Service Center Manager
SCM v19

Supervisor Guide

Dec 2019

Document version 19b

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Document History

Date	Author	Version	Summary
June 2015	Murray Lum	2a	SCM 2.1 enhancements – agent reports, agent Jabber phone compatibility, Jabber reason codes for "not-ready", auto-start supervisor specific wallboard.
July 2015	Murray Lum	2b	Corrections, additional details for wallboards, and reports including troubleshooting
June 2017	Murray Lum	3.0a	SCM 3 enhancements – look and feel updated, IP phones can make calls and stay in the queue. User can be set to have recording suppressed. Queue reports are agent focussed. Timings based on first person to answer calls, can view call legs for each call.
July 2017	Murray Lum	3.0b	Minor edits to info about recording profiles and reports. Added thresholds for queues.
Nov 2019	Murray Lum	19a	Revised images. New reports. Supervisors can now add agents to themselves like an Administrator. Scheduled reports. Monitor and whisper controls. Recordings now on a single tab.
Dec 2019	Murray Lum	19b	Expanded glossary, new feature to change agent status.

Related Documents

Document	Description
SCM Administration Guide	Guide to add/remove Queues, Supervisors and Agents. Set "not ready" reason codes, update screen logos.
SCM Design Guide	Guide to assist with the planning and implementation of and SCM solution

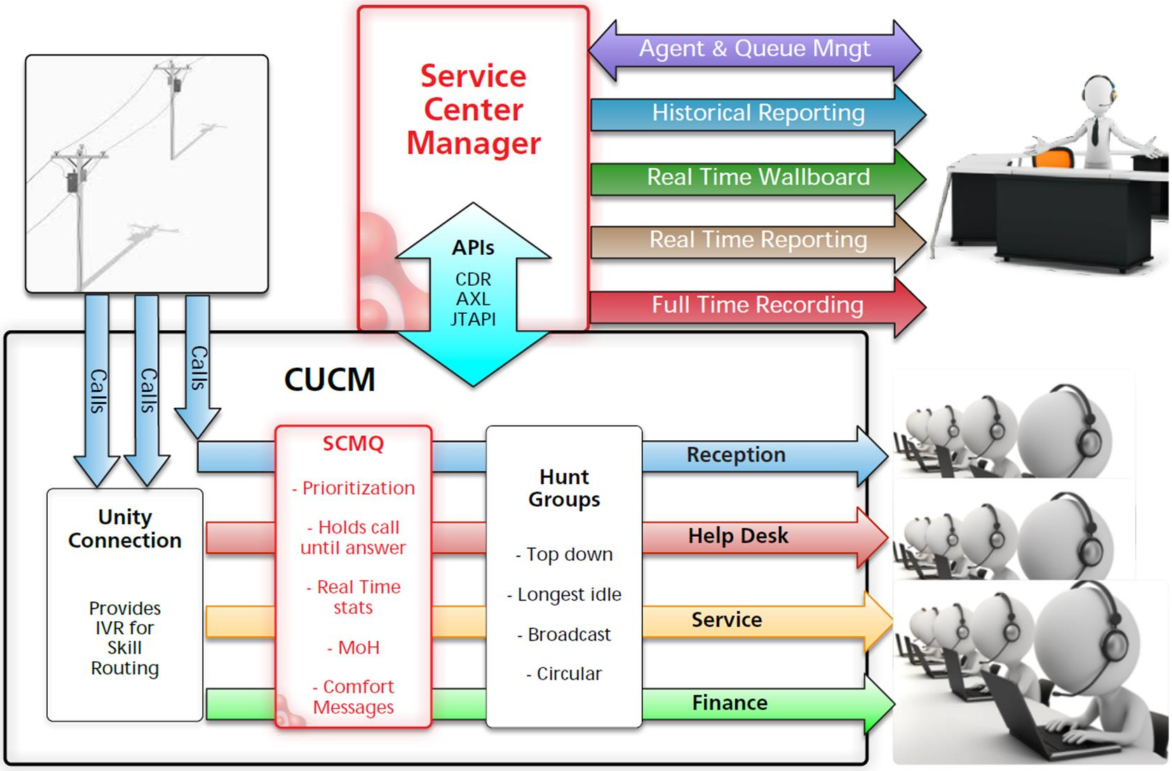
1 Purpose of this guide

This guide is a reference for Supervisors using the Atea Service Center Manager (SCM). This document covers:

- Overview of the SCM features
- Overview of the SCM Administrator role and SCM Supervisor roles
- SCM Supervisor tasks
    - Managing Queues and Agents
    - Real-time and historical reporting
    - Listening to recordings
- Agent ready / not ready operation

2 Service Center Manager (SCM) Overview

The SCM works with your Cisco UCM phone system to provide additional features for a small contact centre.



Inbound calls are queued until the SCM finds an agent to handle the call using a hunt group. The SCMQ holds the call until the agent answers. Whilst the call is being held, the caller can be played comfort messages and music, and calls in some queues can be prioritised over others. The SCM provides call statistics directly, without the need to poll the CUCM.

The key functions of the SCM are:

Call queue control: Controlling the CUCM to queue and treat calls, then deliver them to an agent that has answered the phone.

Administration: Administrators set up SCM users, Supervisors and hunt group Pilots. This includes items like alias display names, thresholds and Grade of Service (GOS) settings.

Queue and agent management: Supervisors use a dashboard to add or remove their agents to any queues the supervisor has access to.

Realtime Reporting: Live statistics are presented via Wallboards, the Supervisor Dashboard and the Jabber phone. These are web pages that display information about one or more queues, and update in close to real time. Atea wallboards also highlight when thresholds are exceeded. The thresholds are configurable for statistics like:

- Calls Waiting
- Longest Wait
- Calls Active
- Calls in-progress
- Agents Available

Historical Reporting: The Supervisor Dashboard has reports for the supervisor's queues and agents. These include calling statistics, individual call details and activity information.

The Queue Reports have call statistics like:

- Call volumes – queue calls, handled, abandoned, abandoned early
- Grade of Service (GOS) met and abandonment rate
- Wait time – average, maximum, total (aggregate)
- Average call time, handle time, after call work

The Agent Reports include their outgoing calls. There is information like:

- Call details, duration, queue, wrap up time
- Call volumes

For each agent, there are individual reports showing all their calls.

For each call, you can view the individual call legs that make up the call.

Full-Time Call Recording: Supervisors can access recordings of their agent's calls. You can listen to the recordings online from your browser or download the file.

Monitoring calls live – plus whisper or barge: Supervisors can listen to calls in progress from their web-browser dashboard. This is transparent to both parties in the call. There is also an optional feature to talk to the agent only (whisper) or join the call (barge).

3 SCM Roles

There are three main roles.

SCM Administrator – set up and control the SCM

The administrator manages the operation of the SCM. They can:

- Add and remove Cisco hunt pilot numbers that match the SCM queues
- Add users to the SCM (users will be agents or supervisors)
- Assign who will be supervisors
- Assign supervisors to queues
- Assign agents to supervisors
- Setup friendly display names (aliases) for queues and users.

The administrator can also adjust some SCM system settings including:

- Adding a logo to the supervisor page display
- Whether the abandonment rate is visible
- Create the default list of reason codes when agent goes "not-ready"
- Access to the wallboard administration (separate account).

The SCM Administrator may also be a supervisor.

The SCM administrator uses a browser to access the SCM admin console screen, and optionally the Wallboard administration screen (using a separate account).

Some organisations use their ICT service desk to fulfil the SCM administration function.

Supervisor – Manage queues and agents

Supervisors manage the queues, agents and calls. Each supervisor may have several agent queues and may add or remove agents to each queue.

The supervisor gets:

- A dashboard with all their queues and agents, including real-time status and a place to manage the assignment of agents
- The ability to alter the status of an agent between ready and not ready
- The ability to listen in on queue phone calls (and if configured, either talk to the agent or join the conversation using the whisper or barge feature)
- A real-time wall board to provide queue and statistical performance
- Historical reports of statistical information and individual calls
- Audio playback of agent recordings
- Activity logs for agents

Agents – answer calls

Agents answer the queue calls delivered to their phones. Agents indicate if they are ready to receive calls using their Jabber phone or a button on their desk phone.

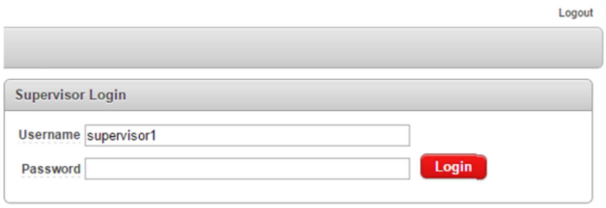
4 Getting started – Logging In

Use a web browser to access the SCM supervisor dashboard. There will be a link on your intranet, or it may look like this:

https://[SCM_ServerName]/apex/f?p=501

Web browser *– Use Chrome or Edge. Some features may not work in other browsers.*

Your username and password will match your phone system (CUCM) details. This may be the same as your LAN account if the phone system is linked to the Active Directory.



Before you begin

Before using the Supervisor Dashboard, you'll need the ***SCM administrator*** *to set you up as a supervisor. They must also assign queues and agents to you.*

5 Supervisor Dashboard – Main Screen

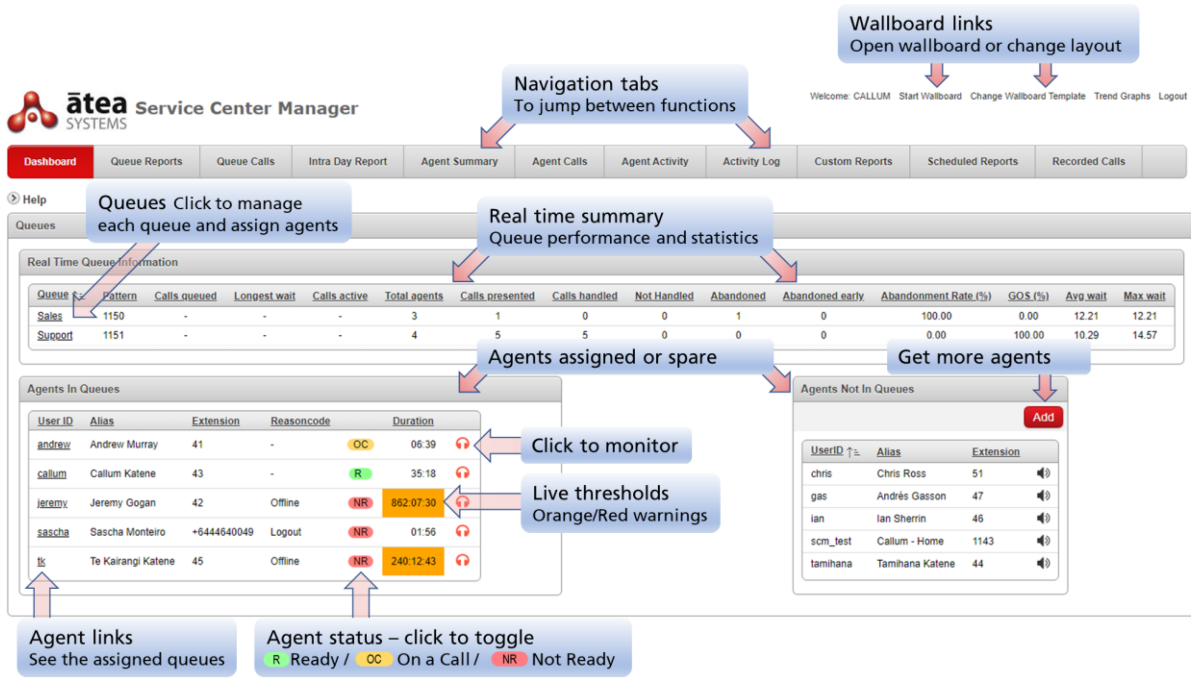
This dashboard is where you manage queues, agents and access the SCM features.

The dashboard shows all the queues and agents assigned to you.

The main parts of the dashboard are:

- **Real time Queue Information** – a snapshot of each agent queue showing how busy it is
- **Agents in queues** – see at a glance who is already assigned
- **Agent status** – see which agents are on calls or not ready, and can force change of state
- **Agents not in queues** – see the agents currently unassigned
- **Navigation tabs** – to access other sections of the SCM tool
- **Wallboard links** – starts your wallboard in a separate window

> *Note:* ***If you are missing some queues,*** *ask the SCM administrator to add these for you using the SCM Admin Console. You may add agents yourself.*



Additional information

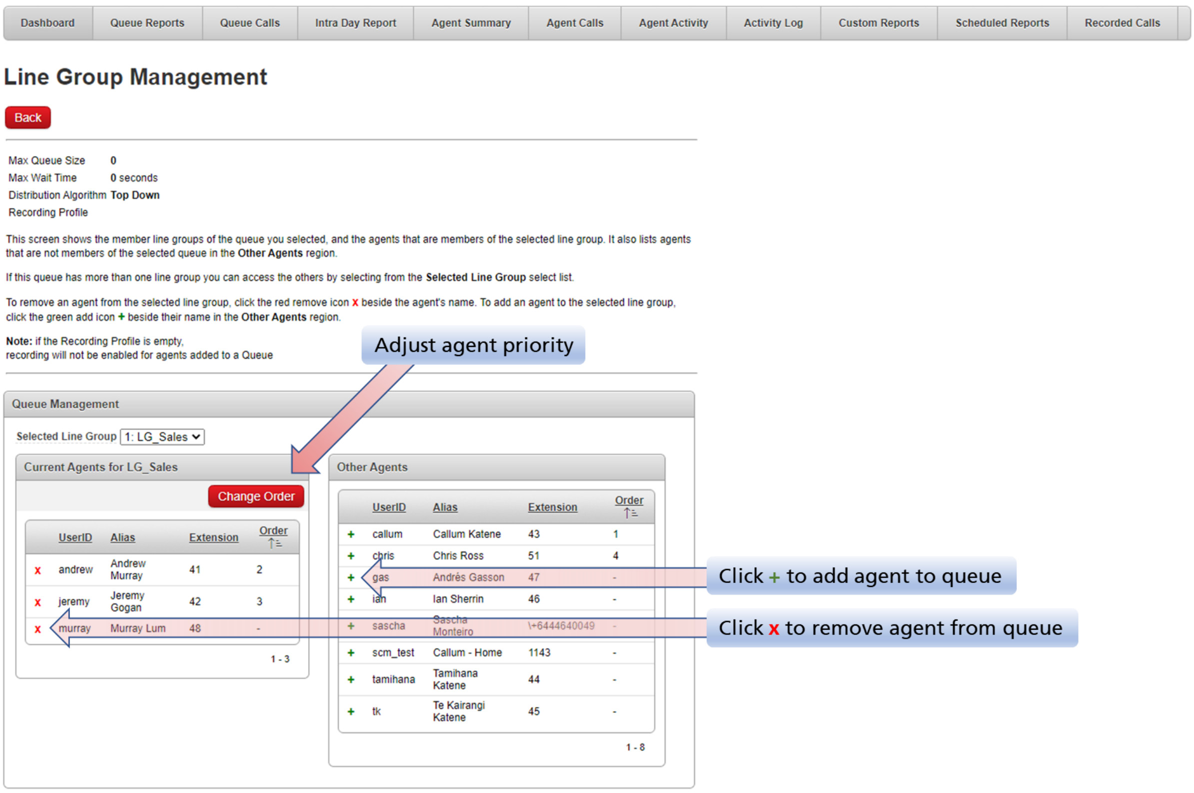
Agents Available – this turns **orange** if only one agent is available or **red** if there are none.

Calls queued – this turns **orange** if one call is queued or **red** if there are more.

Column headings – click on any <u>**underlined**</u> column heading to sort the table.

5.1 Add or Remove Agents from a Queue – queue management

Click the link for the **queue** from the supervisor dashboard. This opens an agent queue management window.



Max queue size / Max wait time / Distribution Algorithm – these are configured by your phone system administrator. They appear here for your information.

Selected line group – this is the line group you are configuring. If there are several for this hunt group queue, be sure to configure each one.

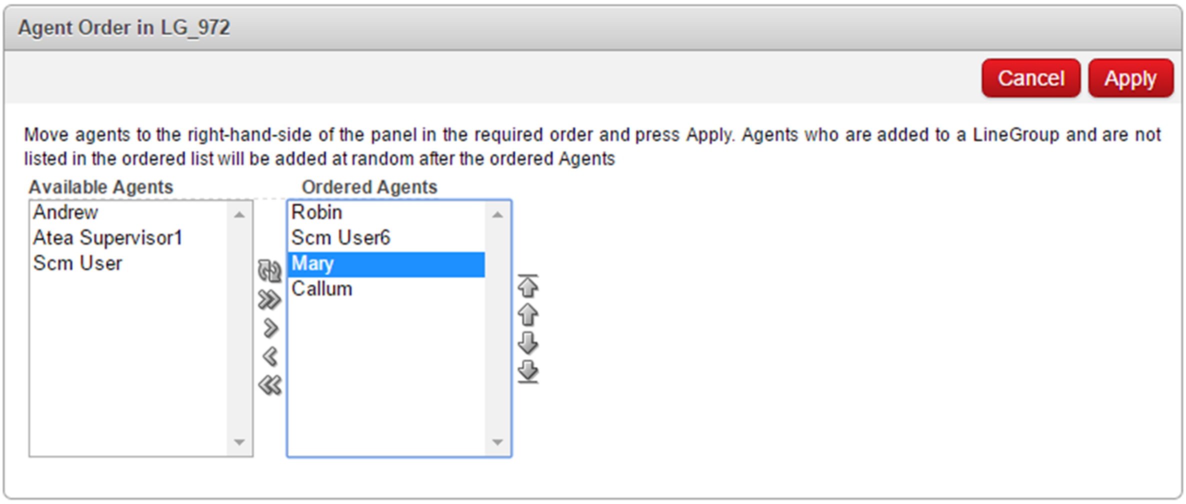
To add an agent – click the green **+** next to the agent name in the Other Agents list

To remove an agent – click the red **x** next to the agent name in the Current Agents list

If you are missing an agent from your list, check to see if they are on a different line group. You can add them to the SCM yourself from the Supervisor dashboard using the Add button. Alternatively, the SCM administrator can add agents for you.

To prioritise the agents – click the **Change Order** button to open a new window. (This button only appears if the queue algorithm is set to **top-down** or **circular**. You can't adjust the order if the distribution algorithm is longest idle or broadcast.)

Agents in the ordered list will get calls in preference to any other available agents.



- Add the high priority agents to the **Ordered Agents** list. They will always receive calls first, based on the algorithm and their position in the list. (For example, with top-down, Mary will get calls only when the two users above her are unavailable or on calls.)
- Anyone in the **Available Agents** list will only receive calls if the Ordered Agents are unavailable.

To rearrange the agents, select the agent and use the arrows ">" to move them to the **Ordered Agents** box. Now select an agent in this box and use the up and down arrows to put the agents in the order you desire.

When you are done, click the **Apply** button to save the changes otherwise click **Cancel**, to return to the queue management screen.

When you finish managing the queue, close the window to return to the Supervisor dashboard.

Additional information

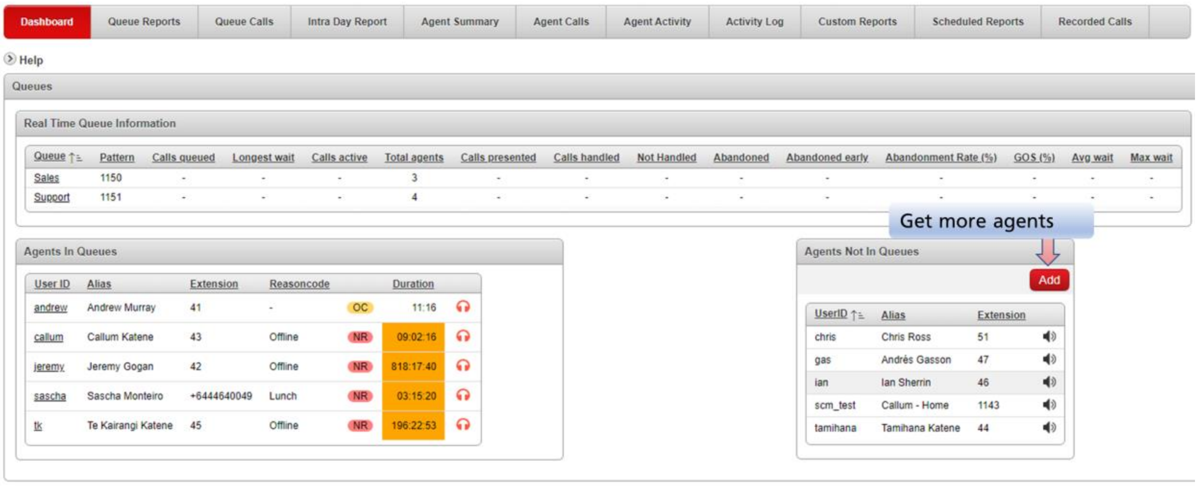
An agent queue is a hunt group or hunt pilot on the Cisco phone system. These represent the collection of agents that the calls are delivered to. Often a hunt group has just a single line group, but your phone system may be configured with several line groups. If there are several of these "Member line groups", you can arrange the agents within each one or otherwise ask for the configuration to be simplified.

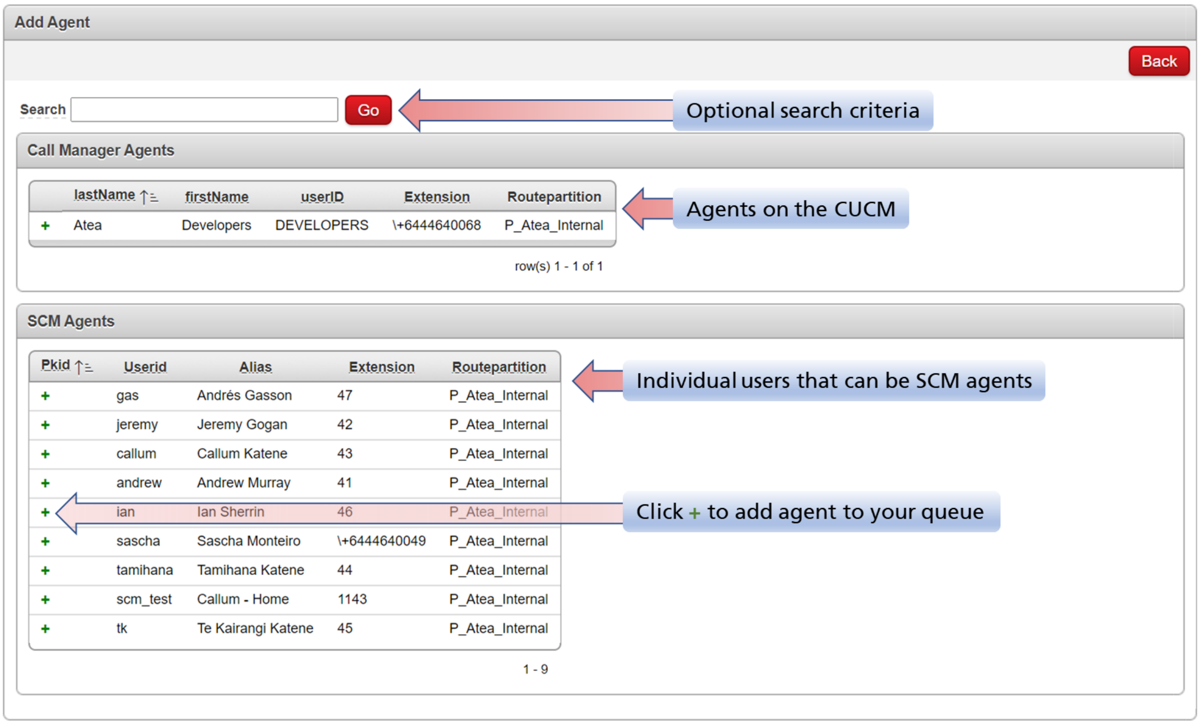
These queues may be different from the SCM inbound queue. The SCM may be configured with several inbound queues pointing to a single hunt group.

5.2 Add agents

As a supervisor, you can add any agents that are you are missing using the **Supervisor dashboard**.

Click the **Add** button in the list of Agents not in queues.



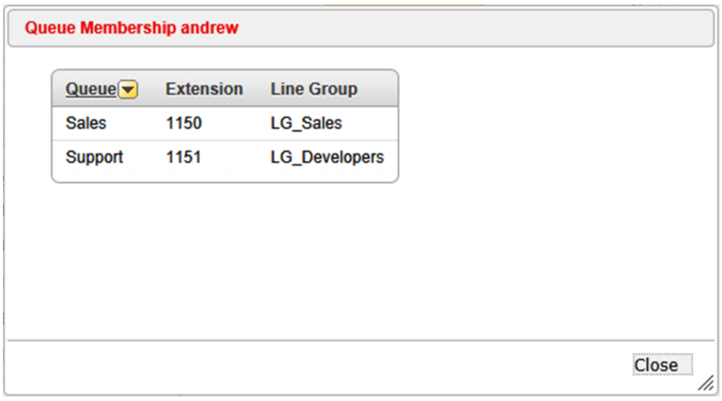


Find the agent you'd like to add and click the green + to add them to your list.

Once you have added them, you can adjust which queues they belong to.

5.3 Check queues assigned to an agent

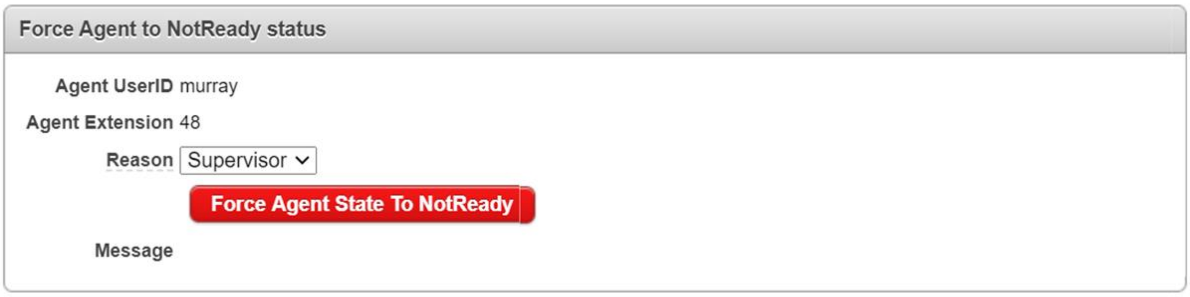
To see the queues assigned to an agent, click the agent **UserID** on the **Supervisor dashboard**. To adjust the assignment, close the window and click on the queue on the dashboard.



5.4 Change agent status – ready and not ready

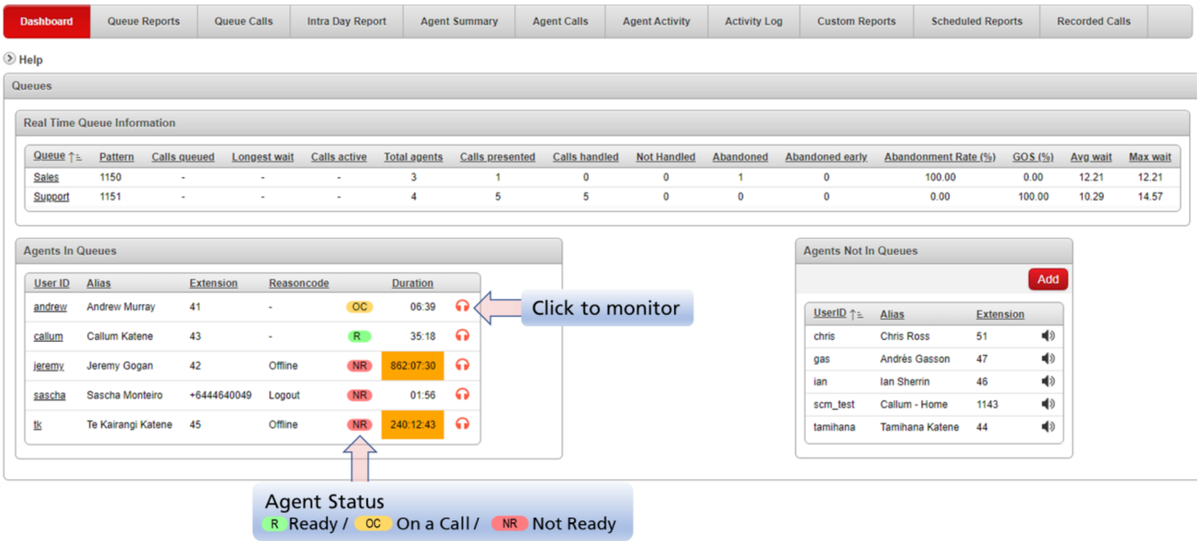
The dashboard shows whether an agent is ready (green), on a call (amber) or not ready (red) using coloured icons.

You can force a change of state on an agent by clicking on the icon. This opens a window to allowing you to confirm that you want to toggle their status between ready or not ready.

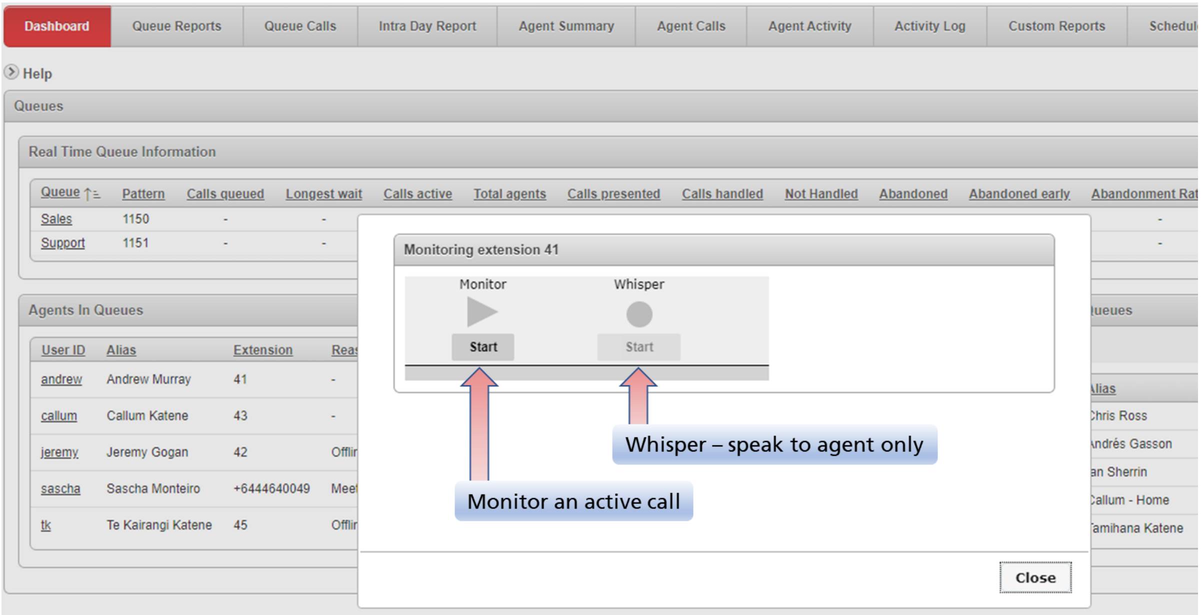


5.5 Listen in on Conversations – monitor, whisper and barge

On the dashboard, click the headphone icon. When the agent is on a call, you'll have the option to listen in on the conversation.



When monitoring is active, a pop-up box allows you to start listening in on a conversation from your computer. You may wish to use a headset with this feature.



Monitor – listen in on a conversation

Whisper – speak to the agent only. The other party in call will not hear what you say.

Barge – join the conversation.

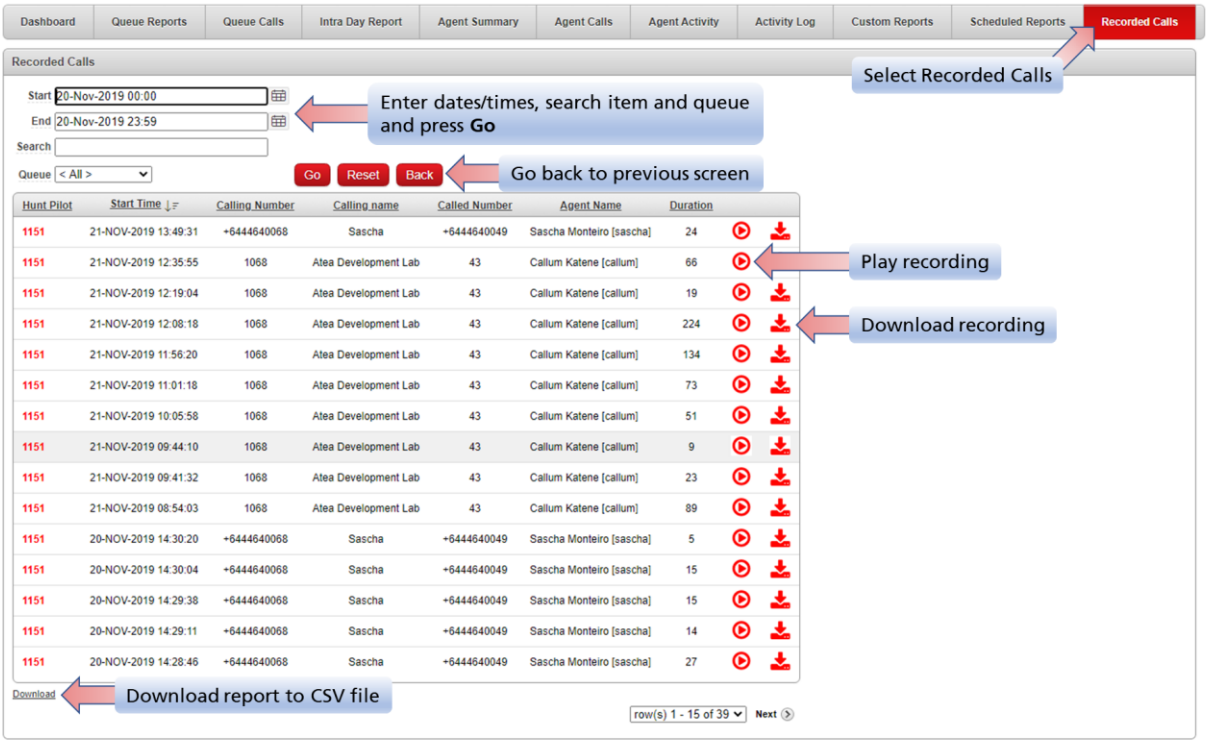
Whisper or barge features require an additional license and may not be included on your system.

5.6 Listening to Recordings

From the dashboard select the recorded calls tab.

Enter a date and time range, and the search criteria. You may choose a queue and any specific agent or other item.

Your system may be setup where calls are only recorded for queue calls and for specific queues.

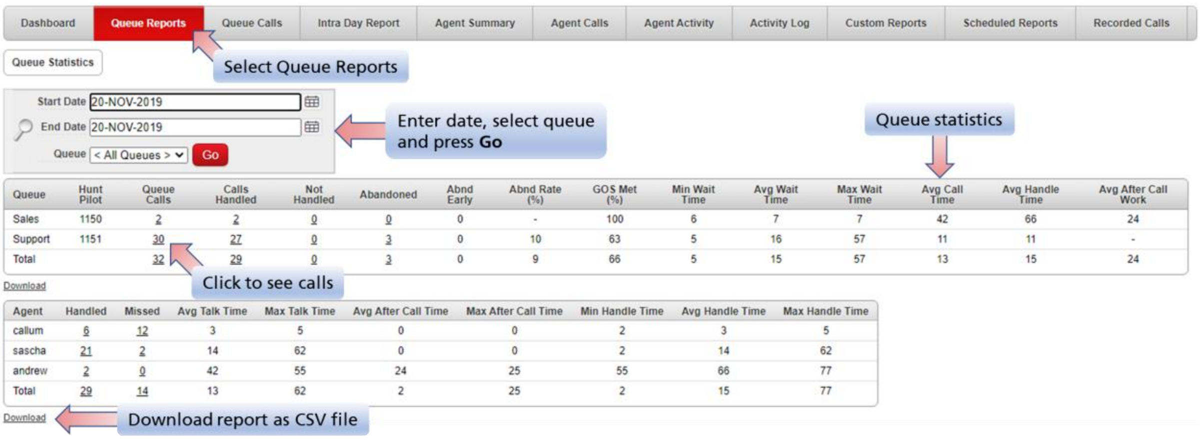


To listen to a recording from your computer, click the play icon.

To download a recording, click the download icon. Recording files are in .wav format and are playable by all common media players.

5.7 Queue Reports – Historical Statistics

From the dashboard, select the **Queue Reports** tab. You'll see a list of all queues that had calls. Any queues without calls are hidden.



Enter the date range and press "Go". You can type the date directly or use the date picker.

You can filter this to a single queue or see all queues that you have access to.

There are two sections:

- Queue summary – shows you the performance for each hunt pilot number
- Agent information – shows the performance grouped by agents

The fields in the queue reports are:

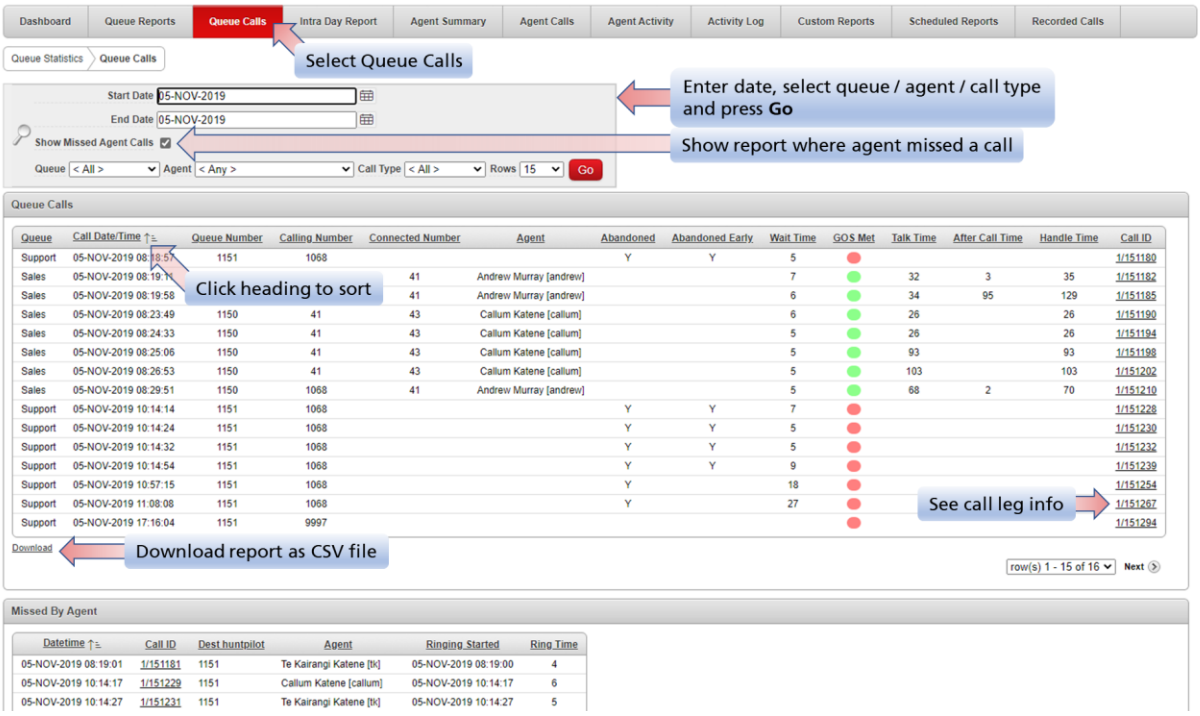
Field	Description
Queue	The name of the queue or hunt pilot. This is the alias set by the SCM administrator for the Cisco Hunt Pilot number
Hunt Pilot	The directory number of the Cisco Hunt Pilot
Call volumes **Queue Calls** **Calls Handled** **Not Handled** **Abandoned** **Abandoned Early**	Quantity of calls in each case. Click the underlined number to see the individual calls as shown in the Queue Calls report. • Calls presented to the queue • Calls handled and answered normally • Calls that were not answered or abandoned • The caller hung up before the call was answered • The caller hung up in less time than is reasonable for an agent to answer the call. This setting set per hunt pilot by the SCM administrator.
Abnd rate (%)	Percentage of calls abandoned

Field	Description
GOS Met (%)	Percentage of calls that met the grade of service (GOS). This is the time-to-answer service level specific to each hunt pilot. The SCM administrator sets this.
Wait times **Min Wait Time** **Avg Wait Time** **Avg Call Time** **Avg Handle Time** **Avg After Call Work**	These are all measured in seconds. • Minimum time a caller waited for a call to be answered • Average time it takes for a call to be answered • Average duration of all calls • Average time to handle a call (call time plus after call work) • After call work is the time allowed by the system to wrap-up after a call completes.
Agent	Person who is assigned to the hunt pilot
Agent Call volumes **Handled** **Missed**	Quantity of calls in each case. Click the underlined number to see the individual calls as shown in the Queue Calls report. • Calls handled normally • Calls they missed answering
Agent times **Avg Talk Time** **Max Talk Time** **Avg After Call** **Max After Call** **Min Handle time** **Avg Handle time** **Max Handle time**	These are all measured in seconds. • Average duration of this agents calls • Longest call for this agent • Average time doing wrap-up after a call completes • Longest wrap-up duration for this agent • Minimum time to handle a call (call time plus after call work) • Average time to handle a call (call time plus after call work) • Longest duration to handle a call (call time plus after call work)
Download	Click this link to download the report as a CSV file that can be opened in Excel.
Rows indicator	An indicator to show the rows of the report that displayed. Click this to change which rows you are viewing.

5.8 Queue calls – See calls for a queue

Breadcrumbs: Queue Statistics > Queue Calls

You can get to this report using the **Queue Calls** tab, or by clicking an underlined **call value** on the **Queue Report**.



Enter the date range and press “Go”. You can type the date directly or use the date picker.

You can filter this to show:

- Missed agent calls – this produces an additional report below the main one
- A single queue or all queues that you have access to
- A specific agent or all agents
- Types of call (all / abandoned / handled / not handled)
- The number of lines to display per page.

There are two report sections:

- Queue calls – shows you the calls for each hunt pilot number
- Missed by Agent (optional) – shows each attempt to call an agent where there was no answer

Click on a report heading to sort the report.

Here’s the fields in the queue calls report:

Field	Description
Queue	The name of the queue or hunt pilot. This is the alias set by the SCM administrator for the Cisco Hunt Pilot number
Call Date/Time	When the call was made
Queue number	The directory number for the Cisco Hunt Pilot
Calling number	The originating number for the call
Connected number	The directory number of the person or device that answered the call
Agent	Alias and UserID of the person who answered the call
Abandoned	Y if the call was abandoned by the caller hanging up before the call was answered
Abandoned Early	Y if the call was abandoned before we'd expect the call to be answered for this hunt pilot. These calls are often removed from performance statistics as they an agent has no control of them.
Times **Wait Time** **Talk Time** **After Call Time** **Handle Time**	These are all measured in seconds. • Duration the caller waited for their call to be answered • Duration of the call after it was answered • Time allowed by the system to wrap-up after a call completes • Duration to handle a call (call time plus after call work)
GOS Met	A red/green indicator whether the call met the grade of service (GOS). This is the time-to-answer service level specific to each hunt pilot. The SCM administrator sets this.
Download	Click this link to download the report as a CSV file that can be opened in Excel.
Rows indicator	An indicator to show the rows of the report that displayed. Use this to change which rows you are viewing.

Checkbox: Show calls missed by agent

This checkbox adds a report that lists the calls that rang on an agent phone but went unanswered. Each time the agent misses a call, it is added to this report. This report is intended to assist with analysing issues where calls are going unanswered.

The Missed by Agent report includes:

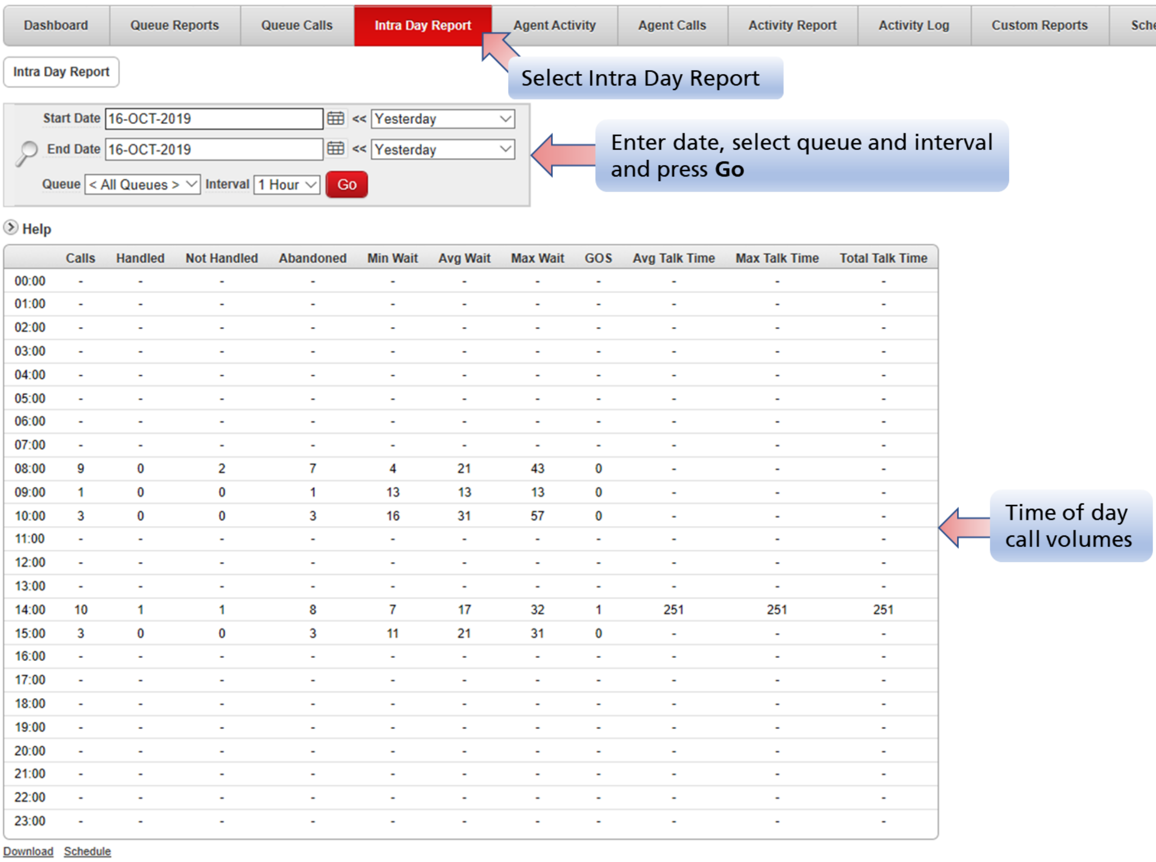
- Date and time of the call to the queue
- Call leg identifier – with a link to the call details
- The hunt pilot that the call came from

- Which agent
- When the ringing started
- Duration of the ringing in seconds.

5.9 Intra-day report – Review calling patterns across the day

Breadcrumbs: Intra Day Report

This report shows how the calls are distributed across the day.



	Calls	Handled	Not Handled	Abandoned	Min Wait	Avg Wait	Max Wait	GOS	Avg Talk Time	Max Talk Time	Total Talk Time
00:00	-	-	-	-	-	-	-	-	-	-	-
01:00	-	-	-	-	-	-	-	-	-	-	-
02:00	-	-	-	-	-	-	-	-	-	-	-
03:00	-	-	-	-	-	-	-	-	-	-	-
04:00	-	-	-	-	-	-	-	-	-	-	-
05:00	-	-	-	-	-	-	-	-	-	-	-
06:00	-	-	-	-	-	-	-	-	-	-	-
07:00	-	-	-	-	-	-	-	-	-	-	-
08:00	9	0	2	7	4	21	43	0	-	-	-
09:00	1	0	0	1	13	13	13	0	-	-	-
10:00	3	0	0	3	16	31	57	0	-	-	-
11:00	-	-	-	-	-	-	-	-	-	-	-
12:00	-	-	-	-	-	-	-	-	-	-	-
13:00	-	-	-	-	-	-	-	-	-	-	-
14:00	10	1	1	8	7	17	32	1	251	251	251
15:00	3	0	0	3	11	21	31	0	-	-	-
16:00	-	-	-	-	-	-	-	-	-	-	-
17:00	-	-	-	-	-	-	-	-	-	-	-
18:00	-	-	-	-	-	-	-	-	-	-	-
19:00	-	-	-	-	-	-	-	-	-	-	-
20:00	-	-	-	-	-	-	-	-	-	-	-
21:00	-	-	-	-	-	-	-	-	-	-	-
22:00	-	-	-	-	-	-	-	-	-	-	-
23:00	-	-	-	-	-	-	-	-	-	-	-

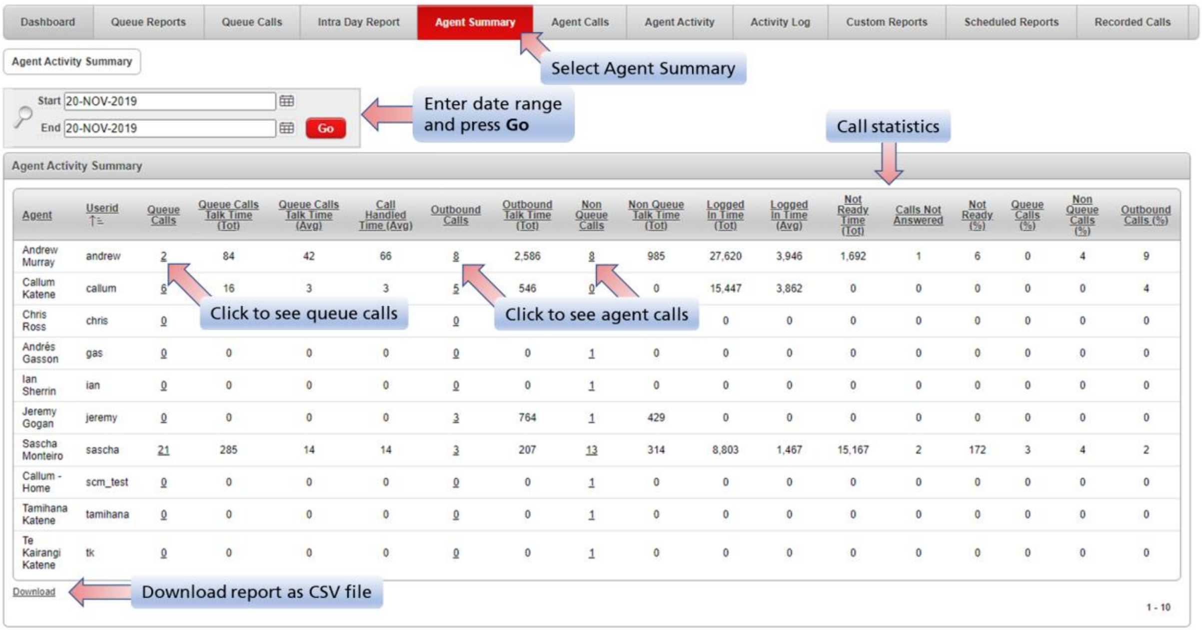
For this report, enter a date range and press Go. You can filter the report to a specific queue and select an interval of either hourly, 30 minutes or 15 minutes.

The calls are aggregated across the day to give a time-of-day view of the volume of calls.

5.10 Agent Summary – A summary of the agent activity

Breadcrumbs: Agent Activity Summary

This report shows the agents and a summary of their calls and activity. This includes things like how long they spent logged in, being not ready, and both queue and non-queue calls. From here you may also click through to see the reports on the individual calls.



The fields in the agent activity summary report are:

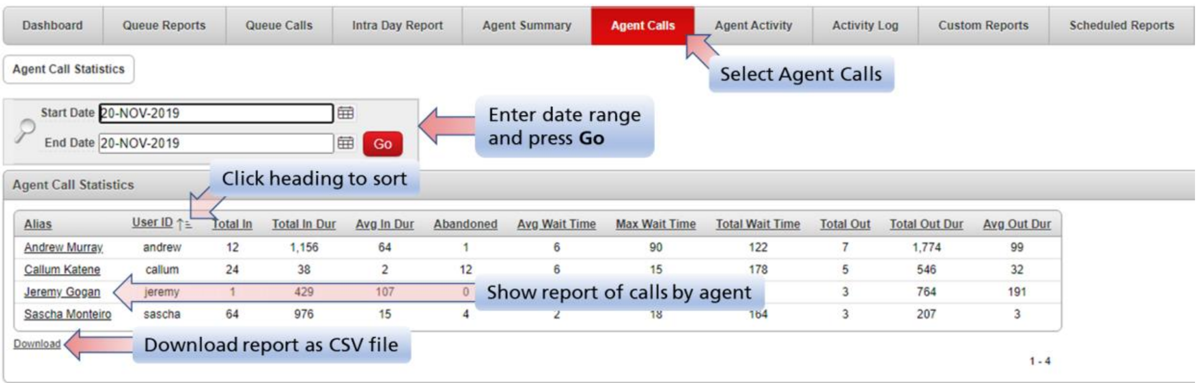
Field	Description
Agent	Alias for the person who answers queue calls
UserID	The agent UserID from the CUCM
Agent Call volumes **Queue calls** **Outbound calls** **Non queue calls** **Calls not answered**	Volume of calls in each case. Click the underlined number to see the individual calls from the Queue Calls report or Calls by Agent report. • Calls from a queue – click the value to see the queue calls • Where the agent makes an outbound call – click to see agent calls • Calls from direct calls rather than from a queue – click to see the agent calls • Queue calls that the agent missed answering
Times **Queue Calls Talk Time (Tot / Avg)** **Call Handle Time (AVG)** **Outbound Talk Time (Tot)** **Non queue talk time (Tot)** **Logged in time (Tot)**	These are all measured in seconds. • Total / average duration of queue calls • Average time to handle a call (call time plus after call work) • Total duration of outbound calls • Total duration of calls other than queue calls • Amount of time the agent has was logged in

Field	Description
Logged in time (avg) **Not ready time (tot)**	• Average logged in time • Time spent in a not-ready state
Not ready (%) **Queue calls (%)** **Non queue calls** **Outbound calls**	Percentage breakdown of calls
Download	Click this link to download the report as a CSV file that can be opened in Excel.

5.11 Agent Calls – A summary of the agent call statistics

Breadcrumbs: Agent Call Statistics

This report is a summary showing the agents and their calls. Click on an agent link to see their specific calls (Calls by Agent report).



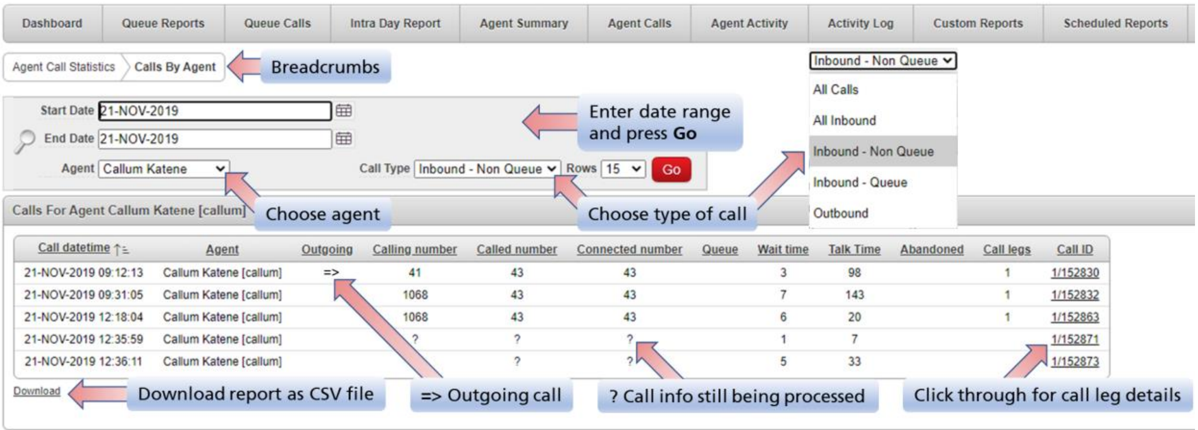
The fields in the agent calls statistics report are:

Field	Description
Agent	Alias for the person who answers queue calls. Click the agent name to see the calls by agent report.
UserID	The agent UserID from the CUCM
Agent Call volumes **Total In** **Abandoned** **Total Out**	Volume of calls in each case. Click the underlined number to see the individual calls from the Queue Calls report or Calls by Agent report. • Total incoming calls for the agent • The caller hung up before the call was answered

Field	Description
	• Total outgoing calls for the agent

Breadcrumbs: Agent Call Statistics > Calls by Agent

This report shows when clicking through on an agent from the Agent Calls report. It shows the individual calls for the agent. You may filter the calls whether they are inbound/outbound and queue or non-queue calls.



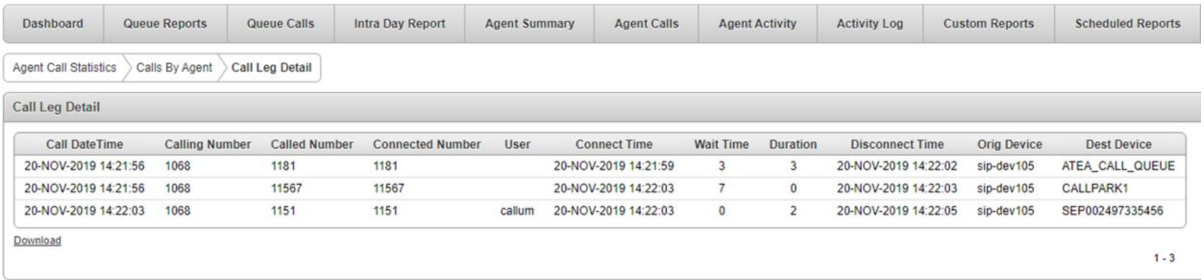
Additional items used in this report:

Field	Description
=>	The call is an outgoing call.
?	Occasionally for recent calls, some information may still be being processed. This shows as a question mark until the information has arrived from the phone system.
Call legs	A count of how many legs make up the call. Calls that are transferred or are multi-party calls will have more than one leg.
Call ID	This is the unique system ID for the call. Click on it to see the individual call legs.

5.12 Agent Calls – Call leg detail

Breadcrumbs: Agent Call Statistics > Calls By Agent > Call Leg Detail

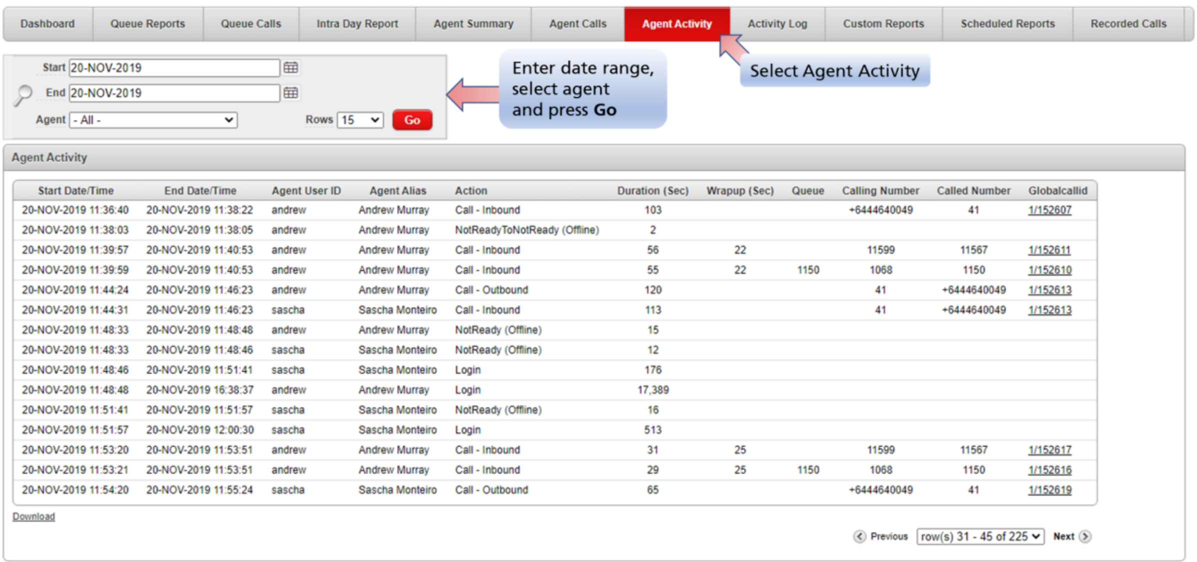
Many reports show a unique call ID for an individual call. Click these links to see the component legs that make up the call. These show details about each leg, such as the date, time and the devices involved. This is handy to analyse the call flow and to better understand the experience received by the caller.



Call DateTime	Calling Number	Called Number	Connected Number	User	Connect Time	Wait Time	Duration	Disconnect Time	Orig Device	Dest Device
20-NOV-2019 14:21:56	1068	1181	1181		20-NOV-2019 14:21:59	3	3	20-NOV-2019 14:22:02	sip-dev105	ATEA_CALL_QUEUE
20-NOV-2019 14:21:56	1068	11567	11567		20-NOV-2019 14:22:03	7	0	20-NOV-2019 14:22:03	sip-dev105	CALLPARK1
20-NOV-2019 14:22:03	1068	1151	1151	callum	20-NOV-2019 14:22:03	0	2	20-NOV-2019 14:22:05	sip-dev105	SEP002497335456

5.13 Agent Activity – Agent state and calls

This report shows all the agent activity, such as when they went "not-ready" and what calls they made. You can filter it for any specific person.



Start Date/Time	End Date/Time	Agent User ID	Agent Alias	Action	Duration (Sec)	Wrapup (Sec)	Queue	Calling Number	Called Number	Globalcallid
20-NOV-2019 11:36:40	20-NOV-2019 11:38:22	andrew	Andrew Murray	Call - Inbound	103			+6444640049	41	1/152607
20-NOV-2019 11:38:03	20-NOV-2019 11:38:05	andrew	Andrew Murray	NotReadyToNotReady (Offline)	2					
20-NOV-2019 11:39:57	20-NOV-2019 11:40:53	andrew	Andrew Murray	Call - Inbound	56	22		11599	11567	1/152611
20-NOV-2019 11:39:59	20-NOV-2019 11:40:53	andrew	Andrew Murray	Call - Inbound	55	22	1150	1068	1150	1/152610
20-NOV-2019 11:44:24	20-NOV-2019 11:46:23	andrew	Andrew Murray	Call - Outbound	120			41	+6444640049	1/152613
20-NOV-2019 11:44:31	20-NOV-2019 11:46:23	sascha	Sascha Monteiro	Call - Inbound	113			41	+6444640049	1/152613
20-NOV-2019 11:48:33	20-NOV-2019 11:48:48	andrew	Andrew Murray	NotReady (Offline)	15					
20-NOV-2019 11:48:33	20-NOV-2019 11:48:46	sascha	Sascha Monteiro	NotReady (Offline)	12					
20-NOV-2019 11:48:46	20-NOV-2019 11:51:41	sascha	Sascha Monteiro	Login	176					
20-NOV-2019 11:48:48	20-NOV-2019 16:38:37	andrew	Andrew Murray	Login	17,389					
20-NOV-2019 11:51:41	20-NOV-2019 11:51:57	sascha	Sascha Monteiro	NotReady (Offline)	16					
20-NOV-2019 11:51:57	20-NOV-2019 12:00:30	sascha	Sascha Monteiro	Login	513					
20-NOV-2019 11:53:20	20-NOV-2019 11:53:51	andrew	Andrew Murray	Call - Inbound	31	25		11599	11567	1/152617
20-NOV-2019 11:53:21	20-NOV-2019 11:53:51	andrew	Andrew Murray	Call - Inbound	29	25	1150	1068	1150	1/152616
20-NOV-2019 11:54:20	20-NOV-2019 11:55:24	sascha	Sascha Monteiro	Call - Outbound	65			+6444640049	41	1/152619

Fields used in this report:

Field	Description
Start Date/Time **End Date/Time**	The time that the activity occurred.
Agent User ID **Agent Alias**	UserID and alias or name for the agent

Field	Description
Action	The activity taken, such as: • Call – Inbound / outbound • Login – Agent logged in • NotReady (Offline / Coffee Break etc) – any not ready state • NotReady to NotReady (Meeting etc) – changing not ready state
Duration (Sec)	Duration that the agent was in this state in seconds
Wrapup (Sec)	Length of time the agent was in wrap-up or after-call-work in seconds
Queue	The hunt pilot for the call
Calling number **Called number**	The phone numbers or DN for the call
Call ID	This is the unique system ID for the call. Click on it to see the individual call legs.

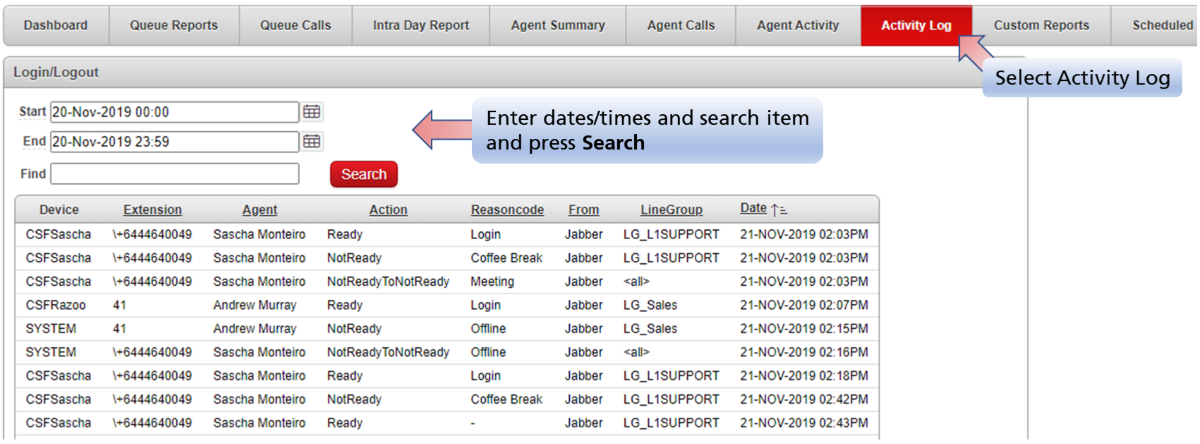
5.14 Activity Log – Ready / Not-ready transitions

This report shows the ready state activity for each agent. This includes items like the not-ready reason codes and login activity.

From the dashboard, select the **Activity Log** tab.

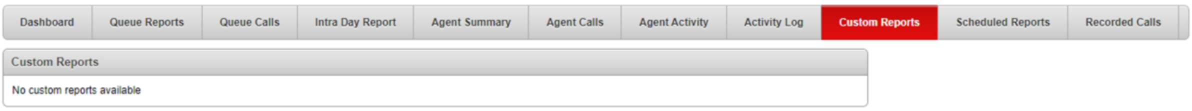
Enter a date and time range, and any search items. The time range helps to reduce how many results are included in the report.

You may also sort the report by selecting a column heading.



5.15 Custom Reports

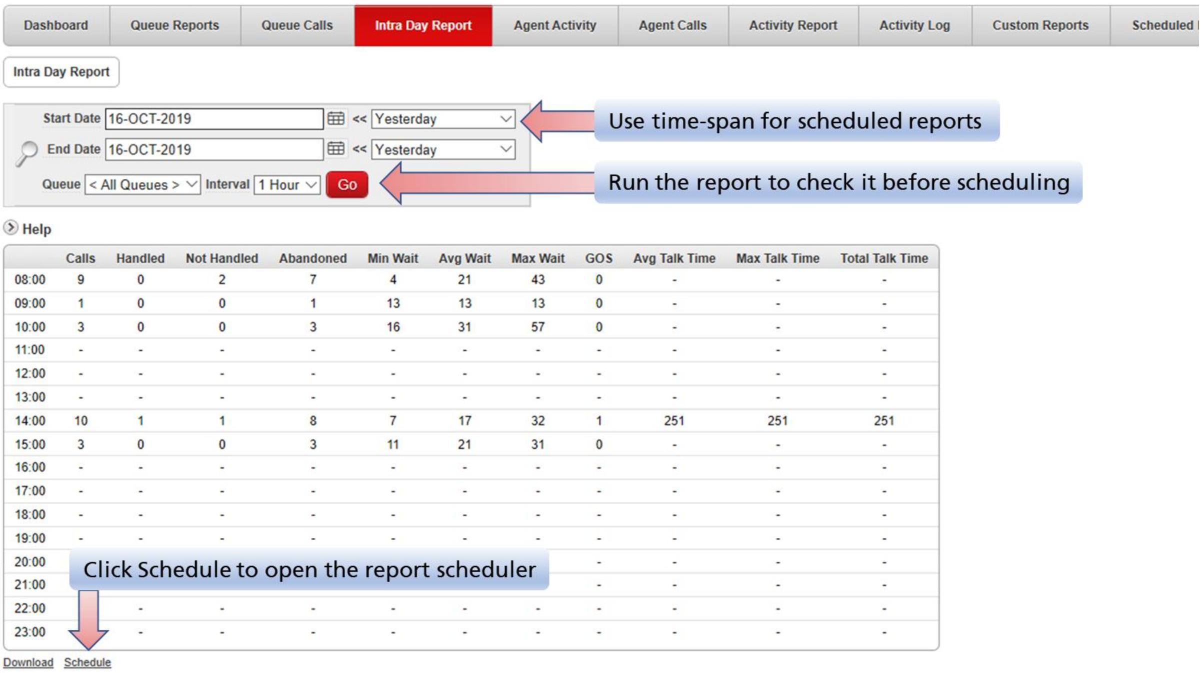
This tab is for any custom reports that Atea may have developed specifically for your organisation.



5.16 Scheduled Reports – automatically emailed

Scheduled reports are automatically run and emailed. Some reports are interactive and therefore not able to be scheduled.

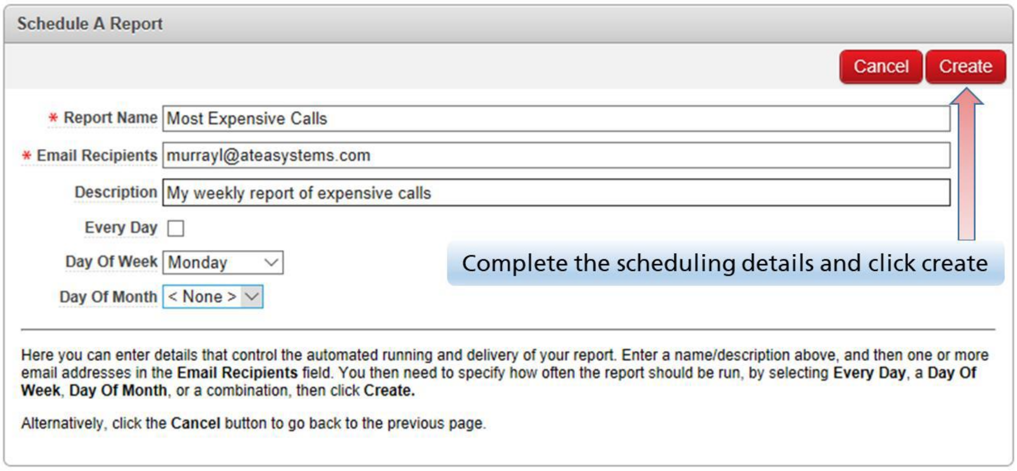
Reports that can be scheduled have an additional time-span field next to the dates, with items like "**Start of last week**", or "**Yesterday**".



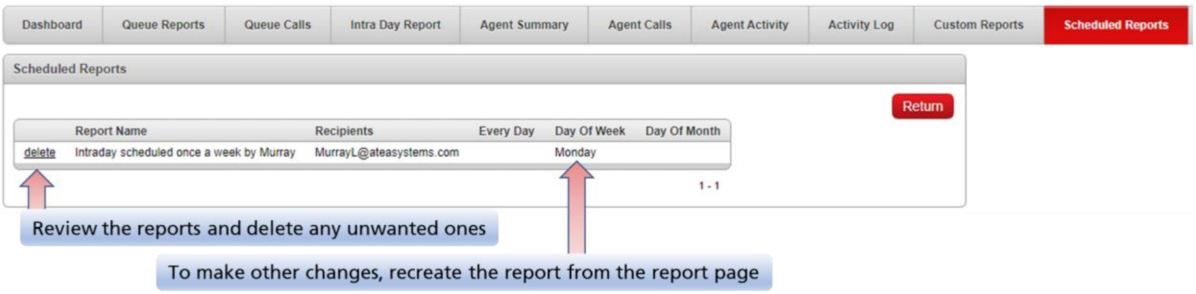
	Calls	Handled	Not Handled	Abandoned	Min Wait	Avg Wait	Max Wait	GOS	Avg Talk Time	Max Talk Time	Total Talk Time
08:00	9	0	2	7	4	21	43	0	-	-	-
09:00	1	0	0	1	13	13	13	0	-	-	-
10:00	3	0	0	3	16	31	57	0	-	-	-
11:00	-	-	-	-	-	-	-	-	-	-	-
12:00	-	-	-	-	-	-	-	-	-	-	-
13:00	-	-	-	-	-	-	-	-	-	-	-
14:00	10	1	1	8	7	17	32	1	251	251	251
15:00	3	0	0	3	11	21	31	0	-	-	-
16:00	-	-	-	-	-	-	-	-	-	-	-
17:00	-	-	-	-	-	-	-	-	-	-	-
18:00	-	-	-	-	-	-	-	-	-	-	-
19:00	-	-	-	-	-	-	-	-	-	-	-
20:00								-	-	-	-
21:00								-	-	-	-
22:00		-	-	-	-	-	-	-	-	-	-
23:00		-	-	-	-	-	-	-	-	-	-

To schedule a report:

1. Set the time-span range for the report. Choose from options like "**Yesterday**", "**Start of last week**", or "**Start of last month**". Remember to set both the start and end periods.
2. Run the report and check the report looks correct
3. Click "**Schedule this report**"



4. Enter the details and click **"Create"**. This will create the schedule. You can name the report, set the email address(s) and set when the report is to be sent.
5. You can delete any reports from the **Scheduled Reports** tab.

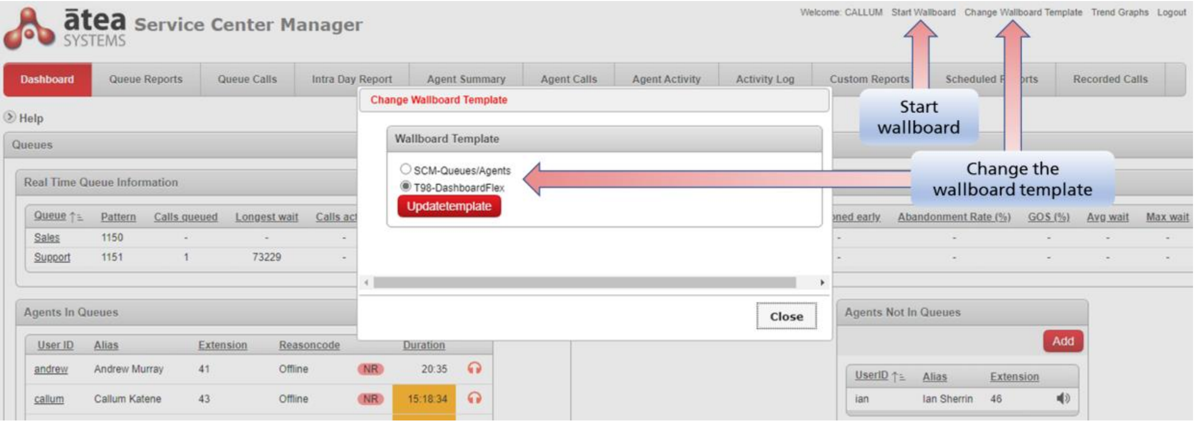


To make changes to a scheduled report, delete it and create a new report schedule.

6 Agent Wallboard

To start the Wallboard, click the "**Start Wallboard**" link at the top right of the screen. This opens your wallboard in a separate window or a tab in your browser. The wallboard is intended to be run on a separate display such as a large monitor screen where all the agents can see it. Each supervisor has their own wallboard.

There are two wallboard templates available. You can choose between them from the Supervisor dashboard.



The SCM Queues / Agents layout

This layout is optimised for a full HD monitor (1920 x 1080 pixels), with the browser set the full screen mode. You can use the browser zoom function if a different size window is required.

The T98 layout

The sections in this layout can be customised with different content. It also scales to different window sizes. (If you resize something, click the page refresh to optimise the scaling).

The wallboard is updated in near real time – typically a second or two. The daily statistics are automatically reset each day.

The main items on your wallboard are:

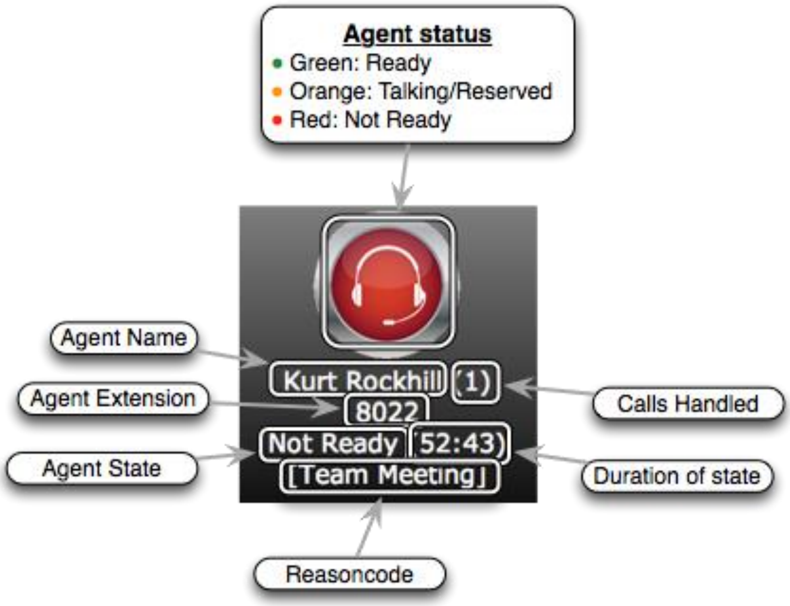
- Details of each of your queues
- The status of each of the agents assigned to the queues.

Queue information

Column	Description
Queue	Name or alias for each of your queues (hunt group numbers)
Calls Queued	Number of calls currently queued for each specific queue
Longest Wait	How long the longest unanswered call has been waiting to be answered
Calls Active / Ringing	Number of calls currently active and number of calls ringing
Agents Available	Number of agents available to answer calls for each queue
Handled / Abandoned Today	Today's statistics for calls handled and calls abandoned
Ave Wait Today	Today's statistics for the average waiting time for callers
Longest Wait Today	Longest waiting time experienced by a caller for today. A call is waiting until it is answered by a human. This is either when the call is answered by an agent, or the last call transfer made by the system.

Agent information

An icon displays for each agent assigned to one of the queues on the wallboard.



The details for each agent are:

- **Coloured icon** (Red, Orange or Green) reflecting the agent's state.
- **Background** area – this is usually green and changes to orange if they have been "not ready" for too long. This is timer is set by the reason code thresholds. To change these, contact the person in your organisation who has administration access to the Wallboard. Often this is the SCM administrator.
- **Agent Name** (alias) and number of **Calls Handled**. We suggest that you keep the name shorter than one line in the display. The SCM administrator can set an alias name for each agent.
- **Agent Extension** number (DN)
- **Agent State** and the **duration** of how long they've been in this state.
- **Reason code** if they are unavailable (this is blank when they are available). Where the agent is using Jabber, they can choose from a list of reason codes. Agents that are not ready using an IP desk phone have the reason code of "User Init" (user initiated).

Wallboard statistics and reconciliation

Reconciling queue totals to agent totals

At times, the queue totals and agent totals may appear to be unmatched. This may occur when calls presented to the queue are eventually transferred to people who are not members of the queue. These calls show in the reports under "-- Other --". As the "-- Other --" is not an agent, these calls appear in the queue statistics but not the agent statistics.

Wallboard size and layout

The Queues/Agent wallboard has eight columns. It is configured for a full HD monitor (1920 x 1080 pixels). You may want to set the browser to full screen (usually F11 on a windows computer). You can also change the size of the wallboard content using the browser zoom function. This is handy if you want to open the wallboard in a window on your computer. We suggest you set the zoom so that all eight columns appear.

Tips to improve the visual appearance of the wallboard.

1. Use short agent aliases that fit within the column (SCM Administrator task)
2. Use short queue aliases that fit within the column (SCM Administrator task)
3. Make the browser full screen (usually F11 on a windows computer)
4. Zoom the browser window (such as ctrl-mouse wheel, or browser settings)
5. Use short not-ready reason-codes that fit within the column. (Wallboard administrator task).
6. Check the "How-to" articles on the website for information about wallboard scaling

The T98 layout will scale to most window sizes. You can also resize most sections. Hit refresh (F5 on most browsers) if the alignment looks wrong.

Customising the Wallboard

Here are some items your SCM administrator may customise on the wallboard.

Updated by SCM administrator	Updated by Wallboard administrator (advanced settings)
Display name for queue	Display order for queues
Display name for agent	Display order for agents (either extension number, userID, name or state)
Not-Ready reason codes (global setting) – used for wallboards and Jabber phones	Not-ready reason codes to appear on the wallboard
Not-Ready reasons codes from Jabber phones. Your phone administrator can customise these when setting up the Jabber tab. See the SCM design guide for details.	
	Threshold time and threshold colours for reason codes, agents available.

Often the SCM administrator is also the Wallboard administrator. The instructions for wallboard settings are in the SCM administration guide.

7 Agent Phones – Ready / Not Ready

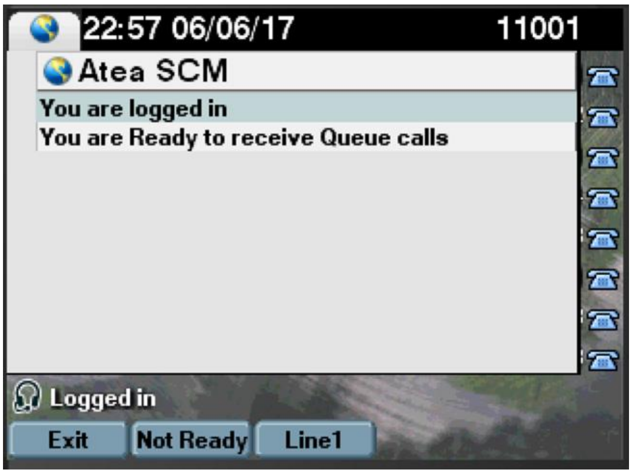
SCM works best if agents use Jabber, there's more features. However, SCM also works fine with just a desk phone.

When agents are assigned to a queue, the screen of their phone will show that they are logged into the Atea SCM queues. They may set themselves as either "Ready" or "Not Ready" to receive calls from the queue using the soft keys on the phone. With the Jabber phone version, you can choose a reason why you are "not ready".

7.1 Agent IP desk phone

When you are logged into a queue the display indicates that you are ready. To toggle between **Ready** and **Not Ready**, use the softkey on the phone.

Use **Line1** to make a call and stay in the queue.



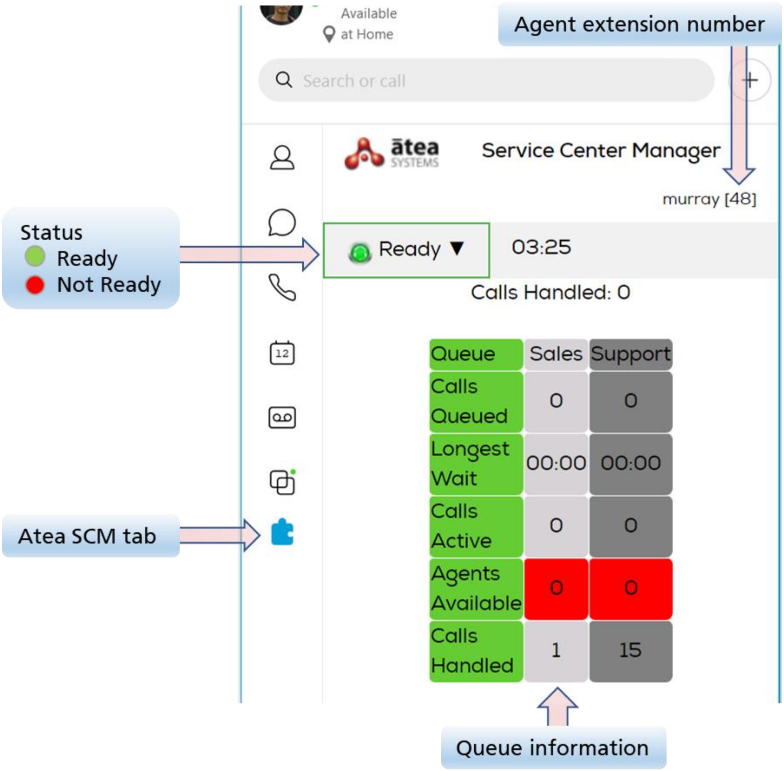
When an agent with an IP desk phone is "not ready", the wallboard shows the not ready reason code of **User Init** (user initiated). The wallboard administrator can edit this text if desired.

7.2 Agent with Jabber softphone

Agents with the Jabber softphone will find that they have access to a few more features that regular IP phone users. The Atea SCM shows as a tab icon on the left-hand side of the Jabber phone window.

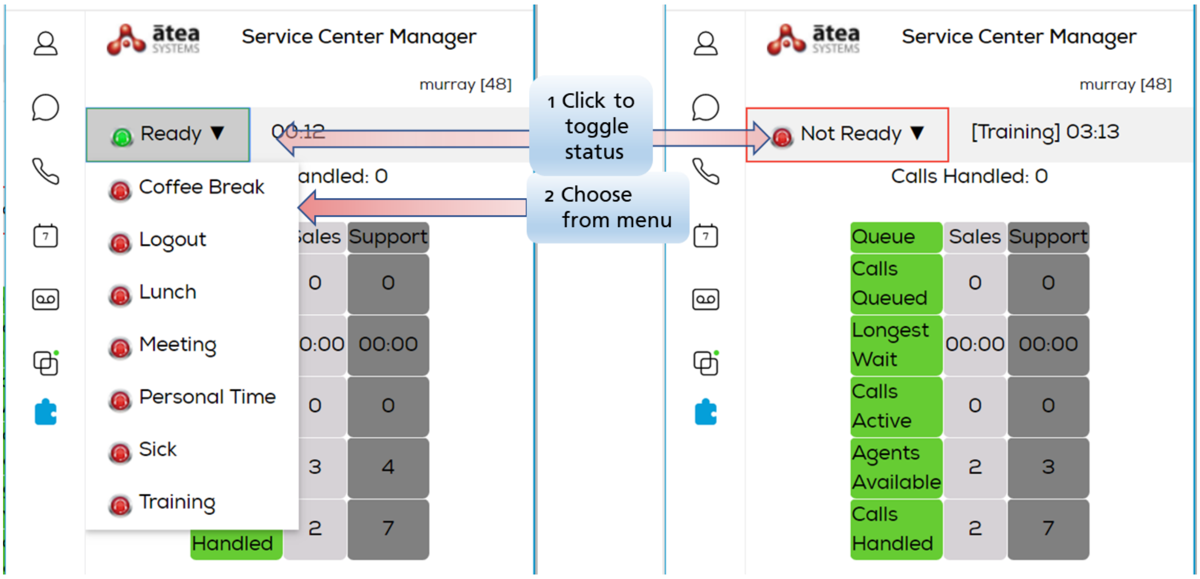
From the Jabber softphone, click the Atea SCM icon to see your status. The Jabber window shows whether you are ready to take calls, and information about each of the queues you are logged into.

If you need different reason codes, contact your administrator who configures the Jabber tab. They can configure a custom list for any specific agent or a group of agents.



To go "Not Ready" or "Ready"

1. Click the status drop-down and choose a reason from the list



2. To become ready to answer calls again, just click the red status button.

You may also be automatically given time to wrap-up a call before receiving your next call from the queue. This is configured in the settings for you Atea SCM Jabber tab.

Tip: If your Jabber tab appears stuck; you can refresh it by right clicking on the window or clicking the Atea logo.

8 Troubleshooting and Setup

Here's some troubleshooting tips and setup tasks. To resolve these issues, you may need help from either the SCM Administrator or the team that configures your CUCM telephone system.

Issue	Tip
Cannot see all your agents	Add the agent from the dashboard, or Ask the SCM administrator to add the user to the SCM and assign it to you
Cannot see all your queues	Ask the SCM administrator to add the queue to the SCM and assign it to you
There are no recordings for a queue	Check with the SCM administrator whether this queue should have recordings. Check whether other supervisors can see the recordings.
There are no recordings for individual users	The user's device or device profile in the CUCM must have the built-in bridge feature enabled
SCM Administrator cannot add a user to the SCM as they cannot see the user	All SCM users must be set up in the CUCM with a primary DN (extension number)
Agent does not have ready / not-ready status on IP phone	Agent is configured with a Jabber phone. The SCM administrator can change this user setting to IP-phone.
Agent cannot set type of not-ready reason code from an IP phone	This is normal. Reason codes can only be chosen from the Jabber soft phone.
New reason code does not appear on the wallboard	The reason code has been updated in SCM but not in the wallboard for the specific supervisor. Ask your wallboard administrator to check the reason code is both in SCM and on the wallboard.
New reason code does not appear in Jabber	The updated standard reason codes or custom reason code list has changed. To ensure it is reflected on Jabber, refresh the page in the Jabber tab by right clicking on it, or clicking the Atea logo in the Jabber tab window.
The reports show calls answered by "Non SCM user"	These are the calls that were transferred to a user who is not an SCM agent, and where the SCM system does not know the name of the party that the caller was connected to.
Queue reports show a user that is not an SCM agent	This may occur when the call is transferred to someone who is not an SCM agent. Where the SCM system can identify the final party for the call, that name is used in the reports.
Longest wait time on report or wallboard appears to be very long	The wait time uses a rule that measures the time from when the call enters the hunt group (queue) until it is connected to a person (who has a UserID in the phone system). If the SCM does not detect a person has answered the call, it uses the

Issue	Tip
	time up until the call is transferred to the final party. This may happen where a queue call is answered by another party before being transferred, and the time spent conversing with that party is included in the waiting time.
Agent reports / agent statistics are missing calls	Calls are only allocated against an agent when they are the last party that a call is connected to. If an agent answers a call, and then transfers it to someone else, the call is then allocated to that other party. It **does not show against the agent**. This is from the rule that the last party on the call is the one the caller is connected to.
Wallboard layout does not fit the browser window	The SCM-queues/agents wallboard is intended for a full HD 1920 x 1080 display. Try using the browser zoom function and check out the "How-to" support articles on our website. For the T98 wallboard, you can resize the zones or the whole wallboard. You may need to refresh the page, so it resizes correctly.

8.1 Glossary

Term	Explanation
CUCM / UCM	Cisco Unified Communications Manager – this is the heart of your telephone system. It manages setting up and disconnecting all calls on the telephone system.
DN / directory number / extension / extn	A DN is the directory number of a phone device or port on the phone system. It's the internal phone number.
Jabber	The Cisco telephone client that runs on your computer
Hunt Group / Hunt Pilot / Line group	Hunt group – a group of users who answer calls to a hunt group phone number. The CUCM will hunt amongst the members to decide who gets the next call. The hunt pilot is the phone number (DN) for this group. The hunt group may consist of one or several line groups, which are merely groups of users. Line groups help prioritise who will get the next call. These are all configured on the CUCM.