

Service Centre Manager SCM v3.0

Administrator Guide

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Document History

Date	Author	Version	Summary
26 May 2015	Murray Lum	1a	SCM version 1 – document reformatted
30 June 2015	Murray Lum	2.1c	Added version 2.1 features – agents are now jabber or IP phone users, “not-ready” reason codes for jabber, update wallboard “not-ready” thresholds, apply logo to supervisor screens.
5 Aug 2015	Murray Lum	2.1d	Additional trouble shooting
June 2017	Murray Lum	3.0a	SCM 3 – updated look and feel, multiple supervisors per queue, disable recording for individual users

Related Documents

Document	Description
SCM Supervisor Guide	Day-to-day operations guide for Agent Supervisors using the Atea Service Centre Manager
SCM Design Guide	Guide to assist with the planning and implementation of and SCM solution

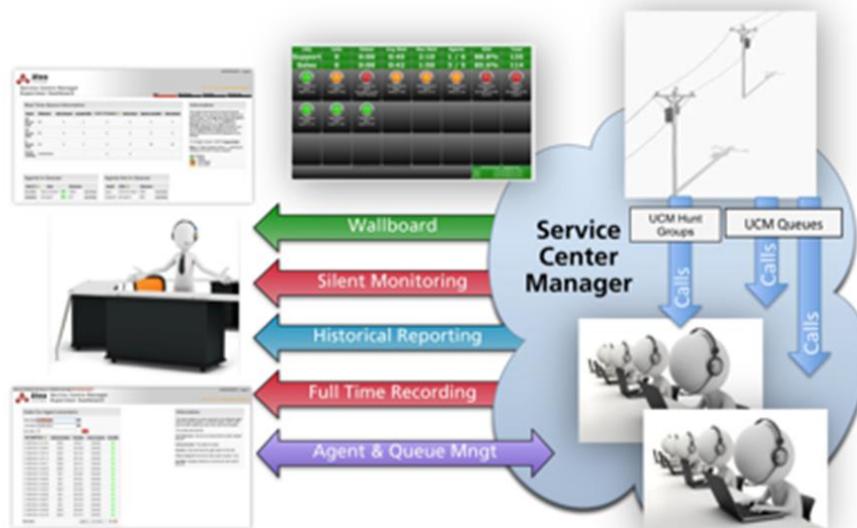
1 Purpose of this guide

This guide is for Atea Service Centre Manager (SCM) Administrators. This document covers:

- Overview of the SCM features
- Overview of the SCM Administrator role and SCM Supervisor roles
- SCM Administrator tasks
 - Adding users to the SCM
 - Adding queues to the SCM
 - Assigning users as Supervisors and other Supervisor settings
 - Assigning users (agents) and queues to Supervisors
 - Setting up alias names
 - Edit jabber “not-ready” reason codes
 - Add a logo to the supervisor console

2 SCM Overview

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



The key functions of the SCM are:

Administration: The administrator assigns CUCM queues (hunt group pilots) to supervisors. The administrator also assigns “agent” users to the supervisors.

Queue and agent management: Supervisors use a dashboard to add or remove their agents to their queues.

Real Time Reporting: We use wallboards to display queue and calling statistics in close to real time. The wallboards are web pages, and there is one for each supervisor showing their queues and agents. Colour coded thresholds are built-in and 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 using the calling history. The Queue Reports show the inbound calls to the queues, and the Agent Reports show both the inbound and outbound calls for the agents.

The Queue Reports have these call statistics:

- Incoming calls – direct in, total offered, total duration, average duration
- SLA met - volume
- Wait time – average, maximum, total (aggregate)
- Number of calls abandoned

The Agent Reports are similar and have these call statistics for each agent:

- Incoming calls – volume, total duration, average duration
- SLA met - volume
- Calls abandoned - volume
- Wait time – average, maximum, total (aggregate)
- Outbound calls – volume, total duration, average duration

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: A supervisor can access recordings of any of their agent's calls where recording is enabled. You can listen to the recordings online (where configured) or download the file.

3 SCM Roles

There are three main roles.

Administrator

The administrator manages the operation of the SCM. They are responsible for:

- Adding and removing queues to the SCM (a queue is a Cisco hunt pilot number)
- Adding users to the SCM (users will be agents or supervisors)
- Assigning who will be supervisors
- Assigning supervisors to queues
- Assigning agents (users) to supervisors
- Assigning whether calls are recorded (supervisor and user settings)
- Setting up friendly display names (aliases) for queues and users.

The administrator can also set some of the system settings including:

- Create the reason codes available when agent goes “not-ready”
- Adding a logo to the page display
- Access to the wallboard administration (separate account).

Supervisor

Supervisors manage the queues, agents and calls. Each supervisor can have several 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
- A real-time wall board to provide queue and statistical performance
- Historical reports of statistical information
- Audio playback of agent recordings
- Activity logs for agents

Agents

Agents answer the queue calls delivered to their phones. Agents use a button on their phone (or jabber softphone) to set whether they are ready to receive calls from the queue.

4 Getting Started

4.1 Pre-requisites

To use the Admin Console, you must be set up in the CUCM as an SCM Administrator. Get the telephone system administration team to include these settings on your account in the CUCM:

Permissions Information

Groups	ATEA_SCM_ADMIN
Roles	Standard AXL API Access Standard CCM Admin Users Standard SERVICEABILITY

All SCM users (who can answer calls from a Hunt Group Pilot) must have a main number (DN) associated with the user in the CUCM. Please see the installation and design guides for details.

4.2 Getting started – Logging In

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

http://[SCM_ServerIPAddress]:8080/apex/f?p=500

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

[Logout](#)

Admin Login

Username

Password

5 Admin Console – Main Screen

This console is where you manage queues, supervisors and agents.

The main parts of the console are:

- **Navigation tabs** – to get access to other sections of the SCM tool such as the reports.
- **Queues** – these are all the queues set up in the SCM. A queue is a Cisco Hunt Pilot.
- **Supervisors** – these are users that you have nominated to control queues and agents (other users).
- **Users** – people you’ve associated with the SCM. These include supervisors and “agents” who answer hunt group calls. You allocate agents to a supervisor, so that the supervisor can add them to a Queue.

In general, clicking on links or buttons take you to a new screen. Click the green “+” or the red “x” symbol to include or remove an item.

Navigation tabs
To jump between functions

1. Add users
Add users to SCM

All SCM Users
Both supervisors and agents

2. Set up Supervisors
Supervisors manage the queues and assign the users to queues

3. Queues (Hunt Groups)
That SCM can manage

UserID	Alias	Extension	Partition	Agent Type	Disable Recording
x scm_test	- test	1130	P_Atea_Internal	IPPhone	n
x andrew	Andrew Murray	41	P_Atea_Internal	Jabber Softphone	n
x gas	Andr�s Gasson	47	P_Atea_Internal	IPPhone	n
x callum	Callum Katene	43	P_Atea_Internal	IPPhone	y
x ian	Ian Sherrin	46	P_Atea_Internal	IPPhone	n
x jeremy	Jeremy Gogan	42	P_Atea_Internal	IPPhone	n
x sascha	Sascha Monteiro	49	P_Atea_Internal	IPPhone	n
x tamihana	Tamihana Katene	44	P_Atea_Internal	IPPhone	n
x tk	Te Kairangi Katene	45	P_Atea_Internal	IPPhone	n

If this is a brand-new system, all the lists will be empty. Follow these steps to get started:

1. **Add users/agents.** You can start by just adding a few if you like and add the rest later. Be sure to include the users that you want to make into supervisors.
2. **Add Supervisors.** Supervisors are users that have access to their Supervisor Dashboard to manage their queues and agents.

3. **Configure each supervisor by adding agents.** Each supervisor is responsible for some agents who answer phone calls. Click on the link for each supervisor to assign these agents.
4. **Add the queues.** Search through the Cisco hunt group pilots that the phone system administrators have already set up. Just add the ones that you want to be controlled by the Atea SCM.
5. **Assign each queue to a supervisor.** You can have several supervisors for each queue if you like. Click on the link for the queue.

To make further changes, use the links or buttons to get to the right section. Changes are updated as you go. You may also go on to update other general settings such as the jabber not-ready reason codes and add a logo to the Supervisor screens.

Tip Use the alias to give names that mean something to you to queues and people. As the administrator, you have control of the aliases.

5.1 Users / agents – add, remove or rename

To add a new user or agent to the SCM

From the main console page, click the **Add** button in the **User** section.

The screenshot shows three panels: Queues, Supervisors, and Users. Each panel has an 'Add' button. The Users panel is expanded to show a table of existing users.

UserID	Alias	Extension	Partition	Agent Type	Disable Recording
x scm_test	- test	1130	P_Atea_Internal	IPPhone	n
x andrew	Andrew Murray	41	P_Atea_Internal	Jabber Softphone	n
x gas	Andr�s Gasson	47	P_Atea_Internal	IPPhone	n
x callum	Callum Katene	43	P_Atea_Internal	IPPhone	y
x ian	Ian Sherrin	46	P_Atea_Internal	IPPhone	n
x jeremy	Jeremy Gogan	42	P_Atea_Internal	IPPhone	n
x sascha	Sascha Monteiro	49	P_Atea_Internal	IPPhone	n
x tamihana	Tamihana Katene	44	P_Atea_Internal	IPPhone	n
x tk	Te Kairangi Katene	45	P_Atea_Internal	IPPhone	n

This takes you to the **Add Agent** page.

Add Agent

[Back](#)

Search [Go](#) Enter search criteria and click Go

Agents

	lastName	firstName	userID	Extension	Routepartition
+	Gogan	Jeremy	jeremy	42	P_Atea_Internal
+	Katene	Tamihana	tamihana	44	P_Atea_Internal

row(s) 1 - 2 of 2

Click + to add user

If desired, enter a search criteria and press **Go**.

For each user you want to add, click the green “+” symbol. You’ll get a confirmation as the system adds the users as you go.

To remove a user or agent from the SCM

From the main console page, click the red **x** link next to the user. You’ll get a confirmation from the system.

Queues [Add](#)

	Extension	Alias
x	1150	Sales
x	1151	Support

1 - 2

Supervisors [Add](#)

	UserID	Alias
x	callum	Callum Katene
x	ian	Ian Sherrin
x	tk	Te Kairangi Katene

1 - 3

Users [Add](#)

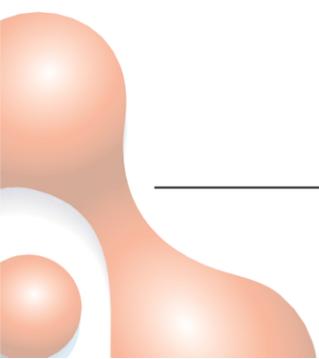
	UserID	Alias	Extension	Partition	Agent Type	Disable Recording
x	scm_test	- test	1130	P_Atea_Internal	IPPhone	n
x	andrew	Andrew Murray	41	P_Atea_Internal	Jabber Softphone	n
x	gas	Andr�s Gasson	47	P_Atea_Internal	IPPhone	n
x	callum	Callum Katene	43	P_Atea_Internal	IPPhone	y
x	ian	Ian Sherrin	46	P_Atea_Internal	IPPhone	n
x	jeremy	Jeremy Gogan	42	P_Atea_Internal	IPPhone	n
x	sascha	Sascha Monteiro	49	P_Atea_Internal	IPPhone	n
x	tamihana	Tamihana Katene	44	P_Atea_Internal	IPPhone	n
x	tk	Te Kairangi Katene	45	P_Atea_Internal	IPPhone	n

1 - 9

Click x to remove user from SCM

Set user or agent display name, set agent phone type and recording opt-out

From the main console page, click the user’s **UserID** link (e.g. Jeremy).



The screenshot shows three panels: Queues, Supervisors, and Users. The Users panel contains a table with the following data:

UserID	Alias	Extension	Partition	Agent Type	Disable Recording
x scm_test	- test	1130	P_Atea_Internal	IPPhone	n
x andrew	Andrew Murray	41	P_Atea_Internal	Jabber Softphone	n
x gas	AndrÃ@s Gasson	47	P_Atea_Internal	IPPhone	n
x callum	Callum Katene	43	P_Atea_Internal	IPPhone	y
x ian	Ian Sherrin	46	P_Atea_Internal	IPPhone	n
x jeremy	Jeremy Gogan	42	P_Atea_Internal	IPPhone	n
x sascha	Sascha Monteiro	49	P_Atea_Internal	IPPhone	n
x tamihana	Tamihana Katene	44	P_Atea_Internal	IPPhone	n
x tk	Te Kairangi Katene	45	P_Atea_Internal	IPPhone	n

A callout box points to the 'jeremy' user row with the text: "Click link to edit user settings".

This takes you to the Agent screen.

The Agent configuration screen includes the following elements:

- Userid:** jeremy
- Alias:** Jeremy Gogan
- Agent Type:** IPPhone Agent
- * Disable Recording:** No
- Buttons:** Update Alias, Update Type, Update Recording
- Supervisors Table:**

USERID	ALIAS
tk	Te Kairangi Katene
callum	Callum Katene
ian	Ian Sherrin

Callouts provide the following instructions:

- "Edit **Alias** then click **Update**" (points to Update Alias button)
- "Choose type of agent and click **Update**" (points to Update Type button)
- "Prevent or allow recording of user" (points to Disable Recording dropdown)
- "Agent is assigned to these supervisors" (points to Supervisors table)

For the alias – enter the name to display and press the **Update Alias** button.

For the type of Agent, select from the drop-down list and click the **Update Type** button. The options are:

- **IPPhone Agent** where the agent uses a desktop IP phone
- **Jabber Phonecontrol Agent** where the agent uses Jabber to control their IP phone
- **Jabber Softphone Agent** where the agents with a pure softphone.

This screen also shows the agent’s supervisors. To change these, go back to the main console page and select the supervisors.

5.2 Supervisors – add, remove, rename or assign agents

To add a supervisor to the SCM

Firstly, make sure you have added the person to the SCM as a user / agent.

From the main console page, click the **Add** button in the **Supervisor** section.

The screenshot shows three panels: Queues, Supervisors, and Users. The Supervisors panel has a red 'Add' button highlighted by a callout box. The Users panel contains a table of users.

UserID	Alias	Extension	Partition	Agent Type	Disable Recording
x scm_test	- test	1130	P_Atea_Internal	IPPhone	n
x andrew	Andrew Murray	41	P_Atea_Internal	Jabber Softphone	n
x gas	AndrÃ@s Gasson	47	P_Atea_Internal	IPPhone	n
x callum	Callum Katene	43	P_Atea_Internal	IPPhone	y
x ian	Ian Sherrin	46	P_Atea_Internal	IPPhone	n
x jeremy	Jeremy Gogan	42	P_Atea_Internal	IPPhone	n
x sascha	Sascha Monteiro	49	P_Atea_Internal	IPPhone	n
x tamihana	Tamihana Katene	44	P_Atea_Internal	IPPhone	n
x tk	Te Kairangi Katene	45	P_Atea_Internal	IPPhone	n

This takes you to the **Add Supervisor** page which lists all available SCM users.

The 'Add Supervisor' page includes a navigation bar with 'Setup', 'Reason Codes', 'Report', and 'Settings'. Below is a 'Help' section and a search bar containing 'Sascha' with a 'Go' button. A table of users is shown below.

lastName	firstName	userID
+ Monteiro	Sascha	sascha

If desired, enter a search criteria to filter on and press **Go**.

For each user you want to make into a supervisor, click the green “+” symbol. You’ll get a confirmation as the system sets the supervisors as you go.

To remove supervisor privileges

From the main console page, click the red **x** symbol next to the supervisor. This removes the supervisor privileges from that person so that they revert to a normal user or agent.

The screenshot shows three panels: Queues, Supervisors, and Users. In the Supervisors panel, the user 'ian' has a red 'x' next to their name. A callout box points to this 'x' with the text: "Click x to convert the Supervisor back to a normal user / agent".

Extension	Alias
x 1150	Sales
x 1151	Support

UserID	Alias
x callum	Callum Katene
x <u>ian</u>	Ian Sherrin
x tk	Te Kairangi Katene

UserID	Alias	Extension	Partition	Agent Type	Disable Recording
x scm_test	- test	1130	P_Atea_Internal	IPPhone	n
x andrew	Andrew Murray	41	P_Atea_Internal	Jabber Softphone	n
x gas	AndrÃ@s Gasson	47	P_Atea_Internal	IPPhone	n
x callum	Callum Katene	43	P_Atea_Internal	IPPhone	y
x <u>ian</u>	Ian Sherrin	46	P_Atea_Internal	IPPhone	n
x jeremy	Jeremy Gogan	42	P_Atea_Internal	IPPhone	n
x sascha	Sascha Monteiro	49	P_Atea_Internal	IPPhone	n
x tamihana	Tamihana Katene	44	P_Atea_Internal	IPPhone	n
x tk	Te Kairangi Katene	45	P_Atea_Internal	IPPhone	n

This takes you to the **Delete Supervisor** confirmation screen. Click the **Remove** button to confirm.

The screenshot shows the 'Delete Supervisor' confirmation screen. The 'Userid' field contains 'sascha'. There are 'Cancel' and 'Remove' buttons.

To edit supervisor details – alias, recording profile and agent assignment

From the main console page, click the supervisor's **UserID** link (e.g. [ian](#)).

The screenshot shows three panels: Queues, Supervisors, and Users. In the Supervisors panel, the user 'ian' has a red arrow pointing to their name. A callout box points to this link with the text: "Click link to edit supervisor settings".

Extension	Alias
x 1150	Sales
x 1151	Support

UserID	Alias
x callum	Callum Katene
x <u>ian</u>	Ian Sherrin
x tk	Te Kairangi Katene

UserID	Alias	Extension	Partition	Agent Type	Disable Recording
x scm_test	- test	1130	P_Atea_Internal	IPPhone	n
x andrew	Andrew Murray	41	P_Atea_Internal	Jabber Softphone	n
x gas	AndrÃ@s Gasson	47	P_Atea_Internal	IPPhone	n
x callum	Callum Katene	43	P_Atea_Internal	IPPhone	y
x <u>ian</u>	Ian Sherrin	46	P_Atea_Internal	IPPhone	n
x jeremy	Jeremy Gogan	42	P_Atea_Internal	IPPhone	n
x sascha	Sascha Monteiro	49	P_Atea_Internal	IPPhone	n
x tamihana	Tamihana Katene	44	P_Atea_Internal	IPPhone	n
x tk	Te Kairangi Katene	45	P_Atea_Internal	IPPhone	n

This takes you to the Supervisor screen. This screen also shows the agents and queues assigned to this supervisor.

Here you can:

- Change the alias displayed for the supervisor (as an alternative to the UserID)
- Set the call recording to off or change the profile (note: agents are only recorded if their phone is capable and they do not have the recording disabled)
- Add or remove agents for the supervisor

The screenshot shows the 'Supervisor' configuration page. At the top right is a 'Back' button. Below it are input fields for 'Userid' (containing 'ian') and 'Alias' (containing 'Ian Sherrin'), with an 'Update Alias' button to the right. Below these is a 'Recording Profile' dropdown menu set to 'SIPRECORDER', with an 'Update Recording Profile' button to its right. The main area is divided into two panels: 'Users' and 'Queues'. The 'Users' panel has an 'Add' button and a table of agents. The 'Queues' panel shows a table of queues. Callouts with arrows point to these elements: 'Edit Alias then click Update' points to the 'Update Alias' button; 'Choose recording profile then Update' points to the 'Update Recording Profile' button; 'Supervisor has these queues' points to the 'Queues' table; 'Click Add button to assign more agents to this supervisor' points to the 'Add' button; and 'Click x to remove agent from supervisor' points to the red 'x' icons in the 'Users' table.

Users

UserID	Alias	Extension
x scm_test	- test	1130
x andrew	Andrew Murray	41
x gas	Andrés Gasson	47
x callum	Callum Katene	43
x ian	Ian Sherrin	46
x jeremy	Jeremy Gogan	42
x sascha	Sascha Monteiro	49
x tamihana	Tamihana Katene	44
x tk	Te Kairangi Katene	45

Queues

PATTERN	ALIAS
1151	Support
1150	Sales

To remove an agent from the supervisor, click the red **x** link next to the agent. You'll get a confirmation as the system updates the supervisors as you go.

To add more agents to the supervisor, click the **Add** button. This opens up a list of available agents. If desired, enter a search criteria to filter on and press **Go**.

Agent

[Back](#)

Find Agent [Search](#) Enter search criteria if required

Search Result

	UserID	Alias	Extension	Partition
+	jeremy	Jeremy Gogan	42	P_Atea_Internal
+	tamihana	Tamihana Katene	44	P_Atea_Internal

1 - 2

Click + to assign user to supervisor

For each user you want to make into a supervisor, click the green “+” symbol. You’ll get a confirmation as the system sets the supervisors as you go.

5.3 Queues – add, remove, rename or assign supervisors

To add a new queue to the SCM

From the main console page, click the **Add** button in the **Queue** section.

Click button to add a queue

Queues

[Add](#)

	Extension	Alias
x	1150	Sales
x	1151	Support

1 - 2

Supervisors

[Add](#)

	UserID	Alias
x	callum	Callum Katene
x	ian	Ian Sherrin
x	tk	Te Kairangi Katene

1 - 3

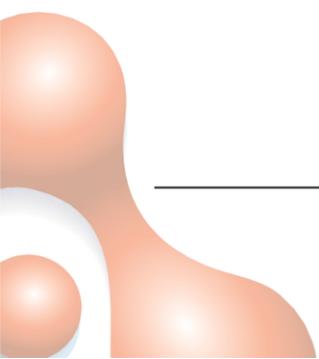
Users

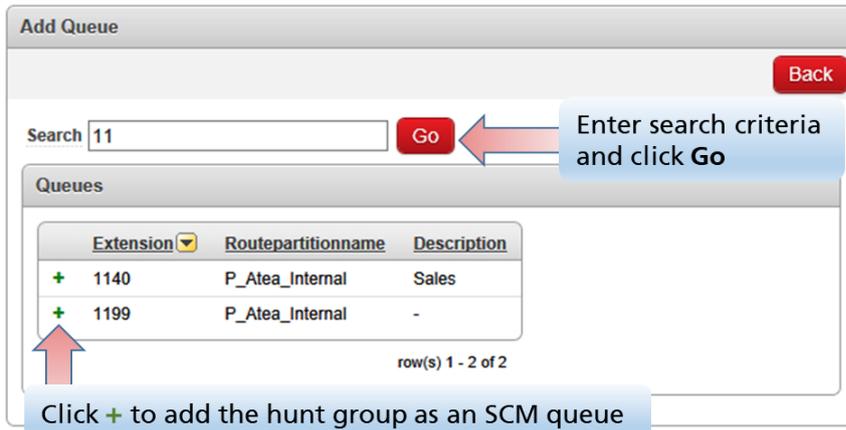
[Add](#)

	UserID	Alias	Extension	Partition	Agent Type	Disable Recording
x	scm_test	- test	1130	P_Atea_Internal	IPPhone	n
x	andrew	Andrew Murray	41	P_Atea_Internal	Jabber Softphone	n
x	gas	Andr�s Gasson	47	P_Atea_Internal	IPPhone	n
x	callum	Callum Katene	43	P_Atea_Internal	IPPhone	y
x	ian	Ian Sherrin	46	P_Atea_Internal	IPPhone	n
x	jeremy	Jeremy Gogan	42	P_Atea_Internal	IPPhone	n
x	sascha	Sascha Monteiro	49	P_Atea_Internal	IPPhone	n
x	tamihana	Tamihana Katene	44	P_Atea_Internal	IPPhone	n
x	tk	Te Kairangi Katene	45	P_Atea_Internal	IPPhone	n

1 - 9

This takes you to the **Add Queue** page.



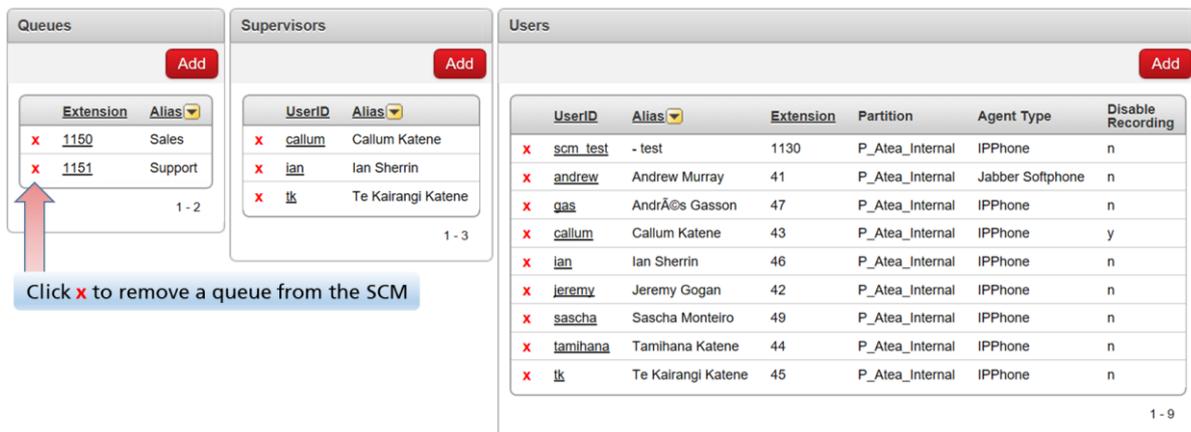


Enter search criteria (or leave blank) and press **Go** to get a list of queues. A queue is a Cisco Hunt Pilot already configured on the phone system. Voicemail queues are automatically excluded from this search.

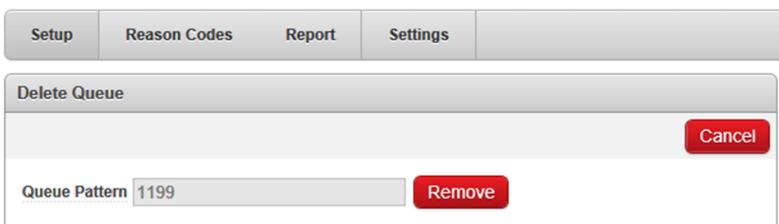
Click the green “+” symbol to add a queue. You’ll get a confirmation as the system add queues as you go.

To remove a queue from the SCM

From the main console page, click the red **x** symbol next to the queue. This removes the queue from the SCM but leaves the Cisco hunt group pilot in place on the Cisco phone system.



This takes you to the **Delete Queue** confirmation screen. Click the **Remove** button to confirm you really do want to remove the queue from the SCM.



To edit queue details – alias and supervisor assignment

From the main console page, click the queue **Extension** link (e.g. 1150).

The screenshot shows three panels: Queues, Supervisors, and Users. The Queues panel has a table with columns 'Extension' and 'Alias'. The Supervisors panel has a table with columns 'UserID' and 'Alias'. The Users panel has a table with columns 'UserID', 'Alias', 'Extension', 'Partition', 'Agent Type', and 'Disable Recording'. A red arrow points to the '1150' link in the Queues table, with a callout box saying 'Click link to edit queue settings'.

This takes you to the **Queue** screen. This screen also shows the supervisors managing this queue.

The screenshot shows the Queue screen with a navigation bar (Setup, Reason Codes, Report, Settings) and a 'Queue' header. Below the header are fields for 'Extension' (1150) and 'Alias' (Sales), with an 'Update Alias' button. A section titled 'Supervisors managing this Queue' contains a table with columns 'UserID' and 'Alias'. Callouts provide instructions: 'Edit Alias then click Update' points to the 'Update Alias' button; 'Queue has these supervisors' points to the supervisor table; 'Click x to remove supervisor from queue' points to the red 'x' links; and 'To add more supervisors' points to the 'Add' button.

To remove supervisors from a queue, click the red **x** link next to the supervisor. You'll get a confirmation as the system makes updates as you go.

To add supervisors to the queue, click the **Add** button. This opens a list of supervisors available to be assigned.

Setup Reason Codes Report Settings

Add Supervisor to Sales

Supervisor Search Back

Enter search criteria and click Go

Search Result

UserID	Alias
+ sascha	Sascha Monteiro

1 - 1

Click + to add supervisor to queue

Enter **search** criteria (or leave blank) and press **Go** to filter the list of supervisors.

Click the green “+” symbol to add the supervisor to the queue. You’ll get a confirmation as the system updates the queue as you go.

Additional information

A queue is called a hunt group on the Cisco phone system. A hunt group may comprise of several line groups to help distribute the calls. These show up as a single queue, but with several “Member Line Groups”.

5.4 View Reports – Login / Logout History

From the console, select the **Report** tab. The report shows agent and supervisor activity.

To filter and run a report, enter search criteria then press **Search**.

Click a column heading to sort the report.

Setup	Reason Codes	Report	Settings			
Login/Logout						
Find <input type="text"/>		Search				
Device	Extension	Agent	Action	From	LineGroup	Date
SEP002584179241	45	Te Kairangi Katene	Ready	IPPhone	LG_Developers	07-JUL-2017 09:05AM
SEP002497335456	43	Callum Katene	Ready	IPPhone	LG_Sales	07-JUL-2017 09:05AM
SEP002497335456	43	Callum Katene	Ready	IPPhone	LG_Developers	07-JUL-2017 09:05AM
SEP002497335456	43	Callum Katene	NotReady	IPPhone	LG_Sales	07-JUL-2017 09:02AM
SEP002497335456	43	Callum Katene	NotReady	IPPhone	LG_Developers	07-JUL-2017 09:02AM
-	46	Ian Sherrin	Logout	CALLUM	LG_Developers	07-JUL-2017 09:01AM
SEP5C501545B0D3	44	Tamihana Katene	Ready	IPPhone	LG_Developers	07-JUL-2017 08:23AM

6 Edit “Not Ready” Reason codes

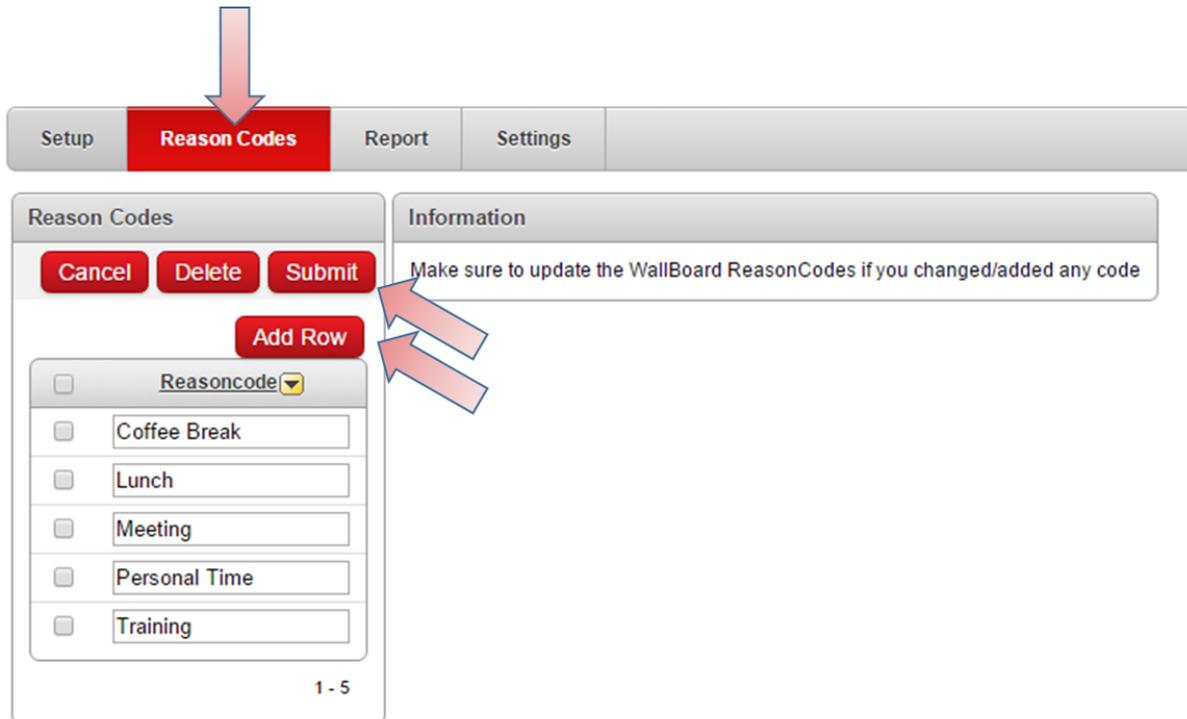
When agents are unable to answer calls they can change their status to “not-ready”. Jabber softphone users can also choose a reason why they are unavailable to take calls, unlike normal IP phone who simply go “not-ready”. This reason code is used for reports and appears on the Wallboard (provided the code matches the wallboard settings).

The SCM administrator can adjust the list of reason codes for the jabber phone agents.

6.1 Agent Jabber phone not-ready reason codes

To manage the jabber phone reason codes

1. From the console, select the **Reason Codes** tab



2. Make your changes:

- To edit a reason code, type in the new details.
- To add a new code, click the “Add Row” button to get a blank row to edit
- To delete a code, select the checkbox next to the code and click the “Delete” button

3. When you are done click “Submit” to save the changes to the system, or click “Cancel” to ignore the changes.

The updated reason codes will appear in the window of the jabber phone when an agent goes not-ready.

NOTE The not-ready reason code must match the setting on the wallboard to make it display on the wallboard. If you update a reason code and you want it to appear on a wallboard, be sure to update the wallboard using the wallboard administration.

6.2 Wallboard not-ready reason codes – advanced configuration

You’ll need access to the wallboard administration if you have added or changed a not-ready reason code for the jabber phone agents. If you have simply deleted one, there is nothing further to do as this reason code will no longer display.

To update the wallboard reason codes:

1. Enter the url to edit the wallboard

http://[SCMServerIPAddress]:8080/UccxStats

Enter the wallboard administration username and password supplied.

2. Click the link for Wallboard Administration >>

The screenshot shows the 'UCCX Agent Wallboard' interface. At the top left is the Atea Systems logo. Below it is a navigation bar with several tabs: 'Wallboards' (highlighted in red), 'Wallboard Administration' (with an external link icon), 'System Administration', 'Trend graphs' (with an external link icon), and 'Administration Guide' (with an external link icon). Below the navigation bar is a table titled 'Wallboards' with two columns: 'Wallboard' and 'Protected'. The table contains several rows of wallboard names, including 'ACT-BAR', 'ATEADEV T01-Agents', 'ATEADEV T02-Queues', 'ATEADEV T03-Queues/Agents', 'ATEADEV T03-Queues/Agents 4 cols', 'ATEADEV T04-Queues/Summary', 'ATEADEV T05-Queues/Agents/Summary', and 'ATEADEV T06-Queues/Agents/Stats'. A red arrow points to the 'Wallboard Administration' tab.

3. Click the tab for Reason Codes

The screenshot shows the 'Reason Codes' configuration page. At the top is a navigation bar with tabs: 'Wallboards', 'View Access', 'Wallboard Editors', 'Queue Names', 'Agent Names', and 'Reason Codes' (highlighted in red). Below the navigation bar is a 'Reason Codes' form. The form has a 'Help' link and three buttons: 'Cancel', 'Delete', and 'Submit'. Below these buttons is a table with columns 'Code' and 'Description'. The table contains several rows of codes and descriptions, including '12 10 Minute Break Stat', '13 Lunch Break Status', '14 After Call Work', '17 Personal Break Statu', '32758 Wrap Up Expired', '32760 Logon', '32761 Inbound', '32762 Outbound', '32763 No Answer', and '80 Lunch'. At the bottom of the table is a 'row(s) 1 - 10 of 14 Next' link and an 'Add Row' button. A red arrow points to the 'Reason Codes' tab, another red arrow points to the 'Submit' button, and a third red arrow points to the 'Add Row' button.

- Update the reason codes to match those you have in the Jabber reason codes. We suggest you leave the standard system codes 99992 and 99993 for Unregistered and Agent Initiated. Make your changes:
 - To edit a reason code, type in the new details.
 - To add a new code, click the **"Add Row"** button to get a blank row to edit
 - To delete a code, select the checkbox next to the code and click the **"Delete"** button
- When you are done click **"Submit"** to save the changes to the system, or click **"Cancel"** to ignore the changes.

To update the wallboard reason codes thresholds

A simple threshold is pre-configured so that the agent back-ground on the wallboard will change to orange if an agent stays in the not-ready state for too long. To change this threshold:

- Click the tab for **Wallboards**



- Click on the link for the wallboard to update



wallboard
< Back Save

Wallboard Title:

Page Refresh:

Authentication:

threshold action:

*Template: [Click for Examples](#)

Team Name: Leave this empty to derive agents through skills

Primary Queues Sort Column: Sort Order:

Secondary Queues Sort Column: Sort Order:

Fixed Message:

Background Colour:

Primary Agent Sort: Sort Order:

Secondary Agent Sort: Sort Order:

Tertiary Agent Sort: Sort Order:

Formatting

Header Format

Font Type: Size: Colour: BG colour:

Queue Format (Even Rows)

Font Type: Size: Colour: BG colour:

Queue Format (Odd Rows)

Font Type: Size: Colour: BG colour:

Agent Format

Font Type: Size: Colour: BG colour:

Columns

Idx	Column Header
1	Queue
2	Calls Queued
3	Longest Wait
4	Calls Active/Ringing
5	Agents Available
6	Handled/Abandoned Today
7	Avg Wait Today
8	Longest Wait Today

1 - 8

HuntPilots

IDX	Q_NAME
1	HP 970[970]
2	HP 971[971]
3	HP 972[+972]
6	HP +973[+973]

1 - 4

- Click the button for **Manage Agent Thresholds**



Agent Thresholds
Back Delete Submit

<input type="checkbox"/>	Threshold State	Threshold Condition	Reason Code	
<input type="checkbox"/>	Not Ready Duration	Greater Than	Coffee Break	-edit values-
<input type="checkbox"/>	Not Ready Duration	Greater Than	Personal Time	-edit values-
<input type="checkbox"/>	Not Ready Duration	Greater Than	Meeting	-edit values-
<input type="checkbox"/>	Not Ready Duration	Greater Than	Training	-edit values-
<input type="checkbox"/>	Not Ready Duration	Greater Than	Lunch	-edit values-

1 - 5

- Click [-edit values-](#) for the reason code that you wish to update

<input type="checkbox"/>	Value	Colour	From Time	To Time	Mon	Tue	Wed	Thu	Fri	Sat	Sun
<input type="checkbox"/>	3600	Orange	00:00	23:59	<input checked="" type="checkbox"/>						

1 - 1
Add Row

10. Update the threshold value (seconds) and press **Submit**. For further advanced configuration, you may also change the other parameters such as the colour and valid period for the threshold. Add more rows if required.
11. Repeat this for any of the other Reason Codes and press the Submit button to update the wallboard.
12. Also repeat this for other wallboards if appropriate.

6.3 Wallboard customisation – advanced configuration

There are several features on the wallboard which do not normally need to be changed. These are:

- Wallboard Users – specific staff or computers (IP address) can be added to get access to the wallboard
- Wallboard Supervisors – specific staff can be added to edit the settings on the wallboard
- Clone or create additional wallboards
- Adjust wallboard layout and colours
- Wallboard system administration

7 Add logo to Supervisor Console

You can add a logo to display on Supervisor Dashboard. The logo appears in the top left of the screen. We recommend you use a logo image that is 52 pixels or less in height, otherwise the image will overlap into other parts of the dashboard.

Use a logo image file located on a webserver that the Supervisors have access to, e.g.

<http://www.mysite/images/logo.png>

1. From the console, select the **Settings** tab

The screenshot shows the Supervisor Console interface. At the top, there is a navigation bar with tabs: Setup, Reason Codes, Report, and Settings (which is highlighted in red). Below the navigation bar, there are two main panels. The left panel is titled 'Settings' and contains a table with two columns: 'Key' and 'Value'. The table has one row with 'LOGO' in the 'Key' column and '#WORKSPACE_IMAGES#Atea Logo2 big.png' in the 'Value' column. To the right of the table are two red buttons: 'Cancel' and 'Submit'. Below the table, there is a small text '1 - 1'. The right panel is titled 'Information' and contains the following text: 'You can reference you own logo here, enter a full URL to a logo like http://www.mysite/images/logo.png', 'Note: The maximum height of a logo is 52px', and 'The logo will appear on the Supervisor Dashboard, changes to the logo will appear after the Supervisor logs out and back in'.

2. Insert the link to the logo image file (recommended height 52 pixels or less)
3. When you are done click "**Submit**" to save the changes to the system, or click "**Cancel**" to ignore the changes.

8 Troubleshooting and Setup

Here are some troubleshooting tips and setup tasks. To resolve these issues, you may need to get help from either the queue supervisors or the team that configures your CUCM telephone system.

Issue	Tip
Setting up an SCM administrator on the CUCM	<p>The administrator(s) must be member of the group ATEA_SCM_ADMIN on the CUCM. This is used to determine whether the user has access to the administrator console.</p> <p>Add the roles:</p> <p>Standard AXL API Access</p> <p>Standard CCM Admin Users</p> <p>Standard SERVICEABILITY</p>
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)
Supervisor cannot see all of their agents	Ensure that you have added the agents as users, and that you have assigned them to the Supervisor
A supervisor is absent and cannot manage a queue	You can add other supervisors to a queue
Supervisor cannot view or listen to any recordings	Check the recording profile is enabled for the supervisor
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
Agent does not have "ready" / "not ready" status on IP phone	The agent is configured with a jabber phone. Either the agent can use the jabber softphone window for call control, or otherwise be configured as IP phone instead of jabber.
Agent cannot set "not ready" reason code from an IP phone	This is normal. Reason codes can only be chosen from the Jabber softphone.
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.
Agent appears on wrong wallboard after number reassigned	Remove the agent (user) from the SCM and re-add them.