between the voice plan elements.

The components of a voice plan are as follows:

Messages - voice messages are the messages played to callers. These messages may contain any of the pre-defined .wav files included with the Voice Toolbox application or users can create custom .wav files.

Auto-attendants - an auto-attendant provides the structure for routing callers through the call center and determining which messages the callers will hear. Callers hear the choices available and dial the digits required to route themselves to the desired section of the call center.

Day Plans - day plans break the call center day into segments and apply an auto-attendant to each segment. This allows different messages to be applied to different times of the day.

Scripts - scripts apply day plans to the days of the week and to special days. This allows different message combinations to be played to callers depending on the day of the week or user-defined special day.

Channels - a voice channel is an output point for audio messages on a Dialogic voice card. When configuring a channel, an unique address number from 1 to 255 is required. Using the address number, the Voice ToolBox application maps messages to the correct voice channels. Assign scripts to voice channels to define the output point for the messages associated with the script.

Special Days - special days are optional elements in a voice plans. Define special days or groups of days throughout the year that require specific messages or unique call center hours.

The chart, above, illustrates the linking between the voice plan elements. Messages must link to auto-attendants, auto-attendants must be embedded in day plans, day plans must be embedded in scripts, and finally, a channel cannot be defined without an embedded script. The calendar icon in the chart represents special days. These are days, such as holidays, that require unique messaging and may have operational hours that are not normal for the call center. Special days are optional elements in a voice plan, however, if they are to be included, they must be used in scripts when identifying the days of the week.

Voice ToolBox Startup and Shutdown

For Voice ToolBox configuration, only the Voice Administrator must be running. For the communication of messages from the Voice ToolBox to the telephone system, the Voice Server must be running on a PC with one or more Dialogic boards installed.

Starting the Voice Administrator

Use the following steps to start the Voice Administrator application.

1. Double-click the TASKE ToolBox icon on the desktop of the PC to open the TASKE ToolBox folder.
2. Double-click the Voice Administrator icon to start the Voice Administrator and open the application window.

Starting the Voice Server

When the Voice Server is started an icon appears in the taskbar of the PC's desktop and the Voice Server light on the Main Control Panel of the Voice Administrator turns green to indicate the establishment of communication.

1. Double-click the TASKE ToolBox icon on the desktop of the PC to open the TASKE ToolBox folder.
2. Double-click the Voice Server icon to start the Voice Server.

Shutting Down the Voice Administrator

Use the following steps to shut down the Voice Administrator application.

1. Click File on the menu bar to open the File menu.
2. Select Exit from the File menu.

Shutting Down the Voice Server

Use the following steps to shut down the Voice Server application.

1. Right-click on the Voice Server icon on the taskbar of the Windows desktop.
2. Select Shutdown from the pop-up menu.
3. Click the Yes button to confirm.

Using the Voice Administrator Interface

The Voice Administrator window is comprised of three sections: the menu bar, the Main Control Panel, and the display area.

Menu Bar

Spanning the top of the Voice Administrator window, the menu bar contains four menus. The four menus of the menu bar are File, Edit, View, and Help.

File Menu

| System Parameters... |
| Settings... |
| Send Data To Voice Machine... |
| Exit |
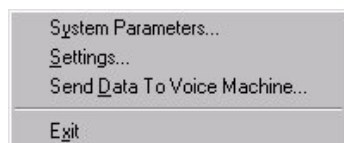
System Parameters... - Use the System Parameters... option to open the System Parameters dialog box and configure system-wide parameters for the Voice ToolBox.

Settings... - Use the Settings... option to open the Configuration dialog box to configure the communication paths to the Voice Server and to the TASKE Voice Database.

Send Data to Voice Machine... - Use the Send Data to Voice Machine... option to update voice configuration or voice plan changes in the Voice Server.

Exit - Select the Exit option to close the Voice Administrator application. This action does not shutdown the Voice Server application.

Edit Menu

| Set Dynamic System Variable Values... |
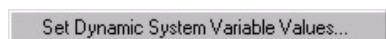
Set Dynamic System Variable Values... - Select Set Dynamic System Variable Values... to open the Dynamic Phrase Test Values dialog box and enter test values for the ACD variables. These values are used in the playback of messages during system configuration.

View Menu

The TASKE Voice Administrator operates in one of two modes. These modes are configuration and view. To switch between the modes, use the Config and View buttons on the Main Control Panel or use the View menu.

Config Mode - The configuration mode is the interface for the creation and management of voice plan elements. When in the configuration mode, each window accessed from the Main Control Panel displays its existing elements. Use the window in the configuration mode to create new elements and edit the existing elements.

View Mode - The view mode is a read-only, real-time display. When in the view mode, the windows accessed from the Main Control Panel display the element that is currently being used by the Voice ToolBox to play the message on the voice channel. This option is only available after configuration is complete and the communication with the Voice Server is established.

Help Menu

Contents - Select Contents from the Help menu to access the online help for the TASKE Voice Administrator and the TASKE Voice Server.

About TASKE Voice Administrator... - This menu option opens the About TASKE Voice Administrator dialog box. This dialog box provides the software release number, the software version number, the copyright information, and the TASKE Lock Number. Click OK to exit the dialog box.

Main Control Panel

The Main Control Panel spans the left side of the Voice Administrator interface. This area of the interface has two functions: Mode selection and Window selection.

(Voice Server) - when the light at the bottom of the Main Control Panel is green it indicates an established communication link with the Voice Server. If the light is red communication with the Voice Server is not available.

Mode Selection - clicking the Config and View buttons toggle the TASKE Voice Administrator program between the configuration mode and the view mode. The configuration mode enables users to create and edit voice plan components using the windows of the display area. The view mode changes these windows to read-only, real-time displays. In the view mode,

the elements that are currently being used to broadcast messages through the voice channels are presented in the record area.

Window Selection - the Main Control Panel contains buttons to access the windows of the voice plan components. Selection of a button opens its corresponding window in the display area. The windows are:

Messages	Auto-attendants	Day Plans
Messages	AA	Day Plans
Scripts	**Channels**	**Days**
Scripts	Channels	
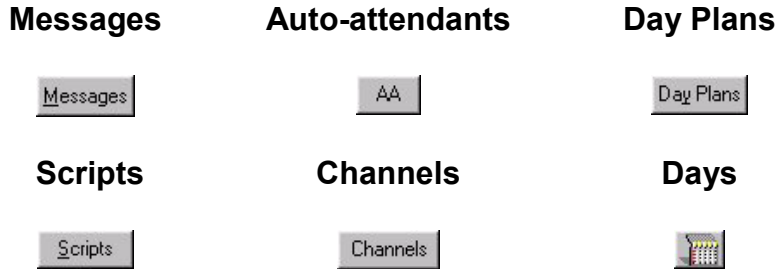
Display Area

The display area of the Voice Administrator interface is the large area to the right of the Main Control Panel. The window selection buttons of the Main Control Panel determine the contents of the display area. Each window selection button opens a window that is displayed in the display area. These windows are the interface for creating and editing the elements of a voice plan in the configuration mode and the real-time display of these items in the view mode.

Selecting a Mode

The TASKE Voice Administrator operates in one of two modes. These modes are configuration and view. To switch between the modes, use the Config and View buttons on the Main Control Panel or use the View menu.

The primary difference between the configuration mode and the view mode is functionality, not the appearance of the program window. The display area of the TASKE Voice Administrator is a pane that displays one of six windows. Switch between the windows using the window selection buttons on the Main Control Panel. These windows provide the interface for creating, managing, and viewing voice plan elements.

The only difference in appearance between the two modes occurs in the record area of the display area pane. In the configuration mode, the record area provides a detailed list of all defined elements for that window. In the view mode, the record area displays the element that the Voice Server is currently transmitting to the voice channel.

Configuration Mode

Config | View   The configuration mode is the interface for the creation and management of voice plan elements. When in the configuration mode, each window accessed from the Main Control Panel displays its existing elements. Use the window in the configuration mode to create new elements and edit the existing elements.

View Mode

Config | View   The view mode is a read-only, real-time display. When in the view mode, the windows accessed from the Main Control Panel display the element that is currently being used by the Voice ToolBox to play the message on the voice channel. This option is only available after configuration is complete and the communication with the Voice Server is established.

The View mode is disabled if the Voice Server is not running. This is because there is no real-time data available for display when the Voice Server is not running.

The Auto-attendant and Days windows do not operate in View Mode.

Setting System Parameters

Use the System Parameters... option on the File menu of the Voice Administrator application to open the System Parameters dialog box. This dialog box provides user access to system-wide parameters for configuration.

System Parameters	
Maximum Play Length (seconds)	0
Maximum Record Length (seconds)	0
Interdigit Timeout (seconds)	3
	Supervisor Password...
	OK Cancel
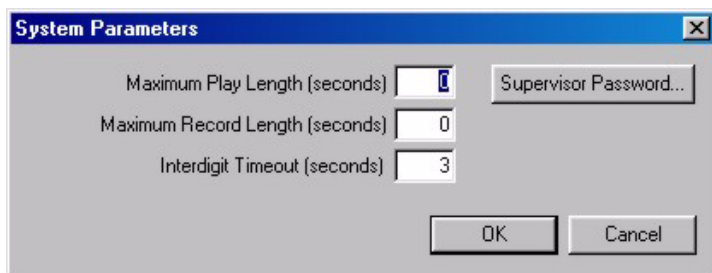
Maximum Play Length (seconds) - This value, defined in seconds, indicates the maximum length of a message. The default value is 300 seconds or 5 minutes.

Maximum Record Length (seconds) - This value, defined in seconds, indicates the maximum amount of time available for a user to record a message through the handset. The default value is 300 seconds or 5 minutes.

Interdigit Timeout (seconds) - This value, defined in seconds, is the maximum amount of time that is acceptable between the digits dialed by the caller. When the value for the Interdigit Timeout expires, the Voice ToolBox assumes the caller is finished entering digits and continues with the next action. The default value is 300 seconds or 5 minutes.

Supervisor Password... - Select Supervisor Password... to change the password for accessing the Supervisor channel. Selection of this option opens the Change Password dialog box where the user must input the existing password and the new password twice. For security reasons, the * character appears for all characters input by the user in the fields of this dialog box.

The default Voice ToolBox Supervisor password is **8885**. Change this number as soon as possible to prevent changes by unauthorized users.

Configuring Communication Paths

Use the Settings... option on the File menu of the Voice Administrator application to open the Configuration dialog box where the communication paths to the Voice Server and the TASKE Voice Database are configured.
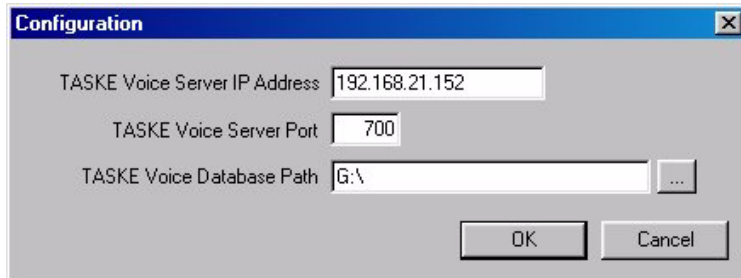
TASKE Voice Server IP Address - Use this field to view or edit the IP address of the TASKE Voice Server. If the address of the Voice Server has changed, it may be necessary to 'ping' the new Voice Server to learn its IP address. To 'ping' the new Voice Server, access a DOS prompt and type: ping *Voice Server PC network name*.

TASKE Voice Server Port - The TASKE Voice Server port is the port that receives information from the Voice Server. This is a virtual number that is a connection ID. By default TASKE uses 700 for the connection ID. This means that any communication received by the PC with a connection ID of 700 is recognized as TASKE Voice Server data.

TASKE Voice Database Path - The TASKE Voice Database Path is the network path the PC uses to find the TASKE Voice Database. Click the ⎯ button to access the established network connections and the Network Neighborhood and change the path if the path information is incorrect.

Updating System Data in the Voice Server

Use the Send Data to Voice Machine... option on the File menu of the Voice Administrator application to send changes made in the Voice Administrator application to the Voice Server. This option is only available when the Voice Server is running and communicating with the Voice Administrator. To confirm communication with the Voice Server, look for the green light on the Main Control Panel - 🟢 (Voice Server). If a red light is present, communication is not available with the Voice Server and the connections should be verified.

Updating System Data Using the Send Data to Voice Machine Option

Use the following steps to update the system data using the Send Data to Voice Machine option.

1. Select Send Data To Voice Machine... from the File menu.
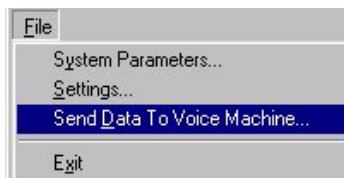
2. Click Yes in the TASKE Voice Administrator dialog box to confirm the update.
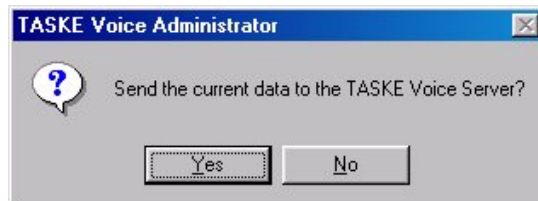
Defining Test Variables

Dynamic phrase test values are used in the playback of messages during the configuration of the Voice ToolBox. For instance, when real-time information is not available, but a user is configuring a message that includes the Dynamic System Phrase for the number of calls waiting, the message can still be tested. When the message is tested, the user hears the value input in the Calls Waiting field of the Dynamic Phrase Test Values dialog box instead of a real-time value.

Select Set Dynamic System Variable Values... from the Edit menu to open the Dynamic Phrase Test Values dialog box. Input the values in the fields of the dialog box as required and click OK to accept the values and close the dialog box.

Using the Messages Window

The Messages Window is the interface for the construction of voice messages. Voice messages can contain any of the pre-defined .wav files included with the Voice Toolbox application or users can create custom .wav files.

The .wav files are drawn from the \\taske\VoiceData directory on the PC where the Voice Server is installed. There are two folders in this directory that contain sound files: System and User.

The System folder contains .wav files that are used for the creation of dynamic system phrases and the sound files for the prompts supervisors hear during remote programming of the Voice ToolBox. Many of the files in the System folder are useful for the creation of voice messages, however, due to the required file naming structure for system sounds, the files are difficult to identify. For easier file identification, the files are grouped by theme on the System Sounds tab of the Messages window.

The User folder contains the .wav files that are most commonly used to create a message. Place custom .wav files in the User directory to make them available to the Voice ToolBox. The sounds from the User folder are available for message creation on the User Sounds tab of the Messages window.

Messages Window Components

The Messages window is comprised of three sections: the record area, the toolbar, and the record edit area.

Record Area

The record area of the Messages window lists the messages. Select a message from the list for editing or deletion. When selected, a message is highlighted in blue and its details can be viewed and edited in the record edit area.

Toolbar

The toolbar in the Messages window is used to create and name new messages, edit existing messages, and delete messages no longer needed.

Record Edit Area

The record edit area of the Messages window provides the platform and the sound files for the construction of voice messages. This area is used to define new voice messages and to edit existing messages. The window in the left side of the record edit area is the message platform. This section is where messages are created by inserting sound files and arranging them logically. The window in the right side of the record edit area houses three tabs that contain the sound files available for message creation.
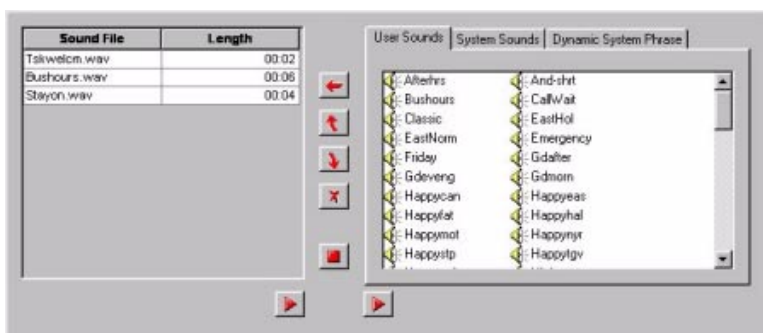
Using the Tools of the Messages Window

The following descriptions provide instruction on how to use the tools of the Messages window that are required for the creation of messages.

Message Platform - The message platform is the window located on the right side of the record edit area. The message platform contains a grid that lists sound files in the first column and the play duration of the file in the second column. These files combine to create a voice message. The files are played in the order they are listed from top to bottom. Use the up and down arrows to the right of the message platform to reorder the files.

Inserting Sound Files in a Message - Select a sound file from the User Sounds, System Sounds, or Dynamic System Phrase tab and click the insert button to add the file to the message platform.

Re-arranging Sound Files in a Message - Select a sound file in the message platform and use the up and down buttons located to the left of the message platform to change the order of the file in relation to the other files in the list. The sound files in the message platform are played in order, beginning at the top and ending with the last sound file in the list.

Playing Messages and Sound Files - Click the play button under the message platform to play the voice message (all sound files in the list). It is not necessary to have a sound file selected to play the message. To play a sound file from one of the tabs, select a sound file from the User Sounds tab or System Sounds tab and click the play button below the tabs to play the sound file. Files cannot be played from the Dynamic System Phrase tab. These files will play when included in a message on the message platform.

Deleting Messages from the Message Platform - Select a message in the message platform and click the *Delete Entry* button to remove the message from the message platform.

Stopping Messages and Sound Files - Click the stop button to stop a message from playing. This button stops messages from the message platform and sound files from the User Sounds and System Sounds tabs.

User Sounds Tab - The User Sounds tab in the record edit area of the Messages, Quick Messages, and Decisions windows contain all of the .wav files located in the \\taske\VoiceData\User directory. The directory contains .wav files supplied with the TASKE Voice ToolBox and all user defined files must be placed in this directory for them to be accessible from within the Voice Administrator application.

System Sounds Tab - The System Sounds tab in the record edit area of the Messages, Quick Messages, and Decisions windows contain all of the .wav files located in the \\taske\VoiceData\System directory. This directory houses all of the files used to create the dynamic system phrases and the sound files for the prompts supervisors hear during remote programming of the Voice ToolBox. System files must be named in the following manner: Sysxxx, where x is a number between 1 and 9. The system files are grouped by theme on the System Sounds tab for easy identification.

Dynamic System Phrase Tab - The Dynamic System Phrase tab in the record edit area of the Messages and Quick Messages windows contain the dynamic system phrases provided with the Voice ToolBox. A dynamic system phrase uses the system sounds to create a message that includes real-time information such as ACD statistics, the date, or the time.
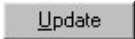
Several dynamic system phrases are provided on the Dynamic System Phrase tab of the Messages window. Include dynamic system phrases in a voice message that include ACD statistics, the date, or the time.

Building a Message

Use the Messages window to construct voice messages using the sound files provided with the Voice ToolBox, dynamic system phrases, and user defined .wav files. The positioning of the sound files in the message platform determines the order the sound files are played.

Steps for Creating a Voice Message

Use the following steps to create a new voice message.

1. Click the *Config* button to choose Configuration mode.

2. Click the *Messages* button on the Main Control Panel to view the Messages window.

3. Click *New* on the toolbar.

4. Type a message name in the *Message Name* field.

5. Select a sound file or dynamic system phrase from the *User Sounds*, *System Sounds*, or *Dynamic System Phrase* tabs. To listen to the sound before adding it to the message platform click the *play* button below the sound tabs.

6. Click the *insert* button to add the selected sound file to the message platform.

7. Repeat steps 5 and 6 to add additional sound files to the message platform.

8. Use the *up* and *down arrow* buttons to reorder the sound files as required.

9. Click the *play* button below the message platform to test the message.

10. Click *Update* on the toolbar to save the new message when satisfied with the message contents and order.

Deleting a Message

The Delete button on the toolbar is used to delete voice messages. A message cannot be deleted if it is referenced anywhere else in the voice plan. All references to the message must be deleted before the message can be deleted.

Steps for Deleting a Voice Message
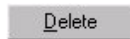
Use the following steps to delete a voice message.

Config View	1. Click the *Config* button to choose Configuration mode.
Messages	2. Click the *Messages* button on the Main Control Panel to view the Messages window.
	3. Select the message to delete in the record area of the Messages window.
Delete	4. Click the Delete button on the toolbar.
	5. Click Yes in the TASKE Voice Administrator dialog box to acknowledge the deletion.
	6. If the message is not referenced anywhere else in the voice plan, it is deleted immediately. If the TASKE Voice Administrator dialog box opens with the statement:

<div align="center">

Message Name - Referenced by *Voice Plan Element*: *Element Name*

</div>

click OK and search the voice plan for references to the message and delete them before attempting to delete the message again.

Using the Auto-attendants Window

The Auto-attendants window provides an interface for the creation and modification of auto-attendants. An auto-attendant is able to route calls and determine which messages to play based on the digits dialed by a caller.

By configuring a voice channel as an auto-attendant and assigning an auto-attendant script to the channel, it is able to accept DTMF digits (dual-tone-multi-frequency digits, also known as touch-tone) from the caller and route the caller to the desired area of the call center based on the conditions outlined in the auto-attendant and the other voice plan components.

Auto-attendants Window Components

The Auto-attendants window is comprised of three sections: the record area, the toolbar, and the record edit area.

Record Area

The record area of the Auto-attendants window lists the defined auto-attendants. Select an auto-attendant from the list for editing or deletion. When selected, an auto-attendant is highlighted in blue and its details can be viewed and edited in the record edit area.

Toolbar

The toolbar in the Auto-attendants window is used to create and name new auto-attendants, save new auto-attendants and edits to existing auto-attendants, and delete auto-attendants no longer needed.
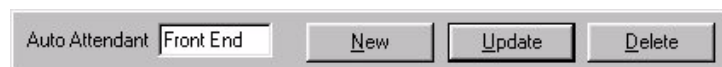
Record Edit Area

The record edit area of the Auto-attendants window provides the tools and the platform for defining auto-attendants. This area is used to define new auto-attendants and to edit the auto-attendants already defined.
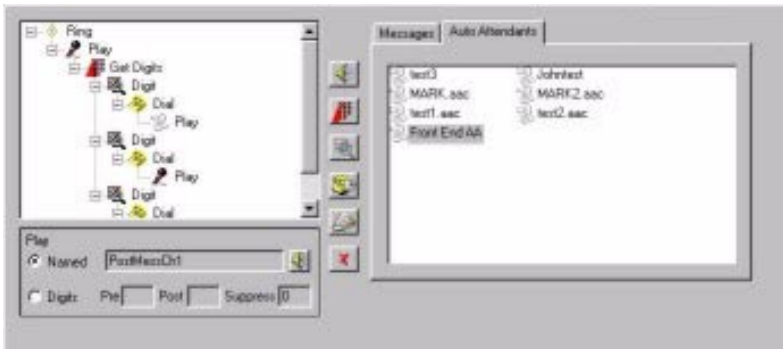
Using the Node List and Properties Window

The auto-attendant node list is the platform for designing auto-attendants. Use the auto-attendant node tools, located to the right of the auto-attendant node list, to add nodes to the auto-attendant and the corresponding node properties windows to define the parameters for each node.
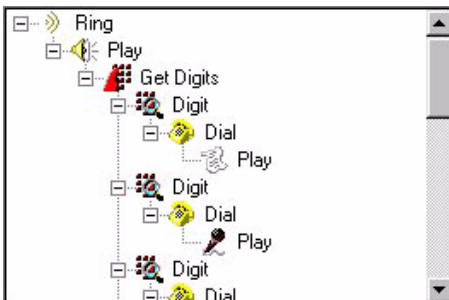
 The delete tool located to the right of the node list deletes the selected node in the node list and all nodes that branch directly from that node. Select a node in the auto-attendant node list and click the delete node button to remove the node and all subordinate nodes. Clicking the delete node button opens the TASKE Voice Administrator dialog box which states:

Deleting the selected node will also remove any child nodes. Do you wish to continue?

Click Yes to delete the selected node and all subordinate nodes, or No to abandon the procedure.

The node properties window is located below the node list. The content of the auto-attendant node properties window varies according to the type of node selected in the auto-attendant node list. There is a properties window for each of the node types. Use the node properties windows to define the settings for each node. Refer to the Auto-attendants Node Descriptions section for information on the node types and how to define the properties for each type of node.

Play Node Properties

Get Digit Node Properties

Digit Node Properties

Dial Node Properties

Supervisor Node Properties

Using Play Nodes

Use the Play node button to insert a play node in the auto-attendant node list. A play node is inserted in an auto-attendant to provide a message when a caller reaches that point of the auto-attendant node list. The contents of a play node can be a message created in the messages window or another auto-attendant.

Insert play nodes beneath ring nodes, other play nodes, digit nodes, dial nodes, and supervisor nodes. Inserting a play node in the node list opens the play node properties in the properties window of the record edit area. The settings for the play node are defined in the properties window. These settings define the message for the play node and the conditions required for it to play.

Defining Play Node Properties

Enable the Named radio button to select a message or auto-attendant from the tabs in the right side of the record edit area. To input a message or auto-attendant in a play node, select the desired file and click the play node button in the Play properties window.

Select the Digits radio button to have the auto-attendant select a sound file (.wav) to play that is based on the digits dialed in the above dial node. This option is primarily used to access the system sound files. The system sound files are located in the \\taske\VoiceData\System directory. System files must be named in the following manner: Sysxxx, where x is a number between 1 and 9.

To acc/ess one of these files using the digits dialed by the caller, the file must be named by adding a prefix, postfix, and suppressing digits as required. For instance, to have the play node use the SYS999.wav file, when the digit dialed by the caller was 9, input SYS9 in the Pre field, input 9 in the Post field, and nothing in the Suppress field. This creates the filename SYS999.wav by combining the prefix of SYS9 with the 9 dialed by the caller and the postfix of 9.

Selecting Play Node Content

The content for the play nodes is located in the Messages tab and the Auto-attendants tab.

Messages Tab - the Messages tab in the Auto-attendants window displays all of the messages created in the Messages window. Use the messages by inserting them into the play nodes of an auto-attendant.

Use the following steps to insert a message from the Messages tab into a play node.

1. Select the play node in the auto-attendant node list.

2. Select the Named radio button in the Play properties window.

3. Select the desired message from the Messages tab in the Auto-attendant window.

4. Click the play node button in the Play properties window to insert the Message into the play node. The name of the Message appears in the field beside the Named radio button.

Auto-attendants Tab - the Auto Attendants tab in the Auto-attendants window displays all of the auto-attendants defined in the Auto-attendants window except for the one that is currently selected. Insert an auto-attendant in a play node of the selected auto-attendant to use it and its associated messages when a caller reaches it in the auto-attendant node list. The currently selected auto-attendant is not displayed in the Auto Attendant tab to prevent users from attempting to nest the auto-attendant onto itself.

Use the following steps to insert an auto-attendant in a play node.

1. Select the play node in the auto-attendant node list.

2. Select the Named radio button in the Play properties window.

3. Select the desired auto-attendant from the Auto-attendants tab in the Auto-attendant window.

4. Click the play node button in the Play properties window to insert the auto-attendant into the play node. The name of the auto-attendant appears in the field beside the Named radio button..

Using Get Digit Nodes

A Get Digits node prepares the auto-attendant to receive dialed digits from the caller. Every time a Get Digits node is inserted into an auto-attendant node list, a default Digit node is also inserted. Insert additional Digit nodes below the Get Digits node as required.

The default Digit node prompts the auto-attendant to move to the next action in the auto-attendant node list. For instance, under the Get Digits node there may be two Digit nodes: the default Digit node and a Digit node that expects the caller to dial a 1. If the caller dials anything but a 1 at this point in the auto-attendant tree, it uses the default Digit node.

When a Get Digits node is selected in the auto-attendant node list, the node properties window displays the property settings for the node.

Defining Get Digit Node Properties

The only property setting for the Get Digit node determines the state of the input digit buffer. Enable the Clear Digit Buffer? check box to clear the input digit buffer before the message is played or disable the check box to have the numbers remain in the buffer for later use.

Using Digit Nodes
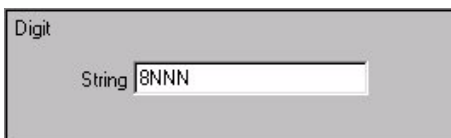
A Digit node identifies the dial string a caller enters to route the call to a specific person or department. Every time a Get Digits node is inserted into the auto-attendant node list a default Digit node is also inserted. Insert additional Digit nodes below the Get Digits node as required.

The default Digit node prompts the auto-attendant to move to the next action in the auto-attendant node list. For instance, under the Get Digits node there may be two Digit nodes: the default Digit node and a Digit node that expects the caller to dial a 1. If the caller dials anything but a 1 at this point in the auto-attendant tree, it uses the default Digit node.

When a Digit node is selected in the auto-attendant node list, the node properties window displays the property settings for the node.

Defining Digit Node Properties
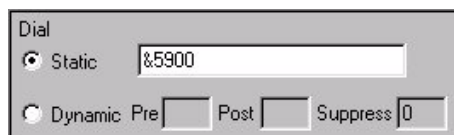
The only property setting for the Digit node is the identification of the dial string. Input a specific dial string or combine digits with wildcards when there are several dialing possibilities for the caller. For instance, input 8NNN to tell the Voice ToolBox that the call can be routed after the fourth digit is entered, when the first digit dialed is an 8. If, on the other hand, only an 8 was identified for the dial string, the call would be routed the moment the caller dialed the 8.

Using Dial Nodes

A Dial node provides the Voice ToolBox with the dial string that it must use to route the call based on the digits dialed by the caller. When a Dial node is selected in the auto-attendant node list, the node properties window displays the property settings for the node. The node properties window for the Dial node requires the dial string for routing the call. There are two types of dial strings for a Dial node: Static and Dynamic. Select only one type of dial string for each Dial node.

Defining Dial Node Properties

To create a Static dial string, enable the Static radio button and input a dial string in the field to the right. The dial string may include special characters such as & and , to perform functions in the PBX. For instance, the & in a dial string tells the channel to go "off hook" so the number can be dialed, whereas, the , creates a 5 second delay. Therefore the dial string &,,5900 takes the channel "off hook" waits 10 seconds and then dials the numbers 5900.

To create a Dynamic dial string, enable the Dynamic radio button and input characters in the Pre, Post, and Suppress fields as required. A Dynamic dial string uses the digits dialed by the caller and adds characters identified in the Pre field to the start of the string, adds characters identified in the Post field to the end to the dial string, and suppresses any digits dialed that are identified in the Suppress field. For instance if the caller dialed 5900 and the user wants the call to be routed to extension 5923, the user creating a Dynamic dial node can input &,, in the Pre field to take the channel "off hook" and wait 10 seconds, input the numbers 23 in the post field, and input the number 00 in the suppress field to have the Voice ToolBox route the call to extension 5923. The formula for this type of dial string is: Prefix + (Digits Dialed - Digits to Suppress) + Postfix.

Using Supervisor Nodes

Insert a Supervisor node into an auto-attendant to route supervisors to the supervisor channel. Supervisors can perform remote programming from the supervisor channel.

Defining Supervisor Node Properties

There are no properties associated with this type of auto-attendant node. See Remote Programming Using the Supervisor Channel in the TASKE Voice ToolBox section of the online help for further information on programming the Voice ToolBox using the supervisor channel.

Defining Auto-attendants

An auto-attendant is able to route calls and determine which messages to play based on the digits dialed by a caller. The node combinations in an auto-attendant are completely dependant on the user. The following is only one example of the combinations available.

Steps to Define an Auto-attendant

Use the following steps to create a new auto-attendant.

1. Click the *Config* button to choose Configuration mode.

2. Click the *AA* (Auto-attendant) button on the Main Control Panel to view the Auto-attendants window.

3. Click *New* on the toolbar.

4. Type a name for the auto-attendant in the *Auto-attendant* field.

5. Click the *Play node* button to insert a Play node in the auto-attendant node list. This prompts the auto-attendant to play the message associated with the Play node when the voice channel rings. An example of a message a Play node may deliver is: Welcome, press 1 for Technical Support or 2200 for Sales.

6. Set the Play node properties in the Play properties window. See *Using Play Nodes* for information on setting the properties for a Play node.

7. Click the *Get Digits node* button to insert a Get Digits node and the default Digit node below the Play node in the auto-attendant node list.

8. Set the Get Digits node properties in the Get Digit properties window. See *Using Get Digit Nodes* for information on setting the properties for a Get Digits node.

9. Click the *Digit node* button to add a Digit node above the default Digit node.

10. Input 1 in the String field of the Digit properties window (see the example message in step 5). See *Using Digit Nodes* for information on setting the Digit node properties.

11. Click the *Dial node* button to insert a Dial node below the Digit node in the auto-attendant node list.

12. Set the Dial node properties in the Dial properties window. Ensure that the Dial string accesses Technical Support (see the message in step 5). See *Using Dial Nodes* for information on setting the Dial node properties.

13. Select the Get Digits node and repeat step 9 to add another Digit node.

14. Input 2NNN in the String field of the Digit properties window (see the message in step 5). The NNN tells the Voice ToolBox not to route the call until an additional 3 digits are dialed after the 2.

15. Repeat step 11 to add a Dial node below the Digit node.

16. Set the Dial node properties in the Dial properties window. Ensure that the Dial string accesses Sales (see the message in step 4).

17. Click *Update* on the toolbar to save the new auto-attendant.

Deleting Auto-attendants

The Delete button on the toolbar of the Auto-attendants window deletes the auto-attendant selected in the record area of the window. It is only possible to delete an auto-attendant that is not referenced elsewhere in the voice plan. If an auto-attendant is referenced anywhere else in a voice plan, all references must be removed prior to deleting the auto-attendant.

<u>Steps to Delete an Auto-attendant</u>

Use the following steps to delete an auto-attendant.

1. Click the *Config* button to choose Configuration mode.

2. Click the *AA* (Auto-attendant) button on the Main Control Panel to view the Auto-attendants window.

3. Select the auto-attendant to delete in the record area of the Auto-attendants window.

4. Click the Delete button on the toolbar.

5. Click Yes in the TASKE Voice Administrator dialog box to acknowledge the deletion.

6. If the auto-attendant is not referenced anywhere else in the voice plan, it is deleted immediately. If the TASKE Voice Administrator dialog box opens with the statement:

   Auto-attendant Name - Referenced by *Voice Plan Element*: *Element Name*

   click OK and search the voice plan for references to the auto-attendant and delete them before attempting to delete the auto-attendant again.

Using the Day Plans Window

The Day Plans window is accessed by clicking the Day Plans button on the Main Control Panel. This window is used to partition a 24-hour period and apply an auto-attendant to each partition.

This process breaks the call center day into segments and allows different messages to be applied to different times of the day. Once defined, the day plans are applied to specific days of the week or special days in the Scripts window.

Day Plans Window Components

The Day Plans window is comprised of three sections: the record area, the toolbar, and the record edit area.
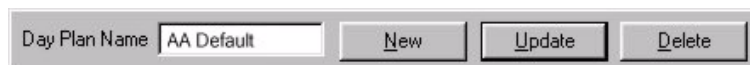
Record Area

The record area of the Day Plans window lists each of the defined day plans with its day plan type. Select a day plan from the list for editing or deletion. When selected, a day plan is highlighted in blue and its details can be viewed and edited in the record edit area.

Name	Type
AA Default	AA
AA Weekend	AA

Toolbar
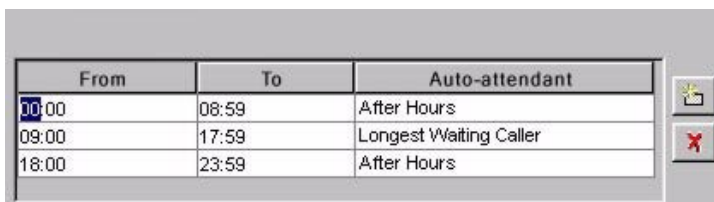
The toolbar in the Day Plans window allows users to create and name new day plans, edit existing day plans, and delete day plans no longer needed.

Day Plan Name | AA Default | New | Update | Delete

Record Edit Area

The record edit area of the Day Plans window is the interface for defining the time segments of a day plan. This area is used to define new time segments, delete time segments, and to edit the existing time segments of a day plan.

Using the Tools of the Day Plans Window

The following descriptions provide instruction on how to use the tools of the Day Plans window that are required for the creation of day plans.

Day Plans Platform - The day plans platform is located in the record edit area of the Day Plans window. This area provides a table where the time segments of the day plans are displayed with their associated decisions. Click on the hour or minute field of a time segment in either the From or To columns of the table to edit the time. Click the down-arrow in the Decision column to assign an auto-attendant to the time segment.

Setting the Start Time for a Time Segment - The From column in the record edit area of the Day Plans window defines the starting time for a day plan time segment. The time in the From column for the first time segment of a day plan must be 00:00. Each day plan must encompass a 24-hour period, beginning with 00:00 and ending with 23:59.

To set the starting hour of a time segment, click the hour field in the From column and type a value between 00 and 23. To set the starting minute of a time segment, click the minute field in the From column and type a value between 00 and 59.

Setting the End Time for a Time Segment - The To column in the record edit area of the Day Plans window defines the ending time for a day plan time segment. The time in the To column for the last time segment of a day plan must be 23:59. Each day plan must encompass a 24-hour period, beginning with 00:00 and ending with 23:59.

To set the ending hour of a time segment, click the hour field in the To column and type a value between 00 and 23. To set the ending minute of a time segment, click the minute field in the To column and type a value between 00 and 59.

Applying Auto-attendants to Time Segments - Applying auto-attendants to the time segments of a day plan creates an association between the time of day, messages, and call center conditions that may be embedded in the messages. The Voice Server searches the day plan configuration for a time segment that matches the current time. It then searches the auto-attendant associated with the time segment for the appropriate message to play.

Adding Segments to a Day Plan - Click the *Add Entry* button to add a new time segment to the day plan in the day plans platform.

Deleting Day Plan Segments from the Day Plans Platform - Select a time segment in the day plans platform and click the *Delete Entry* button to remove the time segment from the day plans platform.

Defining Day Plans

Use the Day Plans window to apply auto-attendants to specific segments of a 24-hour period. A day plan must begin with 00:00 and end with 23:59. The minimum size of a day plan segment is 1 minute while the maximum size is 24-hours. A default day plan is automatically created in the Day Plans window.

Steps for Creating a Day Plan

Use the following steps to create a new day plan.

1. Click the *Config* button to choose Configuration mode.

2. Click the *Day Plans* button on the Main Control Panel to view the Day Plans window.
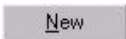
3. Click *New* on the toolbar.

4. Type a day plan name in the *Day Plan Name* field.

5. Click the *Add Entry* button twice to add a second and third time segment to the day plan.

6. Set the start time for each time segment in the From column.

7. Set the end time for each time segment in the To column.

8. Select an auto-attendant for each time segment from the Auto-attendant column.

9. Click *Update* on the toolbar to save the new day plan when satisfied with the day plan contents.

Deleting a Day Plan

The Delete button on the toolbar of the Day Plans window deletes the day plan selected in the record area of the window. It is only possible to delete a day plan that is not referenced elsewhere in the voice plan. If a day plan is referenced anywhere else in a voice plan, all references must be removed prior to deleting the day plan.

<u>Steps for Deleting a Day Plan</u>

Use the following steps to delete a day plan.

1. Click the *Config* button to choose Configuration mode.
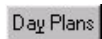
2. Click the *Day Plans* button on the Main Control Panel to view the Day Plans window.

3. Select the day plan to delete in the record area of the Day Plans window.

4. Click the Delete button on the toolbar.

5. Click Yes in the TASKE Voice Administrator dialog box to acknowledge the deletion.

6. If the day plan is not referenced anywhere else in the voice plan, it is deleted immediately. If the TASKE Voice Administrator dialog box opens with the statement:

   Day Plan Name - Referenced by *Voice Plan Element*: *Element Name*

   click OK and search the voice plan for references to the day plan and delete them before attempting to delete the day plan again.

Using the Days Window

The Days window is accessed by clicking the calendar icon on the main control panel. Use this window to identify special days that require unique messages.

Special days are included in a voice plan using the Scripts window. A special day is included in a script and associated with messages through the assignment of a day plan.

Days Window Components

The Days window is comprised of three sections: the record area, the toolbar, and the record edit area.

Record Area

The record area of the Days window lists the defined special days that require specific messages. Select a special day from the list for editing or deletion. When selected, a special day is highlighted in blue and its details are viewable and editable in the record edit area.

Day Name	Day Type	Description	Date	Number Of Days
New Year's Day	Specific	Last day of Christmas Holidays	1 January	1
Agent Training	Reference	New Agent Training	Third Wednesday of June	3

Toolbar

The toolbar in the Days window is used to create and name new special days, edit existing special days, and delete special days no longer needed.

Day Name [Agent Training] [New] [Delete] [Update]

Record Edit Area

The record edit area of the Days window is the interface for defining and editing the special days. Define Specific dates or Reference Dates and type a description of the date for easy identification in the record area.

Date is	○ Specific	1 January	1 day(s)
	⊙ Reference Third ▼	Wednesday of June	3 days(s)
Description	New Agent Training		

Defining Specific Dates

Use the Days window to define special days or groups of days throughout the year that require specific messages. A special day is defined as a specific date when it applies to a particular calendar date. For instance, Christmas is a specific date because it falls on the 25th of December every year.

Date is	⊙ Specific	25 December	2 day(s)
	○ Reference Third ▼	Wednesday of June	3 days(s)

Steps for Creating a Specific Date

Use the following steps to create a new specific date for a special day.
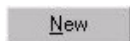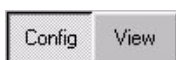
1. Click the *Config* button to choose Configuration mode.

2. Click the *Days* button (calendar icon) on the Main Control Panel to view the Days window.

3. Click *New* on the toolbar.

4. Type a name in the *Day Name* field for the new day or group of days.

5. Enable the *Specific* radio button to define a specific calendar date or a group of dates.

6. Click on the numeric day of the month and use the up and down arrows to select the day of the month.

7. Click on the month and use the up and down arrows to select the month.

8. Use the up and down arrows in the day(s) field to define the number of days the period encompasses, beginning with the selected date.

9. Click in the Description field and type a description for the day or group of days.

| Update | 10. Click *Update* on the toolbar to save the new day, or group of days.

Defining Reference Dates

Use the Days window to define special days or groups of days throughout the year that require specific messages. A special day is defined as a reference date when it applies to an event that falls on the same day of the week, in the same month, every year. A date like Father's Day is considered to be a reference date because it is defined by its occurrence on the third Sunday in June each year.

| Date is | ◯ Specific | | 25 December | 2 day(s) |
| | ⦿ Reference | Third ▼ | Wednesday of June | 3 days(s) |

Steps for Creating a Reference Date

Use the following steps to create a new specific date for a special day.

| Config View | 1. Click the *Config* button to choose Configuration mode.

| [calendar icon] | 2. Click the *Days* button (calendar icon) on the Main Control Panel to view the Days window.

| New | 3. Click *New* on the toolbar.

4. Type a name in the *Day Name* field for the new day or group of days.

5. Enable the *Reference* radio button to define a reference date or a group of dates.

6. Click the down arrow in the first field to the right of the Reference radio button to select the reference day within the month. The selections in this list are First, Second, Third, Fourth, or Last. These adjectives refer to specific days of the week within a specific month. For instance, it may be referring to the first Friday in June.

7. Click on the day of the week and use the up and down arrows to select a day.

8. Click on the month and use the up and down arrows to select a month.

9. Use the up and down arrows in the day(s) field to define the number of days the period will encompass, beginning with the selected date.

10. Click in the Description field and type a description for the day or group of days.

Update   11. Click *Update* on the toolbar to save the new day, or group of days.

Deleting Special Days

The Delete button on the toolbar of the Days window deletes the special day selected in the record area of the window. It is only possible to delete special days that are not referenced elsewhere in the voice plan. If a special day is referenced anywhere else in a voice plan, all references must be removed prior to deleting the special day.

Steps for Deleting a Special Day

Use the following steps to delete a voice message.

Config   View   1. Click the *Config* button to choose Configuration mode.

2. Click the *Days* button (calendar icon) on the Main Control Panel to view the Days window.

3. Select the special day to delete in the record area of the Days window.

Delete   4. Click the Delete button on the toolbar.

5. Click Yes in the TASKE Voice Administrator dialog box to acknowledge the deletion.

6. If the special day is not referenced anywhere else in the voice plan, it is deleted immediately. If the TASKE Voice Administrator dialog box opens with the statement:

Day Name - Referenced by *Voice Plan Element*: *Element Name*

click OK and search the voice plan for references to the special day and delete them before attempting to delete the special day again.

Using the Scripts Window

The Scripts window is accessed by clicking the Scripts button on the Main Control Panel. This window is used to apply day plans to the days of the week and to special days.

This process produces associations between the day of the week, the time of day, messages, and call center conditions by creating links between a script, a day plan, and a decision.

Scripts Window Components

The Scripts window is comprised of three sections: the record area, the toolbar, and the record edit area.

Record Area

The record area of the Scripts window lists the defined scripts. Select a script from the list for editing or deletion. When selected, a script is highlighted in blue and its details can be viewed and edited in the record edit area.

Toolbar

The toolbar in the Scripts window is used to create and name new scripts, edit existing scripts, and delete scripts no longer needed.

Record Edit Area

The record edit area of the Scripts window provides the interface for the application of day plans to the days of the week or to special days. Together, these days and their associated day plans create a script. The record edit area is used to add days to a script and to edit the days that have already been defined for an existing script.

Day(s)	Day Plan
Tuesday	AA Default
Saturday	AA Weekend
Default	AA Default
Wednesday	AA Default
Thursday	AA Default
Friday	AA Default
Sunday	AA Weekend
Monday	AA Default

Using the Tools of the Scripts Window

The following descriptions provide instruction on how to use the tools of the Scripts window that are required for the creation of scripts.

Script Platform - The script platform is located in the record edit area of the Scripts window. This area provides a table that displays the script entries. To edit or delete a script entry, other than the default entry, select the script entry from the table by clicking in one of its table fields.

Selecting a Day for a Script Entry - The Day column of the Scripts window assigns days of the week or special days to script entries. Click the down-arrow in each row of the Day column and select a weekday or special day from the drop-down list. Each day in the list can only appear in a script once.
The first entry in every script is the default entry. The default day plan is automatically applied to the default script entry. This script entry is used when no other script entries are present, or when the existing script entries do not apply to the current conditions.

Selecting a Day Plan for a Script Entry - The Day Plan column of the Scripts window assigns day plans to the script entries. Click the down-arrow in each row of the Day Plan column and select a day plan from the drop-down list.

Adding Segments to a Day Plan - Click the *Add Entry* button to add a new time segment to the day plan in the day plans platform.

Deleting Day Plan Segments from the Day Plans Platform - Select a time segment in the day plans platform and click the *Delete Entry* button to remove the time segment from the day plans platform.

Defining a Script

Use the Scripts window to create scripts that apply day plans to the days of the week or to special days. When a new script is created, a default entry is automatically added that uses the default day plan for the script type. Use each day of the week or special day only once in each script.

Steps for Creating a Script

Use the following steps to create a new script.
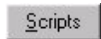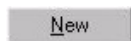
Config View	1. Click the *Config* button to choose Configuration mode.
Scripts	2. Click the *Scripts* button on the Main Control Panel to view the Scripts window.
New	3. Click *New* on the toolbar.
	4. Type a script name in the *Script Name* field.
	5. Click the *Add Entry* button to add a new script entry.
	6. Click in the Day column for the entry and select a day of the week.
	7. Click in the Day Plan column for the entry and select a day plan.
	8. Repeat steps 5 to 7 to define additional script entries.
Update	9. Click *Update* on the toolbar to save the new script when satisfied with the script contents.

Deleting a Script

The Delete button on the toolbar of the Scripts window deletes the script selected in the record area of the window. It is only possible to delete scripts not referenced elsewhere in a voice plan. If a channel references the script in the Channels window, the reference must be deleted from the Channels window prior to deleting the script.

Steps for Deleting a Script

Use the following steps to delete a script.

1. Click the *Config* button to choose Configuration mode.
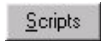
2. Click the *Scripts* button on the Main Control Panel to view the Scripts window.

3. Select the script to delete in the record area of the Scripts window.

4. Click the Delete button on the toolbar.

5. Click Yes in the TASKE Voice Administrator dialog box to acknowledge the deletion.

6. If the script is not referenced anywhere else in the voice plan, it is deleted immediately. If the TASKE Voice Administrator dialog box opens with the statement:

   Script Name - Referenced by *Voice Plan Element*: *Element Name*

   click OK and search the voice plan for references to the script and delete them before attempting to delete the script again.

Using the Channels Window

The Channels window is accessed by clicking the Channels button on the Main Control Panel. This window is used to configure the voice channels and complete voice plans through the application of scripts to the channels.

A voice channel is an output point for audio messages on a Dialogic voice card. Depending on the number of Dialogic cards installed, a PC can support 16 to 64 voice channels. When configuring a channel in the Voice Administrator, an unique address number from 1 to 255 is required. Using the address number, the Voice ToolBox application maps messages to the correct voice channels.

Channels Window Components

The Channels window is comprised of three sections: the record area, the toolbar, and the record edit area.

Record Area

The record area of the Channels window lists the defined channels with their channel numbers, types, and associated scripts. Select a channel from the list for editing or deletion. When selected, a channel is highlighted in blue and its details can be viewed and edited in the record edit area.

Toolbar

The toolbar in the Channels window is used to create and name new channels, save new channels and edits to existing channels, and delete channels no longer needed.
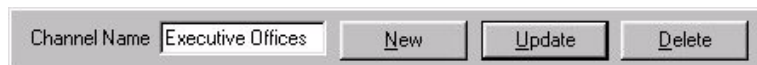
Record Edit Area

The record edit area of the Channels window provides the interface for configuring voice channels. The record edit area is used to assign scripts to voice channels and to define voice channel parameters.

Defining a Voice Channel

Use the Channels window to configure the voice channels and complete voice plans through the application of scripts to the channels.

Steps for Creating a Voice Message
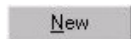
Use the following steps to create a new voice message.

1. Click the *Config* button to choose Configuration mode.

2. Click the *Channels* button on the Main Control Panel to view the Channels window.

3. Click *New* on the toolbar.

4. Select a *channel type* from the *Channel Parameters* dialog box. Once the channel type is selected, it cannot be changed.

5. Assign a channel number in the *Channel* field of the *Channel Parameters* dialog box.

6. Click OK to accept the channel parameters and close the dialog box.

7. Type a channel name in the *Channel Name* field.

8. Select a message from the *Pre-Message* field of the record edit area if desired.

9. Select a script from the *Script* field of the record edit area.

10. Select a message from the *Post-Message* field of the record edit area if desired.

11. Select a Queue from the *Queue* drop-down list in the record edit area.

12. Input an extension number in the *Extension* field of the record edit area if desired.

Update   13. Click *Update* on the toolbar to save the new channel.

Setting Channel Parameters

Open the Channel Parameters dialog box by clicking the New button on the toolbar of the Channels window. This dialog box allows users to define the channel type and channel number.
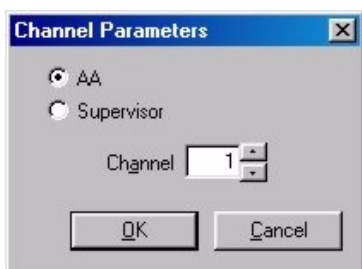
Selecting a Channel Type

Select the radio button of the desired channel type in the Channel Parameters dialog box. There are two channel types:

- **AA (Auto-attendant) channels** wait for the channel to ring, answer the call, and depending on the configuration, proceed to play a message, get DTMF digits from the caller, or dial a string of digits.

- **Supervisor channels** wait for the channel to ring, answer the call, and prompt the caller for a password. The password accesses a series of menus that remotely configure and control the Voice ToolBox.

Defining a Channel Number

Select a channel number in the Channel field of the Channel Parameters dialog box. Use the spin control to select the channel number or type the number into the box. The channel number can be any number between 1 and 255. Ensure that the channel number does not conflict with any other channels.

Properties of a Voice Channel

The record edit area of the Channels window provides an interface for defining or editing the properties of a voice channel. Refer to the descriptions below for information on the properties of a voice channel.

Channel Type	Configure each voice channel to one of the following two types:
	AA (Auto-attendant) channels wait for the channel to ring, answer the call, and depending on the configuration, proceed to play a message, get DTMF digits from the caller, or dial a string of digits.
	Supervisor channels wait for the channel to ring, answer the call, and prompt the caller for a password. The password accesses a series of menus that remotely configure and control the Voice ToolBox.
Pre-Message	The Pre-Message field in the record edit area of the Channels window allows users to select a message for the voice channel to play before the messages associated with the script are played. This field uses the messages created in the Messages window. Leave the field blank if a pre-message is not required.
Script	Use the Script field to apply a script to the channel. A script applies day plans to the days of the week and to special days. This process produces associations between the day of the week, the time of day, and the call center conditions by creating a link between a script, a day plan, and a decision or auto-attendant. This final step links those associations to a voice channel.
	Apply AA scripts to AA (auto-attendant) channels only. Supervisor channels do not accept script associations.

Post-Message The Post-Message field allows users to select a message for the voice channel to play after the messages associated with the script have played. This field uses the messages created in the Messages window. Leave the field blank if a post-message is not required.

Queue Use the Queue field in the record edit area of the Channels window to apply the voice channel and associated script to a Queue. A Queue is a dialable number that accesses a group of answering positions (agents or extension groups). When a caller enters the Queue the voice channel plays the messages associated with its script.

Extension Input an extension number in the Extension field in the record edit area of the Channels window to identify the extension number dialed when a caller enters the queue for the voice channel. This field is used solely to provide information to the user.

Deleting a Voice Channel

The Delete button on the toolbar of the Channels window deletes the channel selected in the record area of the window.

Steps for Deleting a Voice Channel

Use the following steps to delete a voice message.

1. Click the *Config* button to choose Configuration mode.

2. Click the *Channels* button on the Main Control Panel to view the Channels window.

3. Select the channel to delete in the record area of the Channels window.

4. Click the Delete button on the toolbar.

5. Click Yes in the TASKE Voice Administrator dialog box to acknowledge the deletion.

Remote Programming

A Supervisor channel allows an administrator to remotely configure the Voice ToolBox, including changing and recording voice messages, from a touch tone telephone.

A Supervisor channel is enabled in one of two ways:

- creating a Supervisor channel in the Channels window of the Voice Administrator

- add a Supervisor node in the auto-attendant node list of an auto-attendant channel.

To remotely administer voice messaging, an administrator must know the extension of a dedicated Supervisor channel or the path that leads to a Supervisor node in an auto-attendant node list. The Supervisor channel provides the administrator with a group of menus that lead the administrator through the programming process. Following is an illustration of the introductory menu.
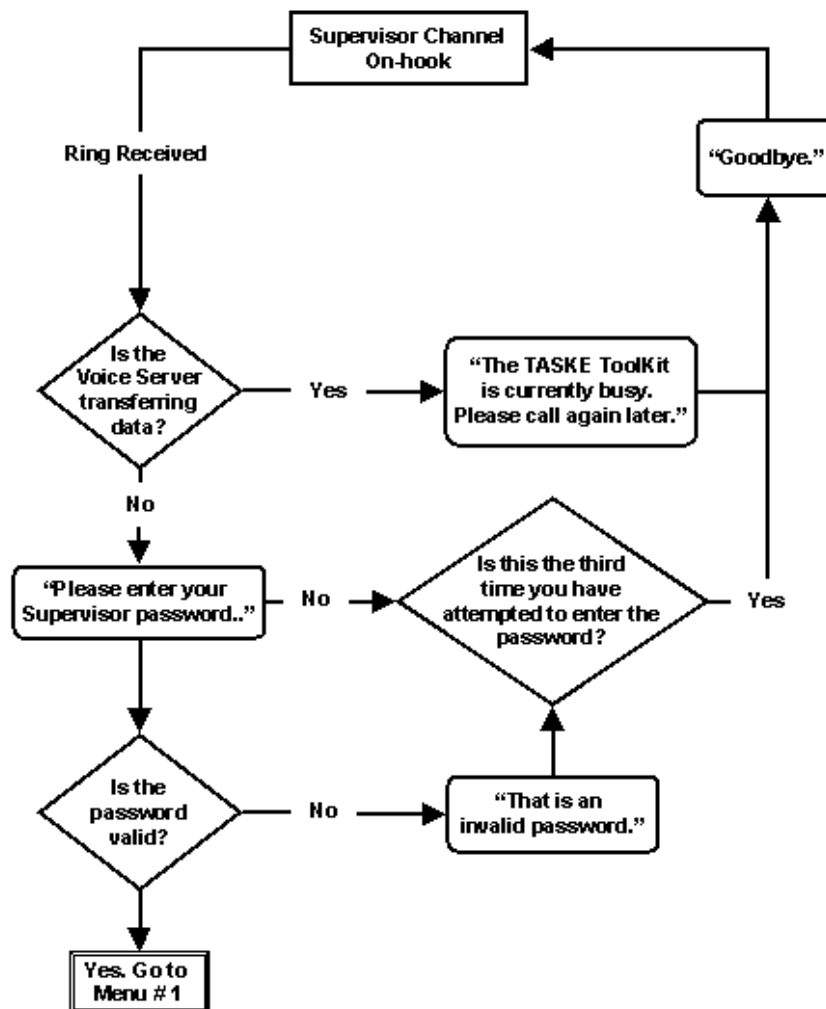
Reviewing the System Message

The Review the System Message menu provides the functionality for reviewing and recording the messages currently programmed for a channel.

```
                    Review the System Message

              "Please enter a three-digit number that
                lies in the range from 000 to 999."
                              │
                              ▼
                          ◇ Is the ◇
                        message number
                            valid?
                              │
                   Yes ───────┴─────── No
                    │                   │
                    ▼                   ▼
              ◇ Does the ◇        "The message
             message already      number xxx
               exist?             is invalid."
                    │                   │
          Yes ──────┴──                 ▼
           │          │            Return to
           ▼          │             Menu # 1
  "The message number │
  xxx does not exist. │────────── No
  To record this      │              │
  message press 3. To │              ▼
  return to the main  │        "The message
  menu press *."      │        number xxx exists.
       │              │              │
   ┌───┴───┐          │              ▼
   ▼       ▼          │            Go to
Pressed: 3  Pressed: *             Menu # 2
Record      Return to
Message     Menu # 1
```

Recording Messages

The Record Message menu allows a user to record a message and to access Menu # 2 for reviewing, re-recording, and saving the recorded message.

```
                        Record Message

                        Is there enough
                      resourced (disk) space
                            available?


              Yes                         No


    Can this message            "There are insufficient system
    file be opened with          resources to continue with
     write privilege?            your request. Please contact
                                   the TASKE Voice ToolBox
                                    system administrator."


   Yes              No                 Return to
                                        Menu #1


 "Begin recording your      "This message cannot
 message after the tone.    be accessed. Please select
 Press any key to end       another message number."
    the recording."


    Go to                    Return to
   Menu #2                   Menu #1
```

Reviewing, Re-recording, and Saving Messages

Menu # 2 allows a user to review, re-record, and save a recorded message.
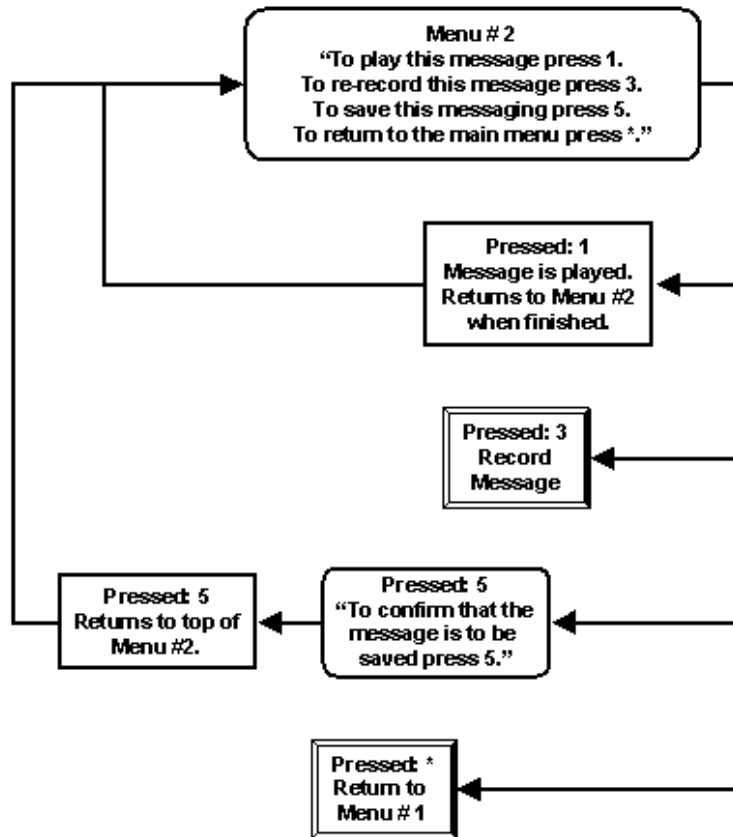
Identifying System Sounds

The System Sounds Tab is located in the record edit area of each of these windows in the Voice Administrator application. To aid in the identification of the contents of the sound files on this tab, refer to the table below. The table contains 176 references, one for each of the sound files in the System Sounds Tab. Each sound in the table is named as it is named on the System Sounds tab, in the format SYSXXX where X is a numeric value from 0 to 9.

Sound Name	Statement
Sys000	Testing: one, two, three
Sys001	Zero
Sys002	One
Sys003	Two
Sys004	Three
Sys005	Four
Sys006	Five
Sys007	Six
Sys008	Seven
Sys009	Eight
Sys010	Nine
Sys011	Ten
Sys012	Eleven
Sys013	Twelve
Sys014	Thirteen
Sys015	Fourteen
Sys016	Fifteen
Sys017	Sixteen
Sys018	Seventeen
Sys019	Eighteen
Sys020	Nineteen
Sys021	Twenty
Sys022	Thirty

Sound Name	Statement
Sys023	Forty
Sys024	Fifty
Sys025	Sixty
Sys026	Seventy
Sys027	Eighty
Sys028	Ninety
Sys029	Hundred
Sys030	Thousand
Sys031	January
Sys032	February
Sys033	March
Sys034	April
Sys035	May
Sys036	June
Sys037	July
Sys038	August
Sys039	September
Sys040	October
Sys041	November
Sys042	December
Sys043	Tomorrow
Sys044	Yesterday
Sys045	Today
Sys046	A.M.
Sys047	P.M.
Sys048	Star
Sys049	Pound
Sys050	Goodbye

Sound Name	Statement
Sys051	Minus
Sys052	And
Sys053	More than nine
Sys054	Cents
Sys055	Dollars
Sys056	Seconds
Sys057	Minutes
Sys058	Hours
Sys059	Pause
Sys060	Flash
Sys061	Call
Sys062	Good morning
Sys063	Good afternoon
Sys064	Good evening
Sys065	Point
Sys066	That was not a valid entry
Sys067	Million
Sys068	A
Sys069	B
Sys070	C
Sys071	D
Sys072	E
Sys073	F
Sys074	G
Sys075	H
Sys076	I
Sys077	J
Sys078	K

Sound Name	Statement
Sys079	L
Sys080	M
Sys081	N
Sys082	O
Sys083	P
Sys084	Q
Sys085	R
Sys086	S
Sys087	T
Sys088	U
Sys089	V
Sys090	W
Sys091	X
Sys092	Y
Sys093	Z (zed)
Sys094	Z (zee)
Sys095	First
Sys096	Second
Sys097	Third
Sys098	Fourth
Sys099	Fifth
Sys100	Sixth
Sys101	Seventh
Sys102	Eighth
Sys103	Ninth
Sys104	Tenth
Sys105	Eleventh
Sys106	Twelfth

Sound Name	Statement
Sys107	Thirteenth
Sys108	Fourteenth
Sys109	Fifteenth
Sys110	Sixteenth
Sys111	Seventeenth
Sys112	Eighteenth
Sys113	Nineteenth
Sys114	Twentieth
Sys115	Thirtieth
Sys116	Fortieth
Sys117	Fiftieth
Sys118	Sixtieth
Sys119	Seventieth
Sys120	Eightieth
Sys121	Ninetieth
Sys122	Hundredth
Sys123	Thousandth
Sys124	Millionth
Sys125	Space
Sys126	Hundred
Sys127	Thousand
Sys128	Million
Sys129	Twenty-one
Sys130	Thirty-one
Sys131	Forty-one
Sys132	Fifty-one
Sys133	Sixty-one
Sys134	Seventy-one

Sound Name	Statement
Sys135	Eighty-one
Sys136	Ninety-one
Sys137	One
Sys138	One
Sys139	Welcome to the TASKE Voice ToolKit.
Sys140	Please enter your supervisor password.
Sys141	Please enter the emergency authorization password.
Sys142	That is an invalid password.
Sys143	To review a system message, press 1. To exit, press the star key.
Sys144	To review a system message, press 1. To review the emergency status, press 5. To review emergency messaging, press 9. To exit, press the star key.
Sys145	To confirm setting emergency mode on all channels, press 9.
Sys146	To review the emergency message, press 1. To record a new emergency message, press 3. To review the emergency status, press 5. To disable emergency mode on all channels, press 7. To enable emergency mode on all channels, press 9. To return to main menu, press star.
Sys147	Begin recording your message after the tone. Press any key to end the recording.
Sys148	TASKE VoiceKit system error.
Sys148b	TASKE VoiceKit system error. The message phrase for this channel cannot currently be accessed.
Sys149	does not exist
Sys150	Please enter the two-digit message number in the range of 00 to 99.
Sys151	Please enter the three-digit message number in the range of 000 to 999.
Sys152	Please enter the four-digit message number in the range of 0000 to 9999.
Sys153	The message number
Sys154	is invalid

Sound Name	Statement
Sys155	There are not enough system resources to continue with your request.
Sys156	This message cannot be accessed, please select another message number.
Sys157	The TASKE Voice ToolKit is calling you.
Sys158	Please use the TASKE configuration tool to select the voice files to play or record.
Sys159	Please use the TASKE configuration tool to select the voice files to play.
Sys160	To record this message, press 3. To return to the main menu press star.
Sys161	Message number
Sys162	exists
Sys162b	exist
Sys163	To play this message, press 1. To re-record this message, press 3. To save this message, press 5. To return to the main menu, press star.
Sys164	To return to the main menu without saving the recorded message, press star. To return to the current menu press any key.
Sys165	To confirm saving this message, press 5.
Sys166	Saved.
Sys167	The TASKE Voice ToolKit is currently busy, please call again later.
Sys168	Please try again.
Sys169	To re-enter the password, press 1. To return to the main menu , press star.
Sys170	The TASKE Voice ToolKit is now in
Sys171	Normal mode
Sys172	Emergency mode
Sys173	The message phrase for this channel cannot currently be accessed.
Sys174	Please contact the TASKE Voice ToolKit system Administrator.

Glossary of Terms

Term	Definition
Abandoned Call	A caller terminates the call before an agent can answer.
ABSBH	Average Busy Season Busy Hour
Account Code	A number assigned to departments, projects, devices, telecom services, and employees for cost tracking purposes.
ACD	Automatic Call Distribution
ACD Call	Inbound or outbound calls that are handled by an ACD queue.
ACD Call Center	Refers to any host PBX that handles many telephone calls of a similar nature.
ACD Queue	The line of calls to be answered.
ACD Record	Event records that are immediately generated when an agent enters a new call state (such as idle or answer ACD call) and when an agent activates a feature (such as log in, log out or make busy). These records are periodically generated to report on a cumulative group event for an ACD queue (such as the number of calls waiting, the number of available agents or longest call waiting time). Agent events are reported on whenever an agent responds to a call, regardless of whether or not an external trunk is involved in the call.
ACD Search	Allows a supervisor to view specific real time event records. Search is based on...
Agent	An employee who answers calls directed to the call center.
Agent Group	A collection of agents who answer calls of a similar nature.
Agent Identifier	A number that represents the agent within the PBX system. This number is used by the agent to log in and log out of the PBX system.

Term	Definition
Agent Report	Shows parameters used to monitor agent activity and performance. These reports indicate the amount of time an agent spends on ACD calls, on inbound non-ACD calls, on outgoing calls, the amount if time an Agent spends in Do Not Disturb and Make Busy, and the duration of time an Agent is logged in.
Agent Scheduling	The process of scheduling agents to work shifts.
Agent State	May be one of the following: idle, on inbound ACD call, on outbound or internal call, hold, work time, make busy, DND, logged out, or indeterminate.
ANI	Automatic Number Identification
ASA	Average Speed of Answer
Baud Rate	Refers to the speed of transmission of a data communication link.
Blocking	Blocking is a term that is used to indicate a call which is unsuccessful because it cannot find an available trunk.
Busy Hour	The period of the day when the traffic is at its highest. The traffic is measured over 15, 30, or 60 minute periods throughout the day, over a ten day period. Each day's busy hour traffic is averaged to determine the average busy hour. The traffic for all periods over each of the 10 days is drawn up as a matrix and the busy hour is identified.
Busy Season	A seasonal variation that produces a large volume of calling traffic. An example of the busy season may be Christmas.
Call Costing	An application that allows for the apportionment of telecom costs among departments, projects, and departments.
Call Duration: Agent	The aggregate of the talk time and the work time.
Call Duration: Trunk	The aggregate of the queue time and the talk time

Term	Definition
Call Load	Expresses, as a percentage, the proportion of waiting calls to the number of agents that are currently engaged in ACD calls. Call Load = 100*(#Calls Waiting / #Agents on ACD Calls)
Call Load Messages	A category of messages for the TASKE Sign Application. Call load messages are used to alert agents and supervisors to a growing backlog of waiting calls.
Call Load Threshold	A user defined parameter to determine when the TASKE Sign Application will provide the reader board with a call load message that alerts the staff to a potential backlog of calls.
CCS	Centime Call Seconds or 100 seconds of server time.
CO	Central Office: the local telephone company's telephone switching system that allows local access on and off of the PSTN.
Comport	A communication port used to connect external devices to a PC.
Consistent Busy Hour	Derived by identifying the hour of the day that has the highest traffic when averaged over a ten-day period.
Cost-based Call Center	In this type of call center a cost is incurred for each call to the organization. The call handling incurs costs but does not result in additional revenue. The costs to the organization include the cost of handling the call and the cost of providing the support service. The level of service in a cost-based call center involves a low probability blocking but an almost certain delay of considerable length. The length of the delay is generally a balance between long distance and manpower costs, and the long-term impact of potential lost business.
CTI	Computer-to-Telephony Interface
CTS	Clear To Send
Customer	The caller that has decided to phone your call center for the services you provide.

Term	Definition
CW	Calls Waiting
Daily Report	Presents data for a single day.
Data Bit	Refers to the number of bits used to transmit information in the words carried over comport links.
DCD	Data Carrier Detect
Decision Tree	A TASKE Sign function that is comprised of a set of condition statements that are applied to ACD performance variables. When the condition is true, the associated message is displayed on the reader board.
Default Messages	A category of messages for the TASKE Sign Application. Default messages typically display background information. These messages may contain variables and be used to display queue status information.
DND	Do Not Disturb
DNIS	Directory Number Information Service
DSR	Data Set Ready
DTMF Dual Tone Multi	Frequency refers to industry standard tone frequencies produced by selecting keys on a touch tone telephone. The Voice ToolBox programs recognize the tone frequencies associated with the digits selected on touch-tone telephones.
End Hour To File	An option available on a networked TASKE system that indicates the ending hour of a LANs operating period. This option instructs the system to begin storing files to the shadow drive at the hour specified. Once the time specified for the Start Hour To File is reached, the system begins to store files to the LAN once again.
Erlang	One hour of server time.

Term	Definition
Erlang B	An equation used for trunk and blocking calculations. The equation assumes that there is no queuing and that callers who get blocked do not retry the call.
Erlang C	An equation used for agent and delay calculations where ACD queuing is employed. The equation assumes that all callers who reach the queue wait until being answered.
ExePath	Defines the location of the TASKE ACD ToolBox executable files. Unless changed by the user during installation, the ExePath is c:\ttbx.
Extension	Physical telephone devices. These devices may include telephones, voice mail ports, or an auto attendant.
Extension Group	A collection of similar extensions that are grouped together for reporting purposes.
Extension Report	Shows the amount of time extensions are engaged in ACD calls, inbound nonACD calls, and outbound calls. These reports also display the number of abandoned calls, the number of transferred calls, and cumulative statistics on extensions across work shifts.
Fixed Messages	A category of messages for the TASKE Sign Application. Fixed messages are played continuously when no variables are available. They are generally used in situations which override the operational considerations of the ACD queue, or where the ACD queue is not in operation.
Floating Busy Hour	Derived by identifying the hour that has the highest traffic for each day and averaging these figures. The Floating and Consistent Busy Hours may be the same. However, the floating Busy Hour traffic is usually higher than the consistent Busy Hour traffic.
Forecasting	An historical analysis of past traffic levels used to project future traffic patterns.
GOS	Grade of Service or the probability of being blocked.

Term	Definition
Historical Reports	Reports based on the ACD and SMDR records. These reports provide information on call center activity over extended periods of time and are used to identify trends in call volume.
Idle Agent	Agent is logged in, but not on a call, in work time, make busy, or DND.
Interflow	Limits the potential call answering delay by routing the call to another answering point after a predetermined period of time. Another answering point may be an operator or voice messaging system. This action may also be referred to as Recall.
Interflow Time	The amount of time a call may be in one or more queues before being interflowed to another answering point.
Internal Call	A call initiated from within the call center that is directed to another call center member.
IVR	Integrated Voice Recognition and response
LAN	Local Area Network
LANA Number	Local Area Network Adapter Number
LCW	Longest Call Waiting
Level of Service	The length of time that a caller waits for an agent to respond after obtaining a free trunk.
Log In	The procedure involved for an agent or supervisor to enter the ACD system by inputting their identifier number.
Log Out	The procedure involved for an agent or supervisor to exit the ACD system by inputting their identifier number.

Term	Definition
Maintenance Error Log	A log entry is added to the Maintenance Error Log when a running TASKE program encounters and error or and alert condition. The system records the error, the time it occurred, and provides a short description.
Make Busy	An agent state where the agent is still logged into the call center but is unavailable to take calls.
Manager Team	A team of supervisors, each of whom manage a team of agents.
Monthly Report	Presents data for one calendar month.
Multi-line Appearances	An extension with multiple telephone lines and multiple telephone numbers that are used for call handling.
NCB	Network Control Block
Nickname	A short name used to identify an agent.
Non-ACD Call	Inbound or outbound calls that are not handled by an ACD queue.
Offered Traffic	The number of calls attempted.
Outbound Call	A call initiated from within the call center that is bound for the PSTN.
Overflow	Limits the potential call answering delay by: taking a call from one queue and placing it in another queue adding the call to a second queue in addition to keeping its place in the first queue
Overflow Time	The amount of time a call may be in one queue before being overflowed to a second queue.

Term	Definition
Parity	The parity bit is added to the transmission of a word in asynchronous communication to detect any transmission errors. The extra bit may be ignored (no parity), may designate an even number of "1" bits (even parity), or may designate an odd number of "1" bits (odd parity).
Path	A route to one or more answering points within a call center.
PBX	Private Branch Exchange
Peaky Traffic	Periods in the day that experience high call volume. An example might be a training course where everyone rushes out at coffee break to make a telephone call, but in between coffee breaks there are almost no calls.
Peg Count	The number of calls.
Pilot	A dialable access number to an extension or agent group.
Pilot Group	A collection of pilots.
Pilot/Pilot Group Report	Also known as a Queue Activity Report, this report shows the service level experienced by Callers; indicate the percentage of calls which are answered or abandoned before the target threshold time.
Poisson	An equation used for trunk and blocking calculations. The equation assumes that there is no queuing and that all callers who fail to connect retry the call.
Prime Line	The first line on a multi-line extension.
Priority Answering	Allows calls meeting a certain criteria to be routed to the front of an ACD queue. For instance, calls arriving over an 800 line may be given priority to local calls in order to reduce costs.
PSTN	Public Switched Telephone Network: the network that enables you to directly dial anywhere in the world.

Term	Definition
Quality of Service	Describes the response of the agent. Agent courtesy, information accuracy, and how current the information is are all considered.
RAD	Recorded Announcement Device: taped or digital recordings played to callers in the ACD queue.
RAD	Recorded Announcement Device
Rate Table	Rate tables are defined for all outgoing trunk groups. Each rate table specifies the costs associated with using a specific carrier for a given telecom service.
Reader Board	A wall mounted LED sign that displays messages from the TASKE Sign application.
Real Time Information	Current call center information on call activity, agent activity, and service levels. This information is available through the ACD Monitor application and is updated once per second.
Revenue-based Call Center	In this type of call center each call has value in terms of the net revenue per call. The objective in this type of call center is to provide a very high level of service with few blocked calls and minimal delays. Otherwise, the caller may go to the competition and the organization loses revenue. Thus, the call center must balance average call answering costs against average per call revenues.
RT	Real Time
Scheduling	The process of estimating the number of resources required to meet the forecast call load.
Secondary Line	Any line, except for the first line, on a multi-line extension.
Serv%	The proportion of calls, answered and abandoned, before the threshold TSF time.

Term	Definition
Server Number	The number assigned to a TASKE network server where multiple TASKE network servers exist on the same physical network. This number cannot conflict with any other server on the network.
ServerPath	Defines the location of the TASKE database files. These files may reside on the TASKE Standalone PC, the TASKE Server, or on a network connected file server.
Service Criteria	The combination of the GOS, level of service, and quality of service required to achieve caller satisfaction.
Shadow Drive	In a networked system, the shadow drive stores incoming data records on the hard drive of the TASKE server, in addition to storing them on the LAN Server.
ShadowPath	Defines the location of the shadow drive in a networked system.
Shift	The amount of time an agent is scheduled to be working in the call center on a given day.
Sign Message	A message sent from the TASKE Sign application to a reader board for broadcast. Up to 50 messages can be defined at one time.
Sign Network	A network of reader boards driven by the same PC.
Sign Plan	Using a unique address for each reader board, a sign plan determines which reader board will display which message.
SMDR	Station Message Detail Recording

Term	Definition
SMDR Records	Event records that are generated by the host PBX when a call or a call segment completes. A call can have multiple SMDR records that are generated when a call is transferred or conferenced, or when account codes are entered while the call is active. The information that is generated includes: the start time of the call, the duration of the call, who started the call and who the answering party was. These records are typically generated when an external Trunk is involved in a call, and not when a call originates internally.
SMDR Search	Allows a supervisor to view specific SMDR records. Search is based on...
Smooth Traffic	The number of calls arrive in an even flow throughout the day.
SNMP	Simple Network Management Protocol
SP	Service Percentage
Special Day	Allows for the definition of holidays and days when staffing discrepancies may exist.
Start Hour To File	An option available on a networked TASKE system that indicates the starting hour of a LANs operating period. This option instructs the system to store files to the shadow drive until the hour specified. Once the specified hour is reached, the system begins to store files to the LAN.
Stop Bit	Denotes the end of an asynchronous word transmitted on a comport link.
Supervisor	The manager of the call center who ensures that performance targets and caller expectations are met. Call center management requires the estimation of the current call center needs and the forecasting of future requirements. This is accomplished through the analysis of real time and historical reports.
TAPI	Telephony Application Program Interface

Term	Definition
TASKE Administrator	Responsible for the development of the TASKE database, its configuration and maintenance, and the configuration and maintenance of its associated files.
TASKE Network Client	A TASKE PC that receives data from one or more TASKE Server PCs.
TASKE Network Server	A TASKE PC that collects records from one or more host PBX devices and provides information to one or more TASKE Client PCs.
TASKE Network System	A network of TASKE PCs, one of which acts as a server that interfaces with the host PBX, and the remainder of which act as clients, receiving data from the server.
TASKE Sign Application	Provides messages for display on a reader board. The application runs on TASKE standalone, network server, and network client PCs, with each PC driving its own network of reader boards.
TASKE Standalone System	A TASKE PC that interfaces with the host PBX to provide call center data to agents and supervisors.
Time of Day Schedule	A TASKE Sign function that is used to select a decision tree based on the current date and time of day.
Traffic	The aggregate effect of the number of calls and their duration.
Trunk	Physical lines that connect the telephone switch to the outside world.
Trunk Group	A collections of trunks.
Trunk Group Report	Indicates the highest number of Trunks in use during an interval.
Trunk Report	Shows the number of calls the trunks carry; the percentage of time the trunks are engaged in calls or are idle; the highest number of trunks used in each interval; and the number of short calls the trunks receive.

Term	Definition
TSAPI	Telephony Services Application Programmers Interface
TSF	Telephone Service Factor. This is the percentage of calls that are answered or abandoned within a defined threshold time, compared to the total number of calls received.
TSF%	The proportion of calls answered and abandoned before the threshold TSF time.
Unavailable Agent	An agent who is logged into the call center but is either in a make busy or work time state.
VTB	Voice Toolbox
WAN	Wide Area Network
Watchdog	This function restarts the PC in the event of a crash.
Weekly Report	Presents data for seven consecutive days.
Work Time	A time period designated to agents after completing an ACD call. The work time allows agents to complete paperwork associated with a call. During this time, the agent is unavailable to accept calls.
Year By Month Report	Presents data for a user specified number of months, beginning with a month selected by the user.
Year to Date Report	Presents data for a specified number of consecutive weeks from a specific start date.

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