About ........................................................................................................................................................................4
Pages.............................................................................................................................................................................4

Copyright .....................................................................................................................................................................4

Agent Manual - Usage .................................................................................................................................................5
About ..............................................................................................................................................................................5
Color Coding..................................................................................................................................................................5
Status Window ...............................................................................................................................................................6
Status Changes..............................................................................................................................................................7
Caller ID Window ..........................................................................................................................................................7
Skillsets Window ............................................................................................................................................................8
Expanded Version ..........................................................................................................................................................8
Agent Callbacks Window ..............................................................................................................................................10
Emergency Button ........................................................................................................................................................10
Messaging........................................................................................................................................................................11

Agent Manual - Menu Bar Items .................................................................................................................................14
About ..............................................................................................................................................................................14
File................................................................................................................................................................................14
Edit................................................................................................................................................................................14
Agent Callbacks: ..........................................................................................................................................................14
Settings Menu: ............................................................................................................................................................15
Toggle Skills: .................................................................................................................................................................22
  Toggle Skill Groups: ....................................................................................................................................................22
Information ....................................................................................................................................................................23
Help................................................................................................................................................................................23
On Board Diagnostics ...................................................................................................................................................23
Send Trouble Report......................................................................................................................................................25
Agent Module Quick Reference Guide ....................................................................................................................26
Agent Module Supervisor Guide ................................................................................................................................26
Agent Module User Guide ........................................................................................................................................26
TM-2000 Reports Package Guide ................................................................................................................................26
TM-2000 SSRS Reports Package Guide .....................................................................................................................26
Remote Connection and Remote Connection Custom ..............................................................................................27
View Patch Notes ..........................................................................................................................................................27
About Agent Module ..................................................................................................................................................27

Agent Manual - Customizable Screen Pop Interfaces .................................................................................................28
Agent Manual - MiniTAP ...............................................................................................................................................29
The MiniTAP .................................................................................................................................................. 29
Picture of the T-Metrics Agent MiniTAP & Connection Diagram ......................................................... 29
MiniTAP with Amplifier .............................................................................................................................. 29
MiniTAP without Amplifier ......................................................................................................................... 29

Agent Manual - Non-Call & ACD Objects ................................................................................................. 30
Customer Callback Messages .................................................................................................................. 30
Completing the Customer Message Information ...................................................................................... 30
Completing the Customer Message Information ...................................................................................... 31
Closing the Customer Message Window without Call Resolution Selected ............................................. 31
Agent Messaging ........................................................................................................................................ 31
Chat Function ............................................................................................................................................ 32
T-Metrics Emailer ..................................................................................................................................... 35
Alternate Media Channels .......................................................................................................................... 37
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

- Agent Manual - Usage (see page 5)
- Agent Manual - Menu Bar Items (see page 14)
- Agent Manual - Customizable Screen Pop Interfaces (see page 28)
- Agent Manual - MiniTAP (see page 29)
- Agent Manual - Non-Call & ACD Objects (see page 30)

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If you have any questions or comments, please contact:

T-Metrics, Inc.
Customer Service
4430 Stuart Andrew Boulevard
Charlotte, North Carolina 28217 USA
Phone: +(1) 704.525.5551
Fax: +(1) 704.525.4886
EMail: sales@tmetrics.com ¹
Or visit our Web site at:
www.tmetrics.com ²

¹ mailto:sales@tmetrics.com
² http://www.tmetrics.com/
Agent Manual - Usage

About

Below you will find 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.
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** column 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, also called Callback Messages, each Skillset has waiting. 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.

### Expanded Version

Open the Expanded View screen by pressing this button: 

![button]
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.
- **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.
- **Aban Avg (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
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.
Monday, January 28, 2019

JJ

Are you available to assist a caller?

RICK

Yes. What seems to be the issue they're having?
The Supervisor receives the message and can write a response back to the Agent.
Agent 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 Email Time, From Address, 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 above.
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/Console – A setting used in conjunction with a softphone or console 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**

You can set custom time limits for position statuses and be notified when you cross them.

Choose a status and set a time limit using the box on the right (0 indicates no time limit):

- **Initial Logon**

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

**Audible Alerts**

- Play an Audible Alert When a New Bubble Form Appears
  - unless the bubble is for an Instant Message
  - unless the bubble is for a Status Change
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 Forms 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.
**Customized Agent Grid Filter**

The Agent Grid can be filtered on a specific skill by selecting the "Filter" checkbox next to the skill name. However, if desired, the Agent Grid can also be made to show only certain agents specified below by name.

- **Only Show the Agents Specified Below in the Agent Grid**

<table>
<thead>
<tr>
<th>All Available Agents</th>
<th>Selected Agents to Show</th>
</tr>
</thead>
<tbody>
<tr>
<td>AH SENTINEL</td>
<td>GARRETT</td>
</tr>
<tr>
<td>ATSNOUTS</td>
<td>JEN</td>
</tr>
<tr>
<td>BILL</td>
<td>KEVIN</td>
</tr>
<tr>
<td>BOO WILLIAMS LL</td>
<td>KYLE</td>
</tr>
<tr>
<td>C-3PO</td>
<td>MEGAN</td>
</tr>
<tr>
<td>CASEY</td>
<td>REBEKAH</td>
</tr>
<tr>
<td>CASEYMOBILE</td>
<td>RICK</td>
</tr>
<tr>
<td>CEDRICK HESSELBEIN</td>
<td>ROBBIE</td>
</tr>
<tr>
<td>CHRISWEB</td>
<td></td>
</tr>
<tr>
<td>CONFROOM\ADMINISTRATOR</td>
<td></td>
</tr>
<tr>
<td>DANIELLE</td>
<td></td>
</tr>
</tbody>
</table>

List Updated at 03:05 PM

**Customized Skill Grid Filter**

The Skill Grid can be filtered on a specific skill by selecting the "Filter" checkbox next to the skill name. However, if desired, the Skill Grid can also be made to show only certain skills specified below by name.

- **Only Show the Skills Specified Below in the Skill Grid**

<table>
<thead>
<tr>
<th>All Available Skills</th>
<th>Selected Skills to Show</th>
</tr>
</thead>
<tbody>
<tr>
<td>EMAIL</td>
<td></td>
</tr>
<tr>
<td>Emergency Support</td>
<td></td>
</tr>
<tr>
<td>JENTEST</td>
<td></td>
</tr>
<tr>
<td>PATRICK</td>
<td></td>
</tr>
<tr>
<td>Premium Support</td>
<td></td>
</tr>
<tr>
<td>SUPPORT</td>
<td></td>
</tr>
<tr>
<td>TESTSKILL</td>
<td></td>
</tr>
<tr>
<td>TM_IVR</td>
<td></td>
</tr>
</tbody>
</table>

**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.

Disable Recordings - No calls Recordings are made
Record All Calls - All Calls are automatically recorded.
Only Record on Demand - Automatic call recordings are disabled and the user will be presented with an option in the File Menu to save an entire call recording (even after the call has begun) either during the call or until the next call.
Upload Path - The location of a network share to which call recordings are uploaded after completion (Local, Mapped, and UNC paths are acceptable).

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)

- **WebRTC URL**: https://webchat.tmetrics.com/webchat/rtc/agentchat

  Show Settings For:
  - **When a chat room goes without user interaction for...**
  - 5 minutes:
  - Bring the Chat Room Window to the Foreground (Pop to Front)
  - Flash the Chat Room Window in the Taskbar

  **Note**: These settings apply to both ACD routed chat rooms and user created chat rooms.

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.
Global Hotkeys

Global Hotkeys allow you to assign keypresses to certain actions within the Agent Module. These keypresses will be detected even if the Agent Module is not in the foreground in Windows at the time of the keypress. This allows you to perform any of the actions below without having to switch windows to the Agent Module first.

Hotkeys require the use of modifiers (Shift, Alt, and Ctrl) to function. Commonly accessed keys, like letters and numbers, will require two modifiers while less commonly accessed keys, like the functions keys and Pause|Break, require only one modifier. For example:

**VALID:** Ctrl-Shift-F, Alt-F12  **INVALID:** Ctrl-C, F1

To assign a hotkey, simply click on the row for the action you wish to assign below. The row will turn red - then simply press the key combination you wish to use as the hotkey. To delete a hotkey, click on the row and then press DELETE key.

<table>
<thead>
<tr>
<th>Action</th>
<th>Hotkey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change to Available Position Status</td>
<td>(none)</td>
</tr>
<tr>
<td>Change Position Status</td>
<td>(none)</td>
</tr>
<tr>
<td>Change Status Details</td>
<td>(none)</td>
</tr>
<tr>
<td>Change to First Unavailable Status</td>
<td>(none)</td>
</tr>
<tr>
<td>Log Off</td>
<td>(none)</td>
</tr>
</tbody>
</table>

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

**Region and Language**

The Agent Module is available in a select number of language and culture settings. Select from the options below to best fit your preferences.

- English - (United States)

**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.
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.

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.

![Schedule Diagnostics](image)

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.
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.
Agent 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.

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.
Agent Manual - Non-Call & ACD Objects

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:

![Customer Message Information Window]

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 \(x\) 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:
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 supervisors 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:
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.

![T-Metrics Emailer Window](image)

**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 Notes](image)

Why is this e-mail being redirected (100 character maximum)?

Submit  Cancel

• 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:

![Select Desired Recipient](image)

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:

![Redirected E-mail](image)

**Redirected E-mail**

This email was redirected to you by REBEKAH who included the following notes:
Here you go!

![OK button](image)

**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 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.

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3 [http://TMetrics.com](http://TMetrics.com)
Webchat

Twitter
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/](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.