Administrator Manual

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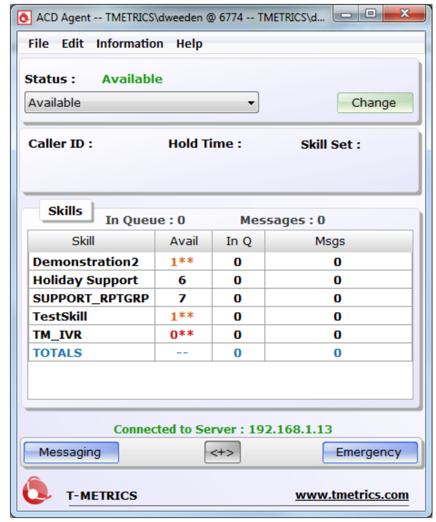

About

The ACD Agent Module will configure itself in Agent mode, based on the user's logon name. When the Agent Module logs onto the ACD Controller Module, the logon name is tested to see the job classification of the person logging on. If the person who logs on is only an Agent (as opposed to a Supervisor or an Administrator), then certain functions will be turned off or made inaccessible.
Shown below is the Main Screen of the ACD Agent Module.

Pages

- Administrator Manual - Introduction(see page 5)
- Administrator Manual - Usage(see page 6)
- Administrator Manual - Menu Bar Items(see page 15)
- Administrator Manual - Customizable Screen Pop Interfaces(see page 35)
- Administrator Manual - MiniTAP(see page 36)
- Administrator Manual - Non-Call ACD Objects(see page 37)
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Copyright

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Administrator Manual - Introduction

The TM-2000 ACD / Call Center is designed to be the primary point of contact an organization has with its callers, providing a quick and efficient method to obtain the person in the organization who is most qualified to handle callers' needs. Its integral parts consist of:

- Agents (representatives who answer the calls)
- Supervisors (people who view Agents and Queue statistics)
- Administrators (people who control call flow and manage the call center)
- Hardware and software to distribute calls to the appropriate Agents

The Agents use a PC to make themselves "Available", make inquiries and look up information for the caller. The selection of an Agent to receive a call is based on:

- Agent availability (**Status** set to "Available")
- Phone state (phone is on hook)
- The Agent's skill set (ability) and preference level
- The amount of time the Agent's phone has been idle (on hook)

When Agents become available to take calls (by logging in and selecting "Available"), they are marked as "Available" Agents for each of their skill-set assignments.
The goal of the TM-2000 ACD solution is to immediately connect each caller to the most appropriate resource or provide an interactive queue for callers when those resources are busy. They may also exit the queue and, upon returning to a menu, select among various options like:

- Listen to an announcement
- Transfer to an extension
- Leave a message with callback information and hang up

In order for the TM-2000 IP ACD to effectively route calls and provide the fastest response to the callers, it is critical that the Agent positions are available to receive the calls.
The TM-2000 IP ACD Call Completion Call Center is made up of a number of IP-based modules that have very specific tasks. These include:

- Event Server Module
- ACD Controller Module
- Hardware Interface Module (one or more)
- Agent Module
- Agent SoftPhone Module
- Agent Console Module
- Reporting Module

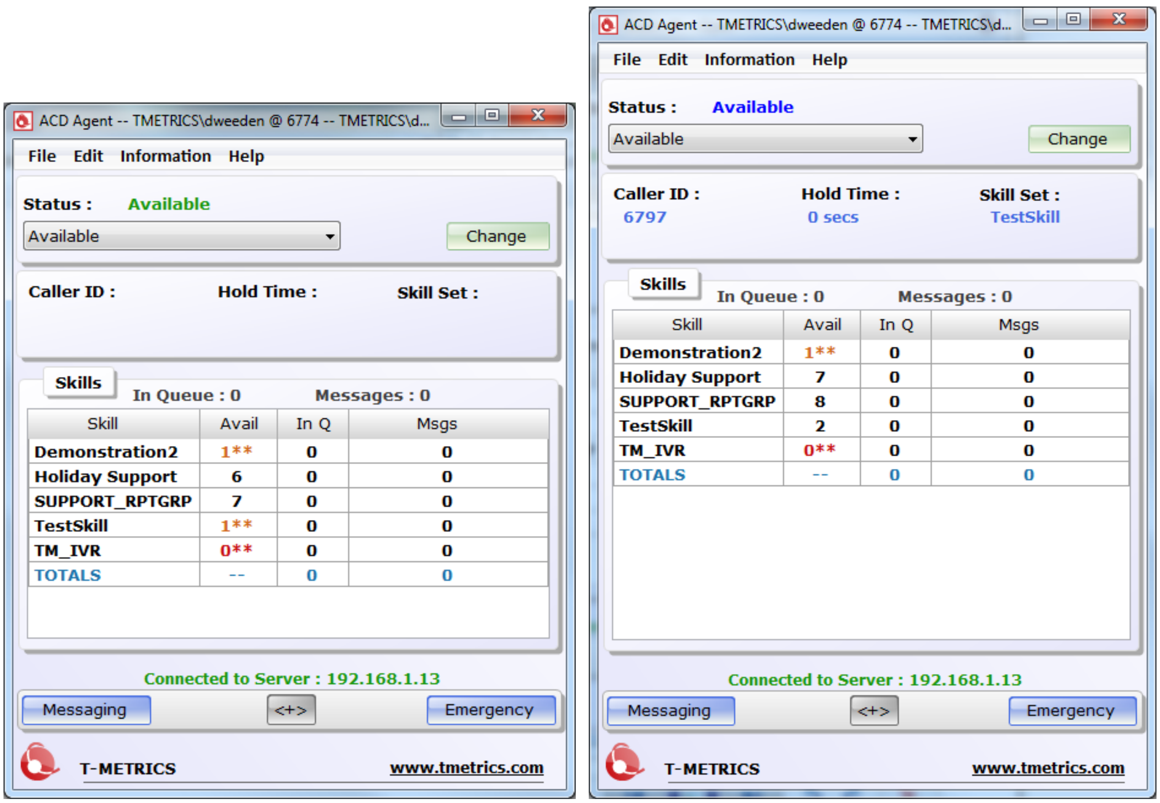
This manual discusses the use of one of these modules, the **ACD Agent Module**, which is used by the Agent to log on and off the ACD system. It also discusses the use of this module by an Administrator.

About

Below you will find the the Usage Guide. It will go over how an agent should use the Agent Module.

Color Coding

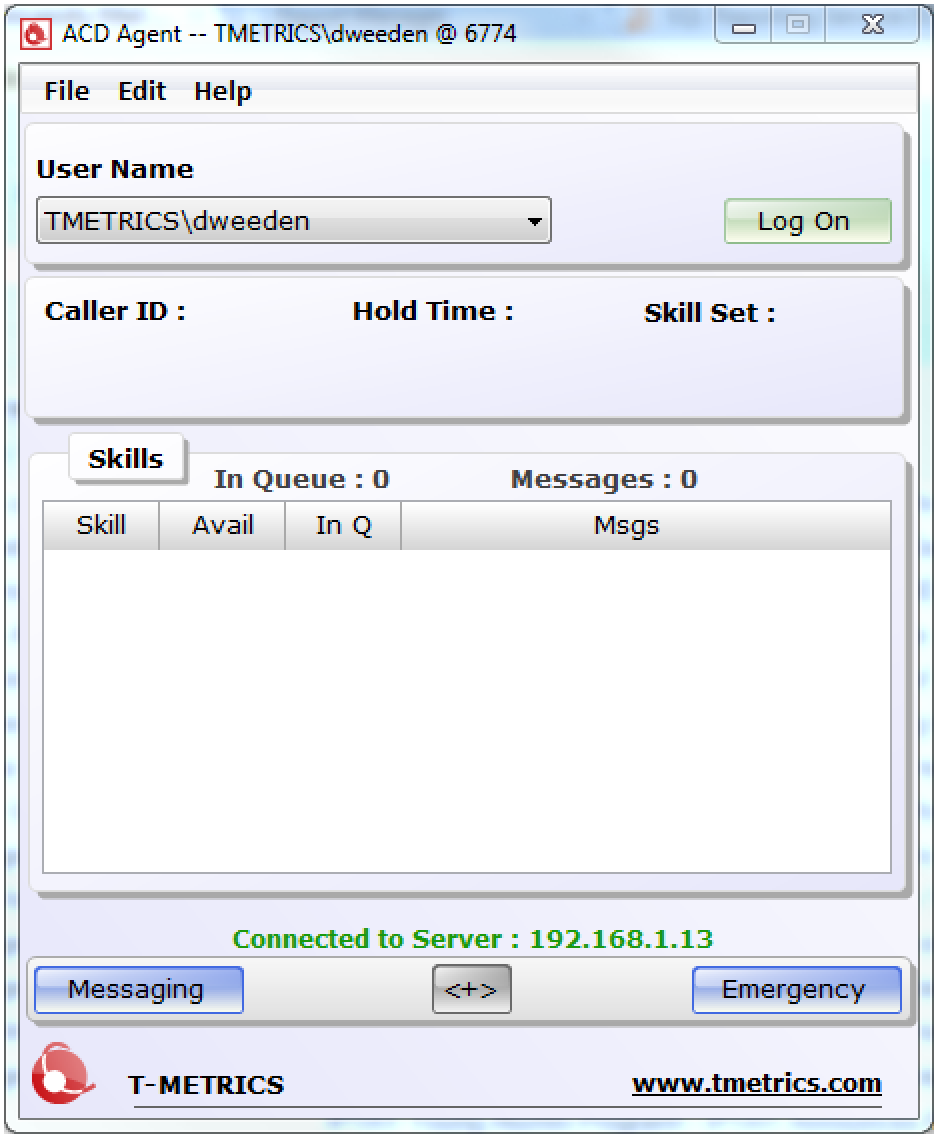
There are several color coded signals that can be used to easily ascertain information on the T-Metrics ACD Agent Module. For example when an agent's line is being used (whether the phone is ringing, a caller is on the line, or a caller is on hold) the **Status** indicator will change from a green **Available** to a blue **Available**.



Another indicator that will change colors, depending on the information it is displaying, is the number of agents available for each skill (discussed later in the Skillsets section). In the screenshots above, notice that the number of agents available in the "Holiday Support" skillset is "7", while the numbers displaying how many agents are available in the "Demonstration2" and "TM_IVR" skillsets are "1" and "0" respectively. When the agent detects that there is only 1 agent available in a skill it will display the number 1 with two asterisks to the right and it will display in the color **Orange**. When there are no agents available in a skill, the agent will display a "0" with two asterisks and it will display in **Red**. More information about these features is available in the **Status Window** and **Skillsets Window** sections.

Status Window

Shown below is the Agent Module in the **Connected to Server** State. This is the State that automatically displays when the Agent Module is opened if the software successfully connects to the server. The user will not receive calls until they Log On and become **Available**.

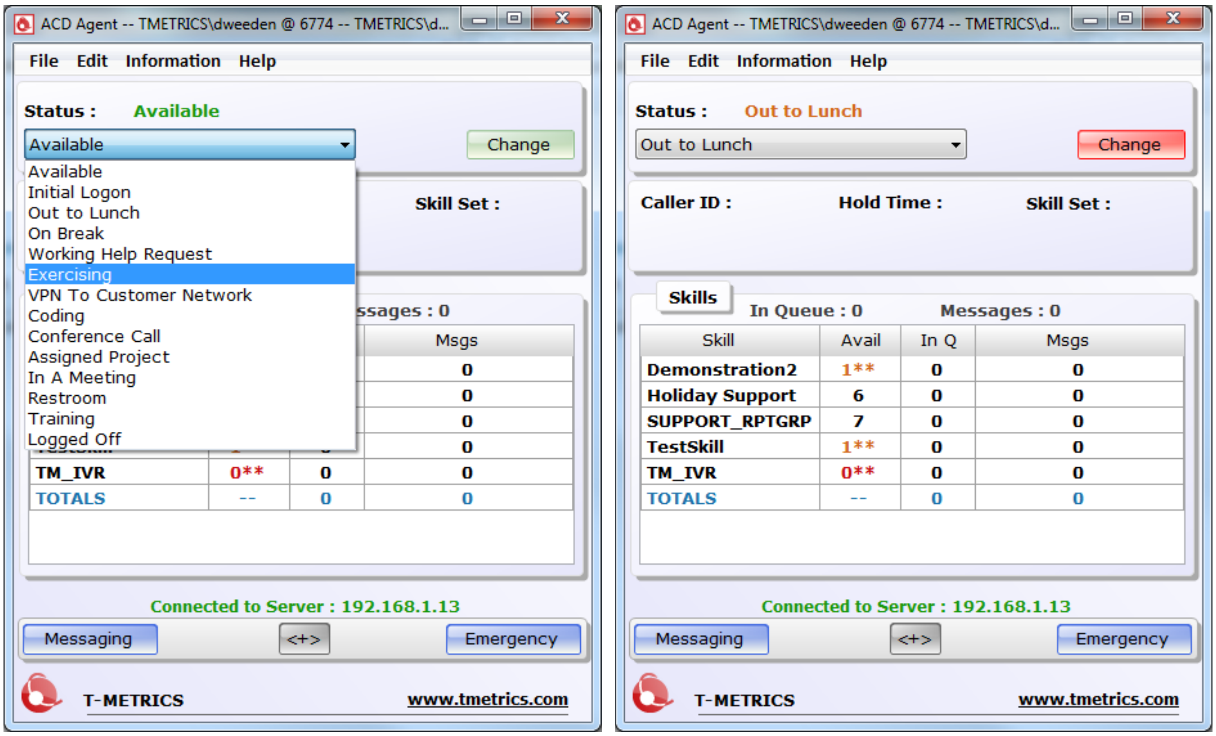


To Log On, simply press the **Log On** button if your logon name was entered automatically by the system (see above). If your name was not already entered, enter your logon name and then press the **Log On** button.
The Agent Module automatically detects that the user is an Agent and places them in the "**Available**" **Status**, making them ready to receive ACD calls. The figure below shows an Agent in the **"Available" Status**.

Status Changes

The **Status** drop-down menu allows the selection of the **Status** item. With the exception of the required "**Logged Off**" and "**Available**" **Status** items, the rest of the settings are chosen by the Administrator(s) and stored in the ACD Controller database. Typical additional settings are "**Performing Post Duties**" and "**Out to Lunch**". These settings will make the Agent "unavailable" to take calls. An Agent can only receive an ACD call if he/she is in the "**Available**" **Status** and the phone is on-hook (idle). Note: If an "**Available**" agent takes a call (off-hook state), the **Status** will change to a blue "**Available**" (see above section labeled "Color Coding").

To change the **Status**, place the mouse over the drop-down menu in the **Status Window** and click to show all existing **Status** options. Move the mouse pointer over the appropriate **Status** and click. The selected **Status** will then be the only one showing. Click on the **Change** button to complete the process.



Agent Changing Status from Available to Performing Post Duties

If an Agent is not going to be available to take ACD calls, then it is important for the agent to change their **Status** to make themselves "unavailable" (e.g., **Out to Lunch**, **On Break**, **Performing Post Duties**) so that calls will not ring at that position. Once the agent is ready to take ACD calls again, simply change the **Status** back to **Available**. Note that when an agent is in an "unavailable" state, the **Status** indicator color changes from green (**Status = Available**) to yellow (e.g. **Status = Performing Post Duties**).

Caller ID Window

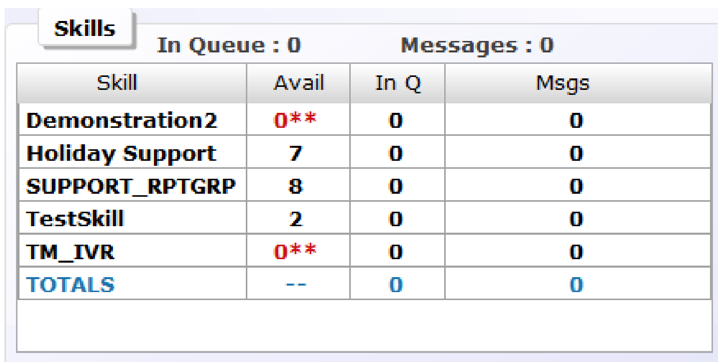
This Window shows three pieces of data every time the agent has a call routed to them from the ACD. These data are **Caller ID, Hold Time, and Skillset**.

- **Caller ID** is the number that the caller is calling from. This may include the trunk number that the 10-Digit Number is a part of.

- **Hold Time** is the length of time for which the call has been in the system waiting for an answer from an agent.
- **Skillset** displays the Skill from which the caller needs assistance and thereby caused the ACD to route the caller to the agent. For instance, if an agent is a member of both Engineering and Support Skillsets, this indicator will display which of these two skills for which the caller is calling.

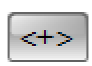
Skillsets Window

This Skillsets Window provides an easy way to view statistics about all the Skillsets to which the user is connected. The **Available** colu mn provides the user with how many agents are in the "**Available**" state for each Skillset listed. The **Queue** column shows how many callers are in the queue for each Skillset waiting for an available agent. The **Msgs** (Messages) column shows how many (voice) messages each Skillset has.
At the top of the window is a display of the total of calls that are in Queue in the ACD and how many total Customer Messages there are.



Skill	Avail	In Q	Msgs
Demonstration2	0**	0	0
Holiday Support	7	0	0
SUPPORT_RPTGRP	8	0	0
TestSkill	2	0	0
TM_IVR	0**	0	0
TOTALS	--	0	0

Expanded Version

Open the Expanded View screen by pressing this button: 

Skills

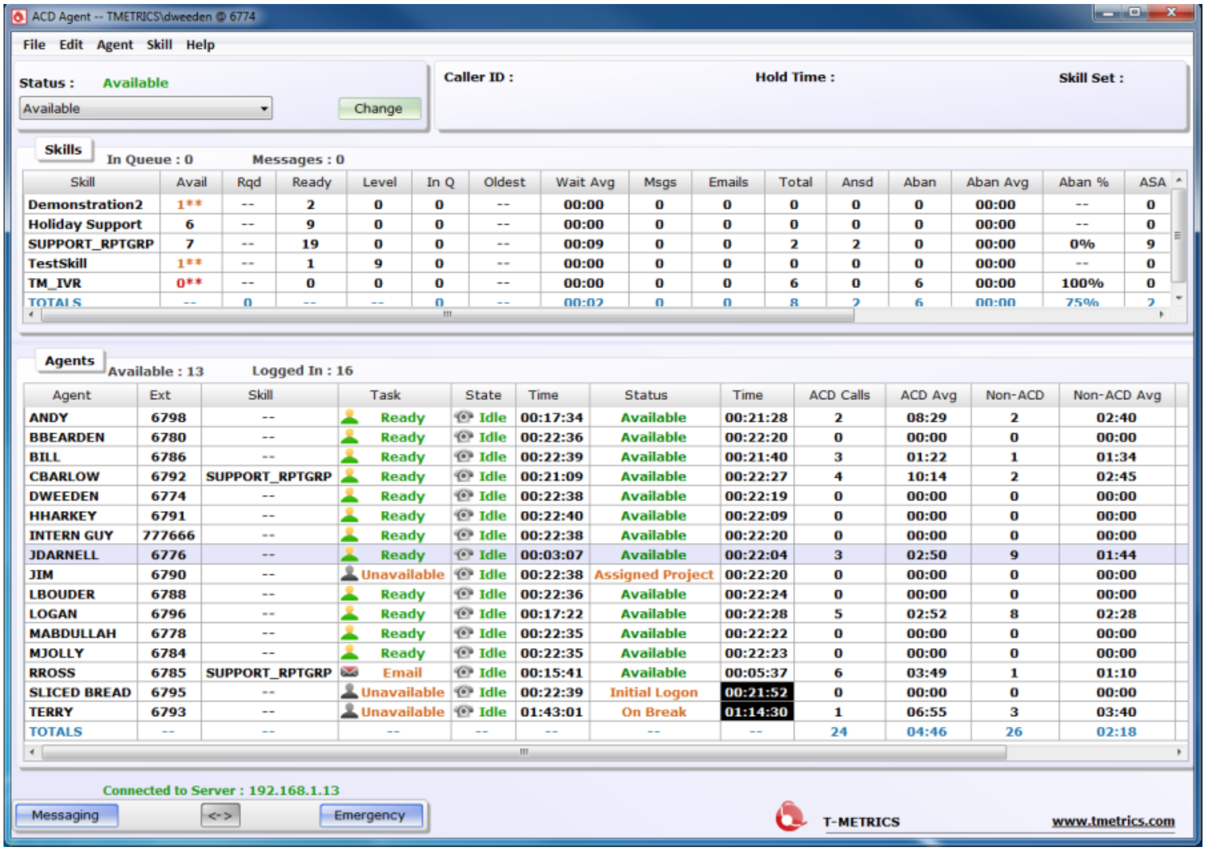
Columns in the **Skills Grid**:

- **Skill** – The name of the skill.
- **Avail** – The number of agents with a skill level higher than '0' who are in the available position status.
- **Rqd (Required)** - The number of agents required to be available to meet your service level agreement (SLA). Note that this column can only be calculated when there have been at least five calls within the interval being analyzed for the SLA calculation.
- **Level** – The viewing agent's skill level in the skill.
- **In Q (In Queue)** – The number of callers in queue for that skill.
- **Oldest** - The length of time that the oldest call in queue has been waiting for that skill.

- **Wait Avg -** The average length of time that a caller waited in queue before being answered by an agent. The time window used is based on just the last four calls that were in queue. The reason for the deviation for this statistic is to give relevant information for real-time use. (This number can be more volatile to give a better picture of how long people are waiting right now)
- **Msgs** – The number of voice messages (customer callbacks) waiting for processing in the queue.
- **Total** – The total number of calls that have been assigned to the skill. The time window for this statistic is reset daily at midnight.
- **Ansd –** The number of calls within 'Total Calls' that were answered by an agent – same time window as Total Calls.
- **Aban (Abandons)** – The number of calls within 'Total Calls' that were not answered by an agent – same time window as Total Calls.
- **AbanAvg (Abandoned Average)** – The average length of time that a caller waits for this skill before abandoning. The time window used is based on just the last four abandoning callers. The reason for the deviation for this statistic is to give relevant information for real-time use. (This number can be more volatile to give a better picture of how long people are waiting before hanging up right now)
- **Aban % (Abandoned Percentage)** - The percentage of abandoned calls vs. Total Calls - same time window as Total Calls.
- **ASA (Average Speed of Answer) -** The average length of time that a caller waits once assigned to a skill before being answered by an agent. This, along with SLA, is based on a special window of time that is adjustable per skillset to allow for different standards for different skills.
- **SLA (Service Level Agreement)** - The percentage of calls that were answered within the period of time as defined in the Controller module for that skill. This, along with ASA, is based on a special window of time that is adjustable per skillset to allow for different standards for different skills.
- **Group** – The name of the group of which the skill is a part. If the skill is not part of a skill group then this column is blank.
- **Off(Skill is Off) –** This checkbox is checked if the skill is turned off for the Agent. Administrators are able to assign the ability so that an Agent can turn off/on skills at will. This ability can be limited by the Administrators on a per skill basis.

Agents

- **Agent** – This column displays all of the Agents which are available to give real time statistics based on the filters checked in the Skills Window.
- **Ext** – The extension for the Agent's phone.
- **Skill** – The skill of the last call the Agent took.
- **Task**– This column displays a more specific description of what an Agent is currently involved in. It can display **Rea dy**, **Unavailable**, **ACD Call**, **Non ACD Call In**, **Non ACD Call Out**, and **Callback**.
- **State** – This column can display an icon and/or text of the current phone state. It can display **Idle**, **On Call**¸ **Ringing**, and **Hold**.
- **Time** – The time that an Agent has been in their current **State.**
- **Status**– This column displays the Status in which the agent is currently engaged.
- **Time** – The time that an Agent has been in the current **Status.**
- **ACD Calls** – The number of calls an Agent has taken from the T-Metrics ACD Queue.
- **ACD Avg** – The average length of ACD Calls in minutes : seconds format.
- **Non-ACD** – The number of calls an Agent has taken that were not sent from the T-Metrics ACD Queue.
- **Non-ACD Avg –** The average length of Non ACD Calls in minutes : seconds format
- **Emails** – Shows the number of emails handled by each agent.
- **Chats-** Shows the number of webchats handled by each agent
- **Call Display** – The Caller ID for the last call an Agent took from the T-Metrics ACD Queue.
- **Status Details-**The area where an agent can put a description of what/or whom they are currently working on.



Skill	Avail	Rqd	Ready	Level	In Q	Oldest	Wait Avg	Msgs	Emails	Total	Ansd	Aban	Aban Avg	Aban %	ASA
Demonstration2	1**	--	2	0	0	--	00:00	0	0	0	0	0	00:00	--	0
Holiday Support	6	--	9	0	0	--	00:00	0	0	0	0	0	00:00	--	0
SUPPORT_RPTGRP	7	--	19	0	0	--	00:09	0	0	2	2	0	00:00	0%	9
TestSkill	1**	--	1	9	0	--	00:00	0	0	0	0	0	00:00	--	0
TM_IVR	0**	--	0	0	0	--	00:00	0	0	6	0	6	00:00	100%	0
TOTALS	--	0	--	--	0	--	00:02	0	0	8	2	6	00:00	75%	2

Agent	Ext	Skill	Task	State	Time	Status	Time	ACD Calls	ACD Avg	Non-ACD	Non-ACD Avg
ANDY	6798	--	Ready	Idle	00:17:34	Available	00:21:28	2	08:29	2	02:40
BBEARDEN	6780	--	Ready	Idle	00:22:36	Available	00:22:20	0	00:00	0	00:00
BILL	6786	--	Ready	Idle	00:22:39	Available	00:21:40	3	01:22	1	01:34
CBARLOW	6792	SUPPORT_RPTGRP	Ready	Idle	00:21:09	Available	00:22:27	4	10:14	2	02:45
DWEEDEN	6774	--	Ready	Idle	00:22:38	Available	00:22:19	0	00:00	0	00:00
HHARKEY	6791	--	Ready	Idle	00:22:40	Available	00:22:09	0	00:00	0	00:00
INTERN GUY	777666	--	Ready	Idle	00:22:38	Available	00:22:20	0	00:00	0	00:00
JDARNELL	6776	--	Ready	Idle	00:03:07	Available	00:22:04	3	02:50	9	01:44
JIM	6790	--	Unavailable	Idle	00:22:38	Assigned Project	00:22:20	0	00:00	0	00:00
LBOUDER	6788	--	Ready	Idle	00:22:36	Available	00:22:24	0	00:00	0	00:00
LOGAN	6796	--	Ready	Idle	00:17:22	Available	00:22:28	5	02:52	8	02:28
MABDULLAH	6778	--	Ready	Idle	00:22:35	Available	00:22:22	0	00:00	0	00:00
MJOLLY	6784	--	Ready	Idle	00:22:35	Available	00:22:23	0	00:00	0	00:00
RROSS	6785	SUPPORT_RPTGRP	Email	Idle	00:15:41	Available	00:05:37	6	03:49	1	01:10
SLICED BREAD	6795	--	Unavailable	Idle	00:22:39	Initial Logon	00:21:52	0	00:00	0	00:00
TERRY	6793	--	Unavailable	Idle	01:43:01	On Break	01:14:30	1	06:55	3	03:40
TOTALS	--	--	--	--	--	--	--	24	04:46	26	02:18

Color Coding	**Status of Agents**
	Logged On and "**Available**"
	Logged On and "**Available**" but on a call
	Logged On but "**Unavailable**" (eg. Out to Lunch, etc)
	Logged Off

Custom Agent Filtering

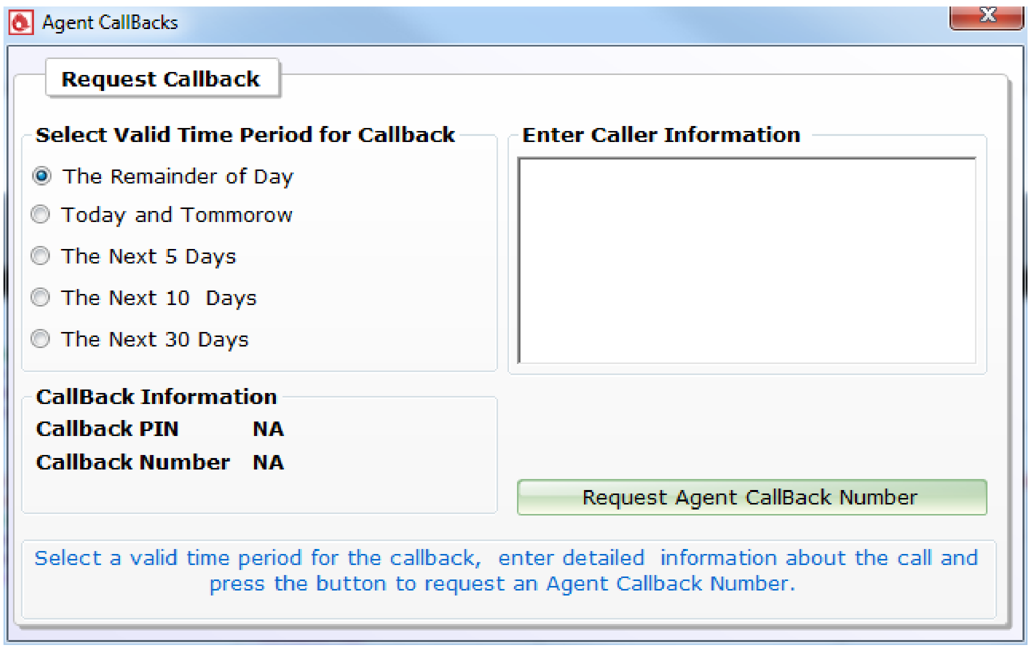
This allows the supervisor to filter on a specific skill or by selecting one or specific group of person(s).
Custom Filter- by skill
Edit Filter- Lets you filter by selecting specific agents

Start WebRTC Chat

Allows agents or supervisors to chat with each other via a web chat.

Agent Callbacks Window

The Agent Callbacks window, accessed by choosing the "Edit" menu and then clicking "Agent Callbacks", is used when an Agent is working with a caller who will need to call back regarding the same problem. By using this feature, the Agent will be able to give the caller specific callback instructions, which will allow the caller to be connected to the same Agent that has helped before. You must be active, on an ACD call, to use this feature.

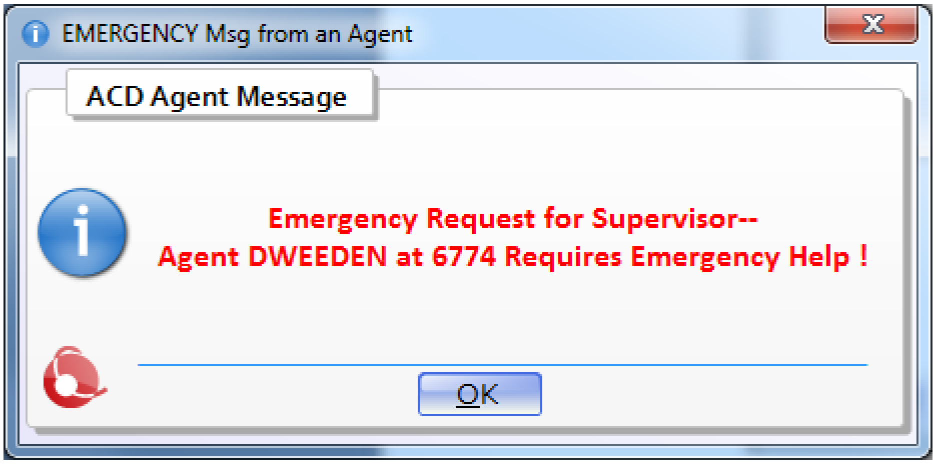


Agent Callbacks Window

The Agent is able to enter a brief message about the call in the window pane on the right, such as "John Doe is calling back with the account information for his checking account"; choose the amount of time the callback will be valid from the **Callback Account is Valid For** list, such as "The remainder of today"; and then click on the **Request Callback Account Number** button. A Callback PIN will appear for the Agent to give to the caller, along with instructions as to what telephone number to call back.
When the caller returns the phone call to the Agent this screen will reappear and the brief message entered by the Agent will appear in the white display list box in the right window pane where it was entered.

Emergency Button

Clicking on the **Emergency** button sends an immediate message to a Supervisor, making him/her aware that a particular Agent is having an emergency condition.

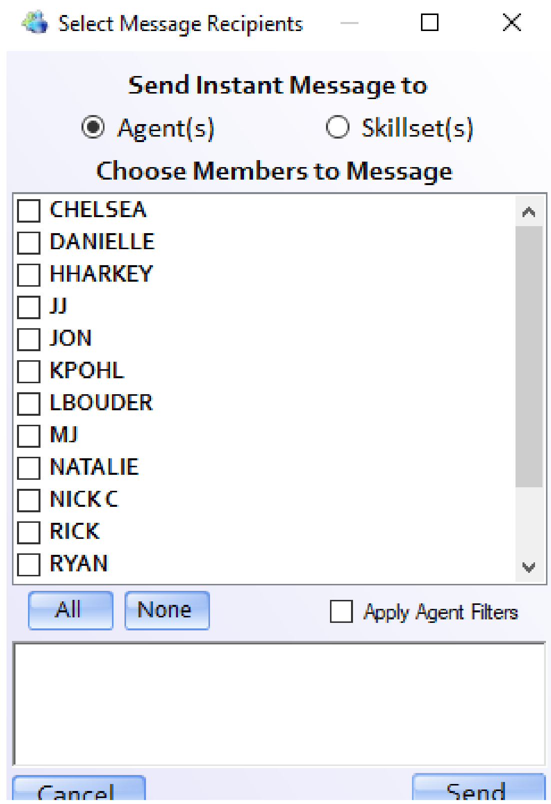


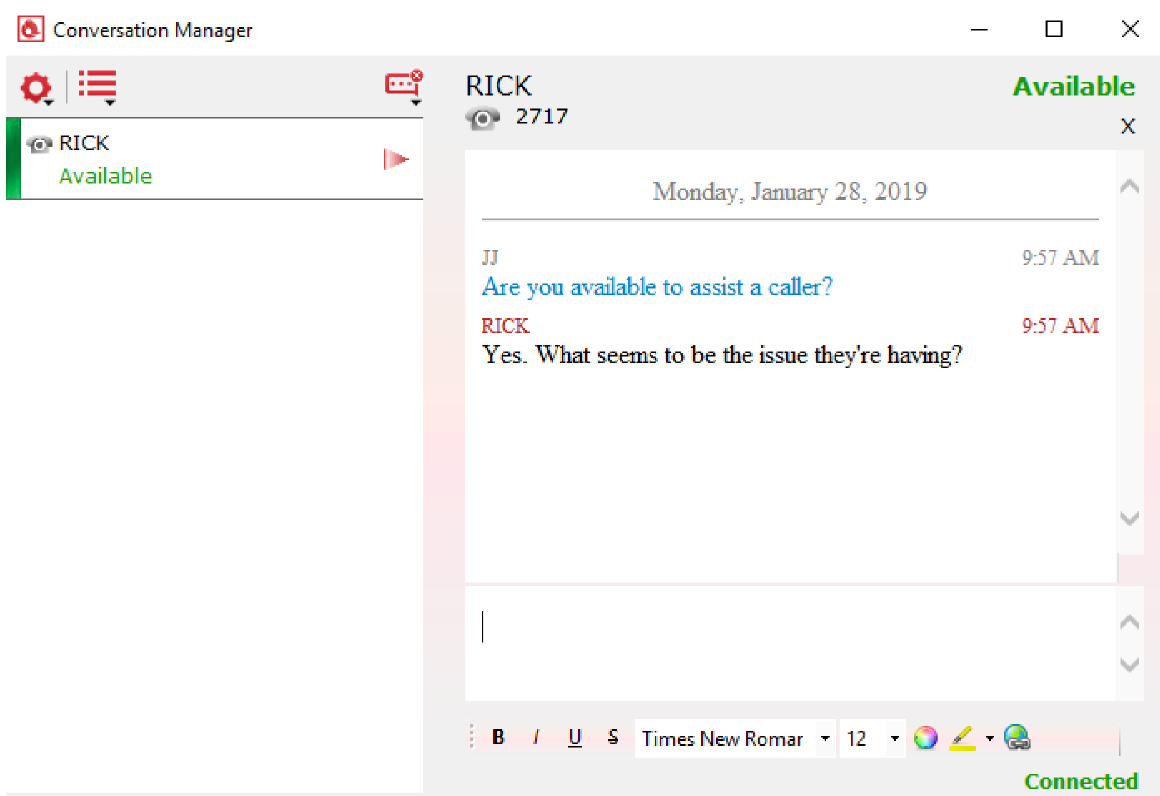
Emergency Request Screen Pop

Messaging

The **Messaging** button is used by an Agent to request help from a Supervisor. Pressing this button brings up a form that allows the Agent to enter a text message that is then sent to the Supervisor. The Supervisor can respond and send a text message back to the Agent. They can continue sending text messages back and forth until the problem has been resolved. This is very handy when an Agent is working with a caller and wants to ask the Supervisor advice on an issue. The Supervisor is able to help the Agent without going to the Agent's position or without the caller realizing the Agent is getting help from the Supervisor.

A message box appears when the Agent clicks on the **Messaging** button. The Agent then fills out the text area and clicks on the **Send** button to send the message to the Supervisor**:**



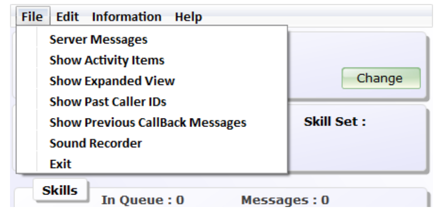


The Supervisor receives the message and can write a response back to the Agent.

Administrator Manual - Menu Bar Items

About

Listed below are the items on the **ACD Agent Module** menu bar.



File

Server Messages: This displays all messages between the server and the Agent client.

Show Activity Items: This option allows the agent to view all the activity items that are tied to each of the skills with which the agent is associated.

Show Expanded View: This opens the expanded view of the Agent Module.

Show Past Caller IDs: This option is used to view caller ID stamps from earlier in the day, as opposed to the one currently showing in the Caller ID window

Show Previous CallBack Messages: This function displays a window with a list of Customer Callbacks previously delivered to this agent position. The window will display the File Name, Caller ID, and Call Time of each Customer Callback. From this screen, a file can be selected and, by pressing the **Get File** button, downloaded to the local computer.

Show Callback Messages For All Agents: This function displays a window with a list of all Customer Callbacks previously delivered to any agent currently logged into the ACD. The window will display the File Name, Caller ID, and Call Time of each Customer Callback. From this screen, a file can be selected and, by pressing the **Get File** button, downloaded to the local computer.

Show past Emails: The feature allows the user to show all of the past ACD Emails. The window will display the EmailTime, FromAddress, Subject, and Reply Type.

Send New Email: This allows the user to create an email form from their Agent Module.

Exit: This is used to close the **ACD Agent Module** and log the Agent off the ACD system.

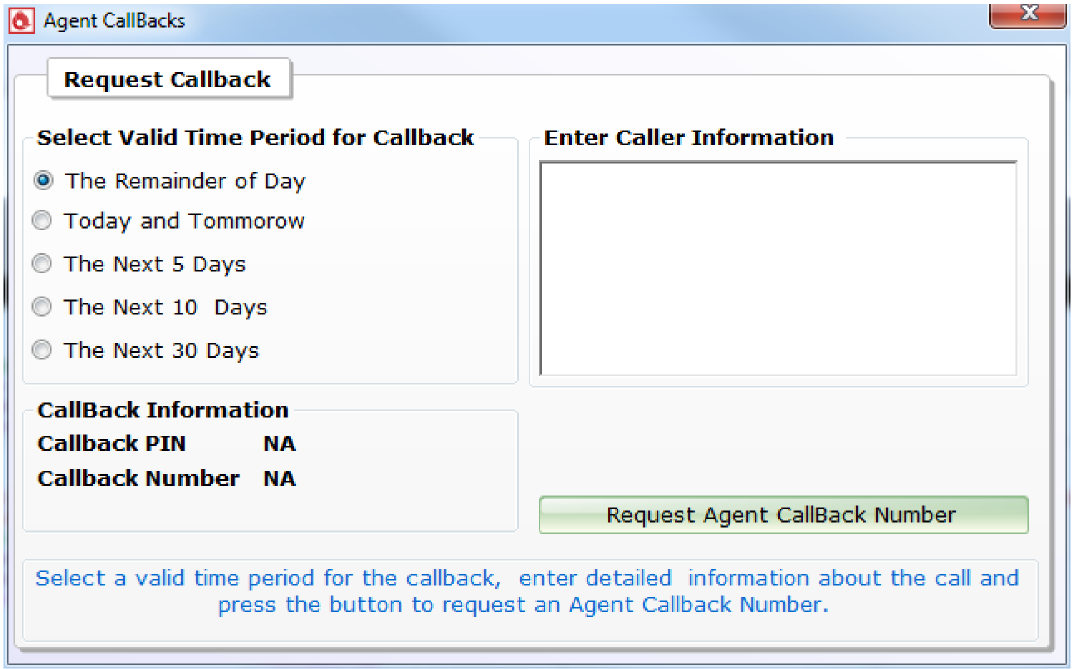
Edit

Agent Callbacks:

This brings up the Agent Callbacks window explained below

Agent Callbacks

The **Agent Callbacks Window**, shown below, is used when an Agent is working with a caller who will need to call back regarding the same problem. By using this tab selection, the Agent will be able to give the caller callback information, which will allow the caller to be directly connected to the same Agent that has helped previously. An Agent must be active on an ACD call, to use this feature.



The Agent is able to enter a brief message about the call in the rightmost window, such as "John Doe is calling back with the account information for his checking account"; choose the amount of time the callback will be valid from the **Callback Account is Valid For** list, such as "The remainder of today"; and then click on the **Request Callback Account Number** button. A Callback Account code will appear for the Agent to give to the caller, along with instructions as to what telephone number to call back.
When the call comes back in and is presented back to the Agent, the brief message entered by the Agent will appear in the white display box on the right hand side of the screen.

Settings Menu

Accessed by means of the Edit > Settings, this window allows you to change several settings concerning the ACD Agent Module. The first option in the settings window is the **Connections and Miscellaneous Settings** menu.

Connection String

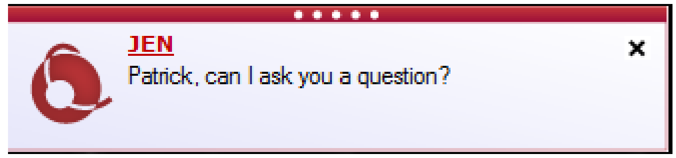
Description – The name of the current connection you are currently using
Server Address- The server where events are being sent to.
Connection Port-The current port being used. Please leave this as 21 unless otherwise advised by T-Metrics.
Connection State- the current state of the connection. This should be set to Active.
Interface- The setting of how you are interacting with your phone.

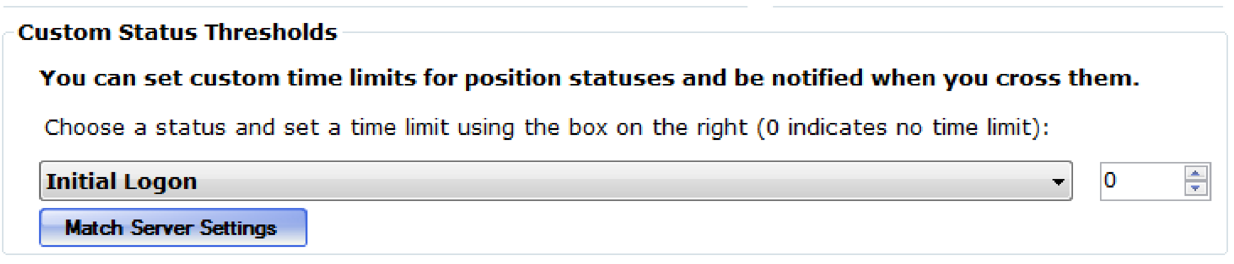
> **Traditional Fixed –** A setting used in conjunction with a standard desk phone. (90% of users will use this setting)
> **Traditional Dynamic –** A setting used in conjunction with a set up where you log into your phone and your number can follow you. Your number is not tied to one desk phone.
> **Microsoft Lync –** A setting used in conjunction with the Microsoft Lync Client as the agent phone. There are additional Microsoft Lync settings under the Unified Communications section.
> **TMetric SIP Softphone –** A setting used in conjunction with a softphone instead of a handset.

Primary ACD DN – phone number or extension associated with the Agent
ACD Redirects – This setting enables the transfer of calls between instruments on the TM 2000 system.
Secondary ACD DNs (View/Edit) – This is a setting used for sites that have multiple DNs set up at each individual operator station.

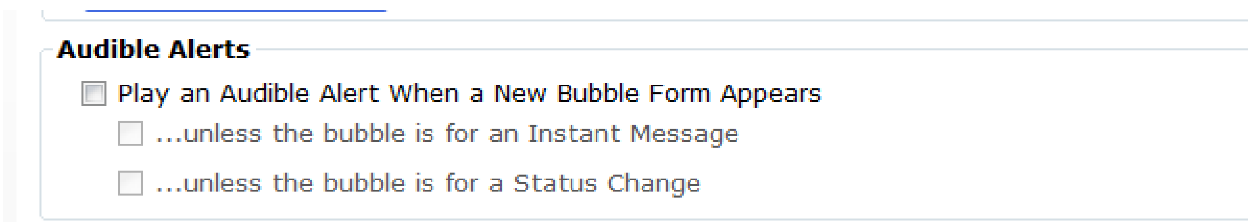
Bubble Forms and System Tray

Bubble Forms pop up when certain events occur, such as an incoming call or an instant message. From here, the administrator may enable/disable the Bubble Form feature, as well as configure the Bubble Forms' fade settings.

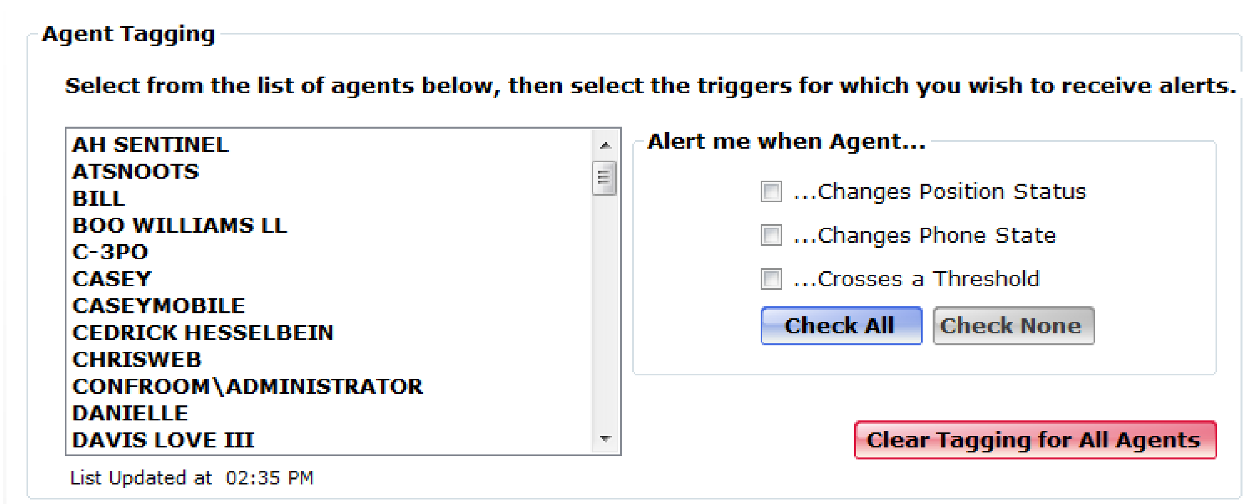




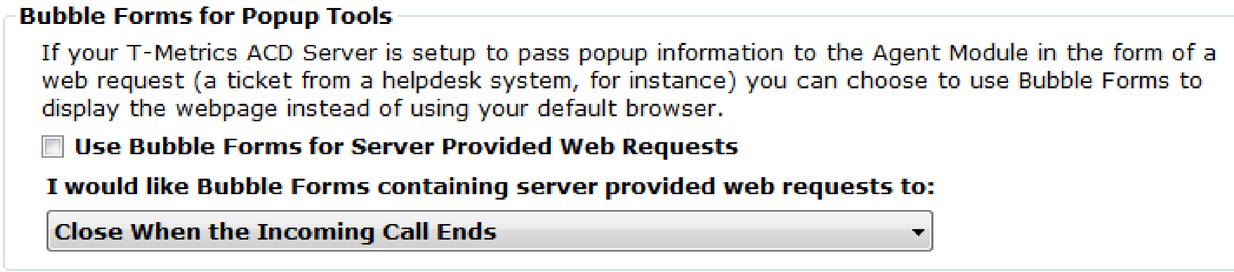
Custom Status Thresholds: This feature allows you to set the time limits for position statuses



Audible Alerts: this feature allows a tone to be played for the bubble forms selected in the top menu.



Agent Tagging: This allows you to choose triggers or alerts from other agents. For example: if Casey was selected and I chose to be alerted when his phone state changed, I'd get a notification every time he answered or hung up from a call.

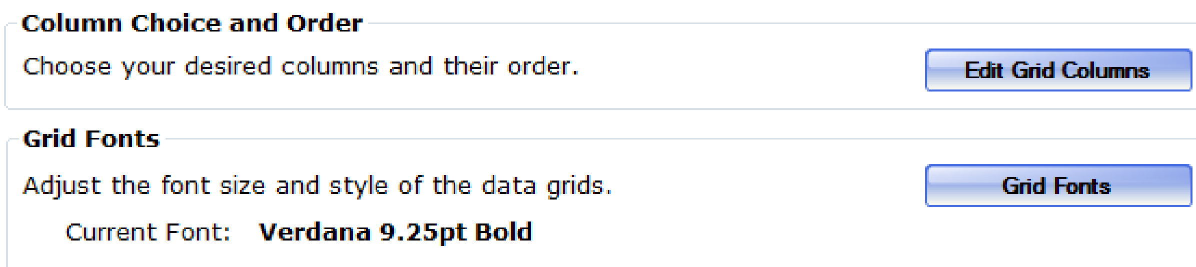


Bubble Form for Popup Tools: This lets the user choose the option of receiving the selected pop up bubble form in either a webpage layout or through their default browser (like a help ticket) and select if you would like that page to close when the call ends, manually, or when the bubble form fades (based on the time selected).

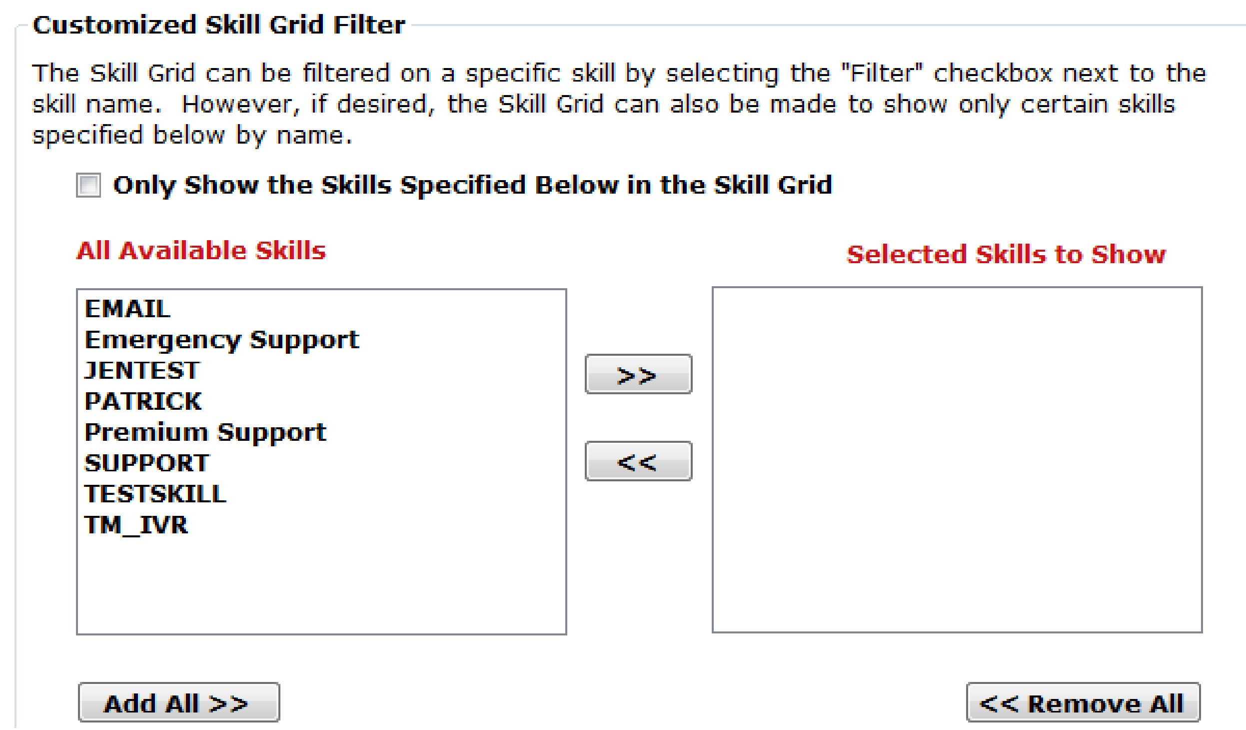
Data Grids

The **Data Grid Options** menu allows the administrator to customize how information is displayed within the Agent Module.

Grid Formats: From here, changes may be made to the grid display, concerning grid location, ordering, font, symbols, etc.



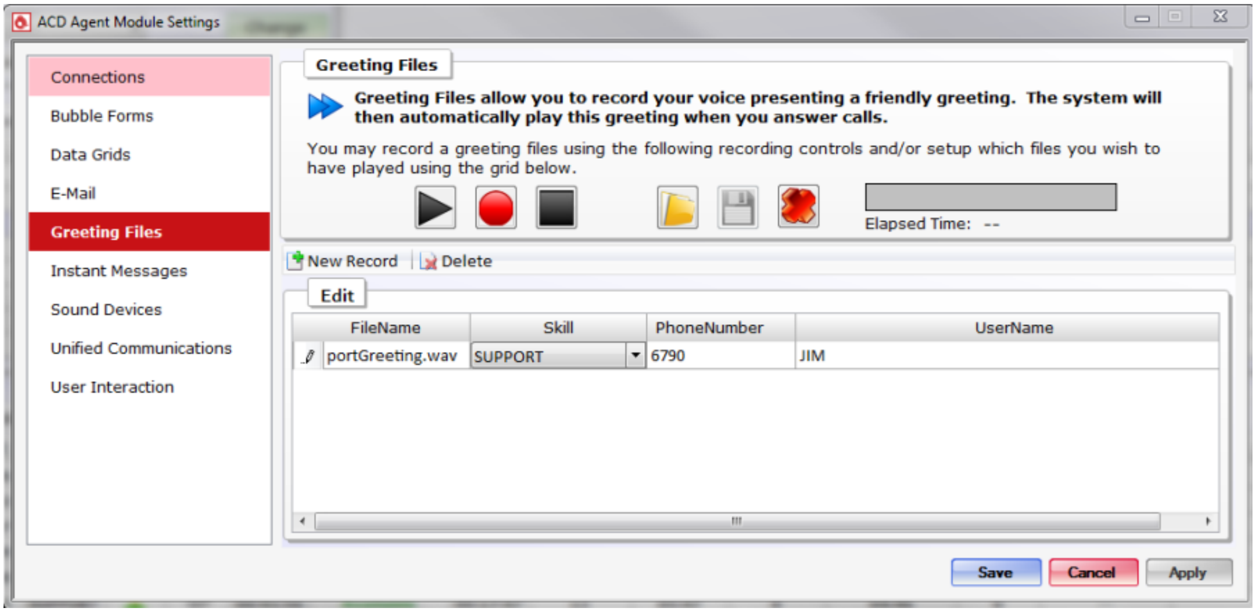
From this menu, the Administrator may also create a **Customized Agent Grid Filter**, displaying only specified agents.



From this menu, the Administrator may also create a **Customized Skill Grid Filter**, displaying only specified skills.

Greeting Files

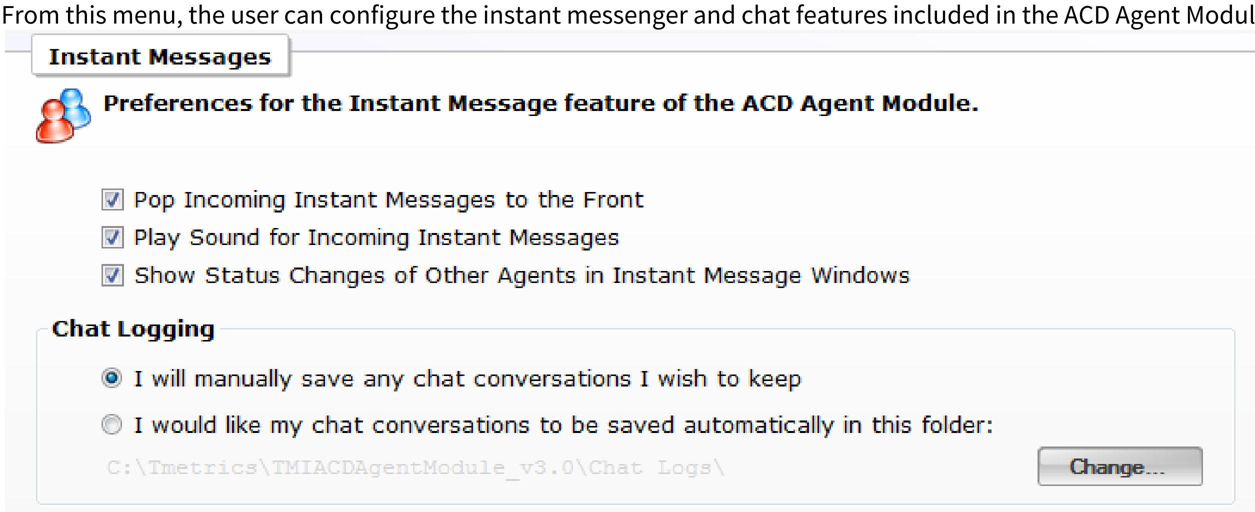
From this menu, a user may set which greeting file they wish to play at their station for selected skills.



Filename – The filename of the audio file to be used as a greeting
Skill – The skill that is to be used with the greeting file
Phonenumber – The phone number of the user
UserName – The agent's username

Instant Messages

From this menu, the user can configure the instant messenger and chat features included in the ACD Agent Module.



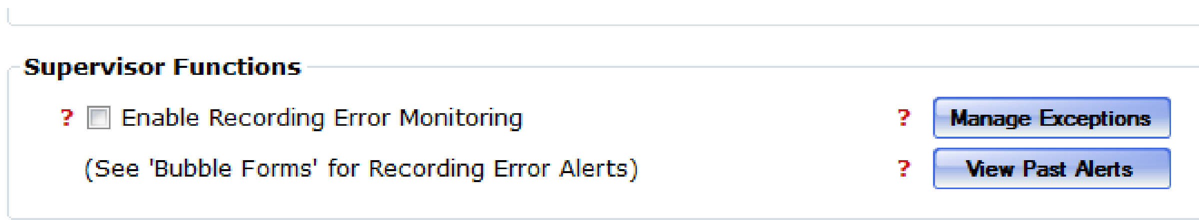
Pop Incoming IM's to the Front - This option allows incoming Instant Messages to display in the forefront of the user's screen. It will load on top of any other window that is open
Play Sound for Incoming IM's- This option allows an audible sound to play when an instant message is received through the ACD Agent Module
Show Status Changes of Other Agents in Instant Message Windows – This option will display the current status of the agent the user is messaging in the chat window
Chat Logging - Manually save chat conversation. Select where/what folder you would like your chat conversations to be saved

Licensing

This menu will show the path to the license file for your software. Please do not change this path, unless you are an Administrator who has spoken with a T-Metrics Representative.

Recordings

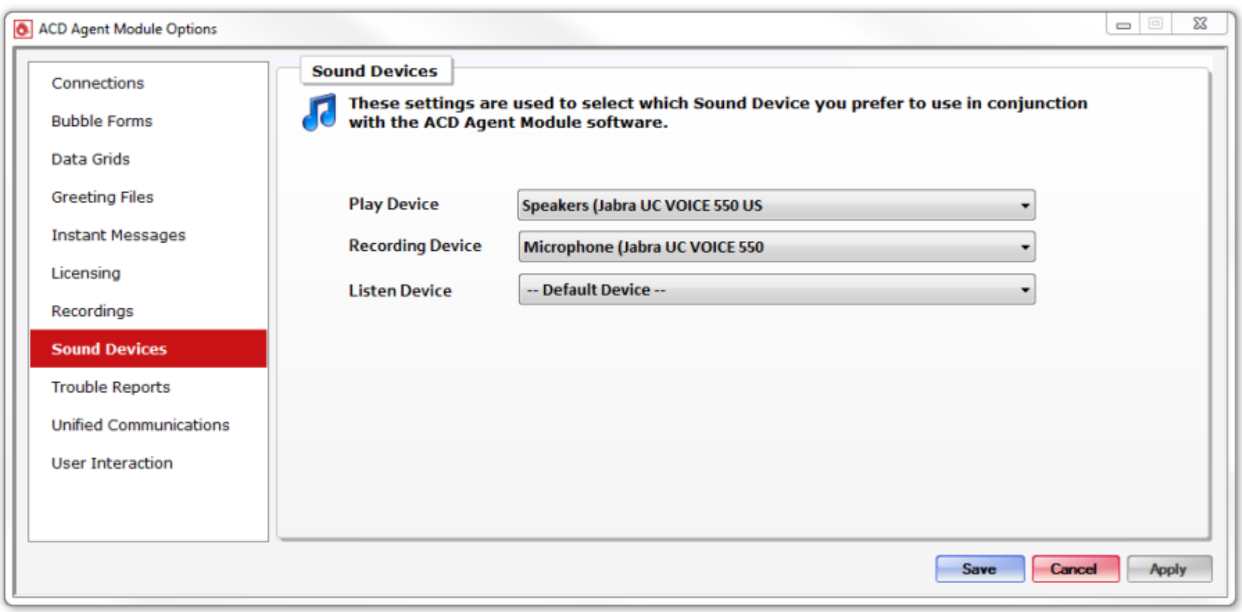
This menu, is where call recordings are enabled and it will also show you the path of where the recordings will be uploaded to. Please do not change this without being an Administrator who has contacted T-Metrics support.



This feature allows supervisors to receive an error message as a bubble form when there are issues monitoring an agents recordings.

Sound Devices

This menu allows the user to choose which sound device will be used in conjunction with the ACD Agent Module software.



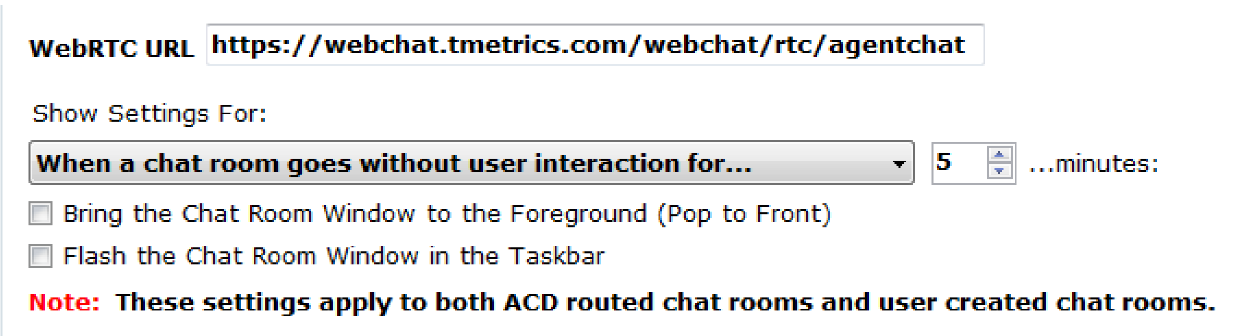
Play Device – The audio device used for audio playback for the agent
Recording Device – The audio device used to capture call recordings
Listen Device – The audio device used by a supervisor when listening to an agent's live call.

Trouble Reports

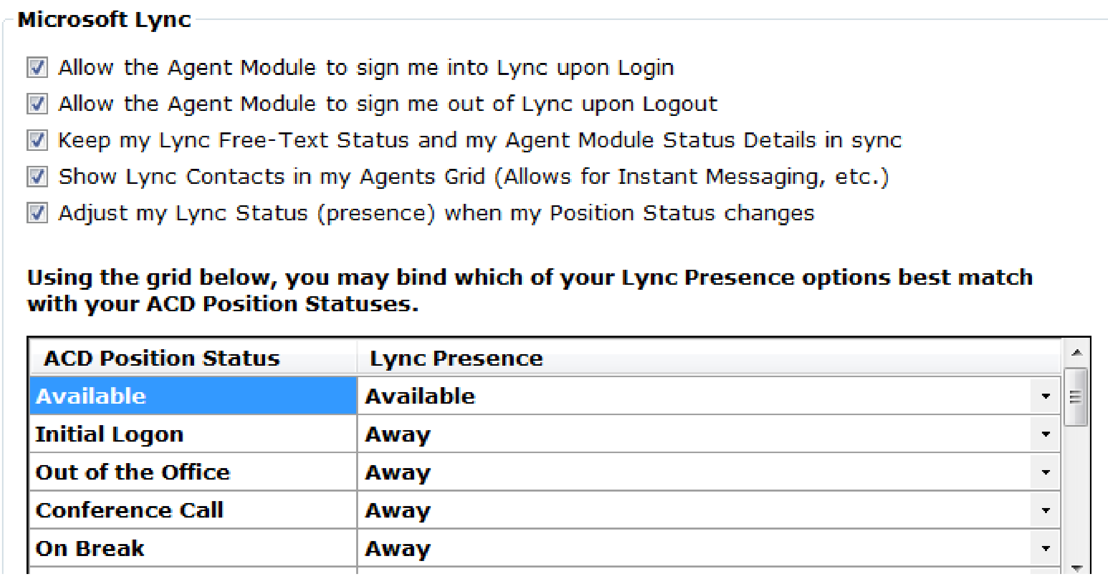
This menu helps user get in touch with T-Metrics Support easily when experiencing problems. It contains the agent's contact information.

Unified Communications

This menu allows user to configure setting both for T-Metrics Unified Communications (ACD Routed Emails and Social Media). This menu also allows user to configure setting both for T-Metrics Unified Communications (WebChat/Enterprise Messaging)



This menu allows user to configure settings through Microsoft Lync.



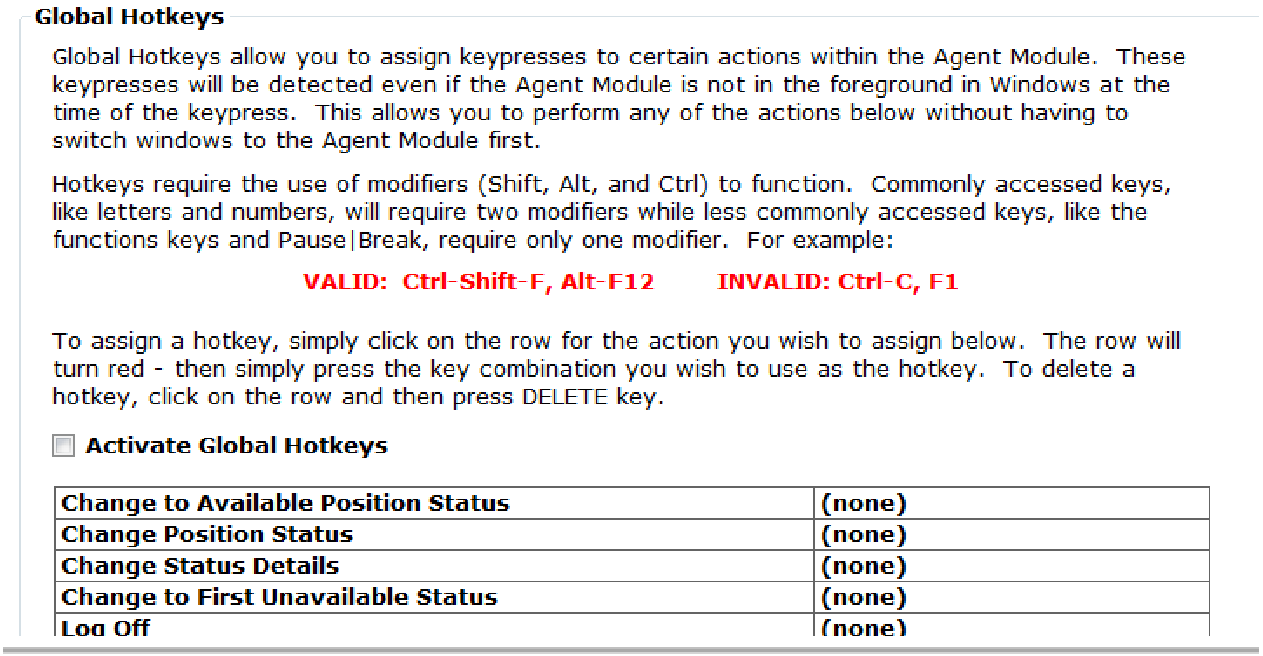
User Interaction

This menu allows the user to make several selections to customize how they will interact with the Agent Module.

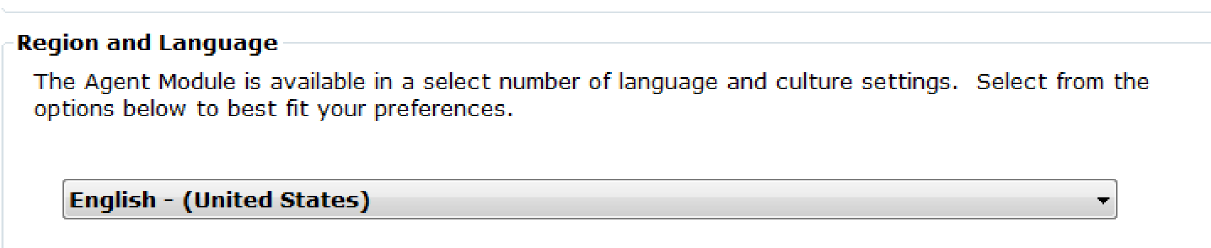
1. Allow Us of Keyboard (Enter Key) to Select Activity Items
2. Allow Use of Keyboard (Enter Key) to Change Position Status

3. Show My Current Status Time Next to My Position Status
4. Minimize the Agent Module to the System Tray
5. Confirm with User Prior to Sending Emergency Messages
6. Disable the Emergency Button
7. Show Status Details Input Box

The user may also assign **Global Hotkeys** to perform common actions via keyboard shortcut.



The user may change the **language** from the list of options (English/French)



Toggle Skills:

If an Agent has been given the ability to turn on and off Skills by a Supervisor, this feature will allow the Agent to perform those actions.

Toggle Skill Groups:

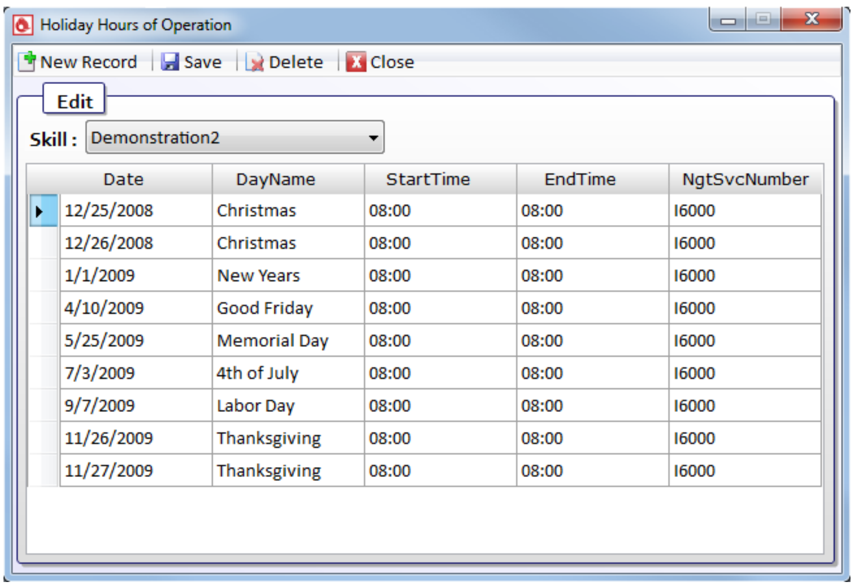
Allows user to turn a specific skill group on or off.

Hours of Operation:

Access by means of Edit > Hours of Operation menus, there are two options **Holiday Hours of Operation** and **Weekday Hours of Operation**. These windows are interfaces to edit the hours when the TM-2000 ACD processes calls.

Holiday Hours of Operation

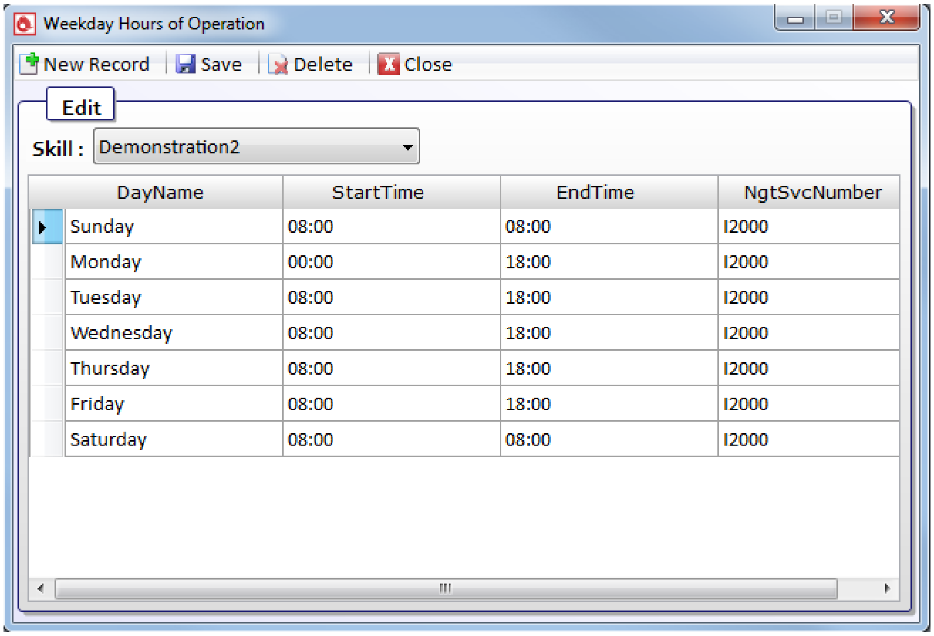
This table allows you to define holiday hours for each skill set. You can pick which dates are considered holidays at your place of business and then name them individually. You may then define different holiday hours for each holiday on the calendar and a different extension for calls to be forwarded to in the event that your place of business is not answering calls during the time that the call came on a specific holiday.



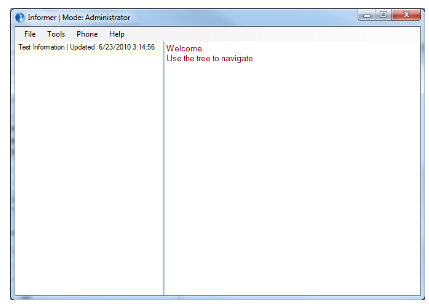
Date	DayName	StartTime	EndTime	NgtSvcNumber
12/25/2008	Christmas	08:00	08:00	I6000
12/26/2008	Christmas	08:00	08:00	I6000
1/1/2009	New Years	08:00	08:00	I6000
4/10/2009	Good Friday	08:00	08:00	I6000
5/25/2009	Memorial Day	08:00	08:00	I6000
7/3/2009	4th of July	08:00	08:00	I6000
9/7/2009	Labor Day	08:00	08:00	I6000
11/26/2009	Thanksgiving	08:00	08:00	I6000
11/27/2009	Thanksgiving	08:00	08:00	I6000

Weekday Hours of Operation

Similar to the last table, this one allows you to set the hours for every day operation. Instead of the names of holidays, you will see the names of the days of the week. You may still specify the Night Service extension to which calls should be forwarded.



Information



The Informaer is used to pop up the Information Directory, shown below, which is used to access information using a Windows Explorer-type of form. This data can be anything, including documents in text and RTF and pictures in such formats as BMP, JPG. Also URL address on the web can be accessed through the viewer. You can access this by pressing F11 on the keyboard.

Agent

> ⚠ The Agent Menu on the Menu Bar is the same as the Agent Menu in the Expanded View. See the Expanded View section for details.

Change Status:

The Supervisor can change the **Status** of an Agent simply by highlighting the Agent's name, choosing **Agent / Change Status** from the menu bar and then choosing the appropriate **Status** settings. Alternatively, a Supervisor can right-click on an agent's name and choose the **Change Status**" option. For example, if an Agent leaves for lunch still in the "**Available**" **Status**, the Supervisor can change the Agent's **Status** to "**Out to Lunch**" without leaving his or her desk. By doing this, the Agent will not receive calls when not available.

Listen & View:

> ⚠ NOTE: The Administrator position must be equipped with the Supervisory Listen & View HASP® key or Soft License and the Agent must be equipped with a T-Metrics Agent TAP, SoftPhone or PhoneGroups Console to use this feature.

With the purchase of the additional hardware and software noted above at the Agent and Supervisor/Administrator positions, the Supervisor/Administrator can highlight an Agent's name and then select Agent / Monitor / Listen to be able to remotely listen to the caller and the Agent. If the Supervisor/Administrator selects Agent / Monitor / View, the Supervisor/Administrator will be able to remotely view the Agent's screen. This feature is very beneficial in training new Agents and monitoring Agents for quality control.

Request Trouble Report:

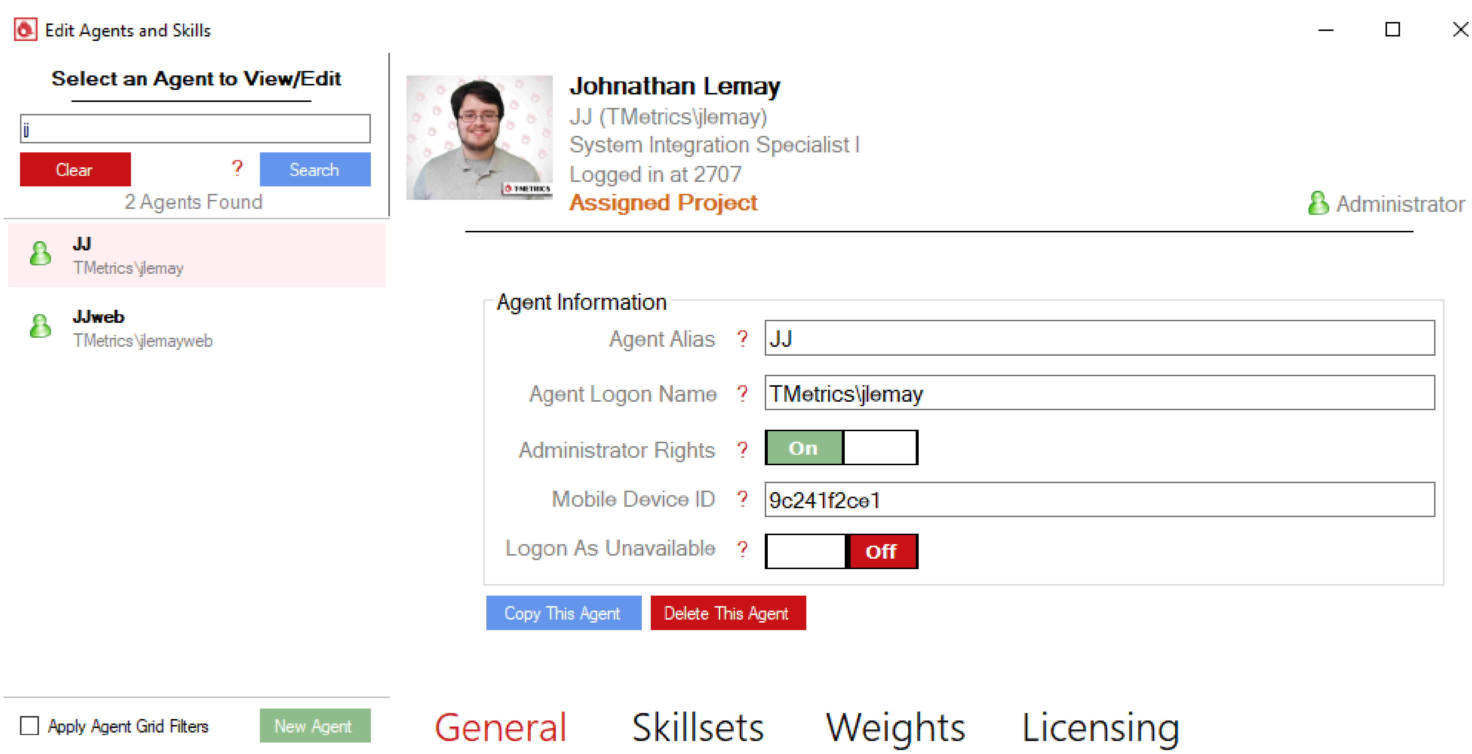
This feature will populate a new window which allows you to send a trouble report to TMetrics explaining the current issue/problem you are experiencing.

Send Instant Message:

Allows the Administrator to send a private instant text message to a particular Agent or to send a broadcast instant text message to all Agents.

Edit Agents and Skills:

The Administrator can add, edit or delete either Agents or Agents' settings by selecting the **Agent / Edit Agent** menu item, which brings up the **Agent Edit Form** shown below:



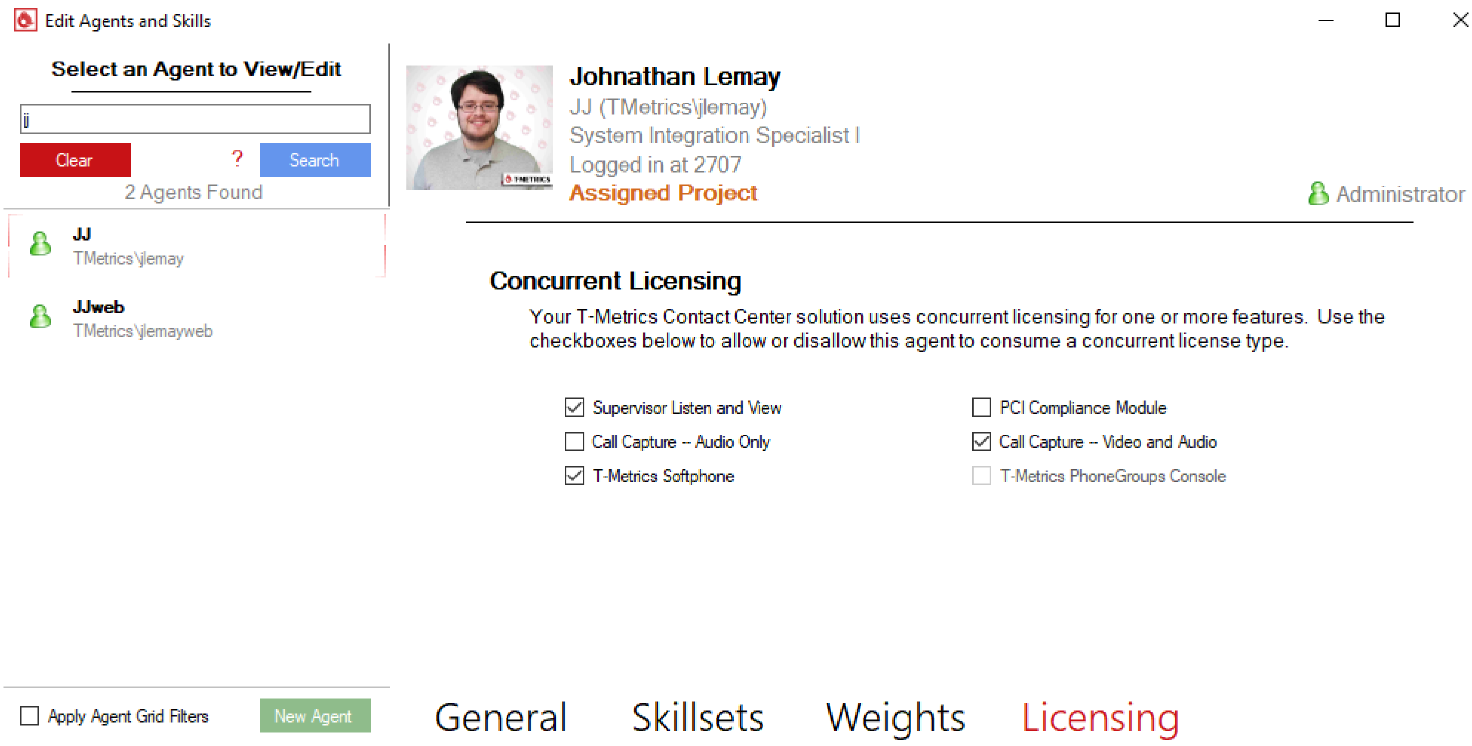
At the main screen of the Edit Agents and Skills form, an Administrator can search for an existing agent account to edit or delete. They can also create a new agent account by clicking the **New Agent** button at the bottom of the **Select am Agent to View/Edit** section of the form. Once an existing agent account is selected or the New Agent button is click, the Administrator can then make the desired changes on each of the defined panels. The first panel presented is the **General** panel as shown below.

1. **Agent Alias** – This is the agent's display name for the system. *This item is optional.*
2. **Agent Logon Name** – This field contains the logon name the user will enter to log into the system. If Windows Authentication is configured on the system this value must match the username used to log into the operating system.
3. **Administrator Rights** – This setting determines if the user will be an Administrator on the system.
4. **Mobile Device ID** – This field is used with the Android Agent Module offering and links an Android based device with the user account. *This item is optional.*

Once the Administrator has selected a specific Agent Logon Name, the **Skillsets** panel can be accessed to bring up the following screen in which to Add, Delete or Edit an Agent's skills or skill groups.

1. **Add/Remove** buttons – These buttons are used to add or remove a skillset or skill group record.
2. **Skill** – Select the desired skill from the dropdown box of available options.
3. **Skill Level** - Select the desired skill level from the dropdown box of available options, where 9 is the most likely to receive objects in this skill and 1 is the least likely
4. **Supervisor** – This setting is used to enable the agent as a Supervisor of the skill. *This item is optional.*
5. **Can Turn Skill Off** – This setting determines if the agent has the ability to toggle the skill on and off themselves. *This item is optional.*
6. **Skill Is Off** – This setting determines if the skill in question is on or off.

The Weights panel, shown above, is displayed when a Contact Center system is configured to use multimedia and is used for defining multimedia routing (e-mail, Facebook, Twitter, etc.) on a per agent basis. At the top of the panel the **Total Contact Weight Allowed** sets the maximum total object weight the agent can accept. The grid below sets the weight of each type of object type for the agent selected. This allows for each agent to have their own unique total and object type weights to best mirror their proficiencies.



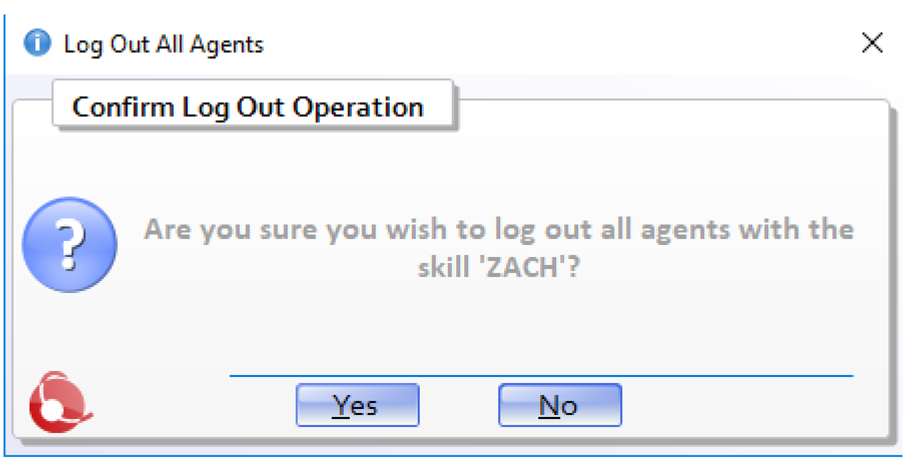
The Licensing panel, shown above, is available when the Contact Center system is configured to use the concurrent licenses model. The Administrator is able to set the type of licenses the agent will acquire at logon to the system.

NOTE: These licenses are applied at logon so if the settings are edited while an agent is currently logged into the system, the changes will not take effect until the next logon.

Skill

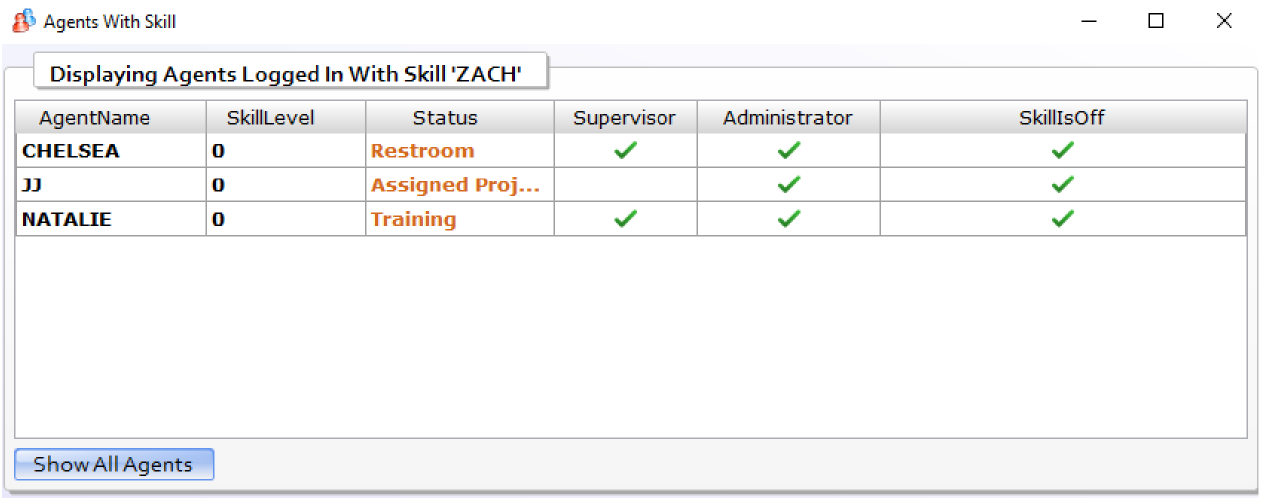
Log out all agents with skill:

This function will logout all agents who have the selected skill. The user is warned before the action takes place:



Show all agents with skill:

This option shows all agents that are a part of the selected Skillset. You can use the button in the bottom left corner to display either all agents or just all agents that are logged in:

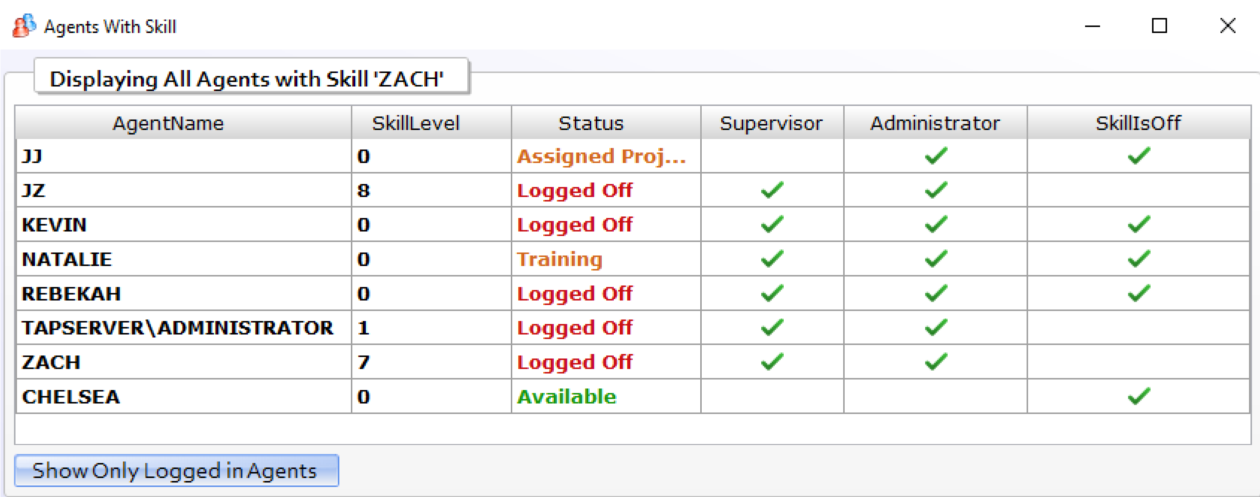


Agents With Skill

Displaying Agents Logged In With Skill 'ZACH'

AgentName	SkillLevel	Status	Supervisor	Administrator	SkillIsOff
CHELSEA	0	Restroom	✓	✓	✓
JJ	0	Assigned Proj...		✓	✓
NATALIE	0	Training	✓	✓	✓

Show All Agents



Agents With Skill

Displaying All Agents with Skill 'ZACH'

AgentName	SkillLevel	Status	Supervisor	Administrator	SkillIsOff
JJ	0	Assigned Proj...		✓	✓
JZ	8	Logged Off	✓	✓	
KEVIN	0	Logged Off	✓	✓	✓
NATALIE	0	Training	✓	✓	✓
REBEKAH	0	Logged Off	✓	✓	✓
TAPSERVER\ADMINISTRATOR	1	Logged Off	✓	✓	
ZACH	7	Logged Off	✓	✓	
CHELSEA	0	Available			✓

Show Only Logged in Agents

Send Instant Message:

This option launches the **Instant Messaging** feature allowing the Administrator to message an entire Skillset. This can also be accomplished by clicking on the **Messaging** button and then the **Skillset** radio button.

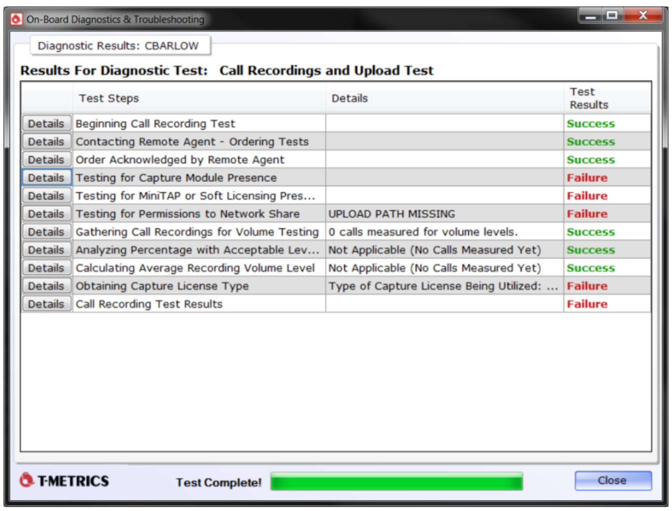
Help

The Help menu item has Several options under it. We will outline the major actions below.

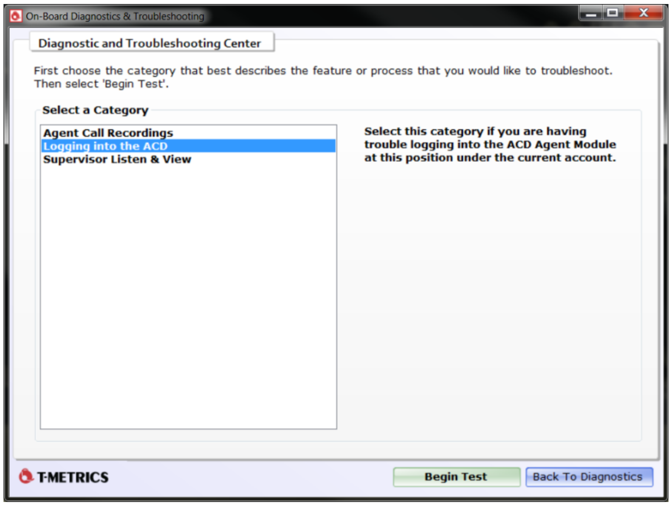
On Board Diagnostics:

This is uses to instruct administrators on the benefits & uses for the on board diagnostics tool in the ACD Agent

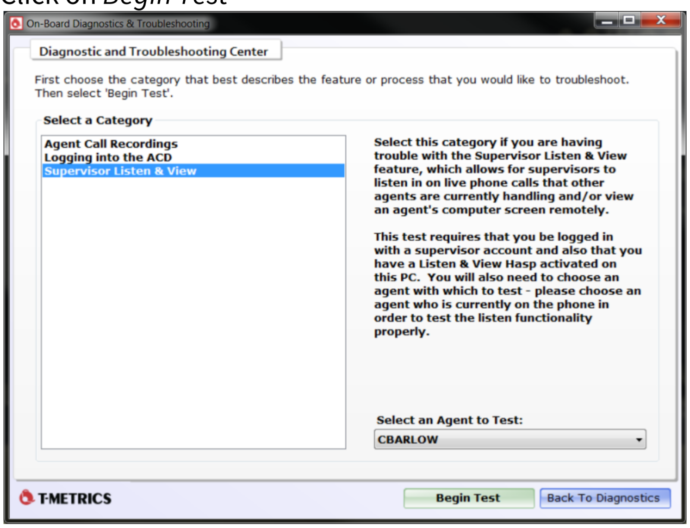
Get Version Info gives you a system information breakdown.
Troubleshoot problems will open a new window.
Agent Call Recordings*:* This will test call recordings, whether the recording volume is acceptable, and whether the selected agent has permissions to the call recording upload folder.

- Select an agent to test.
- Click on *Begin Test*
- **After running a test you will see success and/or failure messages. If any tests fail, you can click on details to find out more information.**
- 

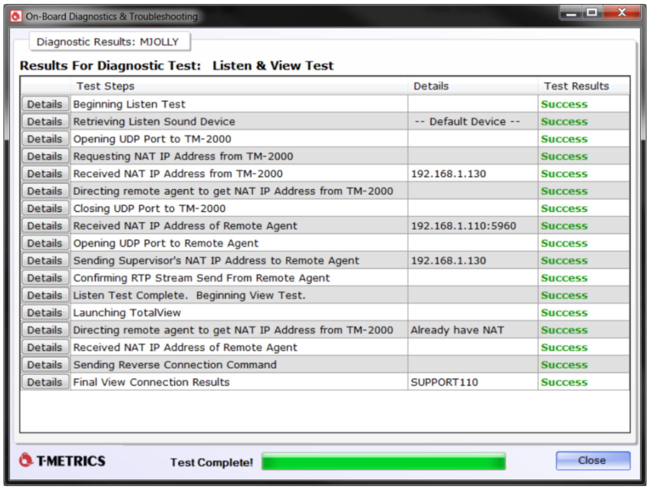
Logging into the ACD - If you are unable to log into the Agent module, you can diagnose this here. This test will of course need to be run by pulling the On-Board Diagnostics up on a position that is unable to log in.

- 

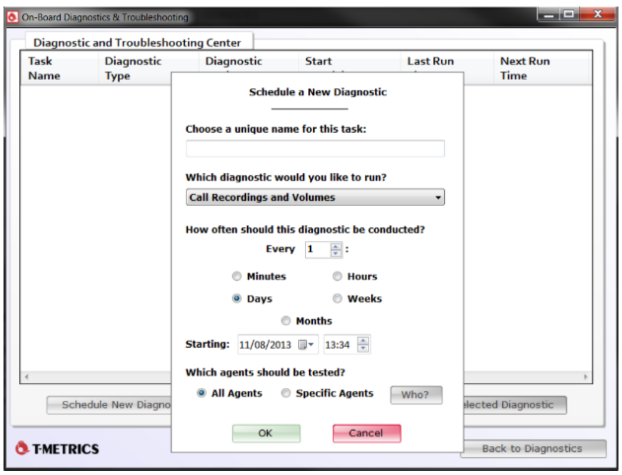
Supervisor Listen & View:

- Select an agent who is currently on the phone
- Click on *Begin Test*
- 

- After running a test you will see success and/or failure messages. If any tests fail, you can click on details to find out more information. It will also open a live view of the agent's computer screen, and stream the audio of their active call.

- 

Schedule Diagnostics allows you to schedule a time to run diagnostics as well as edit & delete any previously scheduled tasks.

- 

Email a System Summary

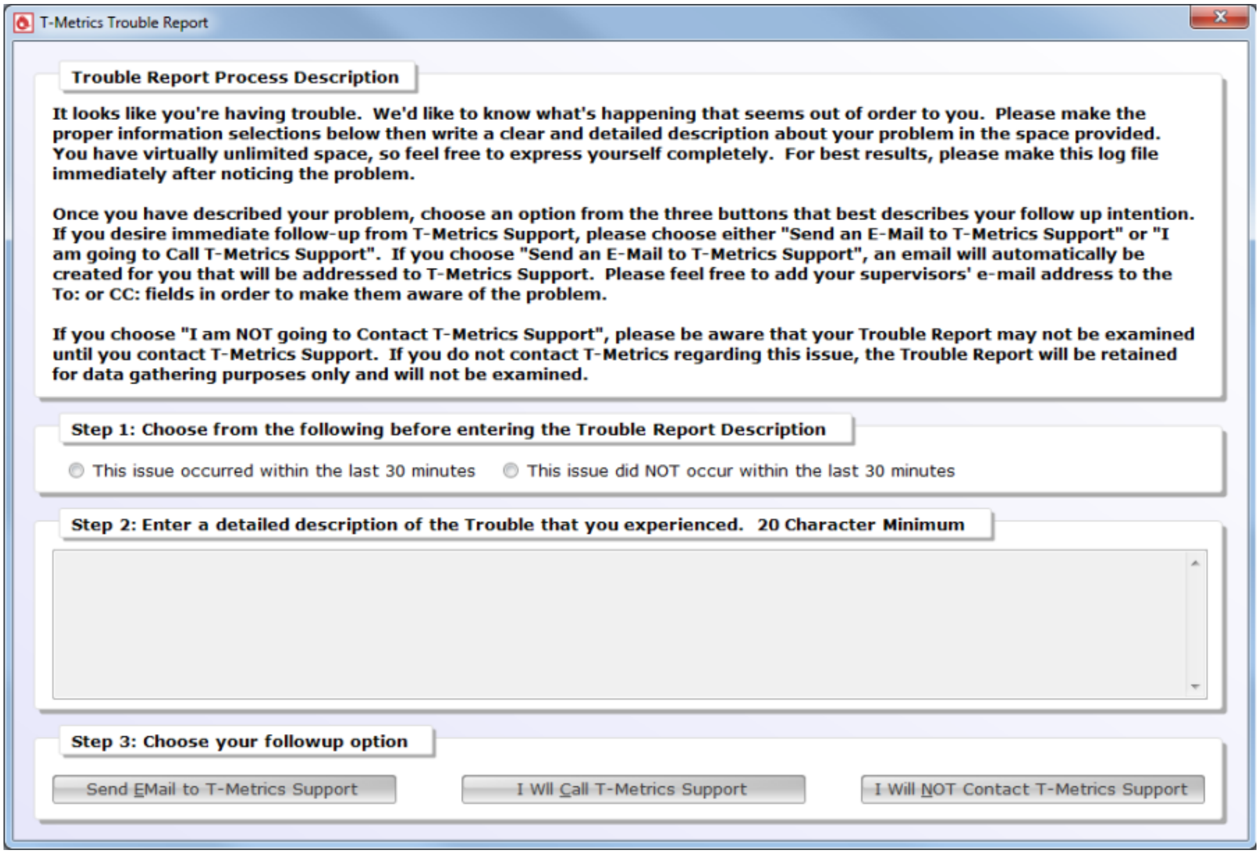
E-Mail a System Summary will create an automated email report.

Send Trouble Report

In the event that a problem occurs, **Send Trouble Report** is used by an Agent / Supervisor to trap the most recent activity on the Agent / Supervisor PC and on the ACD Server that will be forwarded to the T-Metrics Support Staff.

To make a file that will be sent to T-Metrics, do the following:

- Click on the **Help** menu at the top of the screen and select the **Send Trouble Report** option. The screen below will appear.

- 

- Follow the on screen instructions and submit the Trouble Report by clicking **Send Email to T-Metrics Support, I Will Call T-Metrics, or I Will NOT Contact T-Metrics Support.**

Agent Module Quick Reference Guide

This function will open a PDF version of the Agent Module Quick Reference Guide.

Agent Module Supervisor Guide

This function will open a PDF version of the Agent Module Supervisor Guide.

Agent Module User Guide

This function will open a PDF version of the Agent Module User Guide.

TM-2000 Reports Package Guide

This function will open a PDF version of the TM-2000 Report Package Guide.

TM-2000 SSRS Reports Package Guide

This function will open a PDF version of the TM-2000 SSRS Report Package Guide.

Remote Connection and Remote Connection Custom

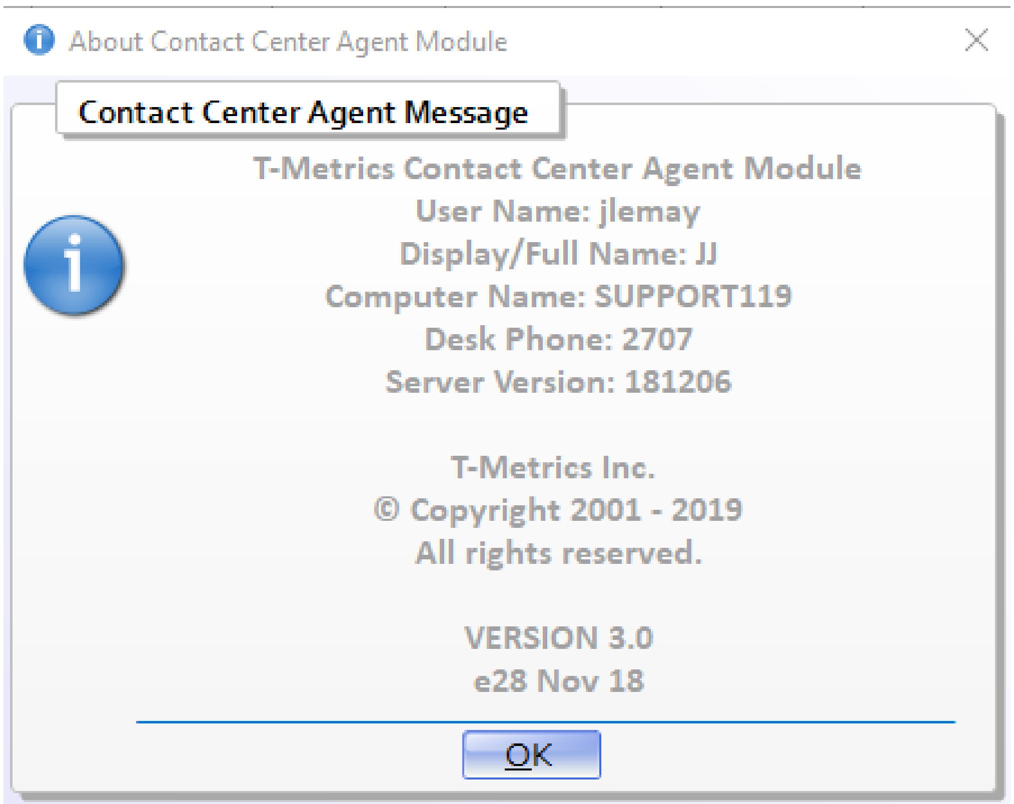
T-Metrics may request that you use this feature to allow us to remotely control your PC in order to fix an issue. T-Metrics will provide you with instructions on how to use this feature should the need arise.

View Patch Notes

This form will show you all there is to know about the Agent Module since your last update

About Agent Module

About Agent Module is an about box telling who made the product and the version of it.



Administrator Manual - Customizable Screen Pop Interfaces

T-Metrics has developed Screen Pop Interfaces for several of our customers. In each instance we have worked with the in-house expert from the customer site to develop tools that assist operators in using T-Metrics software in conjunction with their already existing systems.
T-Metrics has been able to successfully integrate several clients like CHCS,Remedy Interface, Magic Interface, and Web Client Interface.

Working with a customer to create a useful apparatus, T-Metrics has the ability to create software which will work with an existing system. For example, by merging our ACD and a customer service system owned by a customer, it is possible for a customer to enter a customer ticket number while they wait in queue and have the system "pop" a screen to the operator at the appropriate time bringing up their ticket containing all their information.

Administrator Manual - MiniTAP

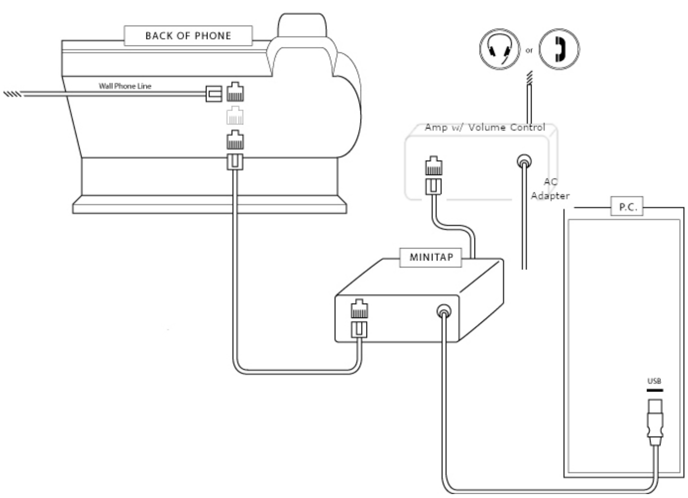
The MiniTAP

The Agent MiniTAP will allow for agent greetings and recording of telephone calls when using a Desk Phone. It is also required at each agent position for the **Supervisory Listen & View** feature when the agent is utilizing a desk phone. Additionally, a HASP or soft license at the Supervisor position would be required for Supervisory Listen & View functionality. When using a hard phone with a headset, an amplifier may be required. Contact T-Metrics Support for more information regarding the need for an amplifier. Connections with and without an amplifier are shown below.

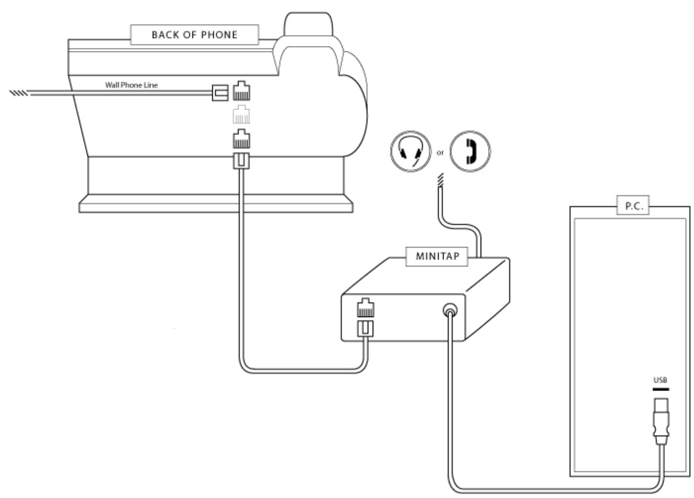
Picture of the T-Metrics Agent MiniTAP & Connection Diagram

The MiniTAP device sits between the users PC and Desk Phone. The MiniTAP connects to the PC via USB, and then plugs into whichever audio hardware port the user wants to use on their Desk Phone (i.e., the handset or headset port). The actual audio hardware will then plug into the front of the MiniTAP. This allows the MiniTAP to sit between the audio source and the audio hardware, capturing the audio and sending it to the PC via USB to be recorded to a file.

MiniTAP with Amplifier



MiniTAP without Amplifier



Optional Features

The T-Metrics Agent module includes several optional features, which may be activated depending on the site's needs, hardware setup, and purchased services.

Customer Callback Messages

Completing the Customer Message Information

This option is in place to allow an agent to retrieve Customer Messages (voice messages) left by a caller for a skill *manually*when the system is configured to withhold them until they are requested by an agent.
Conversely, the system can be configured so that callers can leave a Customer Message that will either be delivered to an "**Available**" Agent when there are no "live" calls to be presented, or delivered to an agent *as if it were a live call with its own place in queue* (depending on the way the system is configured). When a Customer Message is sent to an Agent, the Agent is presented with the **Customer Message Information** window shown below:

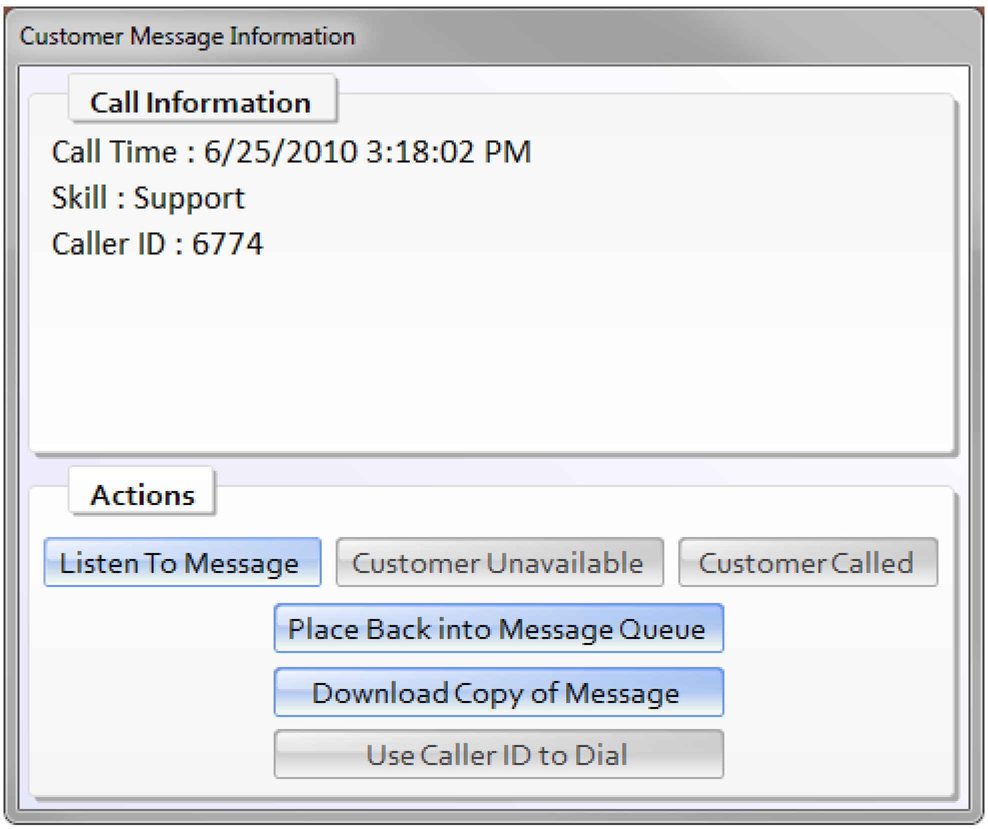


Figure 28. Customer Message Information Screen Pop
In order to listen to the Customer Message, the Agent will click on the **Listen To Msg** button. The Agent's desk phone (either a standard phone or a T-Metrics SoftPhone box) will then ring and the Agent will be instructed to "Press any key to play the message".

- For Agents using a standard phone set, press any key on the telephone keypad.
- For Agents using a T-Metrics Console, go to **Telephone Tools** on the menu bar, select **DTMF Send <CTRL+Alt>**, and then press any digit on the keyboard.

The Agent can press any key to play the message again.

Completing the Customer Message Information

When the message has finished playing, the Agent must select one of the other buttons on the **Customer Message Information** window to indicate the action taken in regards to the message:

- If the Agent reaches the caller and completes the message, the Agent presses the **Customer Called** button and the window will close. This will mark the call as "Cust Called" in the call records log for reporting purposes.
- If the Agent is unable to complete the message (e.g., leaves a message for the caller, etc.), the Agent presses the **Customer Unavailable** button and the window will close. This will mark the message as "Cust Unavailable" in the call records log for reporting purposes.

Closing the Customer Message Window without Call Resolution Selected

- If the Agent closes the **Customer Message Information** window by selecting the  in the upper right-hand corner, the message will be sent back to the Agent to retrieve again. If the Agent receives an incoming call, the message will be sent to the Agent when the position is "**Available**". If the Agent makes his/her position unavailable (by selecting "**On Break**", "**Out to Lunch**", etc), the message will be routed to the next available Agent.
- If the Agent closes the **Customer Message Information** window by pressing the **Close with No Action** button, the message will be sent back to the Agent to retrieve again. If the Agent receives an incoming call, the message will be sent to the Agent when the position is "**Available**". If the Agent makes his/her position unavailable (by selecting "**On Break**", "**Out to Lunch**", etc), the message will be routed to the next available Agent.

The **Customer Message Information** window **should not** be closed by these methods as it creates reporting errors in the call reconciliation process.

Agent Messaging

In addition to sending IM messages to Supervisors, Agents may send IMs to one another, if the Administrator has enabled "IM for All" for their skillset on the server:

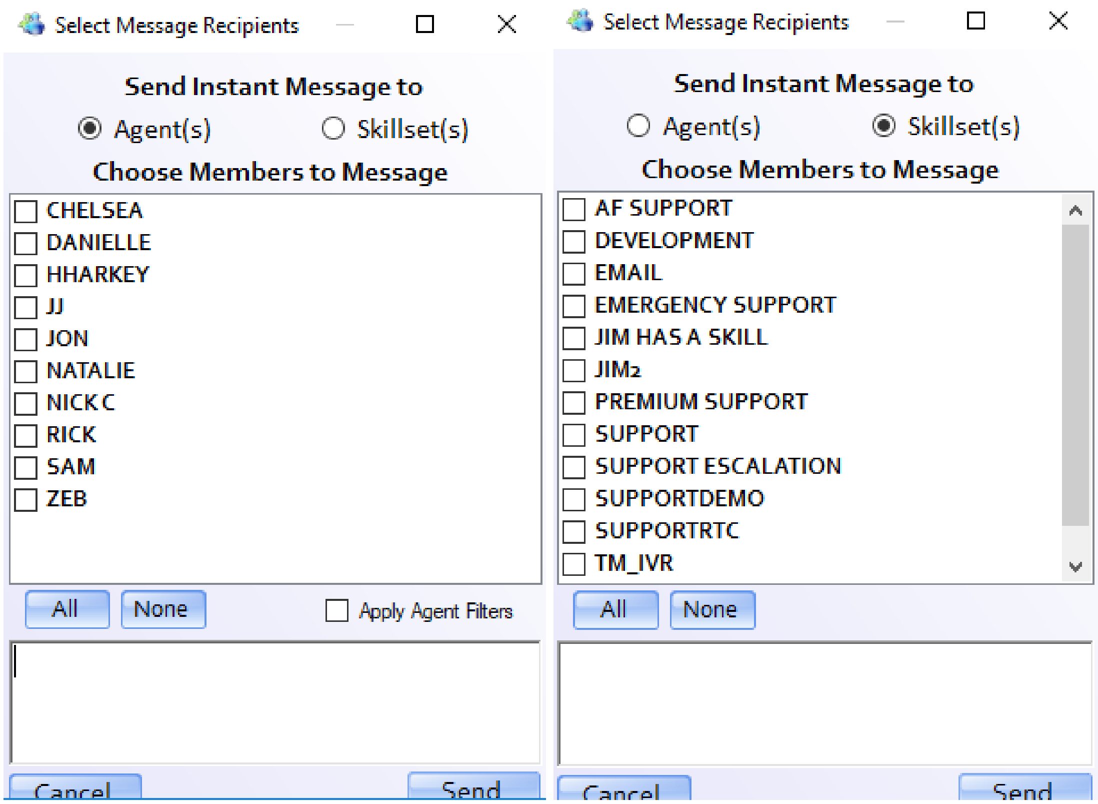


Figure 29. Agent(s) and Skillset Messaging Window

When "IM for All" is enabled, the Agent will see two bullet options: **Agent(s)** and **Skillset**. Under **Agent(s)**, the Agent may select one or several specified agents to whom they may send an IM message. Under **Skillset**, the Agent may choose to send an IM to ALL agents and supervisors with a selected skill.

Chat Function

The T-Metrics system also provides the option to use Chat Rooms. Unlike the IM feature, the Chat Rooms offer agents and supervisor to have a group discussion. If the site is using a chat server, and that server has been set in the ACD Agent Module's Instant Messaging Settings windows (see pages 18-19), then the Agent will see additional options when clicking on the **Messaging** key:

Figure 30. Messaging Window with Chat Room selection

The Agent may select **Join a Room**, and then select from any of the available public or private rooms currently in operation.

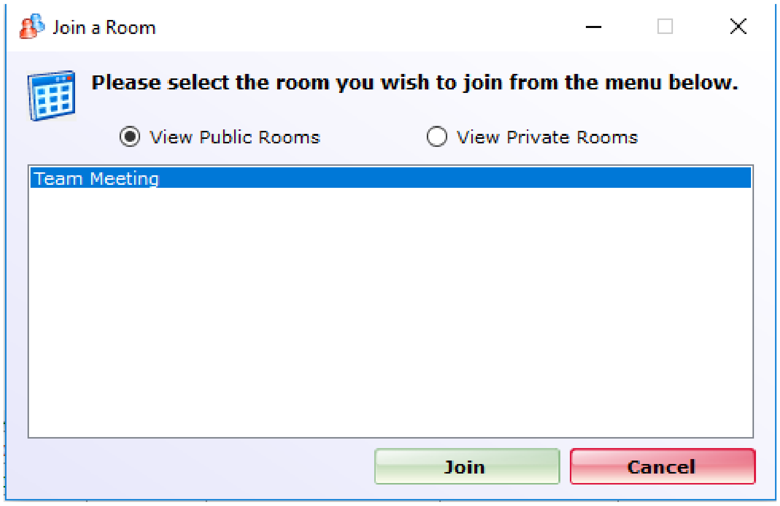


Figure 31. Chat Room Selection

If the Agent selects **Create a Room**, a set-up window will appear, prompting the Agent to provide a Chat Room Name, select whether the room will be moderated or unmoderated, whether the room will be public or private, which agents will be allowed to issue invitations to the chat. The set-up windows also provided the Agent with the option of setting an initial topic for the chat:

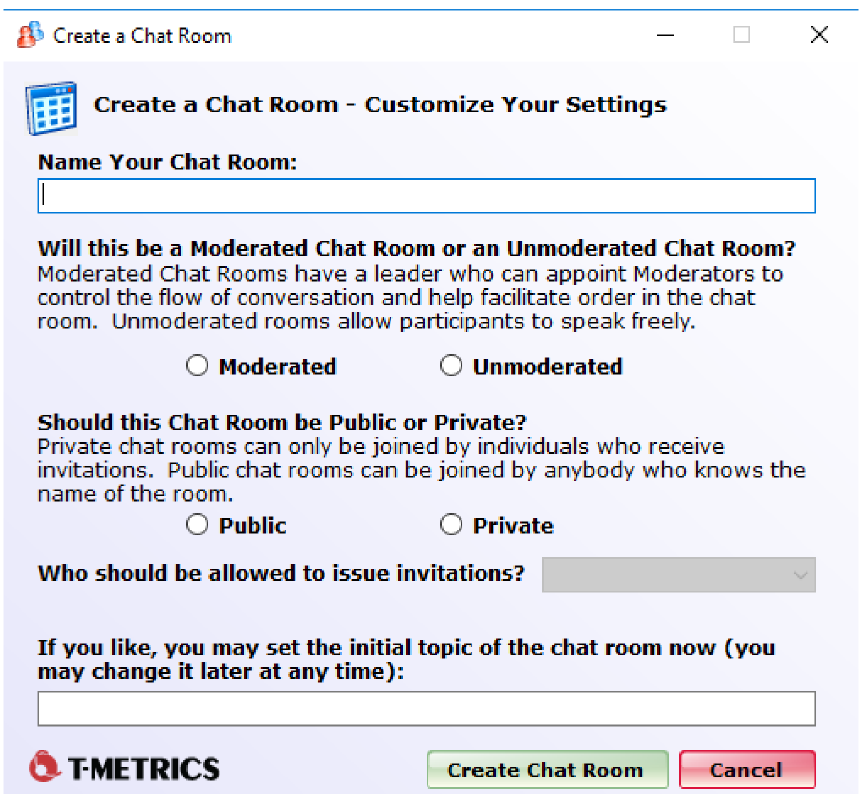


Figure 32. Chat Room Creation

T-Metrics Emailer

The T-Metrics Emailer provides the Agent with a singular communications solution. With the T-Metrics Emailer working in conjunction with the TM-2000 IP Platform, and the client's email server, Agents will receive all calls and emails by the same means. Rather than juggling their workload between the Agent Module and a separate email client, Agents will receive email messages from their Agent Module via pop-up window, when they are not taking calls or are otherwise **Available**.

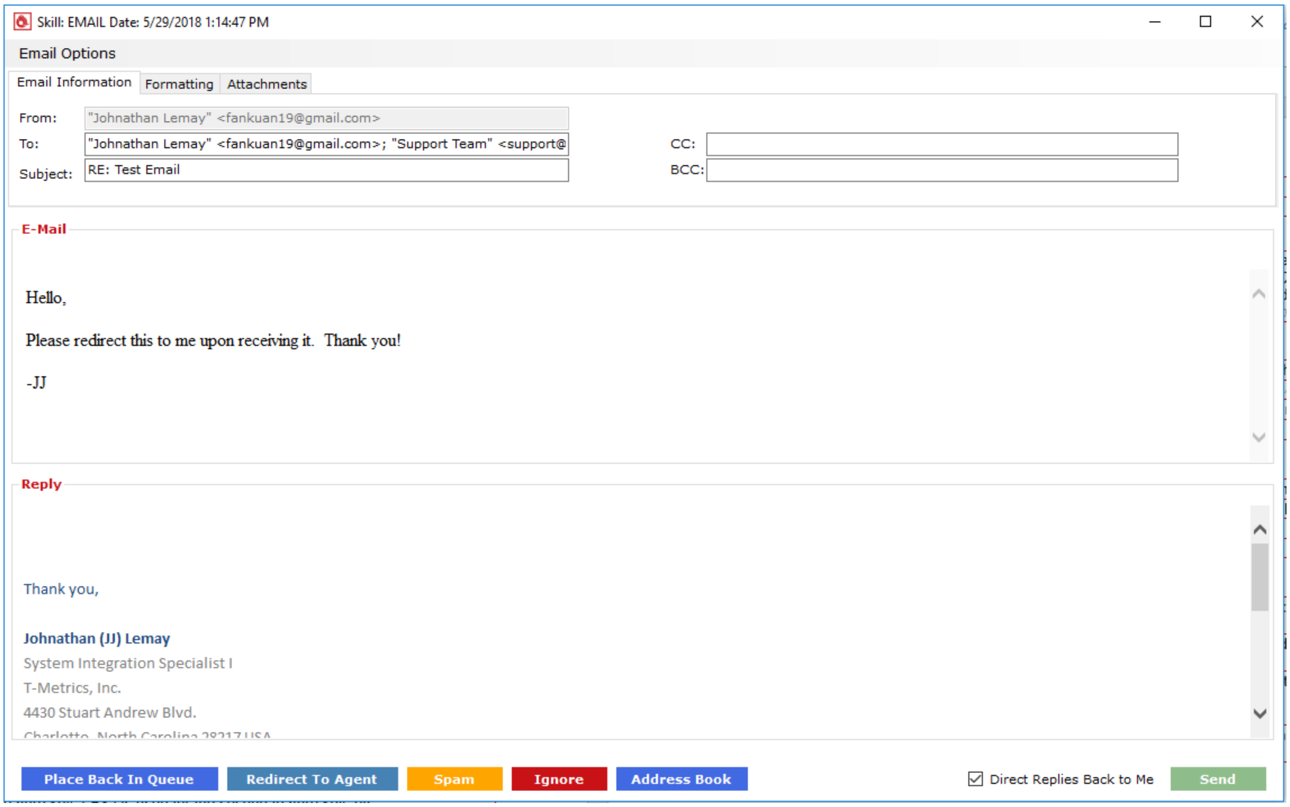
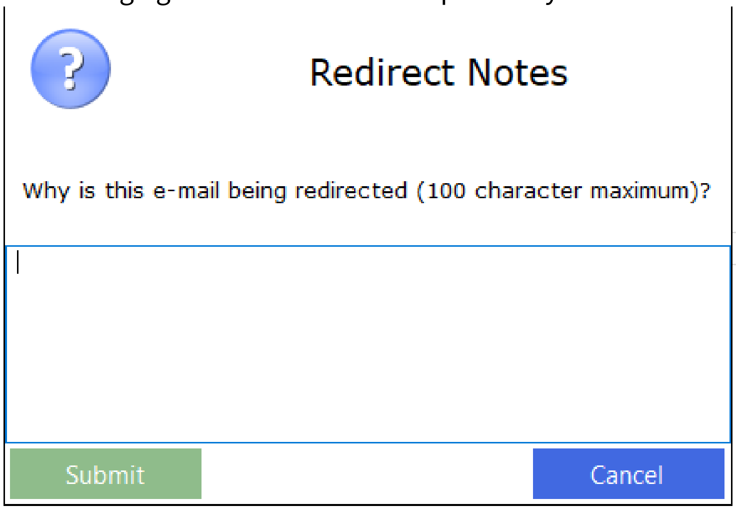


Figure 33. Emailer Window

The Emailer Window:

- Email Information: Provides basic information, such as the "To" and "From" address, carbon copy and blind carbon copy lists, email subject line and attachments.
- Email: The body of the delivered email.
- Reply: Where the Agent types their response.
- Formatting Tab: Allows the Agent to change basic text formatting in the email
- Attachments Tab: Allows the Agent to add/remove files to their response as attachments.
- Spam: Allows the Agent to flag the delivered email as spam.
- Ignore: If selected, the delivered email will be marked as handled, but a reply is not sent.
- Address Book: Opens your email program's address book. (Microsoft Outlook will need to be open and have focus to pop the address book.)
- Direct Replies Back to Me: When checked, replies to this email chain will be automatically redirected to the agent who handled the message, and not placed in the general queue.
- Send Reply: Sends the Agent's response.

- Place Back in Queue: Allows the Agent to place an email message back in queue for the next Available Agent (the redirecting Agent will be asked to explain why the email is being redirected):



- Redirect to Agent: Allows the Agent to redirect the email to another Agent logged into the ACD with the same Skill. The redirecting Agent will select an Agent to redirect to from a list of logged in Agents, then be prompted to explain why the email is being redirected as in the above screenshot:

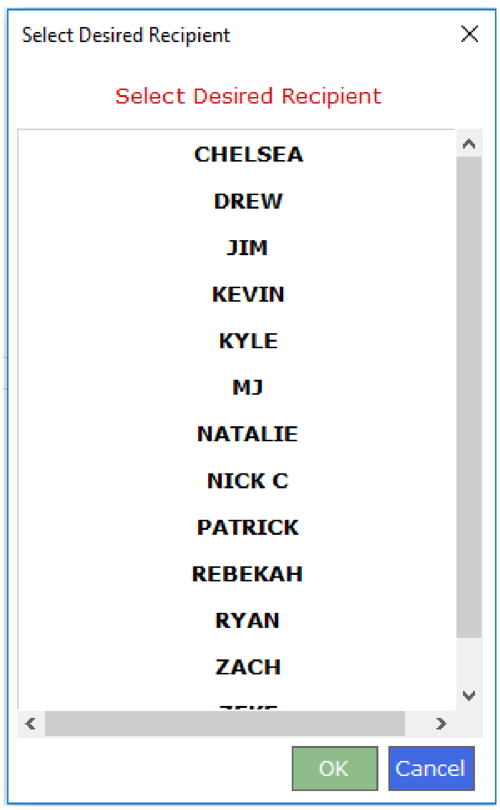
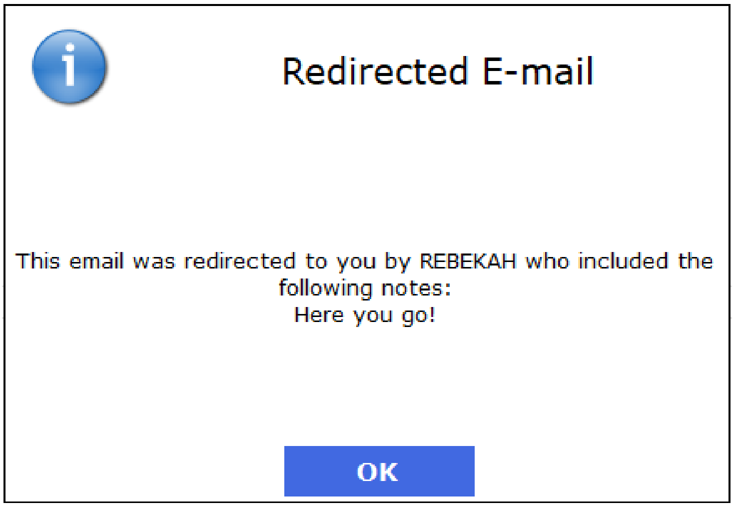


Figure 36a. Redirect Reason

- The Agent who receives the redirected email, will also receive a pop-up with the message the previous agent noted in the input form:



Alternate Media Channels

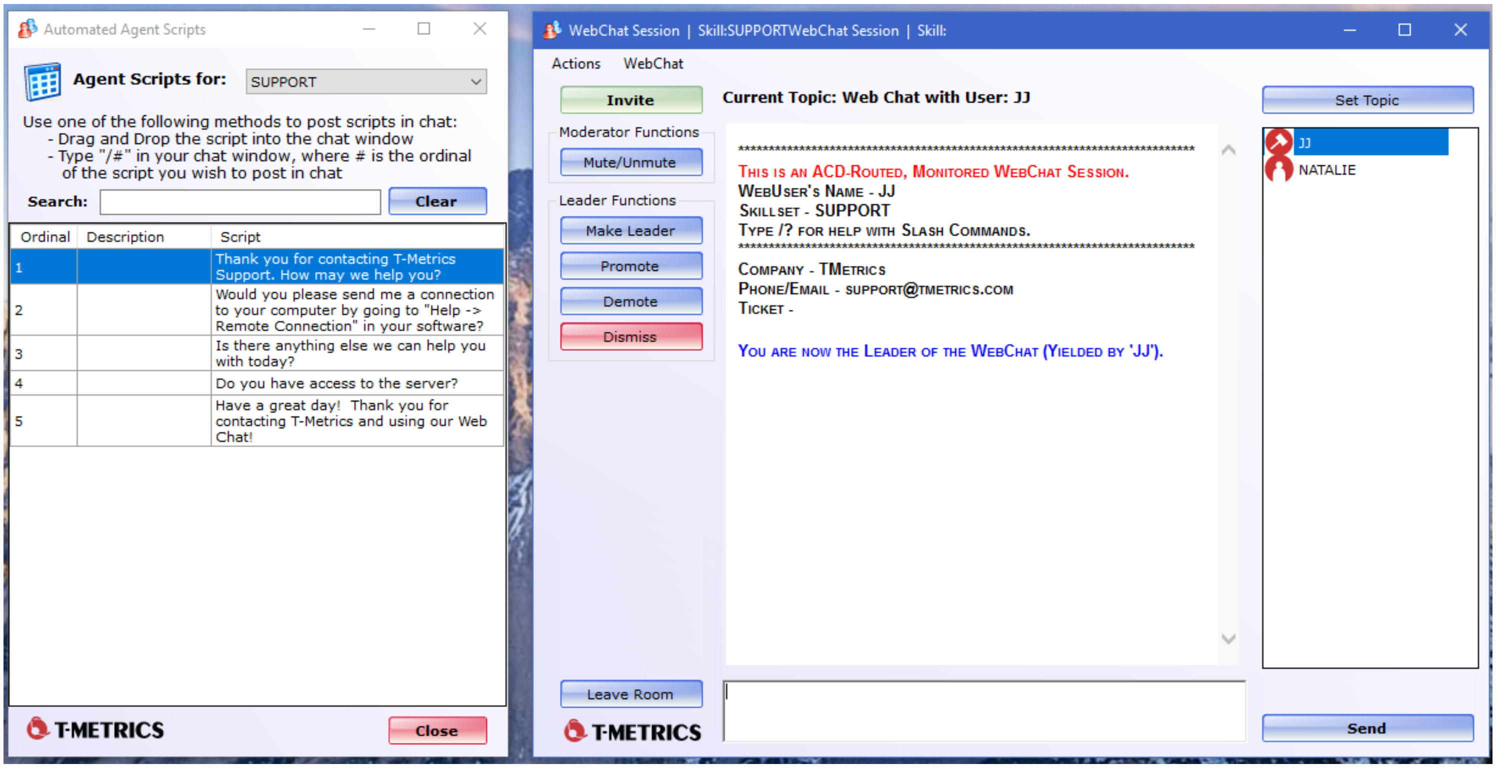
The T-Metrics ACD is also capable of interfacing with Twitter, SMS, and webchat objects in the same way that it interfaces with emails. Agents will receive a pop-up window with the contents of the tweet/text/chat, and the ability to:

- Respond to the user who initiated the object, such as a Twitter user or customer on the TMetrics.com[3] webpage
- Place the Object back in queue for another Agent
- Mark the source of the Object as Spam
- Ignore the Object, dismissing it from their Agent Module and readying them to receive another call or Object

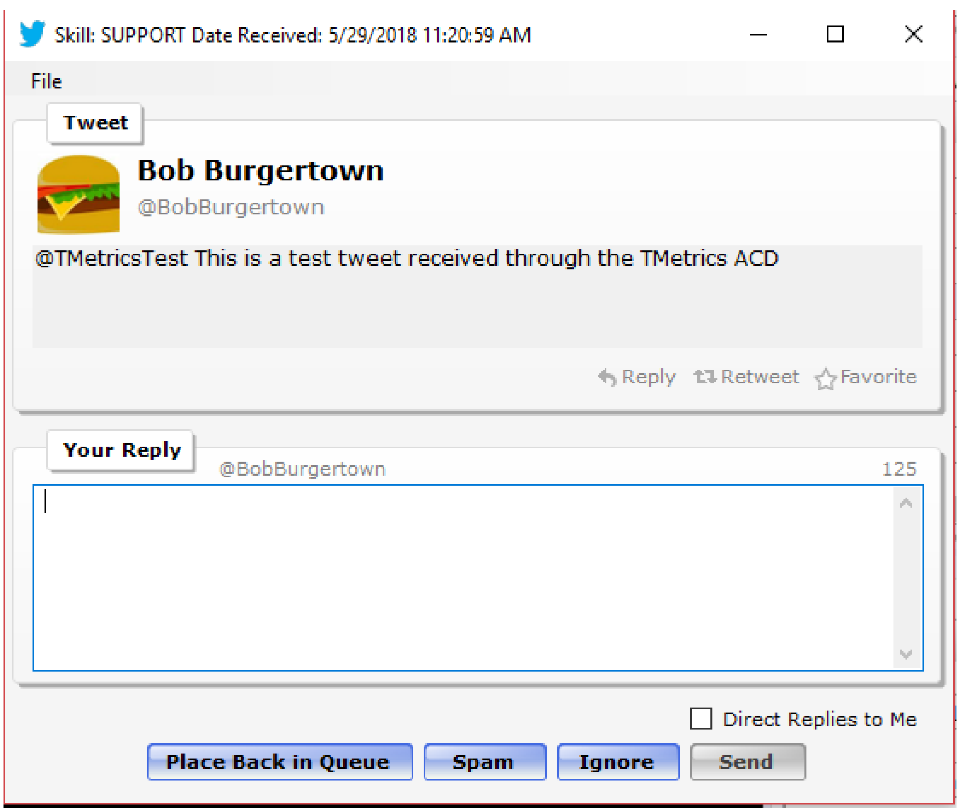
The Web Chat also has additional functionalities such as maintaining a list of commonly used Agent responses to drag and drop into the chat window, seen below on the left, as well as inviting other Agents to the chat.

3 http://TMetrics.com

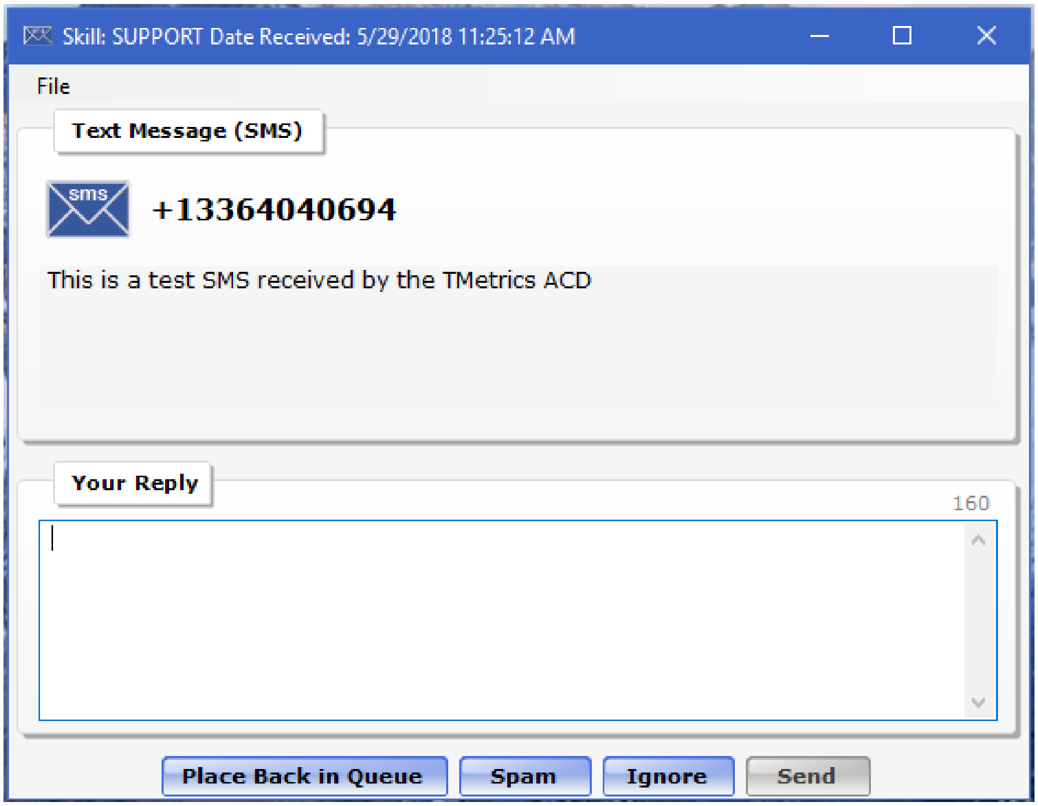
Webchat



Twitter



SMS



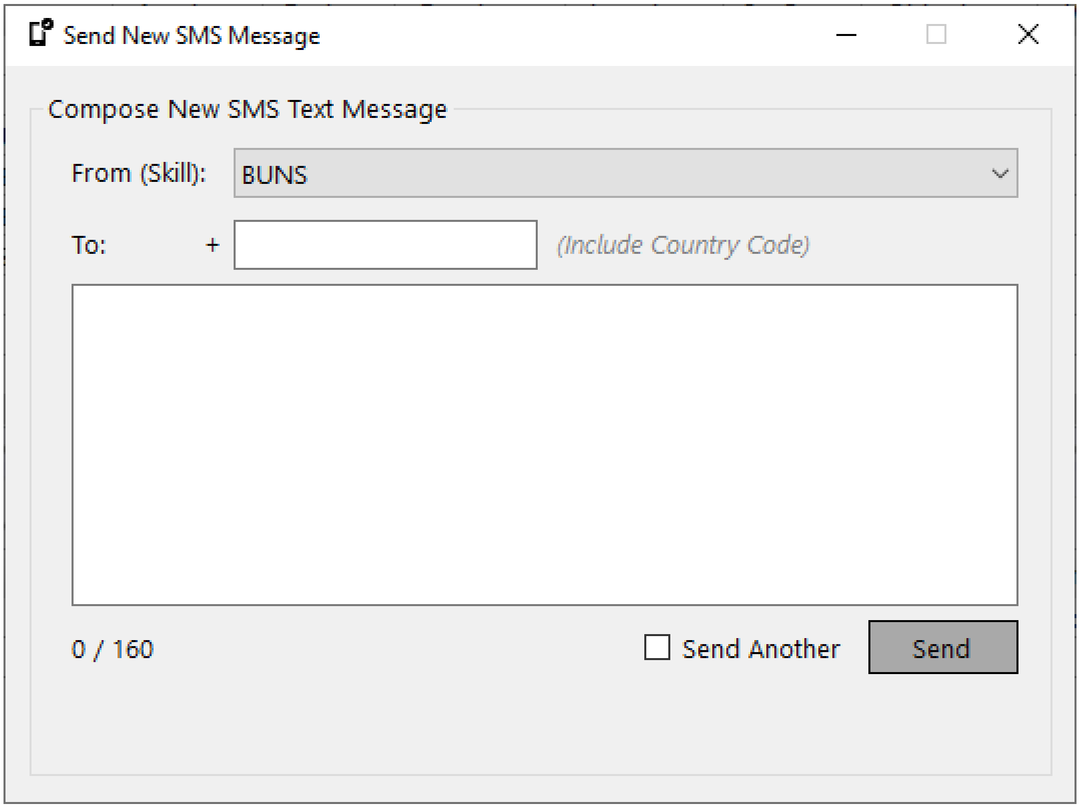
Outbound SMS

Agents can initiate SMS messages using the **File → Send New SMS** menu item in the Agent Module. To send an SMS, follow the directions below.

- Select the skill from which to send the message. A skill is tied to a phone number in the Multimedia Manager. Enter the phone number of the destination. Note that the country code needs to be included.
-
    - ex: If sending a text message to 704-525-5551, enter 17045255551.
    - Country codes can be found here - https://www.internationalcitizens.com/international-calling-codes/.
- Enter the message, up to 160 characters.
- Click Send.

    If multiple SMS messages are to be sent, click Send Another to keep the SMS window open after clicking Send.

    -


Send New SMS Message
Compose New SMS Text Message
From (Skill):
BUNS
To:
+
(Include Country Code)
0 / 160
Send Another
Send

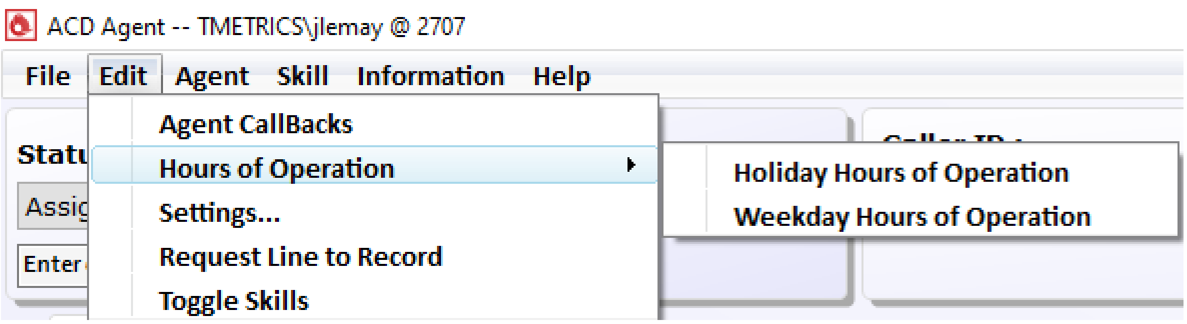
Administrator Manual - Hours of Operation

About

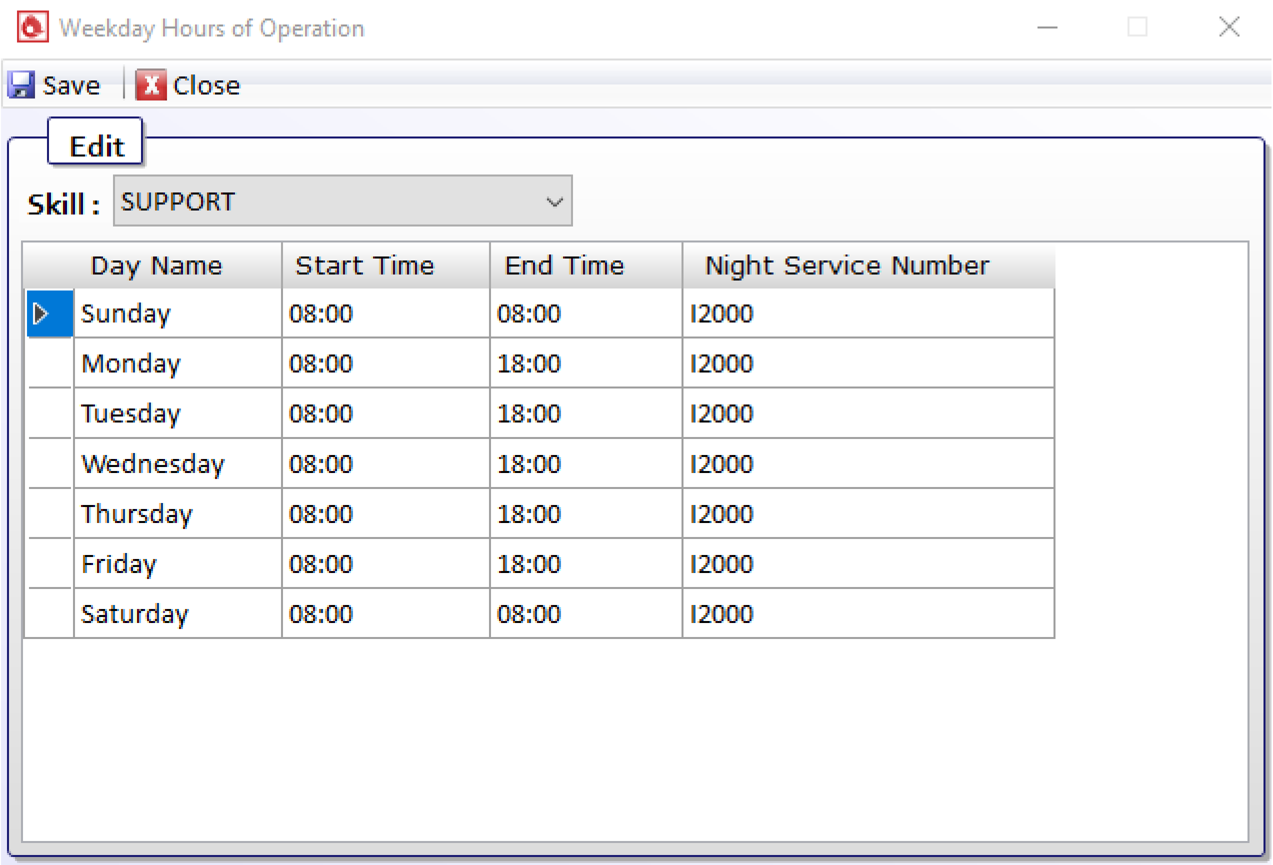
This document details how an Administrator in the Agent Module can set the Weekday Hours of Operation and the Holiday Hours of Operation through the Agent interface

Accessing the Interface

Both of these options are located under Edit > Hours of Operation, which is then broken into Weekday Hours and Holiday Hours:



Weekday Hours of Operation



	Day Name	Start Time	End Time	Night Service Number
▷	Sunday	08:00	08:00	I2000
	Monday	08:00	18:00	I2000
	Tuesday	08:00	18:00	I2000
	Wednesday	08:00	18:00	I2000
	Thursday	08:00	18:00	I2000
	Friday	08:00	18:00	I2000
	Saturday	08:00	08:00	I2000

Skill: Hours of operation are based on skills in the system, which are populated in the Skill drop-down of this window. A few things to note:

- This drop-down only contains skills that are assigned to your Agent Account
- Many menus use a generic skill ending in _IVR to check Hours of Operation as soon as a caller enters a menu
  - This is usually the most efficient skill to put Hours of Operation on, however hours applied to actual skill names will still be checked and routed accordingly. The key difference to note here is that _IVR skills are typically checked as soon as a caller enters the menu, whereas normal skills are checked right before sending the caller to queue. Functionally, this means that setting the hours on an _IVR skill will prevent callers from hearing any of the day menu, instead being sent immediately to the **Night Service Number** treatment, whereas setting them on a normal skill will let a caller go all the way through the day menu up until they press the option for that skill, where the hours check will then run and the caller will then be sent to the **Night Service Number** treatment.

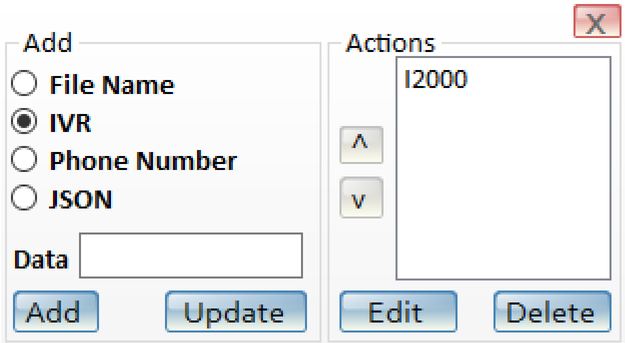
Day Name: Simply the day of the week that these hours should apply to.

Start Time: This is the time (in Military Time) that the menu should open. If we're closing the menu for the day, this should be set to the same exact time as the End Time.

End Time: This is the time (in Military Time) that the menu should close. If we're closing the menu for the day, this should be set to the same exact time as the Start Time.

> ⚠ Sometimes, these start and end times are confused for the times that the menu should be closed, especially when setting hours for early closure days or fully closing the menu. Remember that **Start Time** is always when the day menu opens up, and **End Time** is always when the day menu closes. If normal hours are 0800 - 1600, and we'd like to close early at 1200 for a day, the **Start Time** should be 0800 and the **End Time** should be 1200. If we're fully closing the menu, the **Start Time** and **End Time** should be the same, so that the day menu opens and closes in the same second, or is in other words never open to callers.

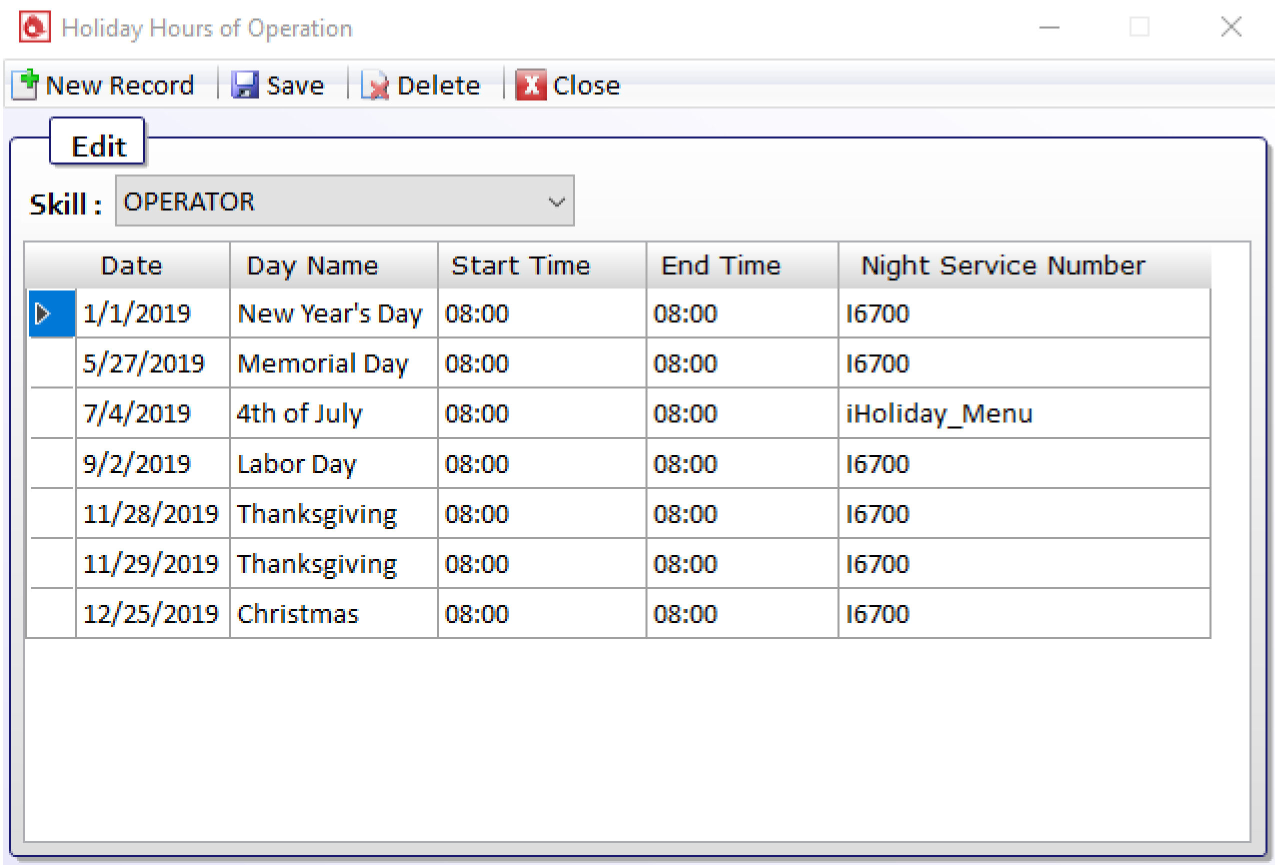
Night Service Number: This is the setting that determines where to send the caller when their call falls outside of the designated hours for a skill. Clicking this field opens the following window:



The File Name and JSON options are not typically used, so we will focus on IVR and Phone Number:

1. **IVR:** This stands for Interactive Voice Response, and means that we are sending the caller to another place in the phone menu, almost always the Night Menu. The **Data** field should be populated with the CallStarted number of the menu we'd like to send the caller to; if this number is not known, please reach out to T-Metrics support and we'll be happy to provide it. In the above screenshot, this number is 2000 (The "I" is being populated automatically because **IVR** has been selected).
2. **Phone Number:** With this option selected, callers who reach this skill check outside of the designated hours will be immediately transferred to whatever phone number is entered into the **Data** field. This can be used to navigate callers to voice mailboxes or other after-hours services.

Holiday Hours of Operation



Date	Day Name	Start Time	End Time	Night Service Number
1/1/2019	New Year's Day	08:00	08:00	I6700
5/27/2019	Memorial Day	08:00	08:00	I6700
7/4/2019	4th of July	08:00	08:00	iHoliday_Menu
9/2/2019	Labor Day	08:00	08:00	I6700
11/28/2019	Thanksgiving	08:00	08:00	I6700
11/29/2019	Thanksgiving	08:00	08:00	I6700
12/25/2019	Christmas	08:00	08:00	I6700

Skill: Hours of operation are based on skills in the system, which are populated in the Skill drop-down of this window. A few things to note:

- This drop-down only contains skills that are assigned to your Agent Account
- Many menus use a generic skill ending in _IVR to check Hours of Operation as soon as a caller enters a menu
    - This is usually the most efficient skill to put Hours of Operation on, however hours applied to actual skill names will still be checked and routed accordingly. The key difference to note here is that _IVR skills are typically checked as soon as a caller enters the menu, whereas normal skills are checked right before sending the caller to queue. Functionally, this means that setting the hours on an _IVR skill will prevent callers from hearing any of the day menu, instead being sent immediately to the **Night Service Number** treatment, whereas setting them on a normal skill will let a caller go all the way through the day menu up until they press the option for that skill, where the hours check will then run and the caller will then be sent to the **Night Service Number** treatment.

Date: This should be the exact date of the Holiday in question, in MM/DD/YYYY format.

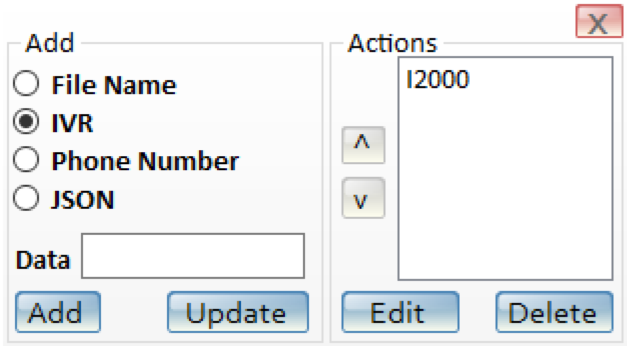
Day Name: The name of the holiday. This does not have functional application, but should be descriptive enough for administrator purposes.

Start Time: This is the time (in Military Time) that the menu should open. If we're closing the menu for the day, this should be set to the same exact time as the End Time.

End Time: This is the time (in Military Time) that the menu should close. If we're closing the menu for the day, this should be set to the same exact time as the Start Time.

⚠ Sometimes, these start and end times are confused for the times that the menu should be closed, especially when setting hours for early closure days or fully closing the menu. Remember that **Start Time** is always when the day menu opens up, and **End Time** is always when the day menu closes. If normal hours are 0800 - 1600, and we'd like to close early at 1200 for a day, the **Start Time** should be 0800 and the **End Time** should be 1200. If we're fully closing the menu, the **Start Time** and **End Time** should be the same, so that the day menu opens and closes in the same second, or is in other words never open to callers.

Night Service Number: This is the setting that determines where to send the caller when their call falls outside of the designated hours for a skill. Clicking this field opens the following window:



The File Name and JSON options are not typically used, so we will focus on IVR and Phone Number:

1. **IVR:** This stands for Interactive Voice Response, and means that we are sending the caller to another place in the phone menu, sometimes the Night Menu and other times a dedicated Holiday Menu. The **Data** field should be populated with the CallStarted number of the menu we'd like to send the caller to; if this number is not known, please reach out to T-Metrics support and we'll be happy to provide it. In the above screenshot, this number is 2000 (The "I" is being populated automatically because **IVR** has been selected).
2. **Phone Number:** With this option selected, callers who reach this skill check outside of the designated hours will be immediately transferred to whatever phone number is entered into the **Data** field. This can be used to navigate callers to voice mailboxes or other after-hours services.