



ContactOne

Management Portal
User Guide

MOMENTUM
T E L E C O M

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WELCOME

Thank you for being part of the Momentum Telecom family!

We are thrilled to have your business and we look forward to working together.

We also want to welcome you to the Momentum ContactOne - a hosted, unified Omni-channel contact center solution. The Momentum Team is constantly developing ways to improve your experience and offer new communications management tools that increase your productivity and make it easy to do what you do. At Momentum, we understand the critical nature of communications services to businesses and to *people*, and we take our responsibility seriously. It is our mission to make certain that you have the ultimate in state-of-the-art communications, unparalleled network reliability, and a consistently superior customer experience to ensure that you and your company are in a position to *thrive*.

Thank you for letting us help you communicate!

Sincerely,

The Entire Momentum Telecom Team

INTRODUCTION

This guide is a convenient, go-to resource for Contact Center Managers, Supervisors and Administrators getting started with the ContactOne Management Portal. It provides an overview of the application website and information about some of the most-used modules that may be available to various users who access the Portal. It offers instructions and tips for working with the features used most in the Management Portal and is designed to assist users as they perform routine tasks.

A complete Help file covering all aspects of the ContactOne Management Portal is provided within the portal, offering information and instructions to assist with more complex tasks. Please note that some features described here may not be included in your subscription or offered to all users by your enterprise. Contact your organization's ContactOne Administrator to determine the features and services that you will manage.

We encourage you to take some time to review this document and keep it handy for future reference. Should you need further assistance, please reach out to us. We are always here to help you with fast, courteous, professional support, and we offer additional training upon request. Momentum Telecom is committed to doing everything possible to deliver an exceptional experience to help you and your business thrive.

GETTING STARTED

The ContactOne Management Portal offers a comprehensive administrative tool set with all the functionality you need to setup and administer your Contact Centers – locally or world-wide. ContactOne is a hosted, unified Omni-channel contact center solution delivered via the cloud. It offers constant access, cutting-edge features, and predictive analytics to improve operational and business performance. Combined with integrations from leading CRMs and other unified communications products, ContactOne arms agents with intelligent tools to handle customer interactions in-context, and on-demand collaboration with others in the enterprise to increase agent productivity and first call resolutions.

CONTACTONE PREREQUISITES

The ContactOne Management Portal requires the use of one of the following browsers:

Internet Explorer 10 or higher • Recommended: **Mozilla Firefox 38+** or **Google Chrome 44+**

Preliminary Browser Setup:

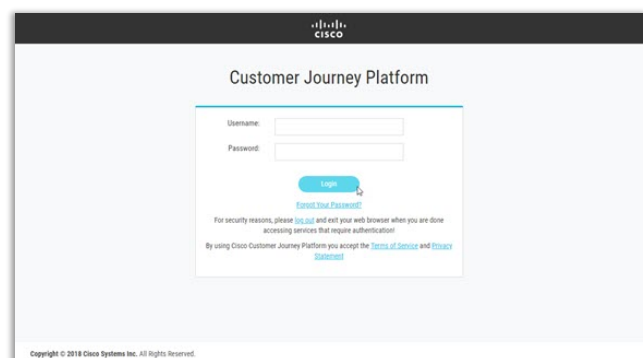
- Cookies set to Enabled
- Security level set to Medium
- Show Pictures option selected
- Pop-up blocker Disabled
- Javascript Enabled
- Browser cache cleared before starting the current (or new) release for the first time

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

SIGN IN

The ContactOne Management Portal is accessed through a Web browser, using login information provided to you by your ContactOne service provider. Access to individual modules, features, and functionality within the portal is defined by the permissions assigned to you by your site administrator.

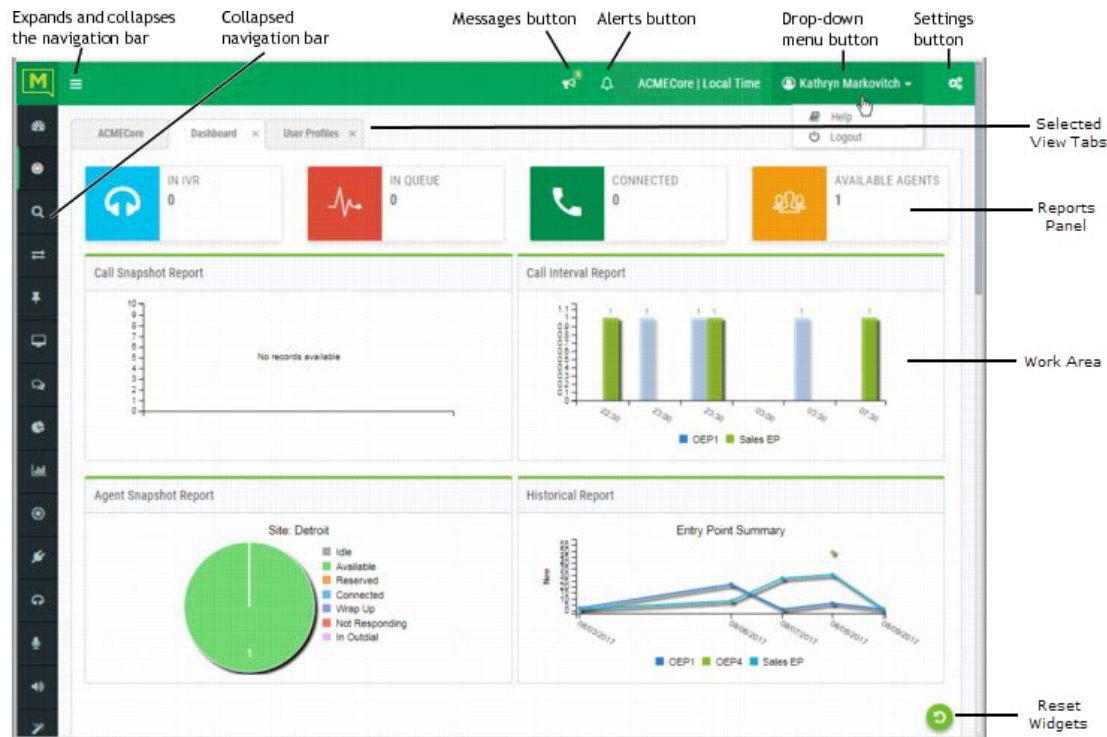
1. Open a Web browser (Chrome, Firefox recommended) and navigate to the URL provided to you by your service host via email.
<http://contactone.momentumtelecom.com>
2. Enter your user name and password.
(Passwords are case sensitive)
3. Click the **Login** button. The ContactOne Management Portal opens to the home page and Dashboard.



Note: When logging out, you should close all open ContactOne windows before logging in again to ensure you are not reviewing old information.

MANAGEMENT PORTAL TOUR

Once you have logged in, the ContactOne Management Portal home page provides access to the tools and features you manage.



PORTAL SECTIONS

TOOLBAR

☰ NAVIGATION BAR / MENU – The first icon in the toolbar expands | collapses the navigation bar on the left side of the screen. The navigation bar menu displays links to the modules that you are authorized to access. Each link displays either as the name of a module when expanded, or an icon that represents the module if the navigation section is collapsed.

✉ SYSTEM MESSAGES – Outages, important information, etc. Click this icon to see system message(s).

🔔 SUPERVISORY ALERTS – Requests from Agents for midcall assistance from available supervisors.

👤 <YOURNAME> ▼ – Click this drop-down menu to display the following options:

Help: Opens a Help file window with access to topics designed to assist you as you work.

Logout: Closes and logs you out of the ContactOne Management Portal.

⚙ SETTINGS – Expands and collapses the Settings panel which offers the following features:

- Choose a user interface skin (color theme) and (if enabled) Customize the user interface banner color and images shown on your Management Portal pages. *Access permissions are required.*
- Change your password.
- Change the time zone to display appropriate routing strategies.

REPORTS PANEL & WORK AREA


In the Dashboard view, the center of the screen displays a **Reports Panel** with widgets at the top that offer counts of the number of calls currently in IVR, In Queue, and Connected, along with the number of currently available agents, and **Real-Time Data** and/or **Historical Data** charts below, as defined in the Real-Time Reports and Historical Reports modules.





Click on a chart to display the corresponding Real-Time or Historical report in a new tab.














When a module is selected and opened, its page displays as a 'tab' above the Reports panel and the center of the screen becomes your Work Area where tasks will be performed and data may be reviewed.

MODULE ACCESS OVERVIEW

The Management Portal offers access to the dashboard and any modules you have been assigned to use. Click the icon in the Navigation bar menu on the left that represents the appropriate module. If the navigation bar is collapsed, you can click the menu  button on the upper-left side of the screen to expand the menu and review all of the icons and module names to which you have access.

 All modules the organization elected to utilize require authorization permissions and the correct login credentials to access.



Available Modules	Features & Tools
 Provisioning	View settings provisioned for your enterprise. Create and edit users, queues, entry points, DN to entry point mappings, sites, skills and skill profiles, multimedia profiles, threshold rules, teams, idle and wrap-up codes and work types, address books, password policies, user and agent profiles, business metrics, and call-associated data variables for use in call control scripts. Add agents to the system and assign them to teams, and delete, activate, and unlock agent accounts. Access Provisioned Items reports.
 Analyzer	Optional. The Customer Engagement Analyzer module allows authorized users to segment, profile, and visualize the data in your contact center system to identify key variables that impact productivity and desired business outcomes.
 Analyzer Data Exchange	Optional. Allows Customer Engagement Analyzer users to create and modify the Analyzer schema.
 Business Rules	Optional. Enables authorized Customer Engagement Analyzer module users to incorporate customer data into the ContactOne environment for custom routing as well as for general implementation.

 Agent Desktop	Handle customer contacts as an Agent.
Campaign Manager	Optional. This module allows authorized users to manage outbound voice and email campaigns.
 Real-Time Reports	View real-time statistics and key performance indicators across all call center sites, teams, and agents.
 Historical Reports	View saved historical reports, create new reports, and adjust report parameters.
 Web Callback Request Report	View information about Web callback requests.
 Routing Strategy	Optional. Create scheduled routing strategies and team capacity strategies and make real-time adjustments to call center traffic flow.
 Call Monitoring	Silently monitor calls at any site for any team or agent, provide instructions to the monitored agent without being heard by the caller, and join a call being monitored and participate in the conversation.
 Call Recording	Optional. Record calls at any site for any team or agent.
 Recording Management	Optional. Search for and play calls recorded through the ContactOne Call Recording feature.
 Workforce Optimization	Optional. Access Workforce Management, Quality Management, and WFO Analytics, including Speech, Text, and Desktop Analytics.
Account Unlock	Unlock user accounts at specified sites and on specified teams.
 Password Reset	Reset or reassign passwords for one or more agents at specified sites and on specified teams.
 Audit Trail	Optional. View details about the changes made to the provisioning database tables for your enterprise anytime during the past two weeks and export the data to a data analysis tool such as Microsoft Excel.
 Usage Metrics Report	Optional. Authorized users can view usage metrics for up to 13 months.
 Release Notes	Optional. View and download release notes.
MM Provisioning	Optional. Multimedia Provisioning. Define resources used for email and chat.
MM Agent Desktop	Optional. Multimedia Agent Desktop. Monitor assigned email and chat queues and the agents assigned to those queues, reallocate and reject email contacts, approve email responses, silently monitor chat conversations, coach the agent being monitored, and join a chat in progress.

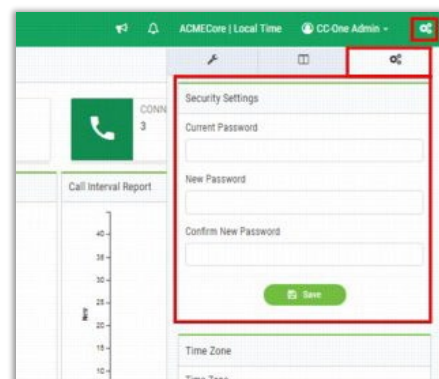
This rest of this guide provides information about typical daily activities performed in the Management Portal.

CUSTOMIZE YOUR PORTAL

CHANGE YOUR PASSWORD

1. Click the Settings  icon in the upper-right corner of the toolbar to display the Settings panels.
2. Click the tab displaying the gears  icon to view Security Settings.
3. Type your current password in the Current Password field.
4. Type your new password in the New Password and Confirm New Password fields.
5. Click **Save**.

Passwords are always case sensitive.




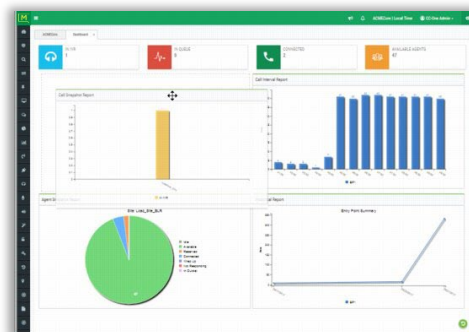
MOVE CHARTS ON THE DASHBOARD

Drag the title bar section of a chart on your dashboard to move it to a different position and customize your view.

CHANGE THE SIZE OF A CHART



1. Point to a corner or edge of a chart so the cursor changes to a two-headed arrow.
2. Drag the corner or edge to shrink or enlarge the chart.

To restore the Charts to Original Size, Click the  **RESET/REFRESH** button, at the bottom of the page.

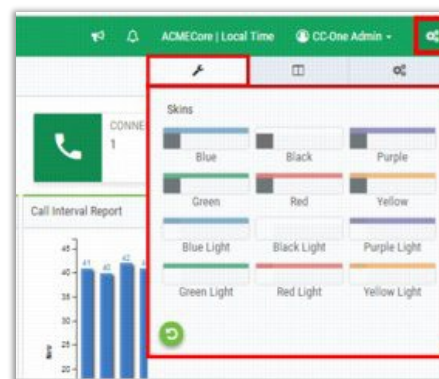


CHANGE THE COLOR THEME

Multiple color skin options are provided to allow you to change the set of colors in the selection panel and in the toolbar banner:




1. Click the gears  icon in the toolbar (upper-right corner) to display the Settings panel.
2. Click the tab displaying the wrench  icon to view the **SKINS** options.
3. Click an option to select a new skin. The colors display immediately so you can decide whether you like it.

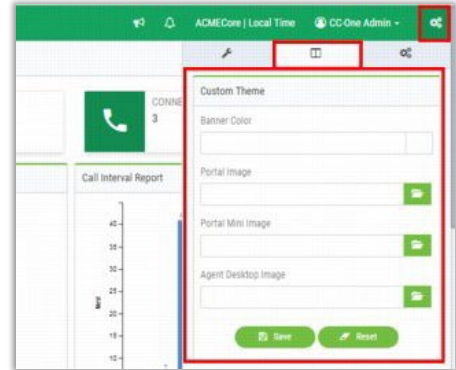
To return the display to the default colors, click the Reset  button at the bottom of the **SKINS** panel.



CREATE A CUSTOM THEME

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

1. Click the **Settings**  icon on the upper-right side of the home page.
2. Click the tab displaying the  icon to display the **CUSTOM THEME** settings.
3. Under **Banner Color**, either type the HTML (hexadecimal) code for a color or click inside the small box on the right and select a color from the color selector.
4. Click the folder  button next to an image type to navigate to the image file in your system that you want to use and click **Open**. Supported file formats are PNG, JPG, JPEG, and GIF.
5. Click **Save** to submit your custom theme settings.



GET HELP

After you sign in to the ContactOne portal, you can access full documentation via the online **HELP** at any time from any section in the portal as you work. The **HELP** file will open to the section you are in to offer instructions and tips for using the tools and settings you see.

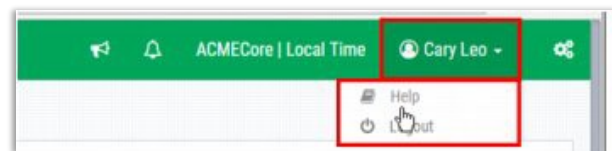
DISPLAY ONLINE HELP

After you sign in to the ContactOne service, you can access online Help at any time from any section in the portal.

- ▶ Click the **HELP** link on the upper right side of any module page.

-OR-

- ▶ Click on your Login Name on the on the upper-right side of the screen and select **HELP**. (If your browser window is wide enough the button also displays your login name.)



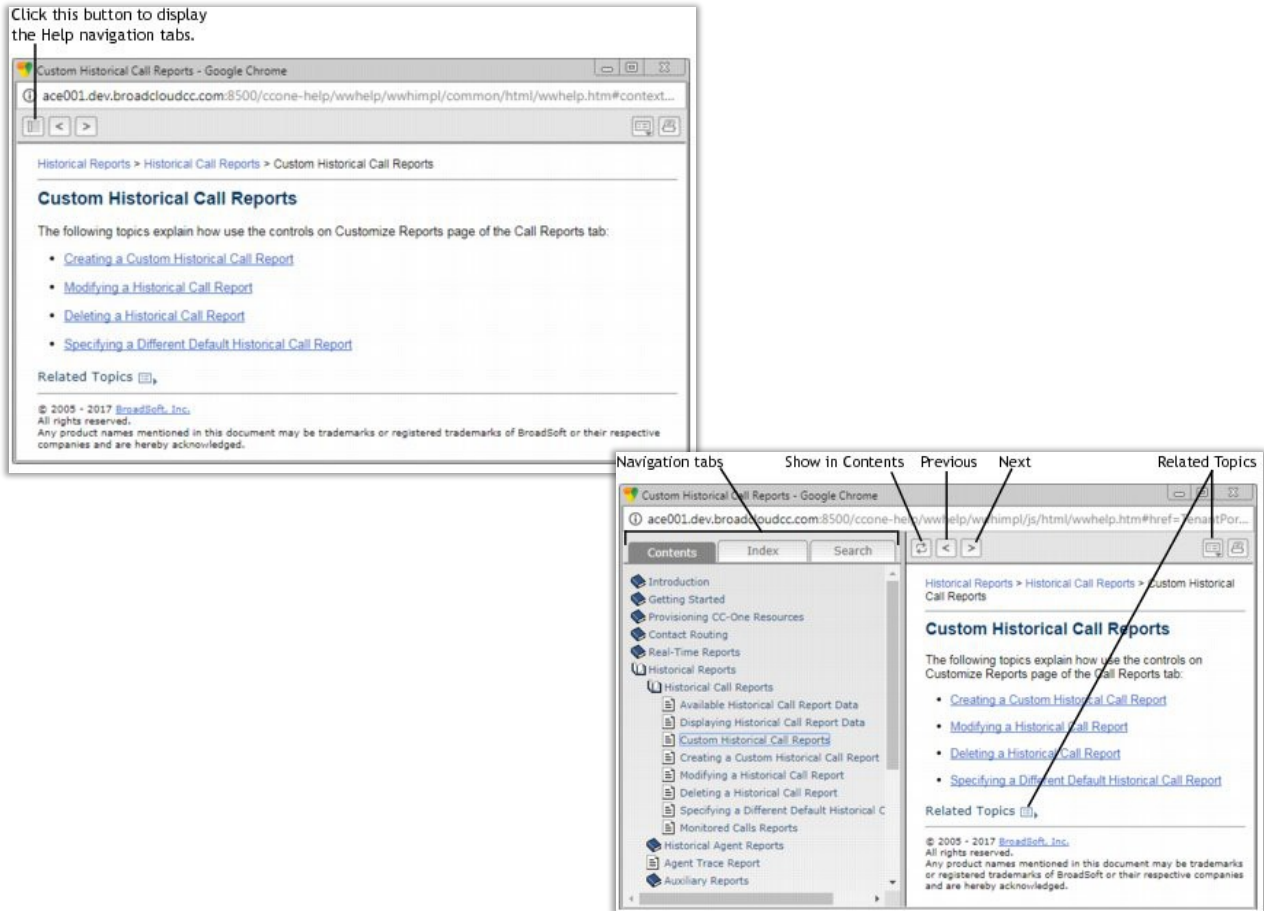
The topics related to the current ContactOne view are displayed to you in a new dialog.

HELP NAVIGATION

The Help file is context sensitive, so when you access **Help** from a page or section in the ContactOne module, information about the page and section you are viewing displays.

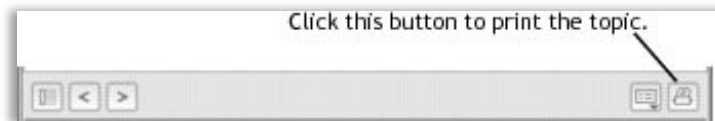
Simply click the **SHOW NAVIGATION**  button to display the full menu of Help topics for all of ContactOne.

- ▼ Help window with the navigation tabs displayed.




PRINT HELP TOPICS

1. Display the Help topic you want to print.
2. Select the **PRINT** button on the Help window toolbar at the top of the dialog.
3. Select the appropriate print options in the Print dialog, or save to PDF format.




DAILY TASKS

SUPERVISORY ALERTS

The **SUPERVISORY ALERTS** feature allows an Agent on a call to send a Midcall Monitor request to all logged-in Supervisors who have access to the feature and to the Agent's queue, site, and team. (Permit Monitoring must be enabled for the queue.) The Alerts  icon displays a count of the number of unacknowledged alerts associated with calls that have not ended. The alert count decreases as an alert is either marked Acknowledged by a Supervisor, or the call for which the Agent requested Supervisor assistance is ended.

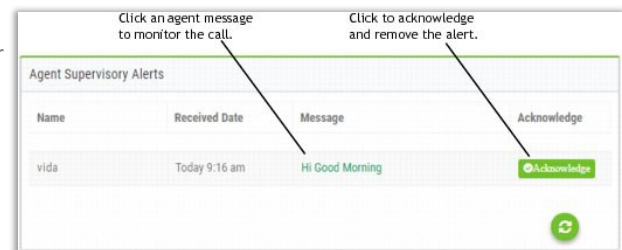
MANAGE SUPERVISORY ALERTS

View Supervisory Alerts

1. Click the **ALERTS**  button at the top of the Portal landing page to open the Agent Supervisory Alerts window. This section displays unacknowledged alerts grouped by agent name.

Monitor a Call

1. Click the agent message to open the Call Monitoring module and view the agent data for that agent.
2. Enter your callback number.
3. Click the **MIDCALL MONITOR** button.



Acknowledge Supervisory Alerts


Acknowledging Supervisory alerts removes them from all supervisor dashboards. If you are handling the alert and wish to remove the message from the Supervisory Alerts on all ContactOne Dashboards:


1. In the *Agent Supervisory Alerts* window, click the **Acknowledge** button to the right of the alert message.
2. Click **OK** to acknowledge and end the alert, and click **OK** again when prompted to acknowledge successful deletion of the alert.

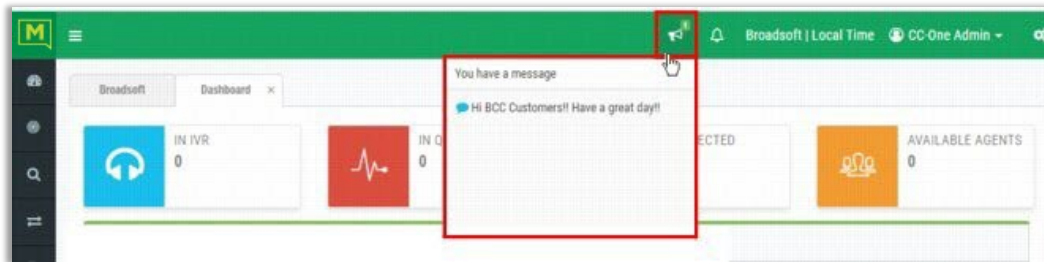
The alert message will be removed from all dashboards at the next data refresh (every 30 seconds).

To refresh the data in your Agent Supervisory Alerts window more often than every 30 seconds, click the Reload/Refresh  button on the lower right side of the window.

DISPLAY BROADCAST MESSAGES

ContactOne broadcast messages are occasionally displayed on the ContactOne Portal home page. Typically, such messages inform users of upcoming scheduled system maintenance. When a broadcast message arrives, the Message  icon displays a count of the number of messages that have not expired.

To view your messages, click on the  loudspeaker icon to open the message window. Click the icon again to close the window.



UNLOCK AGENT ACCOUNTS

The maximum number of allowable invalid login attempts is determined by the Password Policy assigned to the user. The system automatically locks a user account and prevents future attempts to log in if the user enters an incorrect password more than the specified number of times in succession. Here are two ways to unlock an agent account:

UNLOCK AN AGENT USER ACCOUNT

1. Go to **PROVISIONING > USERS**
2. Locate the agent within the list and click the adjacent ellipsis **⋮** icon to view the action options.
3. Select the **EDIT** option and scroll down to the Security section.
4. Toggle the **Account Locked** option to **No**.
Optional: Enter and confirm a new password or require a new password at the next login attempt.
5. Click the **Save** button to submit the change(s) and close the **Edit** view. The user may now attempt to login again.

ACCOUNT UNLOCK MODULE

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


1. Select **Account Unlock** in the navigation menu.
2. On the **Unlock Agents** page, select a site from the **SITES** drop-down list to display a list of the teams at that site to which you have access.
3. From the **TEAMS** drop-down list, select a team to display the **Unlock Agents** page for that team.

4. Select the check box to the left of each listed agent whose account you want to unlock, or Select the check box at the top of the Agent Login column to select all listed agents on the Team.
5. Click the Unlock Agents button at the bottom of the page.
6. Click **Yes** to confirm the action when prompted.

A message on the upper-right side of the page informs you that the agent bulk operation has been initiated and provides a batch name for the operation. The [PROVISIONING > BULK OPERATIONS STATUS](#) page provides operation performance (success/failure and reason) information for bulk operation batches.

RESET AGENT PASSWORDS

Individual agents' account passwords are always available for administration within the *Security Settings* section of the *Users* page in *Provisioning*.

1. Go to [PROVISIONING > USERS](#).
2. Locate the agent within the list and click the adjacent ellipsis icon to view the action options.
3. Select the **EDIT**  option and scroll down to the *Security Settings* section.
4. Enter and confirm a new password **or** elect to require a new password at the next login attempt.
5. Click the **Save** button to submit the change(s) and close the *Edit* view.
The user may now attempt to login again, either using the password sent via email or by submitting a new password when requested.

PASSWORD RESET MODULE

Authorized **Password Reset** module users can also reset or reassign the passwords of one or multiple agents to which they have access privileges at the Site or Team level.

1. Go to [PASSWORD RESET](#) in the Navigation Bar menu.
2. Complete the following, as needed:
 - Select a **Site** or **Team** using the related drop-down menu to display the corresponding list view. You must have access to a Site or Team to select it.
 - **Agent Login** – Click within the check box adjacent to each listed agent to select, or select the check box next to the column header to Select/Deselect ALL listed agents.
 - Enter and confirm a new password (using the correct password credential requirements).

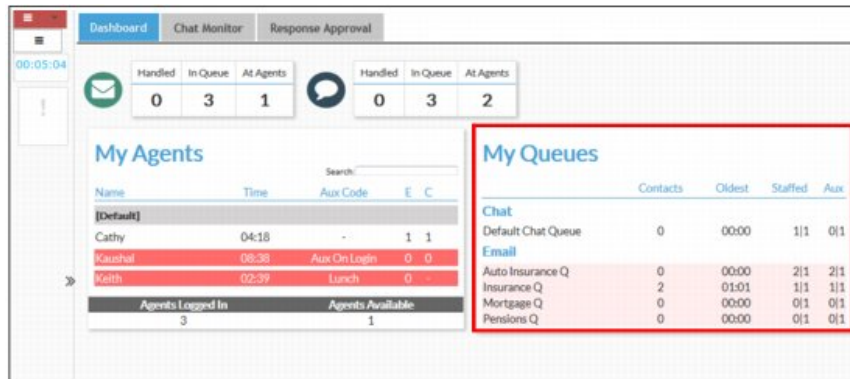
OR

 - **Must Change Password at Login** – Toggle to **True** to require a password change at login.
3. Click the **Reset Password** button at the bottom of the page.
4. Click the **Save** button to submit the change(s).


A *Bulk Operations Initiated* message displays at the top of the page and provides a batch name for the operation. You can go to [PROVISIONING > BULK OPERATIONS STATUS](#) page to review the status or see error message information.

MONITOR CHAT AND EMAIL QUEUES

The **MY QUEUES** panel on the Dashboard displays continuously updating information about each email and chat queue that has been assigned to you.



CALL MONITORING

The  Call Monitoring module enables authorized users to silently monitor any active call that is managed by the ContactOne service at any time, across any site, and verify that customers are being served in a professional manner. Authorized users can also create monitoring schedules, coach an agent who is connected to a call by providing comments that only the agent can hear, and barge in on calls as needed.

The Call Monitoring page displays the following:

- Controls for requesting a monitoring session.
- A chart of active and queued calls for the queue that is currently selected in the Monitoring Filter panel on the left side of the page
- The Monitor Requests and Calls Being Monitored tables

MONITOR REQUESTS

The *Monitor Requests* list displays information about all monitoring requests in your enterprise.

If a monitoring request includes multiple queues, sites, teams, or agents, you can display a list of them in a tool tip by placing your mouse on a value in the Queue, Site, Team, or Agent column.

Request Type	Queue	Site	Team	Agent	Monitoring Status	Supervisor Name	Supervisor Number	Action
Scheduled	Any Queue	Any Site	Any Team	Tim Smith	Request Pending	Akshatha KB	1717	
Scheduled	Any Queue	Any Site	Denver Detroit Miami	Any Agent	Request Pending	Marian Jim	9989	
Continuous ...	Any Queue	Denver	Team ...	Any Agent	Request Pending	Marian Jim	789	

CALLS BEING MONITORED

The *Calls Being Monitored* list displays information about all calls currently being monitored in your enterprise. The information provided in this list includes: The Queue Name, the Site, the Team, the Agent, the Monitoring Status, the Supervisor monitoring the call, Supervisor's Number, the call Duration (mm:ss), and the action buttons to click (Barge In, Coach...), where authorized and available for the call.

MANAGE CALL MONITORING

The *Call Monitoring* module also provides an interface for managing call monitoring settings to be continuous or one-time only basis, and down to the agent level. Authorized users may have access to define new Call Monitor definitions.

Add a Call Monitor

1. Click on the **CALL MONITORING** module.
2. In the *Monitoring Filter* panel on the left side of the page, specify one or more queues, sites, teams, and agents you want to monitor. If you leave a Queue, Site, Team, or Agent list set to All, only those entities to which you have access will be included in the request.
3. In the *Callback Number field*, enter the phone number where you want the audio to be sent. Enter all the digits required to reach that phone, without hyphens or other special characters. For example, if the phone number is (415) 555-1234, you would enter 4155551234.
4. Select the format for the Callback Number:
 - U.S. Format (the default) interprets the phone number as 1 + area code + seven-digit phone number.
 - Other indicates that the phone number format is other than U.S. format.
5. Click within the *Use Invisible Mode* checkbox to prevent the monitoring session from being displayed on other users' Management Portals.
6. Choose one of the following buttons to submit your monitor request:
 - Monitor Next: Monitor the next incoming call the fits the criteria you defined.
 - Mid-Call Monitor: Monitor a call that is already in progress and connected to an agent. This button is available only if mid-call monitoring is authorized by your user profile. If no call is in progress, the request fails.
 - Continuous Monitor: Continuously monitor calls that fit the specified criteria.
7. Monitor Duration: Enter the duration of the monitoring session in minutes or leave the default set to Unlimited.
8. Click the **MONITOR** button to dismiss the dialog box and submit your request.

When a call that matches the criteria you specified is distributed to the destination site, the audio is delivered through a phone call to the number you specified.

The monitored call appears in the *Calls Being Monitored* list.

Pending requests from you and your colleagues are listed here.

Monitoring Filter

Queue: All

Site: All

Team: All

Agent: All

Callback Number: 5551234

Use Invisible Mode

Other U.S. Format

Current Calls Status

Bar chart showing 1 call in the 'Connected' state for 'Sales-Q'.

Calls Being Monitored

Queue	Site	Team	Agent	Monitoring Status	Supervisor Name	Supervisor Number	Duration	Action
Sales-Q	Detroit	Billing Team	Tim Smith	monitoring-started	Akshatha	1717	00:00:13	[Icons]

Monitor Requests

Request Type	Queue	Site	Team	Agent	Monitoring Status	Supervisor Name	Supervisor Number	Action
Scheduled	Any Queue	Any Site	Any Team	Any Agent	Request Pending	Marian Jim	9989	[Start]
Continuous	Any Queue	Any Site	Any Team	Any Agent	Request Pending	Marian Jim	5551234	[Pause] [Cancel]

The Coach or Barge In buttons may be available in the Action column, if the user is authorized to use them.

- **MONITOR NEXT CALL** button allows you to begin monitoring the next call in the queue when a call is ended, or, if you selected Continuous, the next call in the queue is automatically sent to you.
- **MIDCALL MONITOR BUTTON** start monitoring during a call.
- The **START** ► button allows you to begin monitoring a call.
- The **CANCEL** ☒ button stops monitoring activity for that request.
- The **PAUSE** || button temporarily halts continuous monitoring and the **RESUME** button allows calls to again be sent to you for monitoring.

Whisper - Coach an Agent

If the Whisper Coach feature is enabled in your user profile, you can speak to an agent who is being monitored without being heard by the customer. The coaching session continues, even if the call is transferred to another agent, until the call either ends or is transferred to another number (agent-to-DN transfer). If the coached agent consults with another agent, you will hear music on hold and will not be able to continue coaching the agent until the caller is taken off hold.

While you are monitoring a call that is currently connected to an Agent:

1. Click the **COACH** button.
Note: Do not click the Coach button if the call is waiting in a queue after having been transferred by the agent to another queue. Doing so will cause your coach request to fail.
2. Provide verbal instructions to the agent, as needed.
3. Hang up to remove yourself from the call and to remove the call from the Calls Being Monitored list.

Barge In

Authorized users can use the **BARGE-IN** function to join a call they are monitoring and participate in the conversation between the agent and the customer unless the call is transferred to another number (agent-to-DN transfer), after which the call is removed from the Calls Being Monitored list. While you are monitoring or coaching a call that is connected to an agent (not waiting in a queue):

1. Click the **BARGE-IN** button to be immediately connected to the call.
Tip: The Barge-In button disappears from the view while in use.
2. Provide assistance to the caller and the agent, as needed.
3. Hang up when finished to remove yourself from the call and remove the call from the Calls Being Monitored list.

MANAGE CALL MONITORING SCHEDULES

The **MONITORING SCHEDULES** page in the *Call Monitoring* module enables authorized users to schedule call monitoring requests at specific times of the day or week. Note the following:

- Unless otherwise authorized by your user profile, you can view and edit only those call monitoring schedules that you created.
- The start and end times specified in the Call Monitoring Schedule use the enterprise server time. However, calls are actually monitored in the local time. Be sure to adjust for this when specifying start and end times in your monitoring schedules.

Add a Call Monitoring Schedule

1. Open the Call Monitoring module.
 - a) Click the **SCHEDULE** button on the menu bar.
 - b) Click on the **NEW SCHEDULE** button in the list view.


- OR -

While viewing a Schedule's Calendar:

 - a) Hover the cursor over the **Beginning Date** field to view action options.
 - b) Click on the **CREATE** link that appears in the upper-left corner of the date box.
2. Enter or select the schedule information, as required or needed.
3. Click **SAVE** when finished.



Copy a Call Monitoring Schedule

In the Call Monitoring module list view:

1. Click on the ellipsis  icon to the left of a listed schedule to view action menu options.
2. Select the **COPY** option.
3. Enter a new name and modify or disable settings as needed for the new Schedule.
4. Click the **SAVE** button when finished.

Edit a Call Monitoring Schedule

In the Call Monitoring module list view:

1. Click on the ellipsis  icon to the left of a listed schedule to view action menu options.
2. Select the Edit  option.
3. Enter, modify, or disable settings as needed to update the new Schedule.
4. Click the **SAVE** button when finished.

CALL RECORDING

The optional Call Recording module enables authorized users to record any active call that is managed by the ContactOne service. Authorized users can select which queue, team, site, and agent they want to record, and for what time period. After the recording schedules are created and saved, the system starts recording the next call that matches the criteria.

Recordings are transferred daily to your enterprise's recording repository over a secure encrypted virtual private network (VPN). The recording repository is a standalone server housed at a location of your enterprise's choosing, such as the call center premise location or data facility. Your enterprise has full control over the length of storage for these recordings.

The recordings are in standard .wav file format and can be accessed directly by authorized individuals and reviewed using standard third-party utilities. Additionally, you can use the features of the optional *ContactOne Recording Management* module to search for and play recorded files quickly and easily if your organization has implemented it.

MANAGE CALL RECORDINGS

Create a Call Recording Schedule

1. Open the Call Recording module

2. Select a queue from the Queue drop-down list. All call recording schedules for that queue are displayed. You can switch between the list and calendar view, as desired.
3. In the appropriate Queue List view, click the **NEW SCHEDULE** button to open the dialog and begin defining a new schedule.
OR - In the Calendar view, hover the cursor over the beginning date and click the **CREATE** link to open the dialog and begin defining a new schedule.
4. Specify the appropriate settings, dates, and recording details for the new call recording schedule.
5. Click the **Save** button to submit the new schedule.


View a Call Recording Schedule

While viewing the appropriate Queue list in *Call Recording*:

1. Click on the ellipsis **⋮** icon next to the schedule you wish to review.
2. Select the **VIEW** option to display all current settings.
3. Click the **Cancel** button to exit when finished.


Edit a Call Recording Schedule

While viewing the appropriate Queue List in *Call Recording*:

1. Click the ellipsis **⋮** icon next to the schedule you wish to modify.
2. Select the **EDIT**  option.
3. Make changes to the schedule settings, as needed.
4. Click on the **Save** button to submit the information.


Copy a Call Recording Schedule

While viewing the appropriate Queue List in *Call Recording*:

1. Click on the ellipsis **⋮** icon next to a listed schedule you wish to copy.
2. Select the **COPY**  option.
3. Make changes as needed to define a new schedule based on the selected item.
4. Click on the **Save** button to submit the new schedule

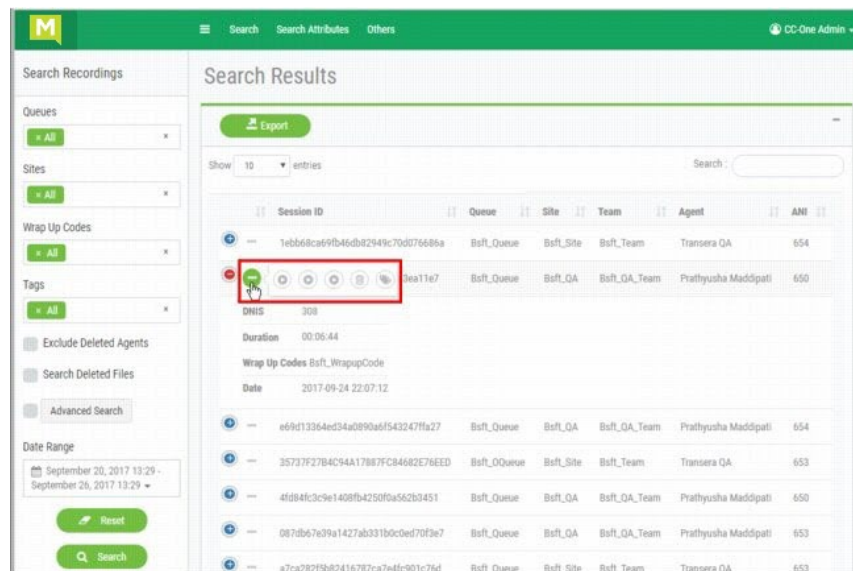
Delete a Call Recording schedule

While viewing the appropriate Queue List in *Call Recording*:

1. Click on the ellipsis **⋮** icon next to the schedule you wish to remove.
2. Click on the **DELETE**  option and confirm the action.

CALL RECORDING MANAGEMENT


The optional Recording Management module allows authorized users to search for and play audio files recorded through the Call Recording feature. Authorized users may also be able to create tags on audio files to use as *search* criteria, specify which CAD variables to store with the recordings, create custom attributes for recording files and view recent Recording Management activity. The Queues, Sites, Teams, and other list options that are provided to assist you in locating recordings are populated based on your access privileges.



USING CALL RECORDING MANAGEMENT

Search Recordings

1. Go to the Voice Recording > Recording Management.
2. Review and select from the recording list or click **SEARCH** to review the search tools.
3. Use any of the basic search tools to locate and select recordings, including:
 - **Filter:** Use the Queues, Sites, Teams, Agents, etc. lists or keep the default **All** settings. Once one or more Sites are selected, the Teams and/or the Agents lists are populated.
 - **Text Search:** Enter one or more characters in a list box to display only the listed entities that include the character sequence you entered.

- **Exclude Deleted Agents:** filter out deleted agents from the search by clicking within the adjacent check box.
 - **Wrap-Up Codes:** Filter using one or more codes from the Wrap Up Codes list.
 - **Tags:** If Tags (text strings that can be assigned to recordings) have been defined and assigned to recordings, you can filter the search based on any associated Tags by selecting them in the Tags list.
4. Optional: click [ADVANCED SEARCH](#) to review additional filtering tools, including:
- **Call-Associated Data (CAD) values:** Selecting the check box to the left of one or more entries in the CAD Variables list and enter a CAD value for each selected variable.
 - **Custom Attributes:** If your Recording Management installation includes custom attributes, you can filter the search based on custom attribute values by selecting the check box to the left of one or more entries in the Custom Attributes list and then entering a custom attribute value for each selected attribute.
 - **Call Attributes:** Enter values in the fields displayed under Call Attributes to filter the search based on Session ID, DNIS (the number the caller dialed), or ANI number (either the caller's phone number or, in the case of an outdial call, the phone number of the agent who made the outdial call).
 - **Recording Duration:** Use the provided fields to specify the minimum and maximum length of recording to search for or select the *Unlimited* check box to search for a recording of any length.
 - **Date:** use the Calendar tool controls to specify a date or date range.
 - **Search Deleted Files:** locate audio files deleted less than 30 days ago. (to play a deleted file, you must restore it first by clicking the  ellipsis icon next to the item, and then select the [RESTORE](#)  option.
5. Click [Search](#) button to submit the filtered criteria and review the new list in the *Search Results* page.

View More Recording Information

If your browser window is too narrow, some columns containing useful information may not display.


1. Click the  plus icon next to a listing to review additional details about the recording.

Search Attributes

1. Go to [CALL RECORDING > CALL RECORDING MANAGEMENT](#).
2. Click on the Search Attributes tab to review and select from a list of Custom Attributes.

Play Recordings


In the Call Recording Management *Search Results* page:

1. Click on the **⋮** ellipsis icon next to a recording
2. Choose the **STEREO**  option to play the audio of Both the Agent and the caller.

If *Leg Recording* is enabled, three (3)  Play buttons (**AGENT**, **CALLER** and **STEREO**) are available when the **⋮** ellipsis icon is selected.


Delete Recordings

In the Recording List:

1. Click on the **⋮** ellipsis icon adjacent to a recording.
2. Select the Delete  option.
3. Confirm the action to remove it. The recording is removed but can be recovered for up to 30 days.

Assign Tags to Recordings

While in the Recording List:

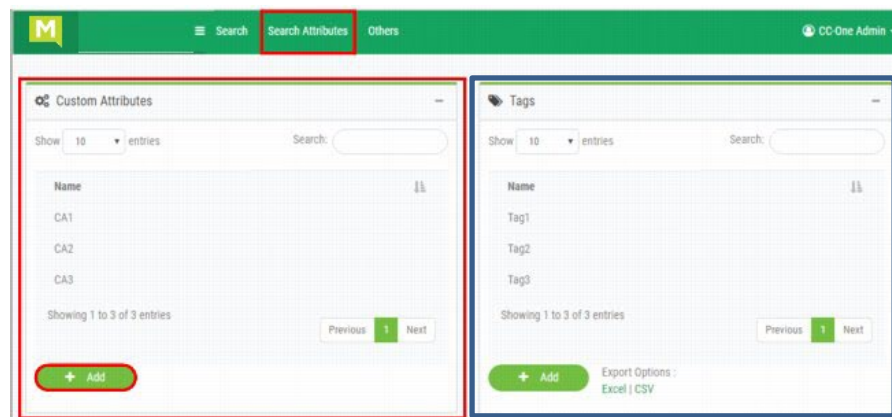
1. Click the **⋮** ellipsis icon to the left of a listed recording on the Search Results page and select **TAGS** .

The current Tag assignments and any available Tags are listed for review.

2. Select one or more tags in the *Available* list (left).
3. Click on the **ASSIGN TAG** button. *Selected items are moved from the Available Tags list to the Assigned Tags list.*

To Remove a Tag from a recording: Select a tag in the *Assigned* tags list (right) and click the **REMOVE TAG** button. The tag is removed from the *Assigned Tag* list and is displayed in the *Available Tags* list.

4. Click the **Save** button when finished.



Create Custom Attributes for Recordings

The Custom Attributes section of the *Search Attributes* page enables authorized users to create attributes that can be saved with recordings and used later in searches.

1. Go to [CALL RECORDING](#) > [CALL RECORDING MANAGEMENT](#) > [SEARCH ATTRIBUTES](#)
2. Click on the [ADD](#) button.
3. Enter a *Name* for the new attribute in the field that is provided.
4. Click the [SAVE](#) button to submit the new information, close the *Add* dialog, and review the updated list.

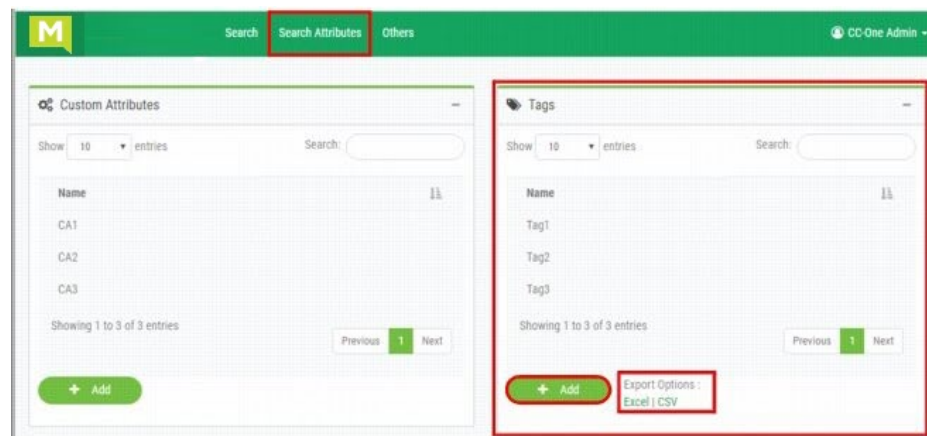
Export the Recording List

While in the Call Recording Management > Search Results page:

1. Click on the [EXPORT](#) button at the top of the Search Results page (left) to create and save or review an Excel spreadsheet report containing the Recording list details.

Export Tags

The Tags section in the *Search Attributes* page enables authorized users to create tags that can be assigned to recordings, and export a list of the tags that are currently available.

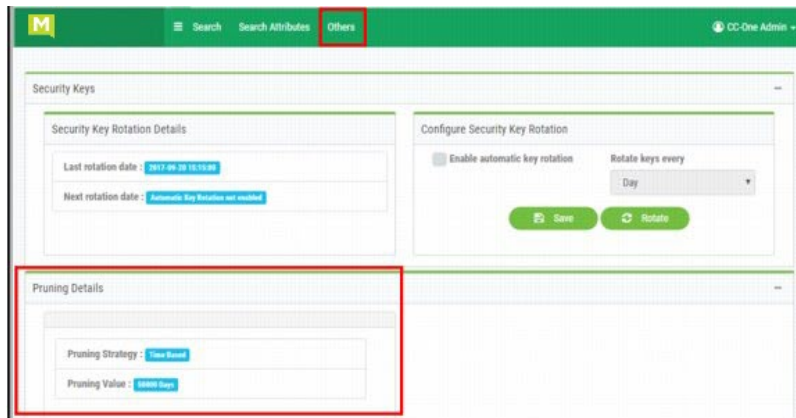


While viewing a Recording's Search Attributes:

1. Click on the preferred Export option (*Excel* or *CSV*) link at the bottom of the section to view the local system navigation tools
2. Click [OPEN](#) to review the list file or click [SAVE](#) to navigate to and select a location in your local file directory to store the file.

Others Page

The *Others* page in [CALL RECORDING MANAGEMENT](#) provides authorized users with access to manage Security Key Schedules and the Call Recording Pruning Details.



CHANGE SECURITY KEY SCHEDULE

If your installation includes the Encryption option, each recording file for your enterprise is encrypted using a public key that is randomly generated. When a user requests a recording file, the Recordings Server software decrypts the file using a randomly generated private key. A new set of public and private keys can be generated periodically based on settings specified in the Security Keys tab.

If your user profile authorizes you to access the Security Keys page, you can view and change the schedule for generating security key pairs at the top of the *Others* page.

1. Go to [CALL RECORDING](#) > [CALL RECORDING MANAGEMENT](#) > [OTHERS](#)

Within the Security Key Rotation Details section at the top of the *Others* page, you can see the information for the *Last Rotation Date* (the last time a security key pair was generated) and the *Next Rotation Date* (the date when a new security key pair will be generated).

2. In the Configure Security Key Rotation section are the Edit options for modifying the rotation rate. Select from:
 - Enable Automatic Key Rotation: Click to place a check in the box to specify a new time interval for automatically generating a new security key pair, and
 - Rotate Keys Every: Select an option (Day, Week, Month, Three Months, Six Months or Year).
 - Rotate: Click the [ROTATE](#) button to immediately generate a new security key pair.
3. Click [Save](#) to submit changes.

PRUNING DETAILS

Authorized Call Recording Management users may have access the *Pruning Details* settings in the *Others* page to review the setup for deleting older recordings that is defined for the enterprise.

1. Go to [CALL RECORDING](#) > [CALL RECORDING MANAGEMENT](#) > [OTHERS](#)

The **Pruning Details** section in the lower part of the page may display the following information:

- **Pruning Strategy:** The options here can include Time Based, Agent Minutes or Storage Based.
- **Pruning Value:** The options here can include: 0 (no pruning occurs), The number of months non-deleted recordings are retained one additional day is added to any value as the added day is when the recordings are deleted. (a month is 31days+1day so 32 days; 2 months is 31x2+1 day so 63 days).

REPORTS

ContactOne offers many useful reports that can be reviewed right out of the box, both for historical data and real-time analysis and charting. By default, the Dashboard view displays 3-4 report Charts. Each report type collates data to assist with all aspects of workforce optimization and service improvement strategies. Plus, ContactOne offers all the customization tools needed to develop and use new reports - whenever you want. The Real-Time Reports and Historical Reports modules provide a set of prepared reports that allow you to see real-time data when you first open the module. These reports may be copied to use as a base for customizing reports.

There is also a set of default Tickers that display real-time information as a scrolling bar in the Ticker section of Real-Time Reports module pages. To assist you with report maintenance as you work, complete Online Help documentation is available for all Report modules, pages, tools and reporting management features.

TYPICAL REPORTING TASKS




Set New Default Report(s) for the Dashboard

The Call Snapshot, Call Interval, Agent Snapshot and (optional) Historical Report are displayed on the Dashboard in ContactOne. You may select alternative reports if you have created custom reports you wish to display upon login and when viewing the Dashboard.

1. Go to Real-Time Reports in the Navigation bar menu on your Dashboard view.
2. Click on the **CALL REPORTS** button in the menu.
3. Select a customization option (Snapshot Reports or Interval Reports) from the drop-down menu to open the appropriate list.
4. Click on the ellipsis **⋮** button next to the desired report.
5. Select **SET AS DEFAULT**.
6. Log out of ContactOne (ensure all ContactOne module browser windows are closed as well).
7. Log back into ContactOne to see the changes to the Dashboard reports.
8. Repeat steps 1-7 in the **Historical Reports**, as needed.

Expand | Collapse Report Module Panels

Each of the Real-time and Historical Report View pages display three report panels that can be expanded, collapsed and resized to optimize your view:

- The **REPORT FILTER** panel on the left displays controls for selecting report parameters.
- Click the **MENU**  button on the left side of the menu bar to collapse and expand this panel.
- The top report panel displays a chart of the report data; the lower panel displays data in a grid format.
- Click the expand  button in the upper-right corner of a *Chart* or *Grid* panel to maximize the panel so it occupies the entire report space. Then you can click the compress  button to restore the panel to its previous size.

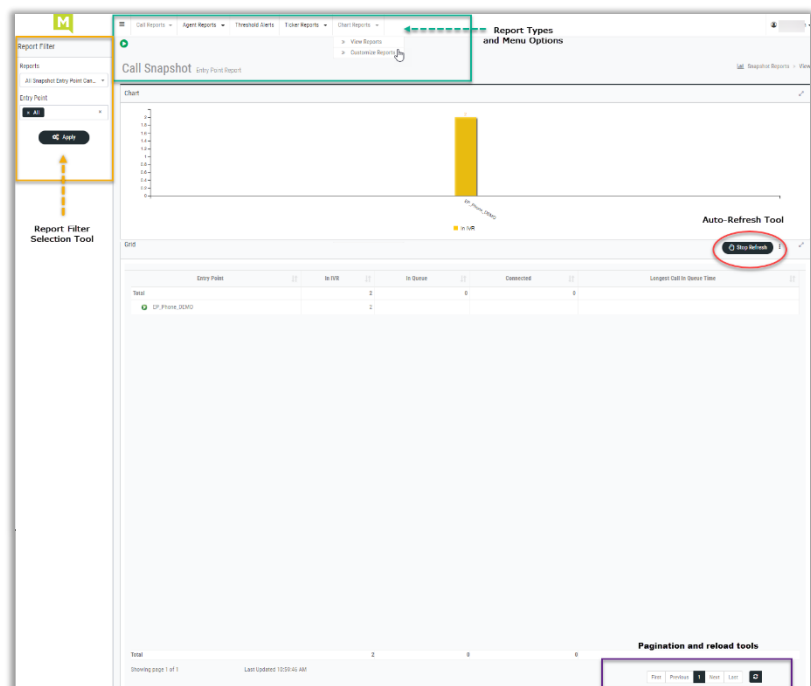
REAL-TIME REPORTS MODULE

Click on the  **Real-Time Reports** option in the Navigation bar menu to open this module in a new browser window.


It provides access to a full set of tools for viewing, filtering, and managing the real-time data viewed in:

- Call Reports
- Agent Reports
- Threshold Alerts
- Ticker Reports
- Chart Reports

This module also offers the normal reporting abilities to Copy, Create, Modify, Delete, and Export Real-Time reports to Print, and save to PDF or Excel formats.



HISTORICAL REPORTS MODULE


The  **Historical Reports** module in ContactOne provides a system-wide view into historical performance, to help you see how to optimize service levels across queues, sites and teams. Reporting is performed on accumulated statistics captured by ContactOne as it participates in cradle-to-grave management of calls. Users can create their own reports by selecting various data elements and parameters to include on a new report.


Historical reports that may be available (if in use) for review, filter, and management include:

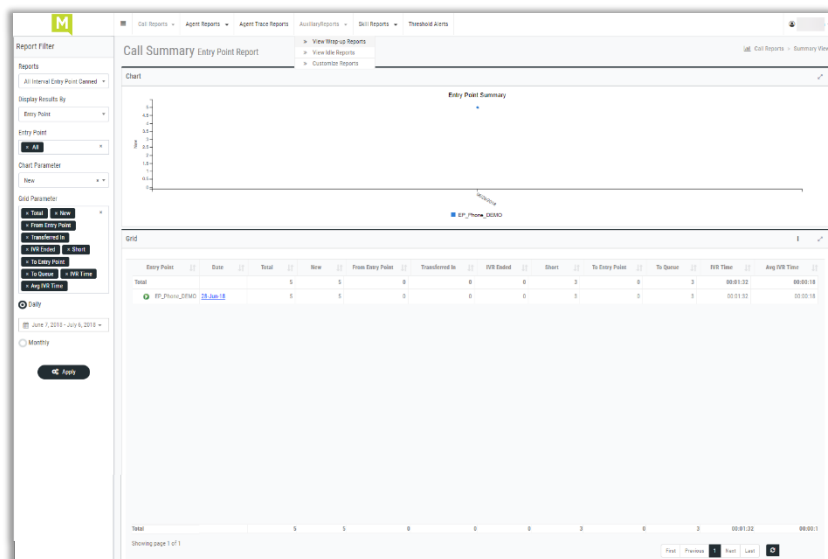
- Call Reports
- Agent Reports
- Agent Trace Reports
- Auxiliary Reports
- Skill Reports
- Threshold Reports

This module also offers the normal reporting abilities to Copy, Create, Modify, Delete, and Export Historical Reports to Print, or save to PDF or Excel formats.

AUDIT TRAIL REPORT MODULE


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

1. In the ContactOne Portal navigation menu, select  **AUDIT TRAIL**.
2. On the Audit Trail page:
 - **Entity Type** - use this drop-down list to select the entity type that interests you (Agent, Auxilliary, etc.)
 - **Action** - use this drop-down list to select an action: All, Create, or Update.
 - **Date Range** – click within the To and From fields to select and Apply a date range filter of eight days or less.
3. Click the **APPLY FILTERS** button to submit the changes and review report or download the filtered data to an Excel or PDF file.



USAGE METRICS REPORT MODULE

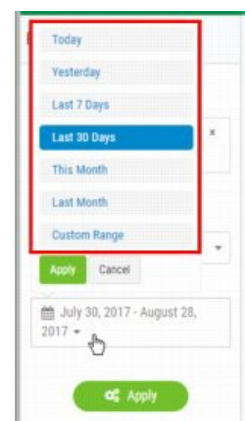
If your enterprise is provisioned with the  Usage Metrics Report module, authorized users can view Service usage metrics for up to **13** months.

1. Select  Usage Metrics Report in the Navigation bar menu to open the module for review.
2. Choose a month and year in the drop-down selection lists within the **Report Filter** panel.
3. Click **APPLY** to view the filtered data. The usage metrics for the months you selected display. The report metrics can include:
 - **Month** - The selected period during which the call activity in the report occurred.
 - **Total Calls** - The total number of inbound and outdial calls.
 - **Calls Duration (min)** - The total amount of time between inbound call arrival (or when outdial calls were placed) and when they were terminated.
 - **Inbound - Total Calls**. The total number of inbound calls. **Connected Calls**. The number of inbound calls that were connected to an agent. **IVR Duration (min)**. The number of minutes during which calls were in the IVR system. **Queue Duration (sec)**. The number of seconds during which calls were in a queue. **Talk Time (min)**. The number of minutes during which agents were talking with callers. **Hold Time (min)**. The number of minutes during which inbound calls were on hold.
 - **Outdial - Total Calls**. The total number of outdial calls. **Connected Calls**. The number of outdial calls that were connected to an agent. **Talk Time (min)**. The number of minutes during which an agent was talking with a party on an outdial call. **Hold Time (min)**. The number of minutes during which outdial calls were on hold.
 - **Recorded Calls** - The number of calls that were recorded.

WEB CALLBACK REQUEST REPORT MODULE

This report displays details about Web callback requests and, if your enterprise uses the Voice Callback feature, about voice callback requests.

1. Click the **Web Callback Report** link in the Navigation Bar. The **Web Callback Request Report** page appears.
2. In the **Report Filter** panel on the left side of the page, select the outdial entry points you want to include in the report.
3. From the **Call Status** drop-down list, select a call status value or select **All** to include all call status values in the report. Call Status metrics options can include:
 - **Scheduled** - Requested callback has been scheduled
 - **Processed** - Requested callback was successfully connected to the requester.
 - **Failed** - An outbound call was made to the requester's phone number, but was not successfully connected to the requester. For example, this would be the case if the requester did not answer the call, or the call was



answered by a recorded message or a busy signal. A failed callback is optionally rescheduled based on the maximum callback attempts allowed and the retry attempt interval provisioned for your enterprise.

- **Cancelled** - A callback request was made and then cancelled by the requester.
 - **Tam Post Failed** - The ContactOne Callback Manager was unable to post the callback request to the ContactOne Interaction Router (internally referred to as TAM). For example, this would be the case if the Router was down.
 - **Date Range** - select a time period option for the report from the drop-down list, or choose **Custom Range** to use the calendar controls to specify an alternate 30-day period.
4. Click **APPLY** to display requested callback counts and details.

PROVISIONED ITEMS REPORTS

REPORTS link in the Provisioning Module provides access to provisioned items reports that can be exported to either Microsoft Excel or Adobe PDF format. These reports provide details about the settings configured for the following active resources provisioned for your enterprise:

Sites, teams, agents, inbound entry points, inbound queues, outdial entry points, outdial queues, agent profiles, and, if your enterprise uses the optional Skills-Based Routing feature, skills, skill profiles, and agent skills (which lists the skills assigned to each agent along with the agent's assigned skill profile and teams).

A **Routing Report** that maps entry points, queues, and teams to the entities from which contacts are being received or to which contacts are being routed is also available.

1. Select **PROVISIONING > REPORTS**
2. Select the report that interests you.
3. Specify whether you want the report to include mapping for All routing strategies that are mapped to entities to which you have access, for **Current** routing strategies only, or for **Active** routing strategies only.
4. Select an **Export** option (Excel or PDF)
5. Specify whether to download the report or have it emailed to you (and enter an email address).
6. Click **OK** to submit the request and complete the action.

CALL REPORT PARAMETERS

Parameter	Description	Report(s)
% Abandoned	The percentage of calls that were abandoned during the report interval. $(\text{Abandoned}/\text{Total}) * 100$	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues
% Answered	The number of answered calls divided by the number of calls that entered the queue minus short calls multiplied by 100. $(\text{Answered}/(\text{Answered} + \text{Abandoned})) * 100$	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues
Abandoned	The number of calls that were abandoned during the report interval. An abandoned call is a call that was terminated without being distributed to a destination site, but that was in the system for longer than the time specified by the Short Call threshold provisioned for the enterprise.	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues
Abandoned Time	The cumulative amount of time calls were in the system for longer than the time specified by the Short Call threshold, but terminated before being distributed to an agent or other resource.	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues
Abandoned within SL	The number of calls that were terminated while in queue within the Service Level threshold provisioned for the queue or skill (in a skills interval by queue report). Note: Although this metric is visible for outdial calls, it is not meaningful for such calls.	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues
Adjusted Service Level %	The number of calls that were either answered or abandoned within the Service Level threshold provisioned for the queue or skill (in a skills interval by queue report), divided by total calls (including abandoned calls) multiplied by 100. $((\text{In Service Level} + \text{Abandoned within SL})/(\text{Answered} + \text{Abandoned})) * 100$ Note: Although this metric is visible for outdial calls, it is not meaningful for such calls.	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues, Sites, & Teams
Agent	The name of the agent who handled the call or a numeric ID code if the call was handled by a capacity-based team resource instead of by a CJP agent.	CDR
Agent Start Time	The time the agent picked up the phone and began talking with the caller.	CDR

Parameter	Description	Report(s)
ANI	The ANI digits delivered with the call. ANI, or Automatic Number Identification, is a service provided by the phone company that delivers the caller's phone number along with the call.	CDR
Answered	The number of calls that were routed from the queue to an agent or available resource and were answered by the agent or resource.	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
Answered Time	The cumulative amount of time between when calls entered the queue and when they were answered (connected to an agent or other resource) during the report interval. Because answered time is calculated after the call is answered, answered time for calls that are waiting to be answered is not reflected in the report.	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
Available Agents	The number of logged-in agents who are currently in the Available state.	Call Snapshot report
Avg Abandoned Time	The total amount of time that calls were in the system before they were abandoned divided by the total number of calls that were abandoned: Abandoned Time/Abandoned	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues
Avg Connected Time	The total connected time divided by the total number of calls that were answered during the report interval: Connected Time/(Answered + Secondary Answered)	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
Avg Handle Time	The average length of time spent handling a call (connected time plus wrap-up time), divided by number of answered calls: Connected Time+Wrap Up Time/(Answered + Secondary Answered)	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
Avg IVR Time	The total amount of time that calls were in the IVR system divided by the total number of calls that were in the IVR system.	Real-time Call Interval & Historical Call reports for Entry Points
Avg Queued Time	The total amount of time that calls were in queue divided by the total number of calls that were queued: Queued Time/Queued	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues.

Parameter	Description	Report(s)
Avg Speed of Answer	The total answered time divided by the total number of answered calls: $\text{Answered Time}/\text{Answered}$	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
Avg Wrap Up Time	The total amount of time agents spent in the Wrap-up state divided by the total number of answered calls: $\text{Wrap Up Time}/(\text{Answered} + \text{Secondary Answered})$	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
Blind Transfer Count	The number of times the call was transferred out of the queue by the agent without consulting first.	CDR
Blind Transfers	The subset of transferred out calls that were transferred by the agent to another agent or an external DN without the first agent consulting or conferencing with the party to whom the call was transferred.	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
Call Duration	The amount of time between when the call arrived at the entry point or queue and when it was terminated.	CDR
Call End Time	The time the call was terminated.	CDR
Call Start Time	The time the call arrived at the entry point or queue.	CDR
Completed	The number of calls that ended during the report interval. Answered, abandoned, and disconnected calls are included in this count. Transferred and short calls are not.	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
Conference Count	The number of times the agent established a conference call with the caller and another agent.	CDR
Conference Count	The number of times agents initiated a conference call to an agent or external number.	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
Conference Time	The amount of time an agent spent in conference with the caller and another agent.	CDR

Parameter	Description	Report(s)
Connected	The number of calls currently connected to an agent.	Call Snapshot report
Connected Time	The time interval between when calls were answered by an agent or other resource and when they were terminated. Because connected time is not calculated until the call is terminated, the connected time for a call that is still in progress is not reflected in the report.	Real-time call interval reports for Sites, Teams, Queues, & Skills by Queue; Historical Call reports for Queues, Sites, & Teams
	The total amount of time the call was connected to an agent (talk time plus hold time).	CDR
Consult Count	The number of times agents initiated a consult with another agent or someone at an external number while handling a call.	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
	The number of times the agent consulted another agent during the call.	CDR
Consult Errors	The number of times agents did not respond to a consult invitation.	CDR
Consult Time	The amount of time an agent spent consulting with another agent while handling this call.	CDR
CTQ Answer Count	The number of times consult-to-queue requests were answered.	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
CTQ Answer Time	The cumulative amount of time between when consult-to-queue requests were answered and when the consultations ended.	Historical Call reports for Queues, Sites, & Teams
CTQ Request Count	The number of times consult-to-queue requests were initiated.	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams; CDR
CTQ Request Time	The cumulative amount of time between when consult-to-queue requests were initiated and when the consultations ended.	Historical Call reports for Queues, Sites, & Teams; CDR
Current Service Level %	The percentage of calls in queue that have not yet reached the Service Level threshold provisioned for	Call Snapshot report

Parameter	Description	Report(s)
	<p>the queue (in a queue report) or skill (in the skill rows of a skills-by-queue report).</p> <p>Note that although this metric is visible for outdial calls, it is not meaningful for such calls.</p>	
Disconnected	The number of calls that were answered (that is, connected to an agent or distributed to and accepted by a destination site), but that were then immediately disconnected within the Sudden Disconnect threshold provisioned for the enterprise.	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
DN	The number the caller dialed (DNIS).	All DN Canned report
DNIS	The DNIS digits delivered with the call. DNIS, or Dialed Number Identification Service, is a service provided by the phone company that delivers a digit string indicating the number the caller dialed along with the call.	CDR
Entry Point	The name of the entry point associated with the call.	CDR
From Entry Point	The number of calls that entered this queue after having been classified into the queue from an entry point by the IVR call control script.	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues
	The number of calls that came in to this entry point from another entry point.	Real-time Call Interval & Historical Call reports for Entry Points
Full Monitored Calls	The number of calls that were monitored from beginning to end.	Monitored Calls report
Handle Time	The amount of time spent handling the call (Connected Time + Wrap Up Time).	CDR
	The cumulative amount of time spent handling calls: Connected Time + Wrap Up Time	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
Handle Type	<p>How the call was handled. Possible values:</p> <p>IVR: The call was handled by the IVR but the caller disconnected before the call was transferred or parked.</p>	CDR

Parameter	Description	Report(s)
	<p>Park: The call was queued in the CJP network and subsequently ended without being distributed to a site.</p> <p>Park and transfer: The call was queued in the network and subsequently distributed to a site.</p> <p>Straight transfer: The call was distributed to a site upon arrival without being queued in the network.</p> <p>Unknown: This is the default value when no other value overrides it.</p>	
Hold Count	The number of times the call was put on hold.	CDR
	The number of times a caller was put on hold.	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
Hold Time	The amount of time the call was on hold in this queue (for a queue CDR) or in all underlying queues (for an entry point CDR).	CDR
In IVR	The number of calls that are currently in the IVR system.	Call Snapshot report
In Queue	<p>The number of calls currently in the queues that are covered in the report. In the case of entry-point reports, this is the number of calls that are currently in queues fed by the entry point.</p> <p>In entry point and queue reports, you can click a number in this column to display the Age of Calls in Queue pie chart in a pop-up window. The chart displays the number of calls that have been in the queue for the length of time represented by three time segments. The time segments are derived by dividing the Longest Time in Queue value by three, rounding the resulting value down to the nearest 10 seconds, and then multiplying that value by 1, 2, and 3. For example, if the Longest Time in Queue value is 85 seconds, then $85/3=28.3$, which is rounded down to 20, and the chart displays time segments of 20, 40, and 60 seconds.</p>	Call Snapshot report
In Service Level	<p>The number of calls that were answered within the Service Level threshold provisioned for this queue or skill (in a skills interval by queue report).</p> <p>Note: Although this metric is visible for outdial calls, it is not meaningful for such calls.</p>	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues, Sites, & Teams

Parameter	Description	Report(s)
Invisible Monitored Calls	The number of calls that were monitored using the Invisible mode, which prevents the monitoring session from being displayed on Management Portals other than that of the initiating supervisor.	Monitored Calls report
IVR Ended	The number of calls that ended in the IVR but were not short calls. (Call interval real-time and Historical call reports for entry points)	Real-time Call Interval & Historical Call reports for Entry Points
IVR Time	The amount of time the call was in the IVR system.	CDR
	The cumulative amount of time calls were in the IVR system.	Real-time Call Interval & Historical Call reports for Entry Points
Logged-in Agents	The number of agents who are currently logged in to this team or to all teams at this site. At the queue level, this is the number of agents logged in to all teams at the sites serving this queue.	Call Snapshot report
Longest Call In Queue Time	The longest amount of time a call has been in each queue covered in the report.	Call Snapshot report
Maximum Wait Time	The longest amount of time a call was in the queue waiting to be answered.	Historical Call reports for Queues
Midcall Monitored Calls	The number of calls for which monitoring began after the call was already in progress.	Monitored Calls report
Monitor Flag	Whether or not the call was monitored, coached, or barged in on. Possible values: Barged-In: The monitoring supervisor used the barge-in feature. Monitored: The call was monitored. Not Monitored: The call was not monitored. Whisper-Coach: The monitoring supervisor used the whisper-coach feature.	CDR
New	The number of external calls that came in to the entry point.	Real-time Call Interval & Historical Call reports for Entry Points
	The number of calls that came into the system via a specific dialed number.	All DN Canned report
No. of Transfers	The number of times the call was transferred by an agent.	CDR
Overflow	The number of calls that were sent to the overflow number provisioned for the queue and were	Real-time Call Interval reports for Queues

Parameter	Description	Report(s)
	answered. Typically, a call is sent to an overflow number if it has been queued for longer than the maximum time specified in the routing strategy or because an error occurred when the call was sent to an agent. If the call is not answered, it is included in the Abandoned or Disconnected count when it ends.	& Skills by Queue; Historical Call reports for Queues
Queue	The name of the queue associated with the call.	CDR
	The name of the queue that was monitored.	Calls Monitored report
Queue Time	The amount of time the call was in a queue waiting to be sent to a destination site.	CDR
Queued	The number of calls that entered the queue during this interval.	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues
Queued Time	The cumulative amount of time calls stayed in queue, waiting to be sent to an agent or other resource. Because queued time is calculated after the call leaves the queue, the queued time for a call that is still in the queue is not reflected in the report.	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues
Record Flag	Whether or not the call was recorded by CJP through the optional call recording feature.	CDR
Requeued	The number of calls that left this queue after having been transferred by the agent to another queue. For calls to be re-queued, the first agent clicks the Queue button, selects a queue from the drop-down list, and clicks Transfer.	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
S No.	A sequence number identifying each leg of a call as it moves through the CJP system. Click an entry in this column to open a window displaying the history of the call throughout its life cycle.	CDR
Secondary Answered	The number of calls that were answered by an agent after being transferred to the agent by another agent.	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
Service Level %	The number of calls that were answered within the Service Level threshold provisioned for the queue or skill (in a skills interval by queue report), divided by total calls (including abandoned calls) multiplied by 100:	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues, Sites, & Teams.

Parameter	Description	Report(s)
	$((\text{In Service Level})/(\text{Answered} + \text{Abandoned})) * 100$ Note: Although this metric is visible for outdial calls, it is not meaningful for such calls.	
Session ID	A value assigned by the system that uniquely identifies a call during its life cycle.	CDR
Short	The number of calls that were terminated within the Short Call threshold provisioned for the enterprise without being distributed to a destination site or connected to an agent.	Real-time Call Interval & Historical Call reports for Entry Points
	The number of calls that were terminated within the Short Call threshold provisioned for the enterprise without being connected to an agent.	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues
Site	The contact center location to which the call was distributed.	CDR
	The name of the site that was monitored.	Monitored Calls report
Team	The name of the team to which the call was distributed.	CDR
	The name of the team that was monitored.	Monitored Calls report
Terminating Party	Who terminated the call: Agent or Caller	CDR
Termination Type	<p>How the call was terminated (ended). Possible values:</p> <p>Abandoned: Call terminated before distribution but was in the system longer than the defined Short Call threshold.</p> <p>Agent Transfer: Call was transferred from one agent to another.</p> <p>Normal: Call ended normally.</p> <p>Overflow: The call was transferred to the overflow destination number provisioned for the queue—typically because the call was queued for longer than the maximum queue time specified in the routing strategy or because an error occurred when the call was sent to an agent</p> <p>Quick disconnect: The call was connected, but the agent talk time for the call was less than the specified Sudden Disconnect threshold.</p> <p>Reclassified: Call was sent to another entry point.</p>	CDR

Parameter	Description	Report(s)
	<p>Self Service: Call ended in the IVR.</p> <p>Short Call: Call never connected and was less than the defined Short Call threshold.</p> <p>Transfer error: Call could not be transferred to the agent.</p>	
To Entry Point	The number of calls that were transferred to another entry point.	Real-time Call Interval & Historical Call reports for Entry Points
To Queue	The number of calls that were sent to a queue.	Real-time Call Interval & Historical Call reports for Entry Points
Total Monitored Calls	The total number of calls monitored during the report time interval.	Monitored Calls report
Transfer Errors	The number of times an error occurred during the transfer process.	CDR
Transferred	<p>The sum of all calls transferred from this queue to an agent, external DN, or another CJP queue:</p> <p>Transferred Out + Requeued</p>	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams
Transferred In	The number of calls that were transferred to this entry point by an agent.	Real-time Call Interval & Historical Call reports for Entry Points
	The number of calls that entered this queue after having been transferred into the queue by an agent who clicked the Queue button, selected a queue from the drop-down list, and clicked Transfer.	Real-time Call Interval reports for Queues & Skills by Queue; Historical Call reports for Queues
Transferred Number	The phone number to which the agent transferred the call in an agent-to-DN transfer. This parameter appears in the window that opens when you click an entry in the S No. (sequence number) column of either an entry point or queue call detail record (CDR)	CDR
Transferred Out	The number of calls that left this queue after having been transferred by an agent to an external DN or to another agent. Transferred out calls result when an agent clicks the Agent button, selects an agent from the drop-down list, and clicks Transfer, or when the agent clicks the DN button, enters a phone number, and clicks Transfer. Transferred out calls may begin as a consultation or conference, but will	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues, Sites, & Teams

Parameter	Description	Report(s)
	be counted as transferred out only when the first agent completes the transfer to the second party.	
Wrap Up	The wrap-up code that the agent gave for the call. Note that if the agent wraps up the call after the CDR is generated, the corresponding CDR will be updated after the agent selects the wrap-up code for that call.	CDR
Wrap Up Time	The amount of time an agent spent in the Wrap-up state after handling the call.	CDR
	The cumulative amount of time agents spent in the Wrap-up state after handling the calls.	Real-time Call Interval reports for Queues, Skills by Queue, Sites, & Teams; Historical Call reports for Queues,

CALL ROUTING STRATEGY

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

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

The screenshot displays the 'Call Routing Strategy' management interface. At the top, there are navigation tabs for 'Call Routing', 'Team Capacity', 'Control Scripts', 'Resources', and 'Queue Precedence'. The main content area is titled 'Call Routing Strategy' and includes a 'List View' toggle, a 'Calendar View' toggle, and a 'Deleted Strategies' link. A dropdown menu for 'Select Entry Point/Queue' is set to 'EP_Phone_DEMO'. Below this is a '+ New Strategy' button and a search field. The main table lists three routing strategies:

Name	ID	Status	Default	Repetition	Start Date	Start Time	End Time	End Date
Current-Syracse_EP_Inbound	AWSzPNokzPH8bg5v0cl3	Current	No	Weekly	19-Jul-2018	0000	2400	19-Jul-2018
24x7	AWONV8-LRRzGhnC72Cq9	Not Active	No	Daily	23-May-2018	0000	2400	22-May-2050
Syracse_EP_Inbound	AWSzO2MM7KYCICFWjA89	Active	No	Weekly	19-Jul-2018	0000	2400	19-Jul-2018

Below the table, it indicates 'Showing 1 to 3 of 3 entries' and provides navigation buttons: 'First', 'Previous', '1', 'Next', 'Last', and a refresh icon. The bottom section, titled 'Routing Strategy - Vteam Mapping Details', shows a table with one entry:

Number	Destination	Type	Routing Strategies
1	Q_Phone_DEMO-Syracuse	Queue	Syracse_EP_Inbound

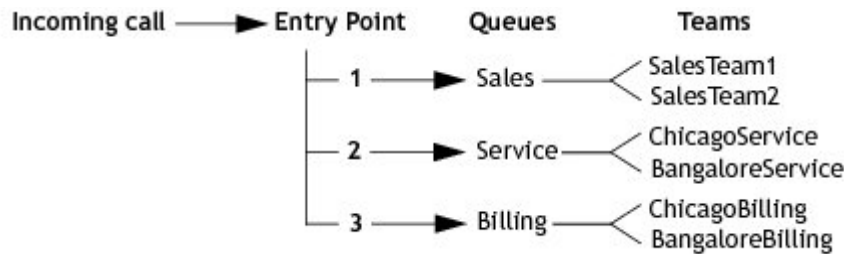
It also shows 'Showing 1 to 1 of 1 entries' and a note: 'Entities displayed in the Routing Strategy - Vteam Mapping Details table are based on user access.'

MANAGING CALL ROUTING STRATEGIES

The Routing Strategy module provides a flexible environment for routing contacts to the best resource, regardless of location. Each incoming contact arrives at an *entry point*, from where it is sent to *queue* for distribution among teams at contact center sites according to scheduled routing strategies, scheduled team capacity strategies, and queue precedence settings specified in the Routing Strategy module. If your enterprise uses the outdial feature, each outdial call passes through an outdial entry point and outdial queue according to routing strategies you specify in the Routing Strategy module. Note: Review the Call Routing Strategy Module Guide for more information.

Basic Contact Routing

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



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

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

- Longest Available Agent. If multiple agents are available, the call is directed to the agent who has been available for the longest time.
- Load Balance. Incoming calls are distributed among a group of teams based on ratios specified in the strategy.
- Priority Based. Incoming calls are distributed to agent teams based on a priority rating assigned to each team.
- A fourth option is available to enterprises that are provisioned with the optional Skills-Based Routing feature, described in About Skills-Based Routing.

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

Add a Routing Strategy

In Call Routing Strategy:

1. Select List View to easily see all action options.
2. Select the correct Entry Point/Queue type.
3. Click on the **NEW STRATEGY** button.
4. Define or select from the following settings:

General Settings

- Name: Enter the name – use underscores or eliminate spaces where possible. This name is displayed in lists.
- Status: Set to Active or Not Active.

Time Settings

- Start Date: Use the default date (today) or open the calendar and select an alternative.
- End Date: Use the default date (today) or open the calendar and select an alternative.

- Day of Week: Set the days the strategy will be in effect (All Days Weekdays or Specific Days and select the days.
- Start Time: Enter the start time in 24hr format. (e.g.; 1pm = 1300)
- End Time: Enter the end time in 24hr format. (e.g.: 11pm = 2300)

Advanced Settings

- Music on Hold: Select an option in the drop-down menu.
- Flag as Default Routing Strategy: Select Yes or No.

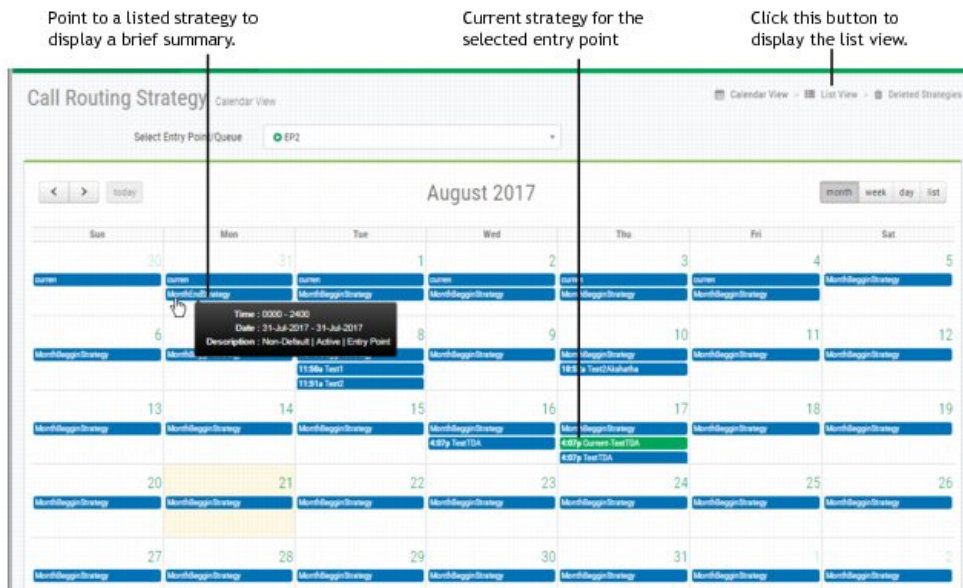
Call Control

Control Script: Select an available option within the drop-down list.

Image: Click on the Image button to add an image file.

5. Click on the **APPLY** button to immediately affect current calls that qualify for the queue.
6. Click on the **SAVE** button when finished to submit the new Routing Strategy and return to the List view.

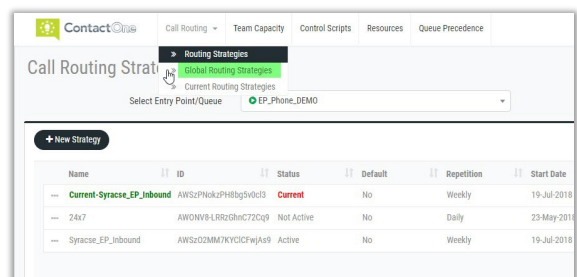
View Routing Strategies





Edit Routing Strategies

In Call Routing Strategy:



1. Select the Call Routing type.
2. Select **LIST VIEW** at the top of the page.
3. Select the Entry Point/Queue from the drop-down menu above the list.



4. Click on the  ellipsis icon next to an item in the list.
5. Click on the **EDIT**  option.
6. Make changes to update the settings as necessary.
7. Click on the **SAVE** button to submit the changes and return to the list view.



Delete a Routing Strategy

In Call Routing Strategy:

1. Select the Call Routing type.
2. Select **LIST VIEW** at the top of the page.
3. Select the Entry Point/Queue from the drop-down menu above the list.
4. Click on the  ellipsis icon next to an item in the list.
5. Select the **DELETE**  option.
6. Confirm the action when prompted. The item is set to Not Active in the list.
7. Repeat steps 3-5 to delete permanently.

Restore Routing Strategies

In Call Routing Strategy:

1. Select the Call Routing type.
2. Select **LIST VIEW** at the top of the page.
3. Select the Entry Point/Queue from the drop-down menu above the list.
4. Click on the  ellipsis icon next to an item in the list.
5. Select the **RESTORE**  option.
6. Confirm the action when prompted.

GLOSSARY OF TERMS

ABANDONED CALL

A phone call that was in the system longer than the predefined Short Call threshold provisioned for the enterprise, but that was terminated before being distributed to a destination site. See also Short Call threshold. Contrast with short call.

ACD

See automatic call distributor (ACD).

ACT

(Average Connected Time) The average amount of time callers were connected to an agent.

ADR

See Agent Detail Record (ADR).

AGENT

A person who answers customer calls; also referred to as a customer service representative.

AGENT-BASED TEAM

A team that has a specific number of agents assigned to it. These agents use the Agent Desktop to interface with the system. See also Agent Desktop. Contrast with capacity-based team.

AGENT DESKTOP

A browser-based application for handling customer interactions on the agent's workstation. Using the Agent Desktop and any telephony device including traditional TDM, mobile or soft IP-based phones, agents have access to a full suite of contact center applications.

AGENT DETAIL RECORD (ADR)

A record representing details about an agent's activities during an agent session (that is, the time interval between when the agent logged in and logged out).

AGENT PROFILE

A group of permissions and Agent Desktop behaviors that can be assigned to specific agents. Each agent profile specifies permission levels relating to queue transfers, agent consults and transfers ("buddy teams"), wrap-up and idle codes, wrap-up time-out values, and agent auto-available.

ANI

See Automatic Number Identification (ANI).

ANSWERED CALL

A call that was routed from the queue to an agent or available resource and was answered by the agent or connected to a resource.

ASA

See Average Speed of Answer (ASA).

AUTOMATIC CALL DISTRIBUTOR (ACD)

A system or application software program that serves to route incoming calls to the most available and appropriate agent or resource according to customer-defined routing requirements.

AUTOMATIC NUMBER IDENTIFICATION (ANI)

A system utilized by telephone companies to identify the phone number of a calling subscriber.

AUXILIARY CODES

Idle and wrap-up codes that agents can select while using the Agent Desktop. See also idle code, wrap-up code.

AVAILABLE STATE

An agent state indicating that the agent is ready to take calls.

AVERAGE SPEED OF ANSWER (ASA)

The average amount of time callers waited in queue before being connected to an agent.

BARGE IN

To join a call while monitoring or coaching an agent in order participate in the conversation between the agent and the customer.

CALL-ASSOCIATED DATA (CAD) VARIABLE

A named variable provisioned for the enterprise that can be used in a call control script to collect data entered either by a caller or an agent. CAD values are stored in the cumulative call detail records that Management Portal users can display and export to Microsoft Excel or .csv files.

CALL CONTROL SCRIPT

A set of instructions for controlling the flow of calls through the ContactOne system. Call control scripts are assigned to routing strategies.

CALL DETAIL RECORD (CDR)

A record representing the history of a call within an entry point or queue. An entry point CDR stores details about the call from the time it arrived at the entry point—either as a new, external call or as a call transferred from another entry point or queue—until it left the underlying queues either by terminating or by being transferred out of a queue to another entry point. A queue CDR stores information about the call from the time it entered the queue until it was either terminated or transferred out of the queue. A queue CDR can have multiple legs, which are represented by segment detail records (SDRs). See also Segment Detail Record (SDR).

CAPACITY-BASED TEAM

A team that does not have specific agents assigned to it, and the agents do not use the Agent Desktop. For example, an outsourcer might have teams that use a PBX or an ACD to handle calls. A capacity-based team might be used to represent a voice mailbox or an agent group that is not managed by the system. The capacity of such a team is determined by the Capacity setting provisioned for it, which can be overwritten by team capacity strategies defined in the *Routing Strategy* module available from the Management Portal. See also Agent Desktop. Contrast with Agent-Based Team.

CCDR

See cumulative call detail record (CCDR).

CDR

See Call Detail Record (CDR).

COACH

To speak to the agent handling a call without being heard by the customer. Also known as whisper coach.

COMPLETED CALL

A call that ended during the report interval. This includes answered, disconnected, and abandoned calls, but not short calls or transferred calls.

CONNECTED STATE

An agent state indicating that the agent is connected with a caller.

CROSS-ACD ENTRY POINT

An entry point used in Scorecard Routing. Calls that arrive at a cross-ACD entry point can be routed to queues across multiple ACDs. Calls sent to an external ACD are distributed to agents by the external ACD. See also entry point, proxy queue, Scorecard Routing.

CUMULATIVE CALL DETAIL RECORD (CCDR)

A record representing the complete life cycle of an external call, from the time it arrived in the system until it was terminated. A CCDR can include one or more CDRs and SDRs. See also call detail record (CDR), segment detail record (SDR).

DIALED NUMBER IDENTIFICATION SERVICE (DNIS)

A service provided by the phone company that delivers a digit string indicating the number the caller dialed along with the call.

DISCONNECTED CALL

A call that was terminated within the predefined Sudden Disconnect threshold provisioned for the enterprise after being distributed to a destination site. See also Sudden Disconnect threshold.

DN

Dial number, the number that is dialed to initiate a call.

DNIS

See Dialed Number Identification Service (DNIS).

ENTERPRISE

An organization that subscribes to the service. Also referred to as the Tenant.

ENTRY POINT

The initial landing place for customer calls on the system. One or more toll-free or dial numbers can be associated with a given entry point. IVR call treatment is performed while a call is in the entry point. Calls are moved from the entry point into a queue and are subsequently distributed to agents.

HANDLED CALL

A call that was terminated after reaching the destination site and exceeding the predefined Sudden Disconnect threshold provisioned for the enterprise. The total number of handled calls is determined by subtracting the number of disconnected calls from the number of answered calls. See also answered call, disconnected call, enterprise.

IDLE CODE

A value that an agent selects while using the Agent Desktop to indicate why the agent is not available to take calls, such as Lunch, Break, or Meeting. See also Agent Desktop.

IDLE STATE

An agent state indicating that the agent is logged in but not yet ready to take customer calls.

IVR

Interactive voice response.

IVR CALL

A call that was successfully put through to the IVR system.

IVR TIME

The cumulative amount of time that calls are in the IVR system, waiting to be handled.

MANAGEMENT PORTAL

The Web-based user interface that provides authorized users with access to features and functions.

MED

Minimum expected delay, a value that represents the smallest expected time interval between the routing of a call to a queue and answering of the call by an agent resource. The routing engine calculates the MED of each queue based on the depth of the queue and the average handle time (AHA) during the most recent time interval.

MIDPOINT CALL MANAGEMENT® GATEWAY

ContactOne Communication's centralized control point for managing and monitoring calls across a heterogeneous contact center environment. This solution creates a virtual point for visibility and control, enabling enterprises to remotely manage their global contact center queues while providing improved bandwidth usage. It also provides a view into real-time and historical performance system wide, allowing service levels to be optimized across sites.

MULTIMEDIA PROFILE

A group of settings that specify the types and number of contacts an agent can handle concurrently. Multimedia profiles can be assigned to sites, teams, or individual agents. When Multimedia is enabled, each agent-based team at a site is associated with the profile assigned to that site unless the team is assigned a different multimedia profile. Similarly, each agent logged in to a team is associated with the team's profile unless the agent is assigned a different multimedia profile.

NOT RESPONDING STATE

An agent state indicating that the agent's phone rang but was not answered within a predefined period of time.

OUTDIAL CALL

A call made from the Agent Desktop by entering a phone number in the Start a new call field.

OUTDIAL RESERVED STATE

An agent state indicating that the agent has initiated an outdial call, but the call is not connected yet.

OVERFLOW NUMBER

A destination phone number, provisioned for the queue, to which a call is sent if it has been queued for longer than the maximum queue time specified in the routing strategy or because an error occurred when the call was sent to an agent.

PROXY QUEUE

A queue that represents an external ACD. In Scorecard Routing, calls that are sent to an external ACD are distributed to agents by the external ACD. Proxy queues are used to track the call activity occurring on the external ACD queues. There is no agent visibility or agent reporting for proxy queues. See also Scorecard Routing.

QUEUE

A holding place for calls while they await handling by an agent. Calls are moved from the entry point into a queue and are subsequently distributed to agents. See also entry point.

QUEUED CALL

A call that has been queued to music-on-hold or customer messaging information while waiting to be sent to a destination site.

RECORDING MANAGEMENT

A module that can be used to search for and play audio files recorded through the optional Call Recording feature.

RESERVED STATE

An agent state indicating that a call is coming through to the agent's station.

SBR

See Skills-Based Routing.

SCORECARD ROUTING

A feature that provides cross-ACD call routing. In Scorecard Routing, calls arriving at an entry point can be routed to queues across multiple ACDs. The queues receiving the calls can belong to ContactOne or non-system ACDs. Calls sent to an external ACD are distributed to agents by the external ACD. Proxy queues are used to track the call activity that occurs on those external ACD queues. See proxy queue.

SDR

See Segment Detail Record (SDR).

SEGMENT DETAIL RECORD (SDR)

A record representing one leg of a call. When an agent transfers a call to another agent, two SDRs are created—one for each leg of the call. See also call detail record (CDR), cumulative call detail record (CCDR).

SERVICE LEVEL

The percentage of calls for a queue or skill that were distributed to a site and were answered by agents within the predefined Service Level threshold provisioned for the queue or skill. Abandoned calls are included in service-level calculations. See also skill.

SERVICE LEVEL THRESHOLD

A threshold provisioned for a queue or skill that is used to calculate service level values. If a call is completed within the time interval set for this threshold, it is considered to have been handled within service level. See also service level.

SHORT CALL

A call that was terminated within the predefined Short Call threshold provisioned for the enterprise before being distributed to a destination site. See also Short Call threshold. Contrast with abandoned call.

SHORT CALL THRESHOLD

The time interval, provisioned for the enterprise, that determines whether a call is considered short or abandoned. Calls that are terminated before being distributed to a destination site but within this time threshold are counted as short rather than abandoned. The default is 5 seconds. See also abandoned call, short call.

Site

A physical contact center location under the control of the enterprise. For example, an enterprise named Acme might have sites in Chicago, Manila, and Bangalore.

Skill

An area of agent expertise, such as language fluency or product expertise, that can be used in skills-based routing to determine which calls an agent can receive. See also skill profile, skills-based routing.

Skill Profile

A set of skills, each with an assigned value, that can be assigned to a team or an individual agent. If a skill profile is assigned to a team, each agent logged in to that team is associated with that skill profile unless the agent is assigned a specific skill profile. See also skill, skills-based routing.

Skills-Based Routing

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

Sudden Disconnect Threshold

The time interval, provisioned for the enterprise, that determines whether a call is considered handled or was terminated so quickly as to possibly indicate an issue with connectivity or agent behavior. A call that is terminated after being distributed to a destination site, but within this time threshold, is considered to be a disconnected call.

Talk Time

The time interval during which the agent is talking to the caller. This does not include time the call is on hold.

Team

The logical entity responsible for handling calls to a given queue. An agent can be assigned to multiple teams for selection; however, an agent can log in to only one team at a time. See also queue.

Tenant

An enterprise that subscribes to the service.

Terminated Call

A call that ends generally either because the caller or agent has hung up the connection.

Ticker

The scrolling text area at the top of the real-time pages. The ticker can be customized to display the key performance indicators that are most important to the enterprise's operations.

User

A person who accesses the service, typically a contact center manager, telecom manager, customer care executive, or other representative of the enterprise.

UTC

Coordinated Universal Time. Also known as Universal Time Coordinate. The standard time common throughout world, UTC is essentially the same as Greenwich Mean Time.

Virtual Team

A holding place for customer and outdial calls. There are six types of virtual teams—entry points, queues, outdial entry points, outdial queues, cross-ACD entry points, and proxy queues. See also entry point, queue, cross-ACD entry point, proxy queue.

Work Type

A value assigned to idle or wrap-up codes and used to group the codes in auxiliary reports. See also idle code, wrap-up code.

Wrap-Up Code

A value that an agent selects while using the Agent Desktop to indicate information about the disposition of each call after it ends—for example, Sale, Transferred, Case Completed. See also Agent Desktop.

Wrap-Up State

An agent state indicating that a call has ended, but the agent is not ready for the next call, typically because the agent is entering a wrap-up code or performing other after-call tasks

CUSTOMER SUPPORT

A team of expert support professionals are here to assist with technical issues, questions related to billing, feature usage, and service upgrades, as well as any other general inquiries you may have. Simply contact us and a representative will help you with your request.

In order to provide optimal support, we recommend that the account owner (or an Authorized Contact) submit a ticket or contact us via our toll-free support number regarding any critical or timely issues that may require troubleshooting. And always keep your account number handy to help us better assist you when you need us.

SUPPORT BY PHONE: 1-888-538-3960

Live phone support is available 24/7 for emergency assistance

ONLINE SUPPORT: www.momentumtelecom.com/support

DOCUMENTATION: www.momentumtelecom.com/mu/training-library

Momentum University (MU) is an online knowledge base of training and support content on the Momentum Telecom website. This library is easy to use and offers the latest information about Momentum's best-in-class cloud services and features. MU includes product guides, user guides, FAQs, videos, and quick reference tools to help you do what you do.

ADDITIONAL TRAINING:

LIVE instructor-led training courses (web-based or in-person) for the ContactOne Management Portal and its modules are available upon request. Simply contact your Provider Account Manager or Customer Support to find out about the current course offerings and related pricing (if any) that may apply, and to request a session for your team.

