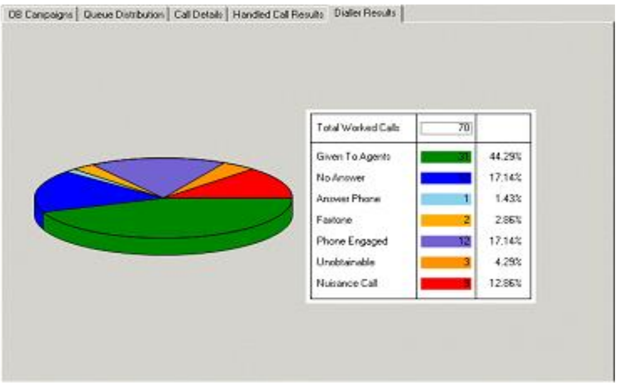
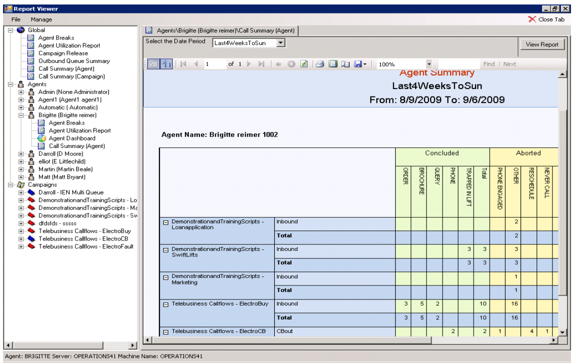
MONITOR & MANAGING FUNCTIONS

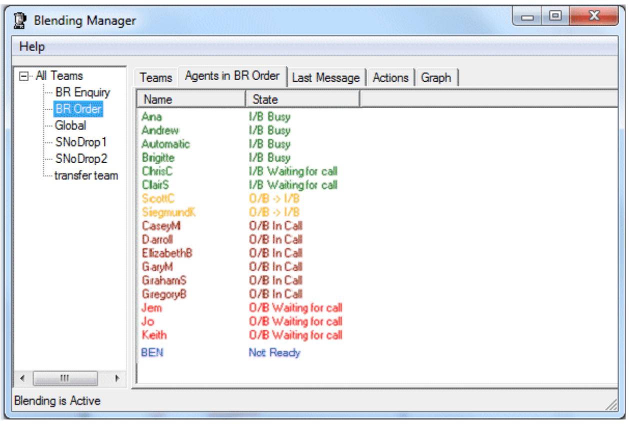
Live Monitor & Synthesys Switch Monitor



Report Viewer



Call Blending & Synthesys Switch Manager



Synthesys.Net Monitor Functions

Software Release Version 5.1

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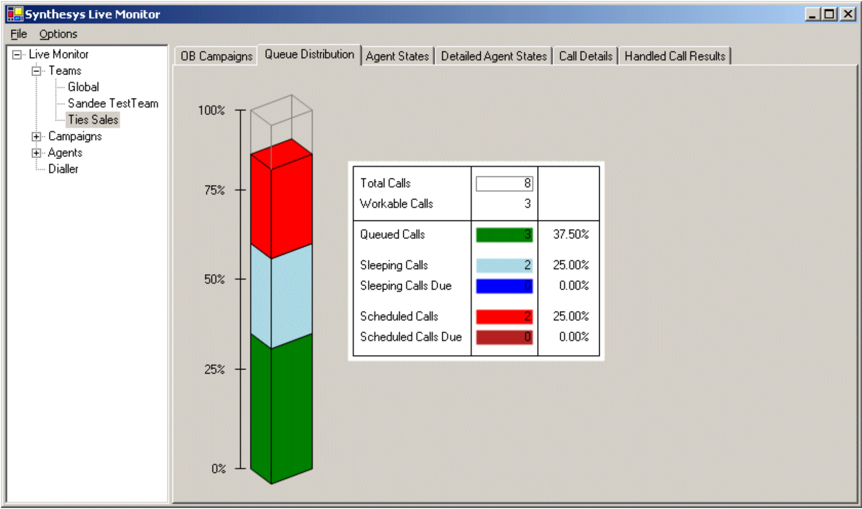
Notes prepared by Brigitte Reimer

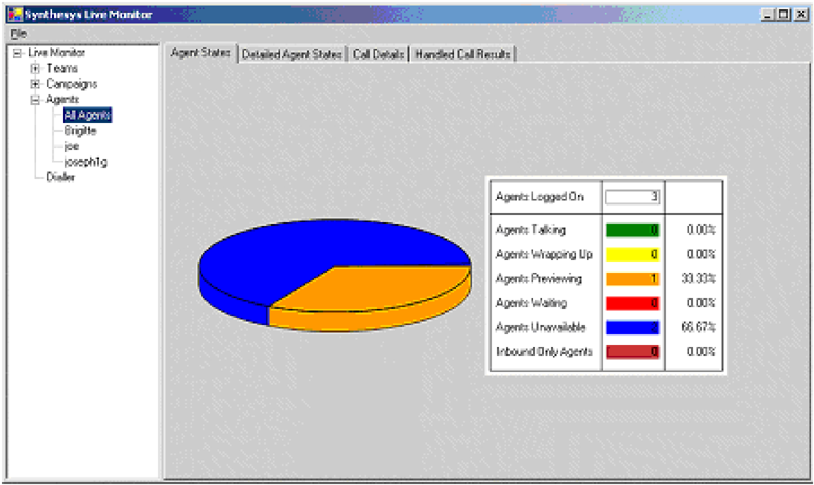
SYNTHESYS MONITOR FUNCTIONS

SYNTHESYS LIVE MONITOR

Queue Distribution



Agent State



SYNTHESYS LIVE MONITOR

Introduction

The core function of the *Synthesys Live Monitor* is to provide *real-time* information of call centre activities for call centre supervisors and managers.

You can view the current state of all live campaigns that are running and observe individual agent activity within your call centre in real-time.

Detailed data statistics are displayed for the individual teams, campaigns, Outbound lists and Outbound groups, agents and the dialler, with information about Queue distribution, Agent State, Handled Call Results and Dialler Results being visually represented in graphs.

The data shown includes, for example, the average agent talk time and you can see how long an agent takes on a particular section of a callflow. This allows you to identify problem areas or congestion points within a callflow, which can be refined in the Campaign editor, to improved performance.

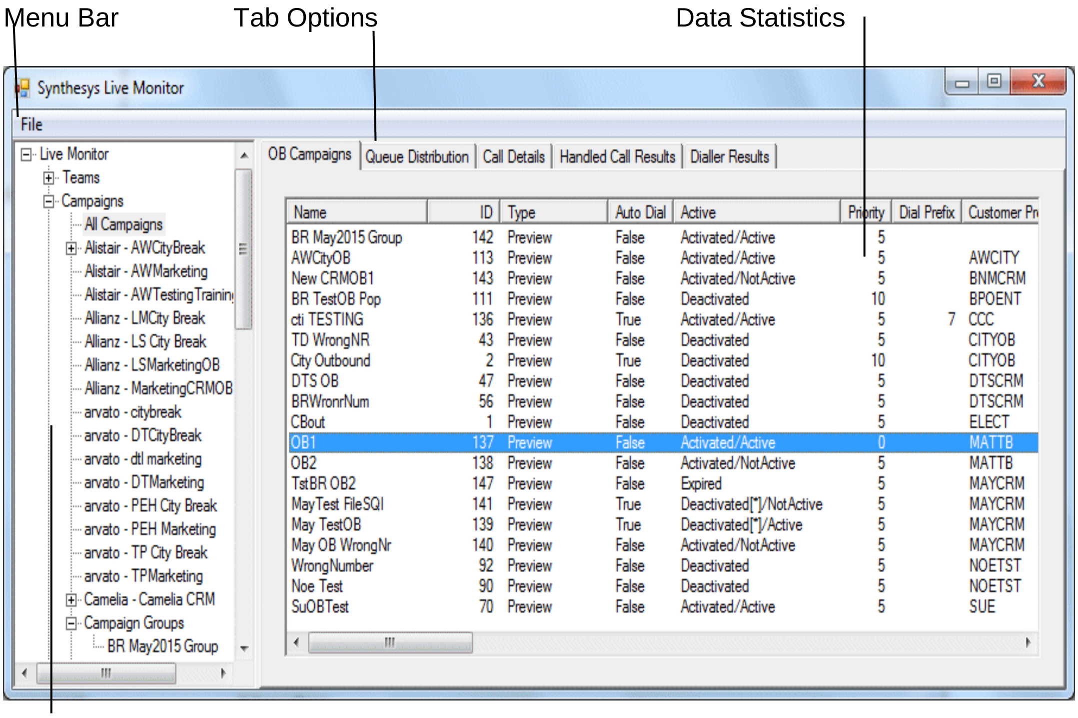
The performance monitor works on the .net framework, and additional software may need to be installed before the monitor will work correctly.

The Synthesys Live Monitor Main Screen

To open the Live Monitor:

- Open Synthesys Management by clicking on the ***Synthesys Workspace Management*** icon on your desktop.
- Select the **Applications** tab and in the Launch Applications screen select ***Live Monitor.***

Using the Live Monitor, you can view the current state of all live campaigns that are running and observe individual agent activity within your call centre in real-time.



Live Monitor Directory

Live Monitor Directory

The *Synthesys Live Monitor Directory* shows a tree structure. Using the category headings *Teams, Campaigns, Agents, Dialler* and *Licensing*, detailed data statistics can be displayed for the individual teams; campaigns, outbound lists and outbound groups, agents and the dialler and licensing arrangements can be viewed.

To display the available options:

- Click on the ⊞ sign next to the Live Monitor caption.
- Click on the ⊞ sign next to Teams and Campaigns respectively, to display a list of all teams and campaigns, including the Outbound lists and outbound groups set up on the Synthesys system.
- Click on the ⊞ sign next to Agents, to display all agents currently logged on to Synthesys and in the *Start Work* screen.
- Select Dialler, to view dialler statistics.
- Select Licensing, to view the current Synthesys and Predictive Dialler licensing arrangements.

Selecting the individual team, campaign, outbound list/ outbound group or agent, you can view the corresponding detailed data statistics.

Available Tab Options

The Live Monitor displays detailed data statistics for the individual Teams, Campaigns, Outbound lists and Outbound groups, Agents and the Dialler.

Option	Displays:
OB Campaigns	Detailed statistics for Outbound lists. This option is available on Team and Campaign level.
Queue Distribution	A graph showing queue details. This option is available on Team, Campaign and Outbound list/ Campaign group level.
Agent States	A graph representing the different Agent States. This option is available on Team, individual Campaign & Outbound list/ Campaign group and 'All Agents' level.
Detailed Agent States	Real time statistics for all agents. This option is available on Team, individual Campaign & Outbound list/ Campaign group and 'All Agents' level.
Call Details	Shows detailed call statistics of all calls completed in the current user session. This option is available on Team, Campaign, Outbound list/ Campaign group and Agent level.
Current Call Details	Shows Customer details of the call in progress. Supervisors can follow the advancement of the call, with section names and time spent in each section displayed and supervisors can view history events associated with a customer.
Handled Call Results	A graph showing all Handled calls in 'real time', including the Call Results. This option is available on Team, Campaign, Outbound list/ Campaign group and Agent level.
Dialler Results	A graph showing dialler result details. The option is available on Campaign and Outbound list/ Campaign group level.
Factor details	Displays the factor details, i.e. the value used to calculate how many calls to dial on a predictive campaign. This option is available on Outbound list/ Campaign group level.
Group Summary	Detailed statistics for Outbound groups. This option is available on Campaigns Group level, located under the Campaigns level, as part of the All campaigns options.
CTI Details	Displays details of the Predictive Dialler and the Switch. This option is available on the Dialler level
Licensing	View current Synthesys and PD licensing arrangements. This option is available on the Licensing level.

Terminology

Term	Definition
Talking	Refers to agents taking calls, with the ‘talking’ state starting as soon as the telephone becomes unavailable, for example, when agents press the dial button or even just take the phone of the hook.
Talk Time	The time when the agent starts the ‘talking’ state, or is actually connected on the phone and still in the script. (ONLY THE FIRST DIAL IS COUNTED HERE, ANY SUBSEQUENT DIALS ARE COUNTED IN WRAP)
Previewing	Starts when the agent is in the script BEFORE entering the ‘talking’ state or being connected.
Connected	The term connected refers to the point when the Synthesys CTI interface receives a notification from the switch that the agent is no longer available. There may be a variation of up to 1 second between the call being connected and the Synthesys CTI interface being notified by the telephone switch.
Wrapping	Starts when an agent is no longer both on the phone and in a script following a dial, regardless of whether or not the dial results in a connected call.
Wrap Time	Starts when the agent enters the ‘wrapping state’ plus any switch wrap up time (set in the inf file Default 2 seconds).
Idle Time	The time between an agent ending wrap up state and getting the next screen pop (except for the first call of the day, where it is from the log in to the first screen pop.

OB Campaigns/ Campaign Group Options

The *OB Campaigns Option* is available on Team and Campaign level and shows detailed statistics of your Outbound lists and Outbound groups.

Option	Displays:
Name	The names of the Outbound lists/ OB groups.
ID	The Outbound list/ OB group ID's.
Type	Type of Outbound list/ OB group: 'Preview or Predictive'.
Auto Dial	True or False, depending if Auto Dial is activated or not.
Active	**Activated/ Active** = the OB list is activated and on active times; **Activated/ Not Active** = the OB list is activated but outside of its active times; **Deactivated** = the OB list is deactivated; **Deactivated[*]/Active** = the OB list is deactivated, but on active times in at least one OB Group using Group settings (i.e. 'Use Campaign State' is NOT ticked); **Deactivated[*]/Not Active** = the OB list is deactivated and outside of its active times in at least one OB Group using Group settings (i.e. 'Use Campaign State' is NOT ticked); **Expired =** the OB campaign has expired, i.e. it is past the end date specified using the Campaign Expires option.
Priority	The priority rating of the Outbound list/ OB group: Low = 0; High = 10
Dial Prefix	The initial number (i.e.'9') used to dial out.
Customer Prefix	The customer prefix of the CRM.
Idle Agents	The number of agents waiting' in 'Start Work' without currently taking calls.
Expected Free Agents	The number of agents that the dialler expects to be free within the average connect time for the campaign.
Unavailable Agents	The number of agents in 'Start Work', but currently not available to make or take calls (i.e. 'On Break').
Previewing Agents	The number of agents previewing calls.
Talking Agents	The number of agents in the taking state, with 'talking' starting as soon as the telephone becomes unavailable, i.e. agents press the dial button or begin to dial, or even just take the phone of the hook.
Wrapping Agents	The number of agents in the process of completing calls, from clicking OK in the conclusion window of a Callflow to hanging up the phone, or from hanging up the phone to clicking OK in the conclusion window of a Callflow.

OB Campaigns Option continued

Option	Displays:
Total Agents	The total number of agents available to take calls.
Avg Idle Time	The average time an agent is waiting in 'Start Work' without being in the talking state, in any one session.
Queued Calls	The total number of calls queued in the Outbound Manager.
Sleeping Calls Due	The total number of sleeping calls due to be taken.
Rescheduled Calls Due	The total number of rescheduled calls due to be taken.
Calls in Hopper	The total number of calls in the Dialler cache.
Total Calls Worked	A count of predictive dials, plus preview records handed to agents.
Calls To Make	The total number of predictive calls that the Dialler has calculated it needs to make for an Outbound list/ OB group.
Calls Requested	The actual number of calls the dialler requests the CTI layer to make.
Max NC Rate	The maximum nuisance % rate acceptable for predictive Outbound list/ OB group.
Current NC Rate	The current nuisance % rate for the predictive Outbound list/ OB group.
Current SR	The current success rate (SR) in percent (%) of calls that are given to the agents.
Avg Connect	The average time it takes for predictive dialled calls to be connected.
Trunks Allocated	The number of lines allocated for predictive dialling.
Next Start Time	The next time the campaign becomes live based on the active time settings in the Synthesys Outbound Manager.
Next End Time	The next time the campaign is due to finish based on the active time settings in the Synthesys Outbound Manager.
Estimated Time left	The estimated time the campaign runs out of call data, based on the number of records still to be worked, the number of agents and the average duration of the calls.
Weight	Weighting set for the Outbound groups to determine the number of calls to be taken from a selected Outbound list within a group, before moving to the next.

Detailed Agent States Option

This option is available on Team, individual Campaign, Outbound list, Campaign group and 'All Agent' level and shows real time statistics for all agents.

Option	Displays:
User Name	The name used to log on to Synthesys.
Agent ID	The agent's ID, as allocated in Synthesys Personnel.
First Name	The agent's first name, as entered in Synthesys Personnel.
Last Name	The agent's surname, as entered in Synthesys Personnel.
Machine	The name of the workstation.
Switch	The name of the switch / PBX used.
Extension	The extension number for the workstation.
Status	The current status of the agent, i.e. 'Waiting' 'Previewing' etc.
Detailed Status	The current agent state ('Available'; 'Unavailable – Break') or the agent's progress within a campaign, showing the campaign and current section name, or 'Wrap-up' once the agent has reached the conclusion window.
Time in State	How long agents have been in the current Status.
OB Campaign	The name of the Outbound list currently allocated to the agent.
Handled Calls	All calls that the agent has taken. Aborted I/B calls are displayed as completed calls, aborted O/B calls show the selected aborted type.
Finished Calls	All Inbound and Outbound calls that an agent has completed, but NOT the aborted O/B calls.
Time Logged On	The time an agent has logged on and accessed 'Start Work'.
Total Talk Time	The length of time an agent is both, connected on the phone and in a Synthesys Callflow.
Avg Talk Time	The average length of time the agent is connected on the phone and in a Synthesys Callflow (ONLY THE FIRST DIAL IS COUNTED HERE, ANY SUBSEQUENT DIALS ARE COUNTED IN WRAP).
Total Wrap-up Time	The total time when an agent is <u>not</u> both on the phone and in a script following a dial, whether the dial results in a connected call or not, plus any switch wrap up time.

Detailed Agent States continued

Option	Displays:
Avg Wrap-up Time	The average time when an agent is <u>not</u> both on the phone and in a script following a dial, whether the dial results in a connected call or not, plus any switch wrap up time.
Total Idle Time	The total time between an agent ending wrap up status and getting the next screen pop.
Avg Idle Time	The average 'Idle Time' between an agent ending wrap up status and getting the next screen pop in any one session.
Total Preview Time	The total time an agent is in a Synthesys callflow BEFORE the call is connected.
Avg Preview Time	In average length of time an agent is in a Synthesys callflow BEFORE the call is connected.
Total Unavailable Time	The total time of an agent being unavailable to take calls in any one session.
Avg Unavailable Time	The average time of an agent being unavailable to take calls in any one session.

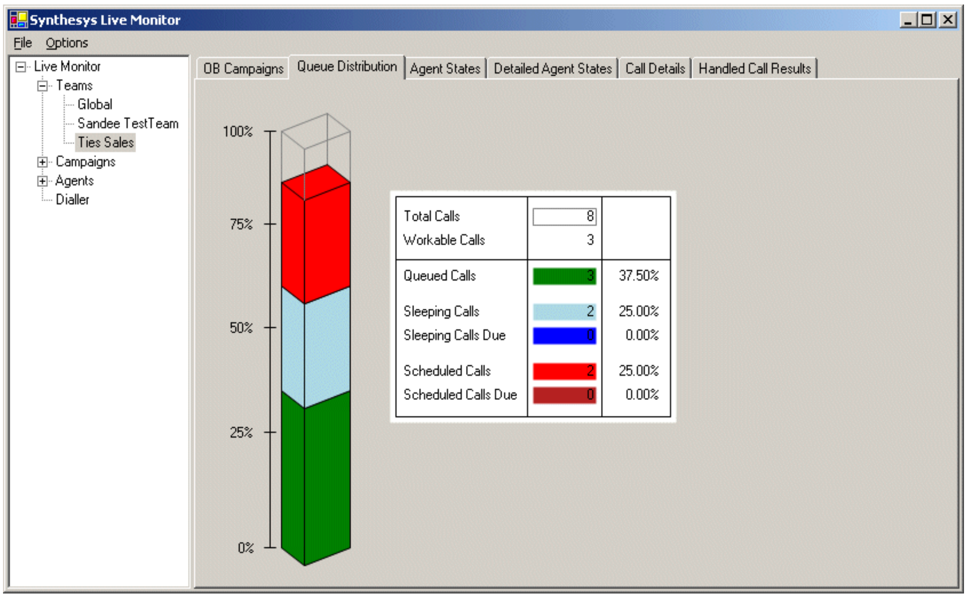
Call Details

This option is available on Team, Campaign, Outbound list, Campaign group and Agent level and shows call statistics of all calls completed in the current user session.

Option	Displays:
User Name	The name of the user logged into Synthesys.
Sequence ID	The unique ID for the completed call in the current user session.
Customer ID	The Customer ID (CRM Prefix) of the completed call.
Call Type	'Inbound' or Outbound', depending on whether it was an Inbound or Outbound list.
Call Result	The outcome of the call. Finished calls display the Call Results, as set up in the conclusion flags in the Callflow Editor; aborted calls show the aborted type, i.e Rescheduled; Phone engaged; etc.
Campaign	The name of the campaign.
OB Campaign	The name of the Outbound list.
Queue ID	The Queue ID of an Outbound list (or IB for an Inbound call).
Time Started	The date and time the call started.
Time Finished	The date and time the call finished.
Preview Time	The length of time an agent was in a Synthesys callflow BEFORE the call was connected.
Talk Time	The time the agent was in the talking state and in the Synthesys Callflow. (ONLY THE FIRST DIAL IS COUNTED HERE, ANY SUBSEQUENT DIALS ARE COUNTED IN WRAP)
Wrap Time	The time when an agent spent not both on the phone and in a script following a dial whether the dial results in a connected call or not, plus any switch wrap up time (set in the inf file Default 2 seconds).
Total Time	The total time it took the agent to take a call, from the time of the Callflow pop, including preview time, dialling, talk time and wrap-up time, to the point at which the agent was available again to take the next call.
Idle Time	The time spent between the agent ending the wrap up state and getting the next screen pop (on the first call of the day from login until the first screen pop.

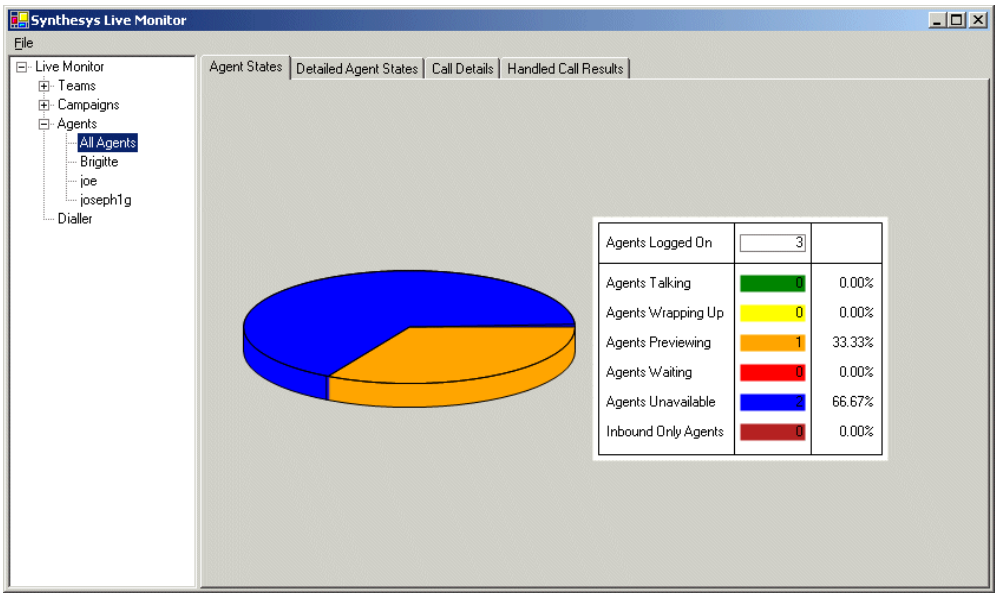
Queue Distribution

This option is available on Team, Campaign and Outbound list and Campaign group level, displaying a graph showing queue details.



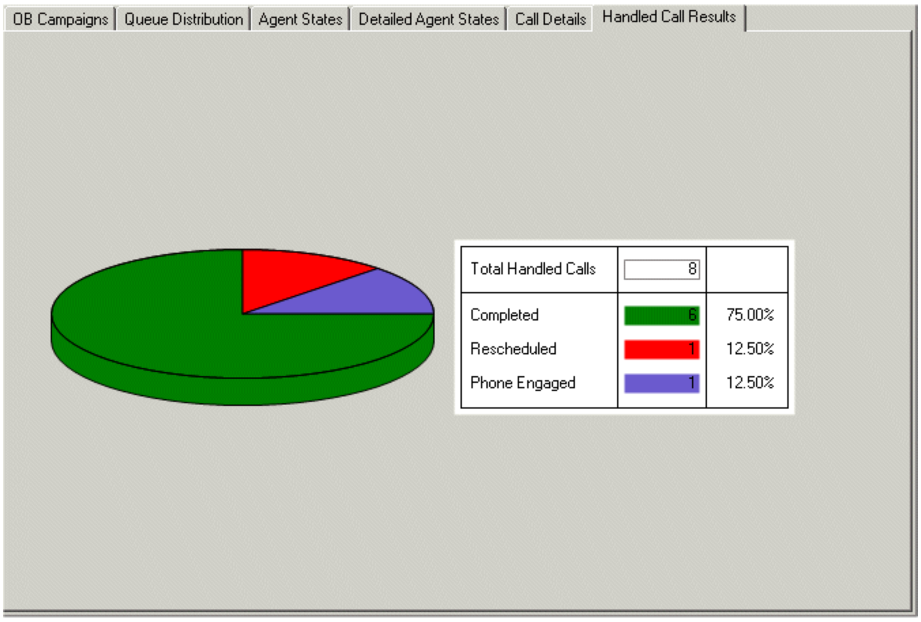
Agent State

The option is available on Team, individual Campaign, Outbound list, Campaign group and 'All Agent' level, displaying a graph representing available Agent States.



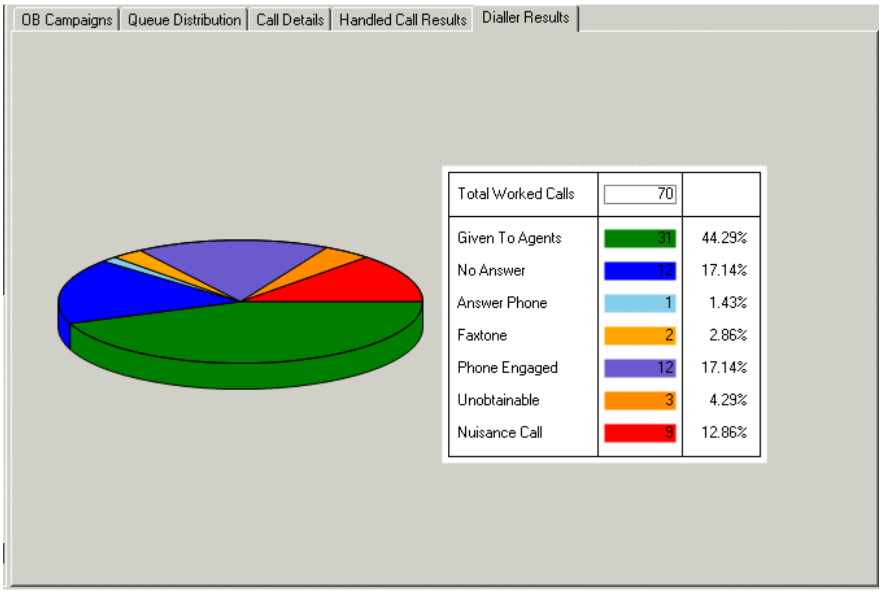
Handled Call Results

This option is available on Team, Campaign, Outbound list, Campaign group and Agent level, displaying a graph showing all Handled calls in 'real time', including the Call Results.



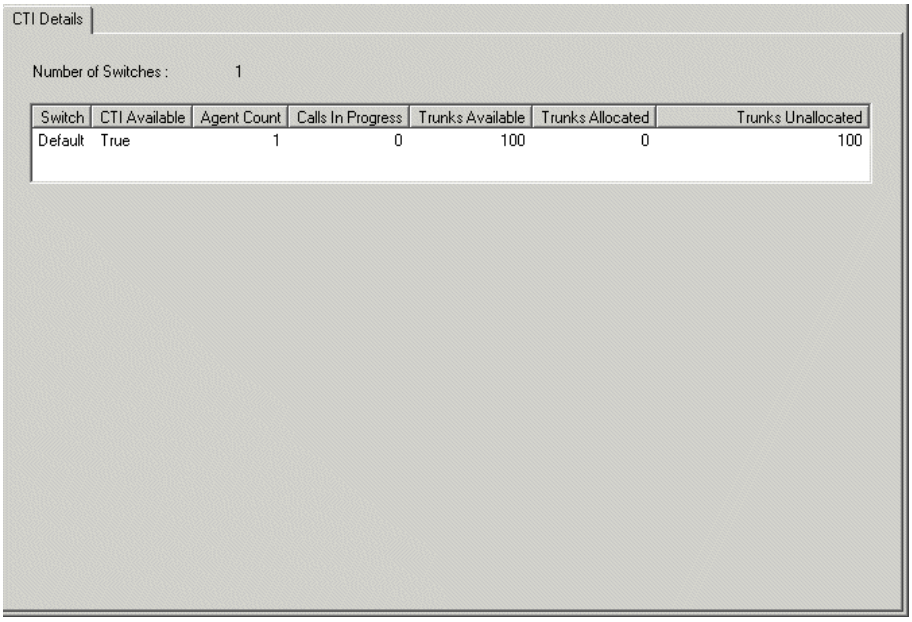
Dialler Results

This option is available on Campaign, Outbound campaign and Campaign group level and displays a graph showing dialler result details.



Dialler

CTI Details displays details related to the Predictive Dialler and the Switch.

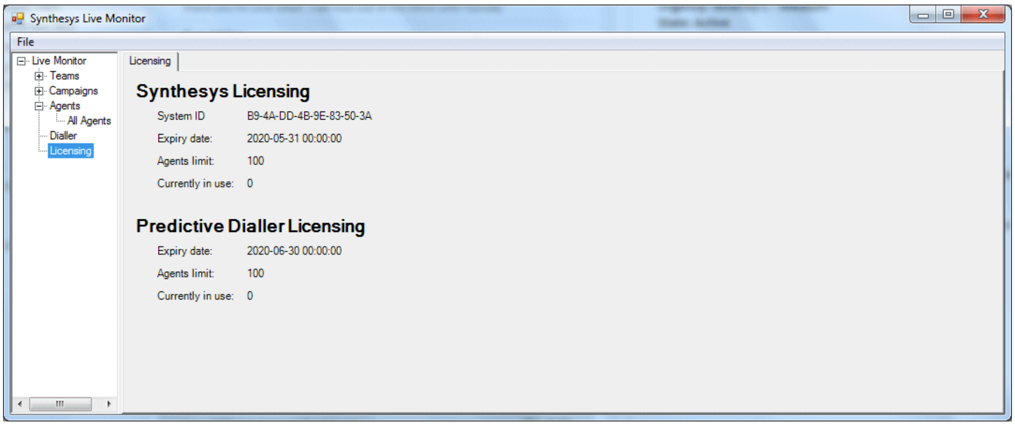


Option	Displays:
Switch	The switch agents are logged into; if multi switch is used, the different switches, agents are logged into.
CTI Available	True or False, depending on whether or not CTI is available.
Agent Count	The number of agents logged into the specific switch.
Calls in Progress	The number of predictive calls being dialled.
Trunks Available	The number of Trunks available for the Dialler on that switch.
Trunks Allocated	The number of Trunks allocated to Outbound lists.
Trunks Unallocated	The number of Trunks not allocated to Outbound lists.

Licensing

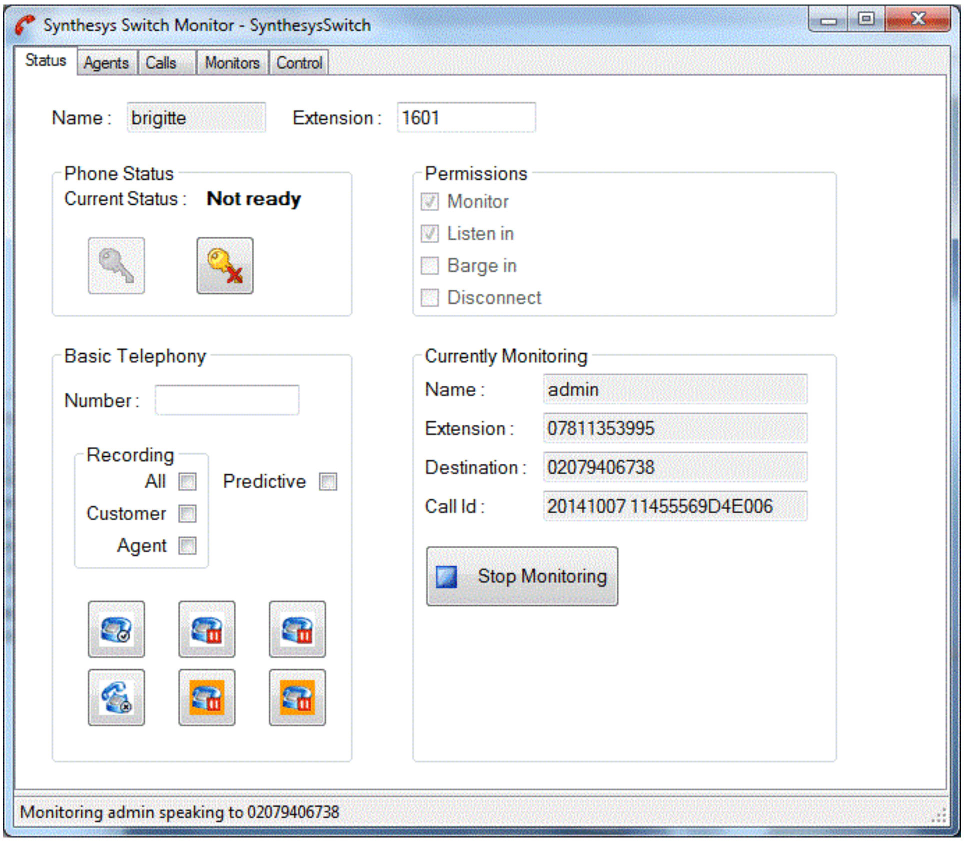
Selecting the ***Licensing*** option, you can view the current Synthesys and Predictive Dialler licensing arrangements, including:

System ID	Shows the System ID that is generated when Synthesys is installed.
Expiry date	Date the licence expires.
Agent limit	Maximum agents that can be logged on at any one time.
Currently in use	Number of agents that are currently logged on.



NOETICA VOICE PLATFORM

THE SWITCH MONITOR



NOETICA VOICE PLATFORM: SWITCH MONITOR

Introduction

The *Switch Monitor* enables supervisors to view and monitor calls made using the Noetica Voice Platform.

Supervisors can select the type of call that they wish to monitor, for example all predictive calls, or all calls with a specific extension.

The supervisor will then hear a selection of calls, from the moment the call is placed, through to the delivery of the call to an agent, to the call being finished or until the supervisor chooses to stop monitoring the call.

The Switch Monitor is not a standard feature but needs to be purchased separately.

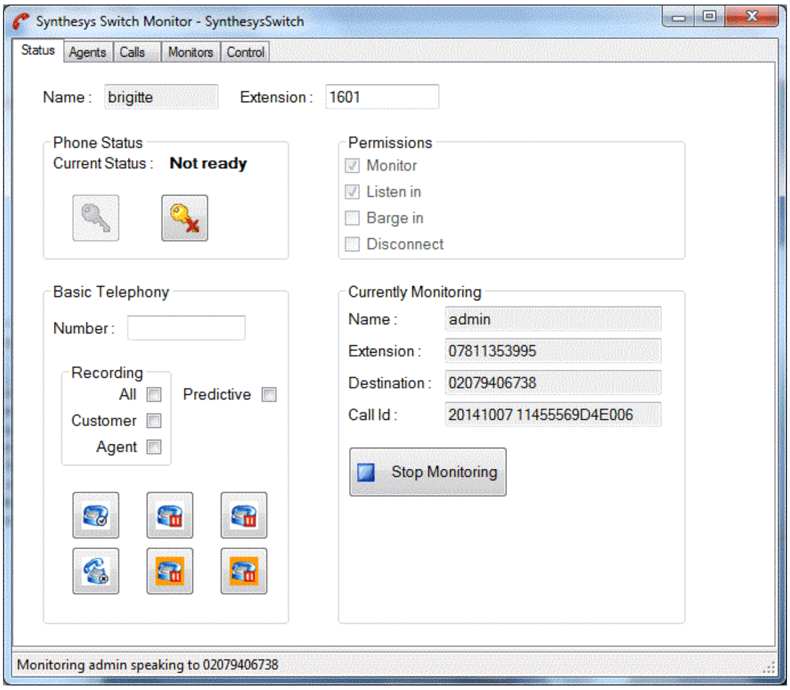
The Status Screen

To start the Switch Monitor:

- Open Synthesys Management by clicking on the ***Synthesys Workspace Management*** icon on your desktop.
- Select the **Applications** tab and in the Launch Applications screen select ***Switch Monitor***.

The ***Name*** and ***Extension*** are taken from the details entered when logging into Synthesys; they should include a valid extension.

In our example, we are logging in with username 'brigitte', using extension '1601'.



The **Status Bar** shown above saying ***initialised*** also displays ***current call progress*** information and other messages.

Please see next page for more information.

Status Screen Options

The sections available in the Synthesys Monitor main screen include:

Phone State

Logging in the phone	Clicking the key icon connects the *Noetica Voice Platform* to the supervisor phone, when the call is connected then status will turn to *Ready*.
Logging out	Click the key icon with a red cross to disconnect and logout from the Noetica Voice Platform. Closing the *Switch Monitor* will not disconnect the phone, since the phone can still be in use at the same time by the *Synthesys Agent* module.
Permissions	To access the advanced monitoring screens, you need to have the Synthesys *Run Live Monitor* permission, which can be set up in Personnel module. The permissions ticked show the permissions that are available on your phone system.
Basic Telephony	This allows the CTI engineers to test extensions after an upgrade or the installation of new phone software.

Number: For entering the extension number to be dialled.
Recording: Tick to determine the type of recording file to be created.
Predictive: Tick to call predictively, do not tick to test Preview calling.

Making a call	Hold a call
Hang it up	Unhold a call
Stop recording	Resume recording

The call can be recorded, but is not tagged within Synthesys Call History and so needs to be located manually on disk.

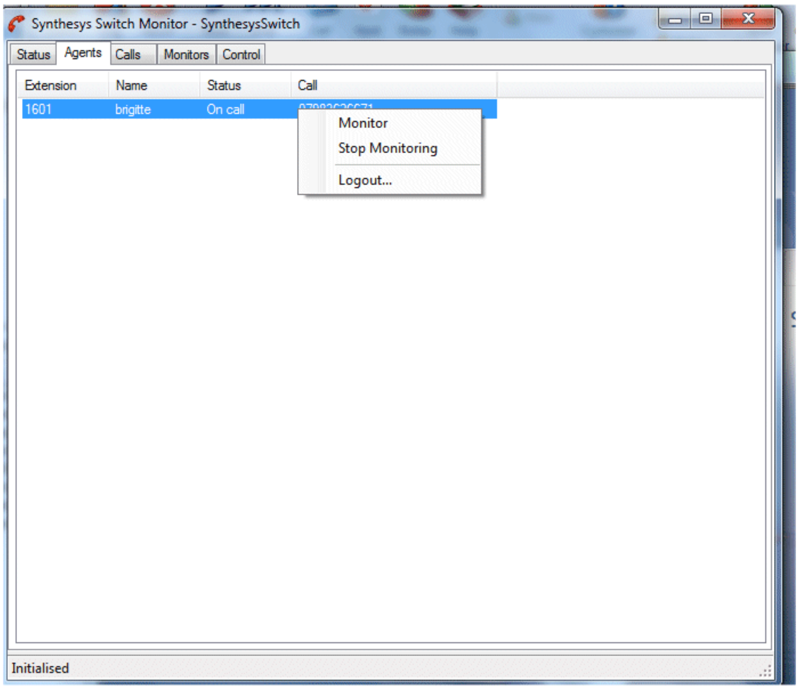
Telephone control should normally be done using the Synthesys Agents module.

Currently Monitoring	When monitoring a call, details of the monitored call appear here.

The Agent Screen

This shows all the currently logged on agents.

- Right click on an agent and select the Monitor option to add the agent to the items being monitored. If the agent is currently on a call, the current call is immediately monitored, otherwise the next call (and all subsequent calls) are monitored.
- To stop monitoring an agent, choose the Stop Monitoring menu option, or use the Monitors tab.
- To log an agent off, select the Logout option.



The Call Screen

The Calls Screen is similar to the Agents screen, but ***showing all currently active calls*** (including calls not currently assigned to an agent).

Again, the call can be monitored from this screen by using the right-click menu option.

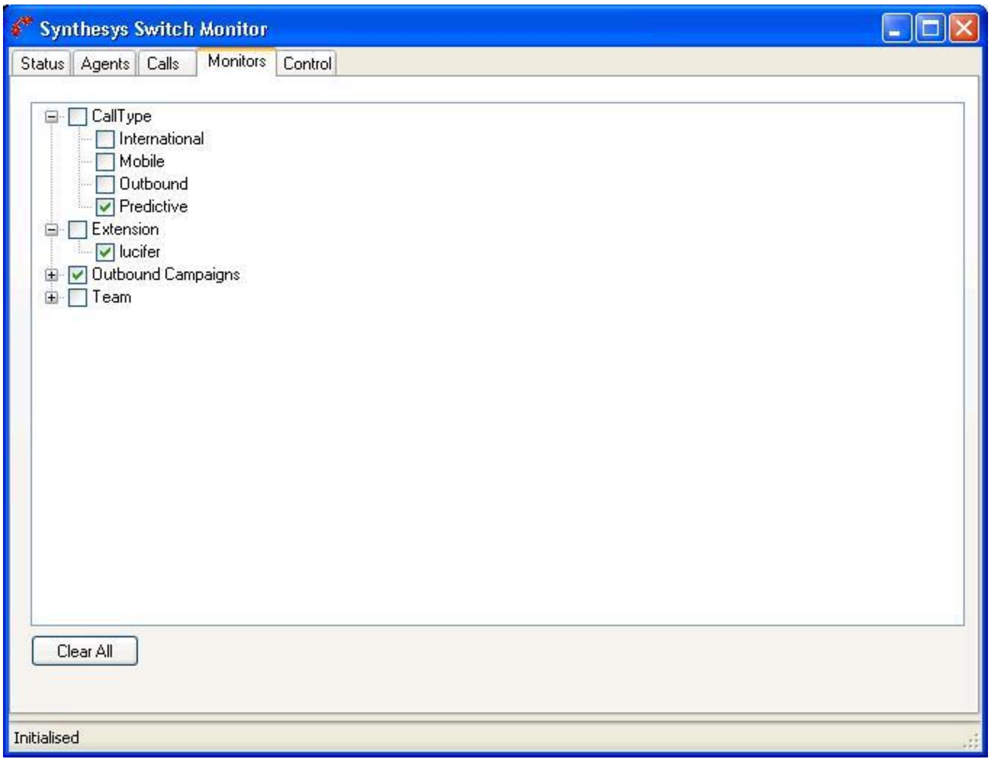
The Monitors Screen

For more advanced call monitoring, the Monitors screen can be used.

This is a tree of all the entity types that can be monitored. For example below, we have requested to monitor:

- All predictive calls
- All agents with extension 'Lucifer', and
- All Outbound lists.

Items can be selected or deselected here by pressing the checkbox.



Clear All

The ***Clear All*** button provides a rapid way of clearing all the monitored items in the tree.

This will not necessarily stop monitoring the current call, (unless it was associated with a request to monitor an agent); this must be done from the 'Status' screen.

Call Monitoring

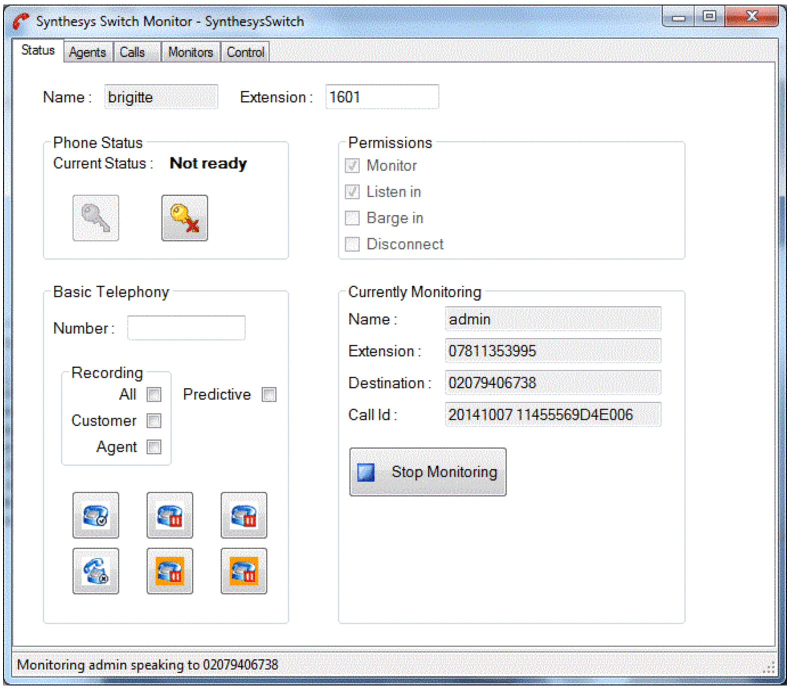
Providing that the supervisor who has requested this type of call to be monitored is available and not on, or monitoring another call, he or she can monitor a new call whenever it is started to its conclusion, or until the supervisor chooses to stop monitoring the call from the 'Status' tab.

Selecting ***Predictive,*** for example, the supervisor will hear a selection of predictive calls, from the moment the call is placed, through to the delivery of the call to an agent, to the call being finished.

Call Monitoring Details

Back in the first screen **Status**, we can view details of the currently monitored call.

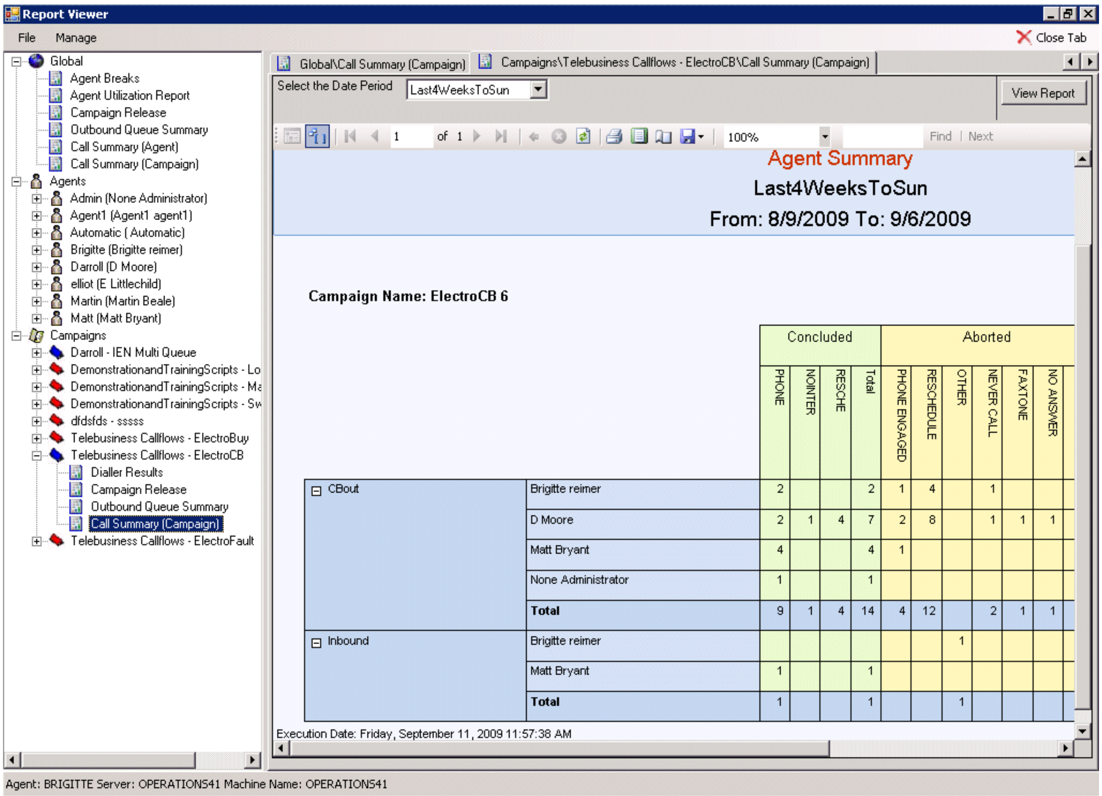
In our example, the agent ***Admin*** logged on to extension 07811353995 has called the number '02079406738'. The status bar also provides current call information.



The supervisor can stop monitoring this call by pressing the ***Stop Monitoring*** button.

The supervisor will then be ready to monitor the next call. To stop monitoring this agent or other classes of calls, the relevant option is deselected in the 'Agents' or 'Monitors' tab.

Report Viewer



THE SYNTHESYS REPORT VIEWER

Introduction

The Report Viewer is used to add and view SQL reports.

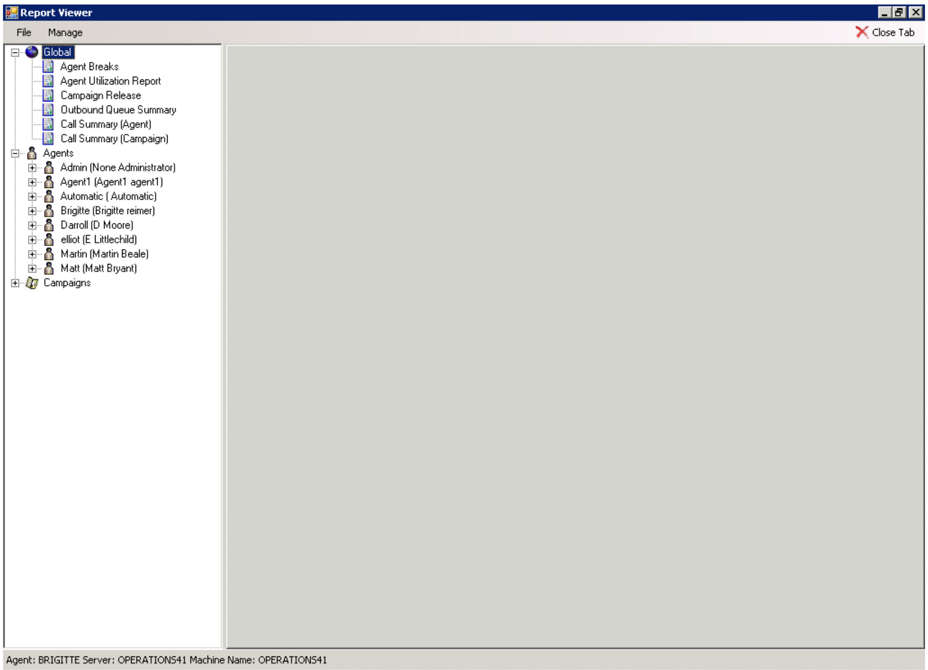
A range of standard SQL reports will be available in the *Report Viewer* as part of the Synthesys installation. Included are for example, the *Agent Utilization*, *Outbound Queue Summary* and *Dashboard* reports.

Your reporting team can design further SQL reports, which you then can add to the *Report Viewer* under the relevant *Global, Agents or Campaigns* categories.

Starting the Report Viewer

To start the Report Viewer:

- Open Synthesys Management by clicking on the ***Synthesys Workspace Management*** icon on your desktop.
- Select the **Applications** tab and in the Launch Applications screen select ***Report Viewer.***

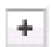


File Options

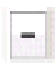
RefreshTree. To update the list of reports displayed.

Exit. To exit the Report Viewer and return to the Synthesys main screen.

Manage Options



Add Report. To pick up a new SQL report from the server and to display it under the selected categories.



Remove Report. To remove an SQL report from the category lists.

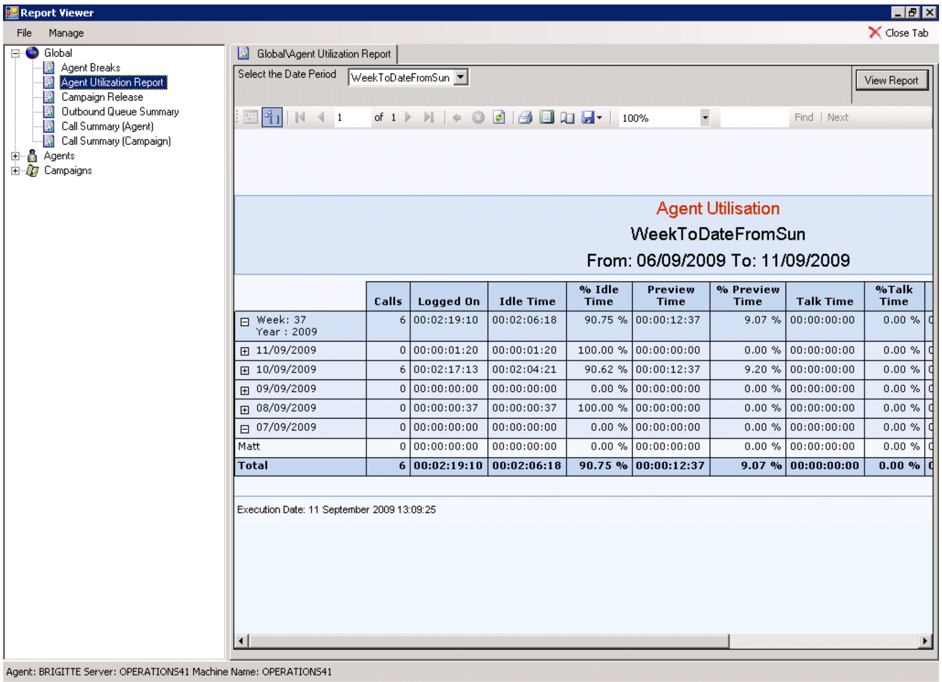
Viewing Reports

To open a report:

- Select the report under the relevant category ***Global, Agent*** or ***Campaign*** in the tree structure on the left side of the Report Viewer
- Double click on the report to display report details on the right side of the Report Viewer.

Some reports, for example the Agent Utilization, Outbound Queue Summary and Dashboard reports, will open automatically.

*For other reports you need to **specify a date period parameter**, before the report opens, displaying the required information.*



Please see next page for more information.

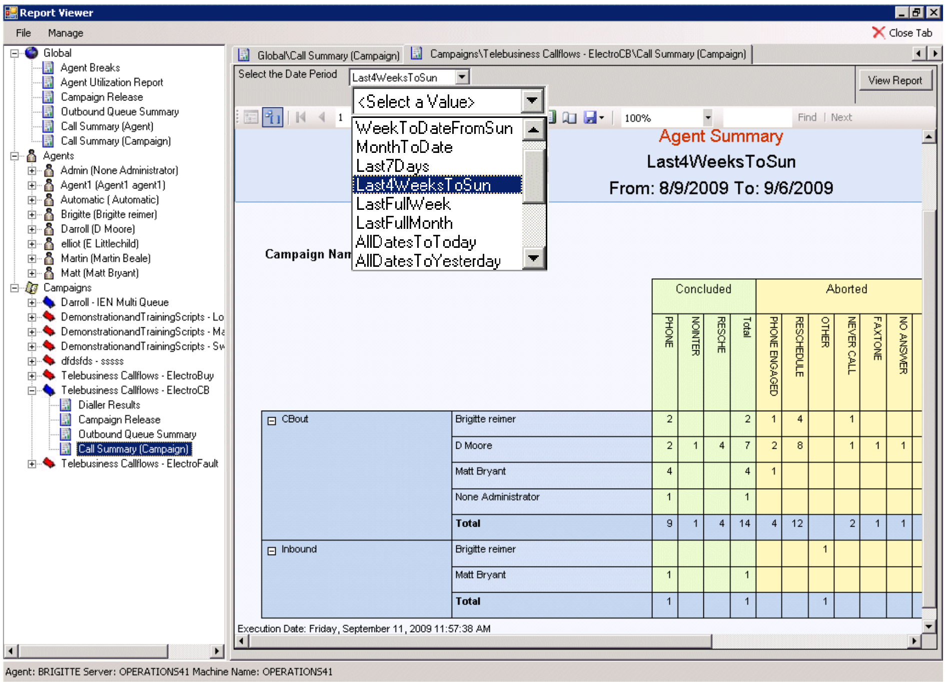
Entering Date Period parameters

Some reports have been set up to display data for a specified time range automatically, for example the *Agent utilization report*, for others a date period needs to be selected.

To specify the desired date period:

- Select the report that you wish to open in the tree structure on the left side.
- Choose the required date period parameter from the Select a date Period drop down menu.
- Click the View Report button on the top right of the Report Viewer.

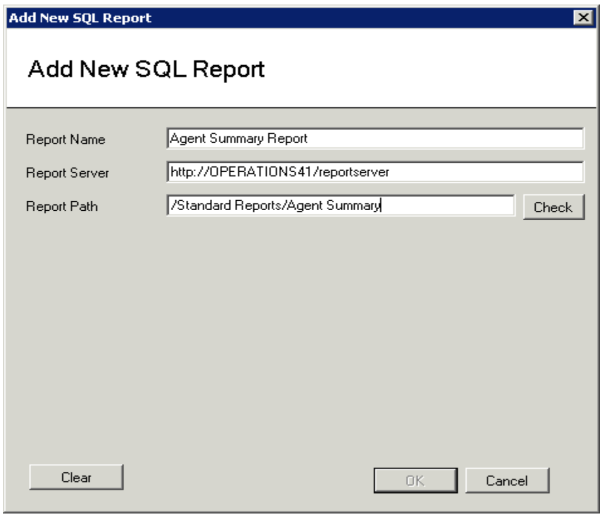
The report will open displaying the data for the selected time period.



Adding new SQL Reports

A range of standard SQL reports will be available in the Report Viewer as part of the Synthesys installation. Other SQL reports can be designed by your reporting team. To add these reports:

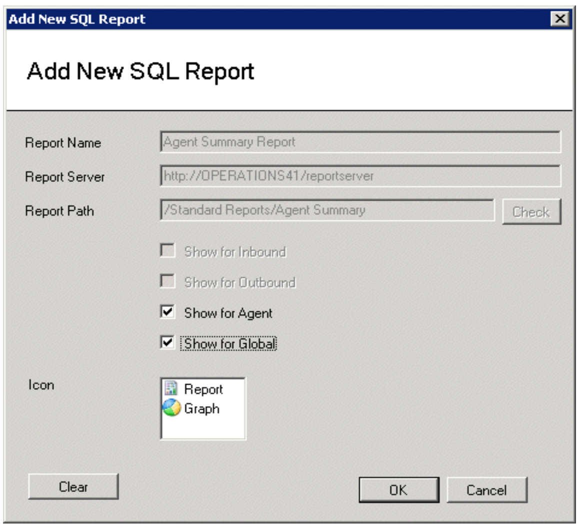
- Go the Manage on the Menu bar and select the Add Report option.
- In the Add New SQL Report dialog, enter the Report Name, the URL address for the Report Server and the Report Path



If the report path entered is incorrect, a message will prompt you to check the path.

Click the ***Check*** button, to locate the report.

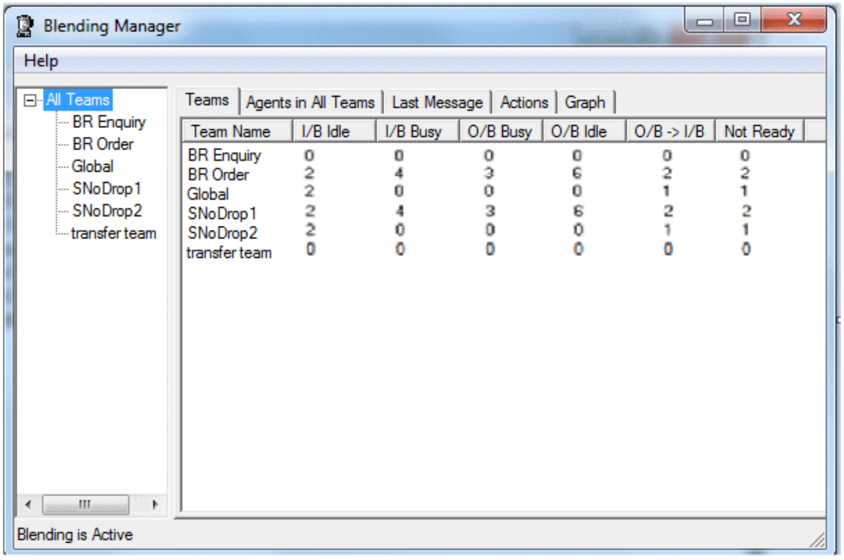
- Next, select the ***category*** under which the report is to be displayed. Options not relevant for the type of report selected will be disabled.
- Select the ***icon*** that should be displayed with the report.



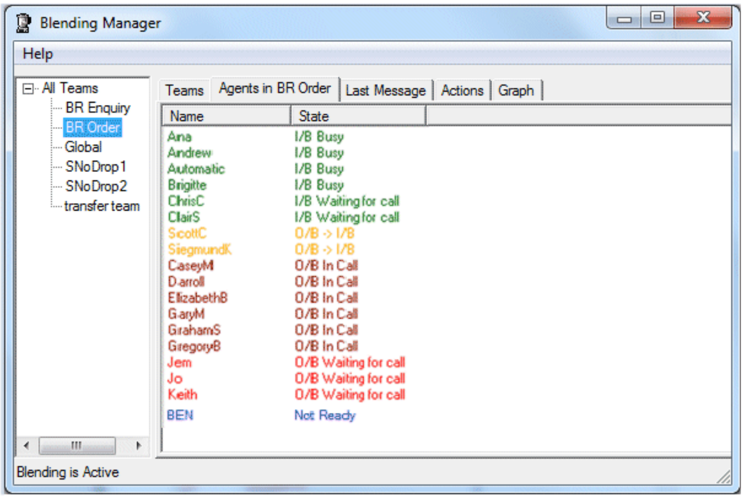
If you forget to select a category or icon, a message will prompt you do to do so.

SYNTHESYS.NET CALL BLENDING
Blending Manager

All Teams: Number of Agents in Teams



Selected Team: Current Agent State



SYNTHESYS CALL BLENDING

Introduction

The Blending Manager is used to setup blending of Inbound and Outbound calls. For each team created, you decide if it should be *Inbound* or *Outbound* only, or a *Blended* team. If it is a blended team, containing both Inbound and Outbound campaigns, you need to specify the number of ***Reserved Inbound Agents*** that should remain free to take Inbound calls, and the number of ***Maximum Inbound Agents*** that can either be in, or are waiting for Inbound calls.

Depending on the selected number of Reserved Inbound Agents (0 or > 0) (your telephony platform may not support both or indeed any), you may be using either **Reactive Blending**, or **Active Blending**.

Reactive Blending: The Synthesys Blending module monitors each team of agents, ensuring that a pool of agents in each blended team is available for Inbound work (Inbound Only state). Contact centre administrators need to keep an eye on the inbound queues, as blended team settings may need to be adjusted, aiming to reserve either more or fewer agents to Inbound, depending on the Inbound traffic during certain periods of the day.

Active Blending: In Active Blending (please check with your Noetica project manager if your CTI platform supports this), Synthesys is notified by the telephony platform of the numbers of Inbound calls in the queue (if any). Only when calls are coming in will the system make the next free agent available for Inbound work. This way there is no need to reserve a fixed number of agents in each blended team for Inbound calls.

Blending is system wide and effects all Teams. When Call Blending has been configured, you can’t switch the blending feature on and off yourself although you can configure teams to be Inbound Only or Outbound Only (in effect not blended). Please ask Noetica technical support for assistance.

Blending ignores the Global Team, and for blended teams it only takes account of ONE team membership for each agent, so the teams need to be set up accordingly, i.e. one agent can only ever be in one team in a blended environment.

A system wide setting can be enabled such that, if rescheduled calls are due, agents will be released for Outbound so that they can handle the rescheduled calls due.

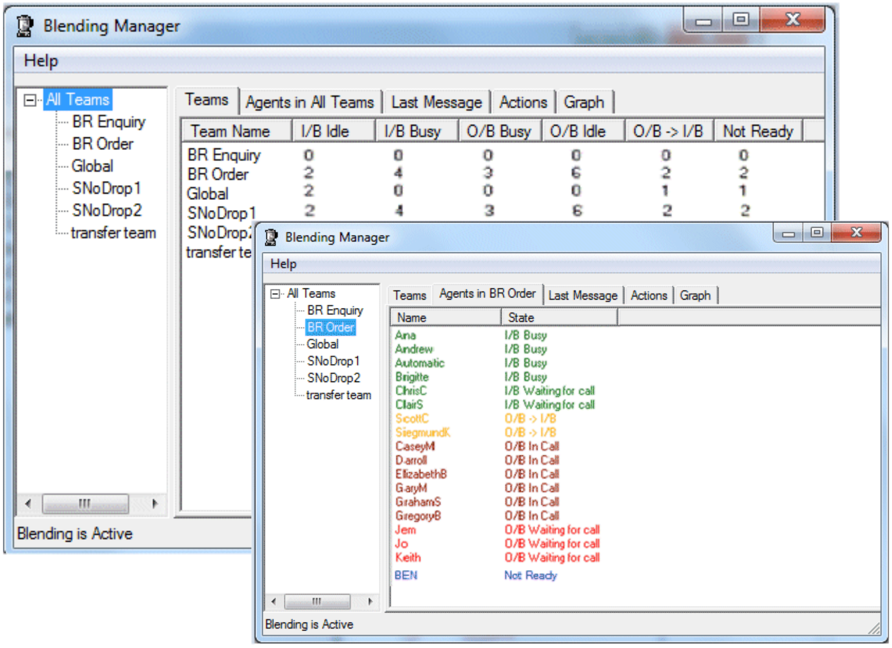
Since Synthesys must monitor when an agent is ready to take an Inbound call, it is necessary that the telephony platform correctly keeps the system informed when an agent logs off, makes a manual call, goes 'busy' on their extension or otherwise changes state. Call blending can only work effectively to the extent these functions are provided by the telephony platform.

Opening the Blending Manager

To open the Synthesys *Blending Manager*

- Open Synthesys Management by clicking on the ***Synthesys Workspace Management*** icon on your desktop.
- Select the **Applications** tab, and in the Launch Applications screen select ***Blending.***

The left hand side of the Blending Manager shows a tree view listing all teams set up in the Synthesys Team Manager. On the right, you can see associated information when selecting the Teams, Agents in All Teams, Last Message, Actions and Graph tabs.



Option	Shows
Teams	All teams set up in the Synthesys Team Manager, with a count of the number of logged in agents in each different state per team, i.e. I/B Idle; I/B Busy; O/B Idle; O/B Busy; O/B-> I/B; Not Ready.
Agent in All or a selected Team	Detailed current agent state for all teams or a selected team.
Last Message	Snapshot of the last blending decisions made. This is also logged in the Blender.Details.Log on the server.
Actions	Summary of the last blending action, such as moving agents to Inbound or Outbound.
Graph	Graph of the last hour’s activity. If you move the mouse over the graph, a tool tip will give you a legend explaining the scale and the different lines. This information is also logged in the Phoenix_BlenderLog table.

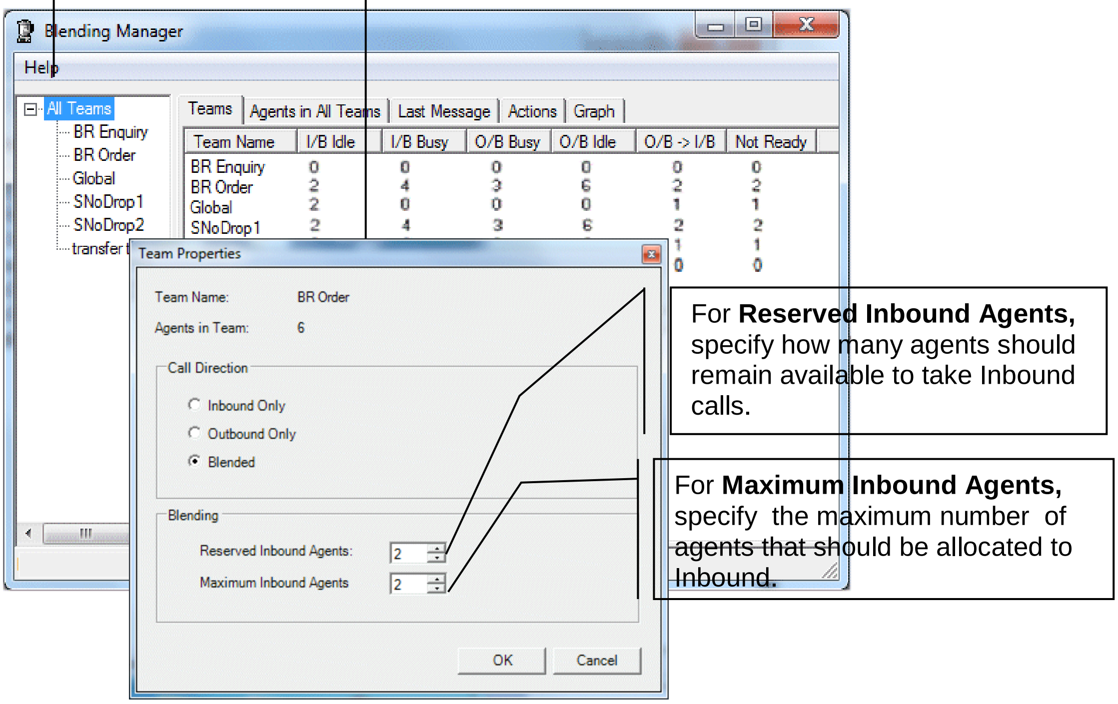
Blending Settings

With Blending enabled, **All teams** will initially go to ***Blended*** state by default. You need to adjust the settings in the *Blending Team Properties* page for each existing team, and for any new team that is subsequently created.

- Right click on the relevant team in the Tree on the left hand side of the *Blending Manager* dialog, and select *Properties* to open the Team Properties dialog.
- Select the **Inbound Only** option, if the selected team is to be used for Inbound calling only, or **Outbound Only**, if the team is to be used for Outbound calling only.
- For blended teams, select **Blended**, and use the **Reserved Inbound Agents** selection box, to specify the number of agents that should remain available to take Inbound calls (from 1, up to the maximum number of agents exclusively represented in the selected team).
- Use the **Maximum Inbound Agents** selection box, to specify the maximum number of agents that should be able to work Inbound, from the **Reserved Inbound Agents** selected above, up to the maximum number of agents exclusively represented in the selected team. This number includes agents in I/B waiting and I/B busy states.

Blending Manager with tree view, listing all Teams

Team Properties page for adjusting team settings



When using the up/ down arrows in the selection box for setting the Reserved Inbound Agents and Maximum Inbound Agents for a team, you can only select up to the maximum number of agents represented exclusively in the selected team.

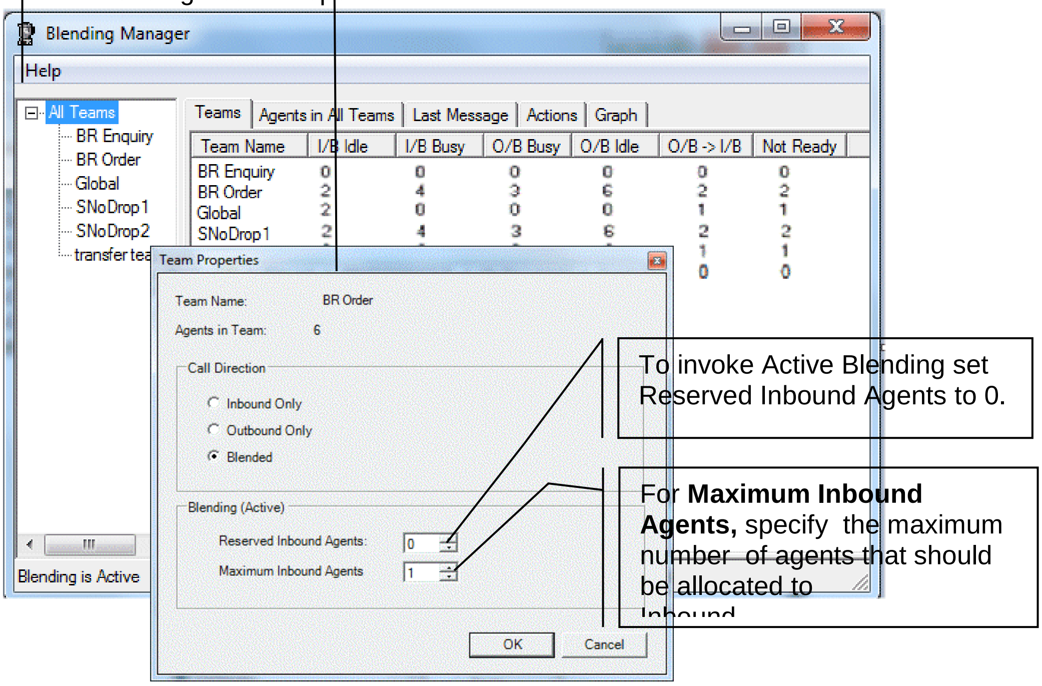
Active Blending Settings

With Active Blending installed, Synthesys is notified of incoming calls. There is no need to reserve a fixed number of agents in each blended team for Inbound calls, as the system will free the next available agent for Inbound work, when calls are coming in. To adjust the default team settings (Reserved Inbound Agents = 0, Maximum Inbound Agents = N1) as required:

- Right click on the team in the Tree on the left hand side of the *Blending Manager* dialog, and select *Properties* to open the Team Properties dialog.
- Select the **Inbound Only** option, if the selected team is to be used for Inbound calling only, or **Outbound Only**, if the team is to be used for Outbound calling only.
- For blended teams, select **Blended**, and to invoke Active Blending, set the **Reserved Inbound Agents** selection box to zero **(0).** To revert to reactive blending, use the *Reserved Inbound Agents* selection box to specify the number of agents that should be reserved to take Inbound calls, as described on the previous page: *Blending Settings*.
- Use the **Maximum Inbound Agents** selection box, to specify the maximum number of agents that should be able to work Inbound, from 1, up to the maximum number of agents exclusively represented in the selected team. This number includes agents in I/B waiting and I/B busy states.

Tree view, listing all Teams

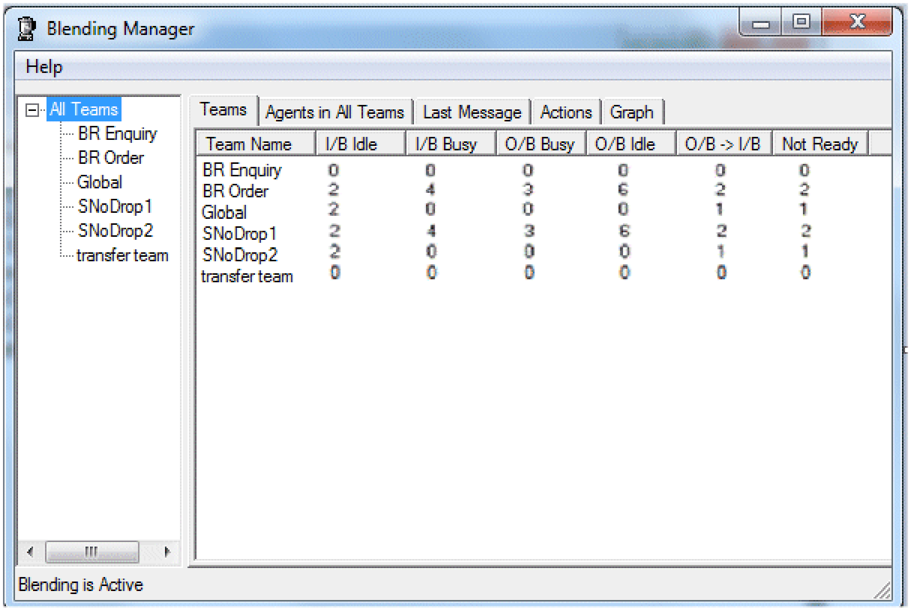
Blending Team Properties



When using the up/ down arrows in the selection box for setting the Reserved Inbound Agents and Maximum Inbound Agents for a team, you can only select up to the maximum number of agents represented exclusively in the selected team.

Teams

The *Teams* option in the Blending Manager shows a summary of all teams, with the number of agents in different states.

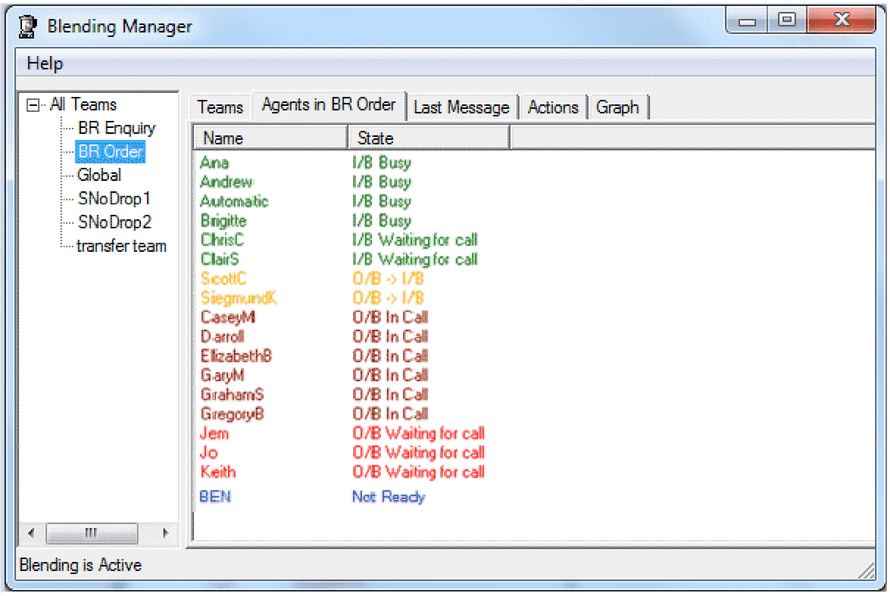


Option	Shows
Team Name	Names of the different teams set up in the Synthesys Team Manager.
I/B Idle	Number of agents free and waiting to take Inbound calls.
I/B Busy	Number of agents currently on an Inbound call.
O/B Busy	Number of agents currently on an Outbound call.
O/B Idle	Number of agents free and waiting to take Outbound calls.
O/B -> I/B	Outbound Transition: the number of agents about to be moved from Outbound to Inbound calls.
Not Ready	Number of agents currently not free to take calls.

When agents log off Synthesys they are disregarded and dropped from the Blending Manager statistics.

Agents in All or Selected Teams

The ***Agents in All (or selected) Teams*** option lists the names of all agents for the team selected on the left (which can be all teams or just one team), and shows their current states.



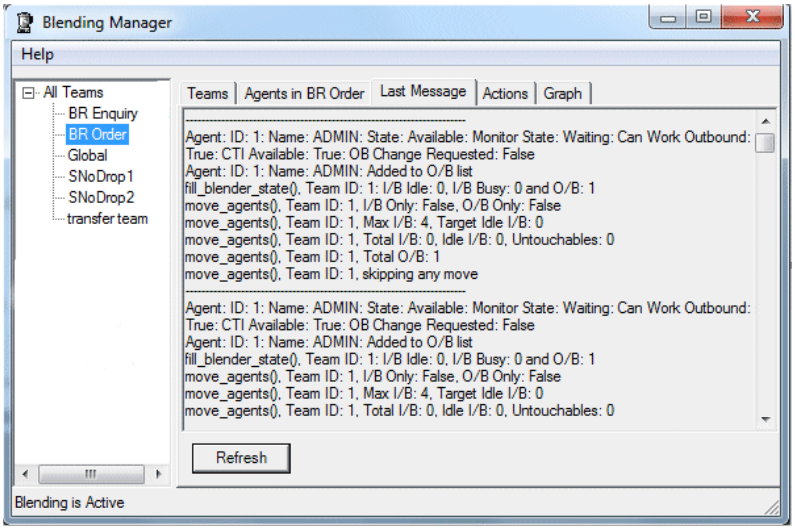
Option	Shows
Name	User names of all agents for the team selected on the left (which can be all teams or just one team).
State	Current state of the agent.

A system wide setting can be enabled such that, if rescheduled calls are due, agents will be released for Outbound so that they can handle the rescheduled calls due. When agents log off Synthesys they are disregarded and dropped from the Blending Manager statistics.

Last Message

The ***Last Message*** option shows a snapshot of the last call blending decisions made. This is also logged in the *Blender.Details.Log* on the server.

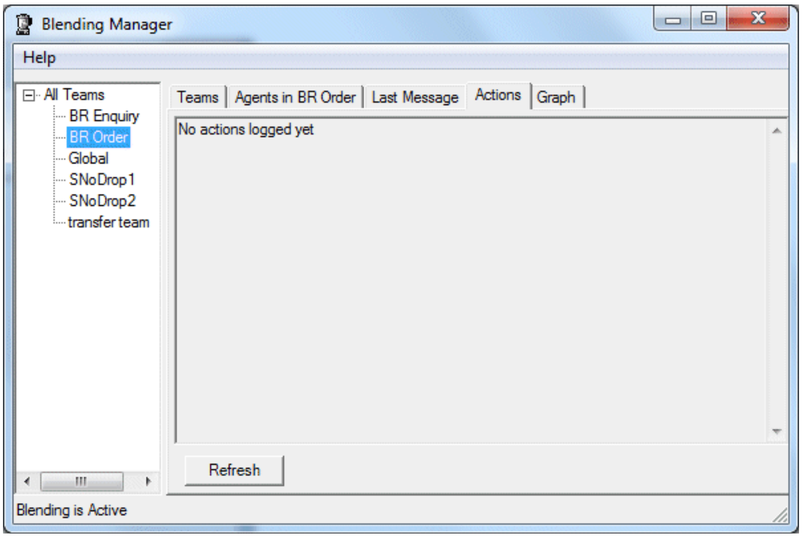
The information is useful for understanding why certain blending actions were carried out.



Click the ***Refresh*** button, to display the latest message update.

Actions

The ***Actions*** option shows a summary of call blending actions taken, such as moving agents to Inbound or Outbound.



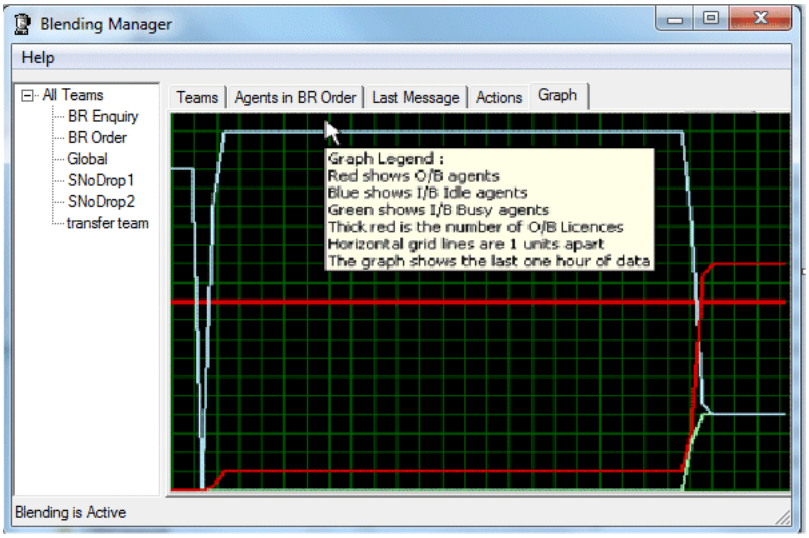
Click the Refresh button, to display the latest call blending actions.

Graph

The *Graph* option displays a graph of the last hour's activity.

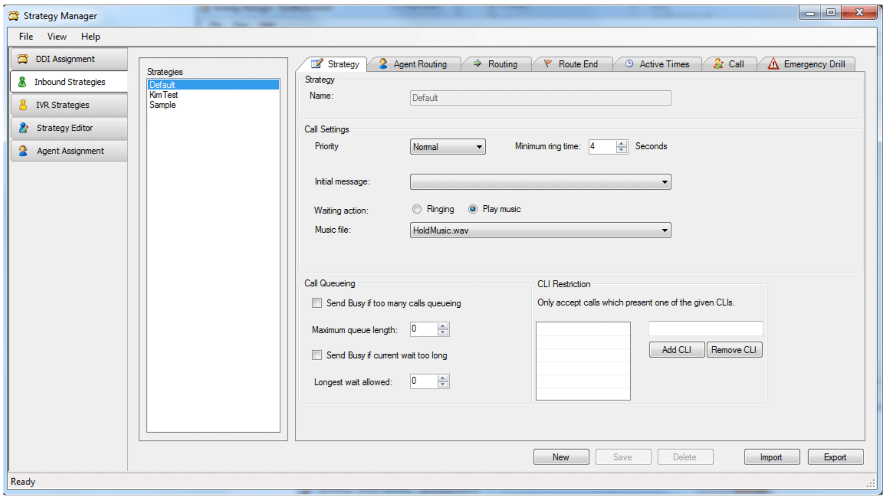
If you move the mouse over the graph, a tool tip will give you a legend explaining the scale and the different lines.

This information is also logged in the Phoenix_BlenderLog table.

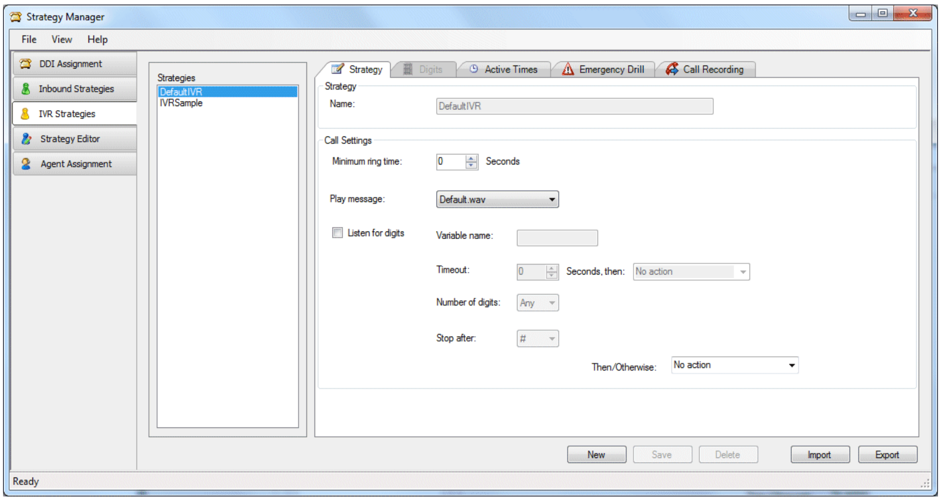


NOETICA VOICE PLATFORM

Switch Manager Inbound Strategies



IVR Strategies



NOETICA VOICE PLATFORM: SWITCH MANAGER

Introduction

- Open Synthesys Management by clicking on the ***Synthesys Workspace Management*** icon on your desktop.
- Select the **Applications** tab and in the Launch Applications screen select ***Synthesys Switch Manager***.

In the DDI Assignment dialog, users associate each incoming DDI with an Inbound or IVR strategy.

Inbound Strategies are used to define call settings and the queuing process. Users can set a minimum ring time before calls are answered, decide if a regulatory message or music should be played while callers are waiting and if the call should be recorded. For each stategy defined, users can then specify further details under the ***Agent Routing, Routing, Route End, Active Times, Call and Emergency Drill tabs.***

IVR Strategies *(*Interactive voice response) allow you to define strategies for customer interaction using message requests and DTMF tones input via the telefone keypad to route the call to the appropriate agent.

As part of the IVR strategy users can define *Variables*, and associate single digit entries with specific Inbound or IVR strategies (1 for Customer service, 2 for Sales), which subsequently can be used in Callflow calculations and branching, and for reporting.

The Strategy Editor can hold, if requested, more complex bespoke strategies designed in XML, to add extra functionality. Please contact your Noetica Account Manager for more information.

In the **Agent Assignment** dialog, users can assign an incoming DDI to a selected Agent.

All system messages are held in WAV files and can be customised per inbound campaign. If you need guidance to creating WAV files, please get in touch with Noetica and we can provide further information. (Document Reference NDID-33-72 : 'Recording Sound Files for the Noetica Voice Platform')
All call details (successful or abandoned) are logged to a database for reporting on call centre performance.
Variables set up as part of IVR strategies can be used in Callflow calculations and branching to determine the flow of the conversation, and in reporting.

The Noetica Voice Platform (NVP™) is not a standard feature but needs to be purchased separately.

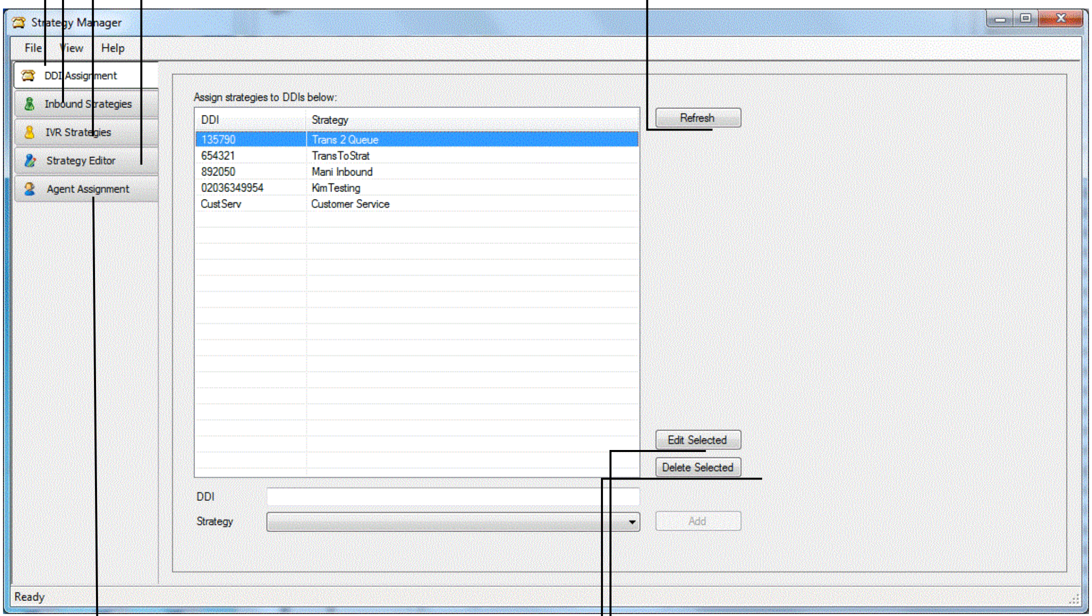
DDI ASSIGNMENT

Using the ***Switch Manager,*** users can configure the Inbound and IVR strategies that are to be associated with each incoming DDI.

IVR and Inbound strategies are assigned to DDI numbers in the **DDI Assignment** dialog**.**

- Enter the DDI number into the **DDI** field at the bottom of the dialog.
- Select the desired strategy from the **Strategy** drop down menu.
- Click the **Add** button now enabled, to display the DDI and associated strategy in the **DDI** and **Strategy** columns of the *Assign strategies to DDI below* section.
- To update information, click the Refresh button on the right of DDI and Strategy columns.

DDI Assignment – to associate DDI with Inbound strategy
Inbound Strategies - to configure the Inbound strategy to be used
IVR Strategies - to configure the IIVR strategies to be used
Strategy Editor – advanced strategies configured by Noetica
Refresh – to update strategy assignments



Agent Assignment – to link a DDI to an agent

Edit Selected – to modify the currently selected strategy
Delete Selected - to remove the currently selected strategy

The next pages will describe how you can configure new Inbound and IVR strategies.

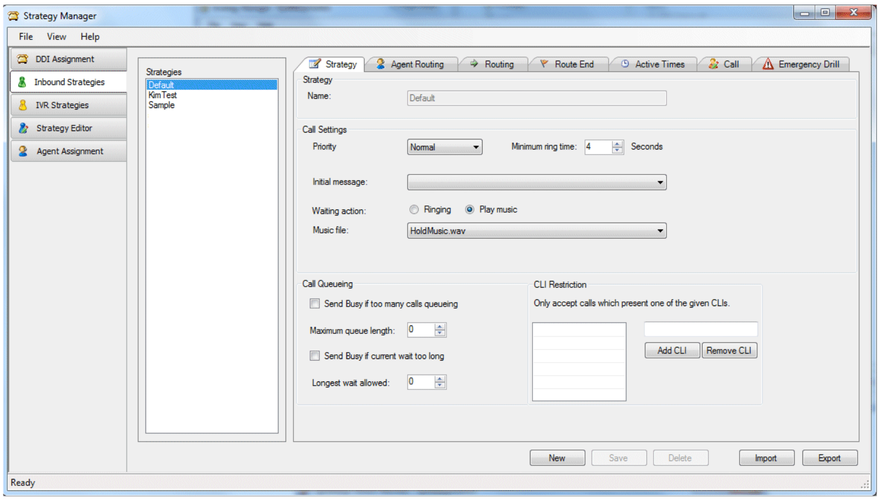
To assign a DDI to a selected agent, please go to the section **Agent Assignment** for more information.

INBOUND STRATEGIES

Strategy

To configure the Inbound Strategy, specifying the **Call Settings** to be applied for each call. The *Import* and *Export* buttons are used to import or export Inbound strategies as xml files.

-
- Create a new Inbound strategy clicking the New button at the bottom of the Strategy screen, and then type a name for the strategy into the Name field.
- Select a Priority of Low, Normal, High or Urgent to determine which calls from the available strategies should be presented to available agents first.
- Select, in seconds the Minimum ring time before the call is answered.
- Select an Initial message (WAV file), if one is to be played before a caller joins the queue (e.g. your call may be recorded for training purposes).
- Specify the Waiting action, i.e. tick Ringing if the caller should hear a ringing tone while queuing/ waiting, or select a Music file (WAV file), to play music.



Configuring details for the Call Queuing process

- Tick Send Busy if too many calls queuing and for Maximum queue length, enter the maximum number of callers allowed in the queue. If the limit set is exceeded, any new caller will hear a busy signal.
- Tick Send Busy if current wait too long and enter, in seconds, the Longest wait allowed, to send a busy signal to any new caller, if the waiting time for any caller in the queue exceeds the limit set.

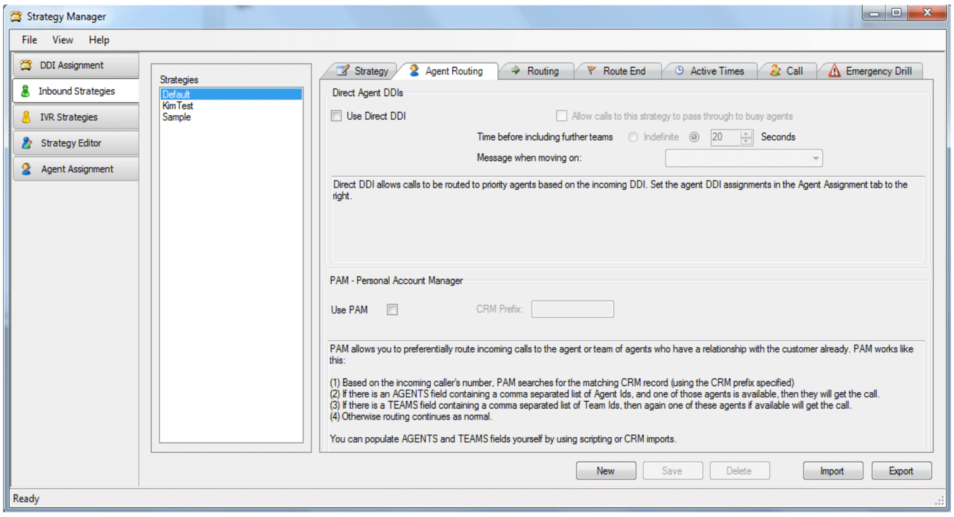
CLI Restriction

- Enter one or multiple CLIs to activate the CLI restriction feature, specifying that ONLY calls from the listed CLI number(s) will be accepted.
- If the ACD rejects a call because it does not match any of the CLIs entered, it will send a busy back.

Agent Routing

Direct Agent DDIs

- Tick the Use Direct DDI option, if the DDI is initially to be routed to a selected agent or agents, as assigned in the Agent Assignment page of the Strategy Manager.
- Users can specify, in seconds, the Time waiting, before the call can overflow to other teams in the routing tab. If Indefinite is selected, the call will only pop to agents assigned to the DDI.



PAM - Personal Account Manager

PAM routing allows for customers to be routed to preferred agents or teams, depending on successful CLI recognition. To enable PAM routing you initially need to use call scripting to add an AGENTS and/or TEAMS field to the relevant CRM, and then use CRM imports, to populate these fields with a comma separated list of Agent Ids and Team Ids.

In the *Inbound Strategies* page, under the Agent Routing tab

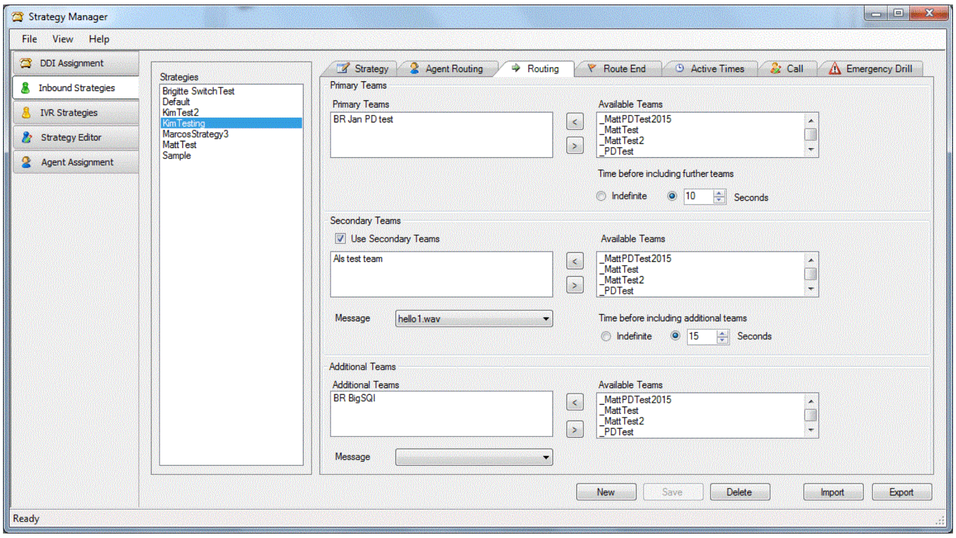
- Tick the **Use PAM** option and enter the relevant **CRM Prefix**.
- Based on the incoming caller's number, PAM will search for the matching customer record, using the CRM prefix specified.
- If there is an AGENTS field containing Agent IDs, and one of the agents is available, the call will be passed to that agent. If there is a TEAMS field containing a list of Team IDs, the call will be passed to one of the available agents in that team. If no Teams or Agents options are available routing continues as normal.

Routing

Under the Routing option, users can assign teams and specify how to deal with a call, if it hasn't been answered within a given time:

- Use the **Primary Teams/ Available Teams** option to assign a list of Primary Teams to each strategy.
- If the call isn't answered in a configurable time (**Time before including further teams**), the call can be routed to **Secondary Teams**, if they have been specified.
- A **Message** (WAV file) can be played while the caller is waiting in the queue.
- If the call isn't answered in a configurable time (**Time before including additional teams**), the call can be routed to further **Teams**, if they have been specified.

A **Message** (WAV file) can be played while the caller is waiting in the queue.



The number of inbound calls that can be queued is only limited by the number of lines configured on the system.

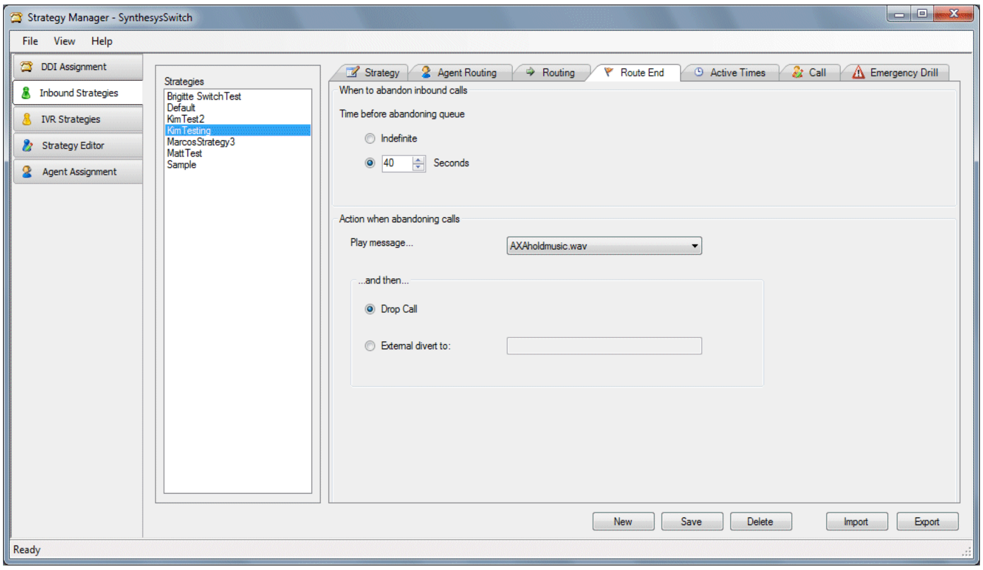
If multiple teams have been set up, all teams will be searched to locate an available agent.

The longest waiting call is answered first, and is given to the longest waiting agent who is in the correct teams and not on wrap.

Route End

Under the *Route End* tab you can decide details for abandoning or diverting inbound calls.

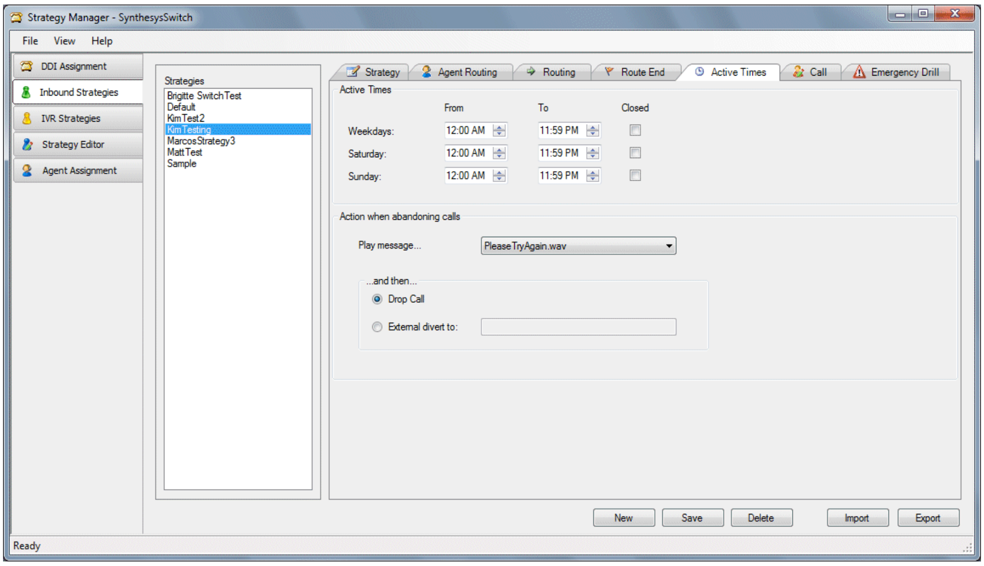
- Users can specify, in seconds, the **Time before abandoning queue.**
- In the **Play Message** field you can select a message (WAV file), if one is to be played before the call is either dropped or diverted.
- To drop the call, sending a busy tone, select **Drop Call.**
- To redirect a call to an external number, select **External divert to** and enter the telephone number (with full DDI) for the external transfer.



Active Times

Under **Active Times**, users can specify the opening hours during which the Inbound strategy will be used and select an Out of hours message. When abandoning calls, you can specify an required action, i.e. to play a message, and then either drop or divert the call.

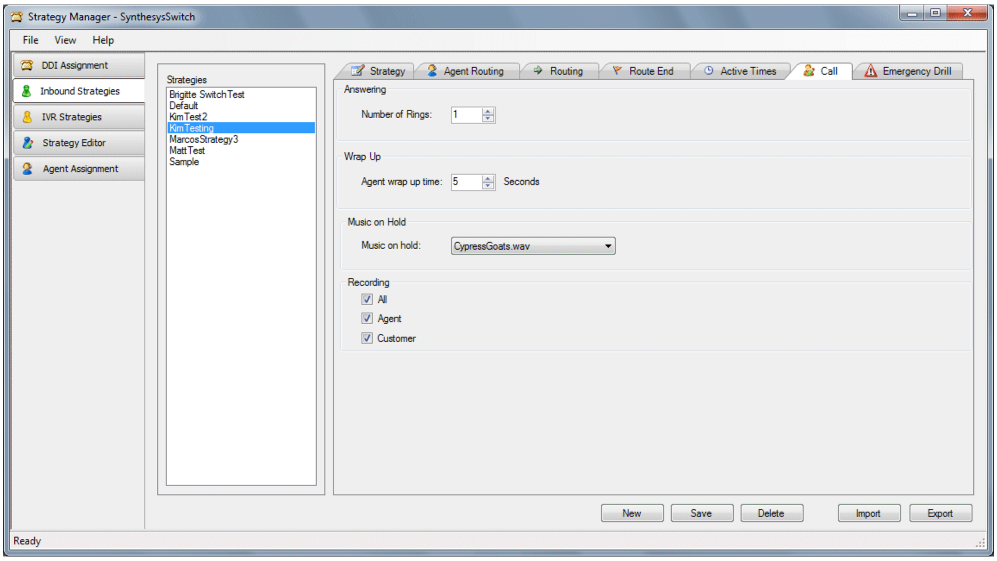
- Specify the opening hours for Weekdays, Saturday and Sunday, as required, or if the office is closed all day, place a tick into the ‘Closed’ box.
- In the **Play message** field you can select the message (WAV file) to be played when the offices are closed. If no message is selected callers will hear a busy tone.
- To drop the call, sending a busy back, select **Drop Call.**
- To redirect a call to an external number, select **External divert to** and enter the telephone number (with full DDI) for the external transfer.



Call

Use the **Call** tab to specify the number of rings that will sound after the call has been passed to the agent, to notify the agent of an incoming call. You can also decide to play music while the caller is waiting in the queue.

- In the *Answering* section, enter or select the ***Number of Rings*** before the call is answered.
- In the *Wrap Up* section enter or select, in seconds, the *Agent wrap-up time* to be used.
- In the ***Music on Hold*** section users can select a Wav file to be played, when the caller is put on hold by the agent, after the call has been transferred.



Under **Recording,** you can either tick all options, or select any option(s) as required.

- Tick **All,** if you wish to record the conversation of both the agent and the customer.
- Tick **Agent** if you wish to create a recording file for the conversation of the agent.
- Tick **Customer** if you wish to create a recording file for the conversation of the customer.

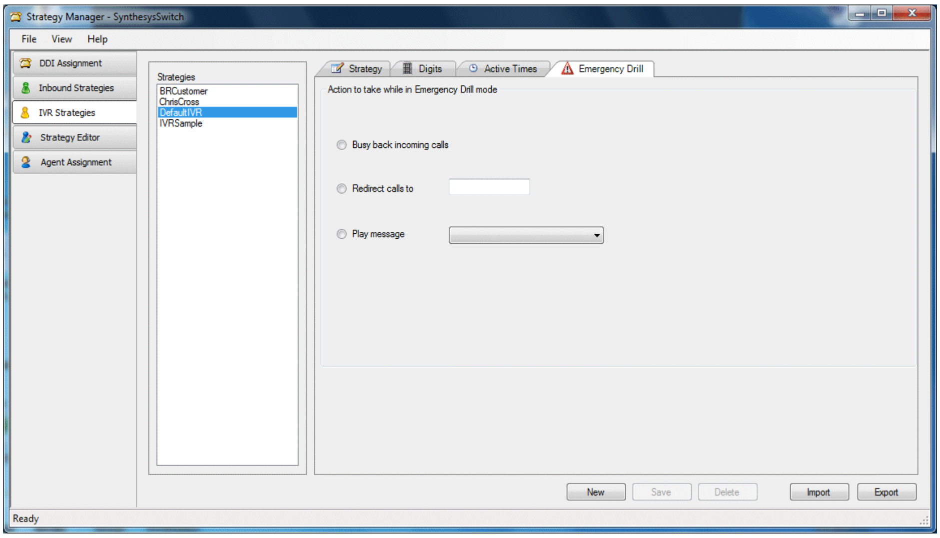
Information related to call recordings is stored in the Phoenix_Switch_Recording table.

Information related to the Voice Recording Pause/ Resume Actions (Synthesys.Net), or Pause Recording control (Synthesys Classic and MiCC Outbound), used to stop and re-start recording at strategic points within the call, is stored in the Phoenix_Switch_Interface_Event table.

Emergency Drill

Using the **Emergency Drill** page, users can specify the action to be taken, on a per strategy basis, should the Contact Centre have to be evacuated due to a fire drill or other cause. The specified action is then activated when the voice platform is put into emergency mode via the designated website.

Specifying the Action to be taken in an Emergency

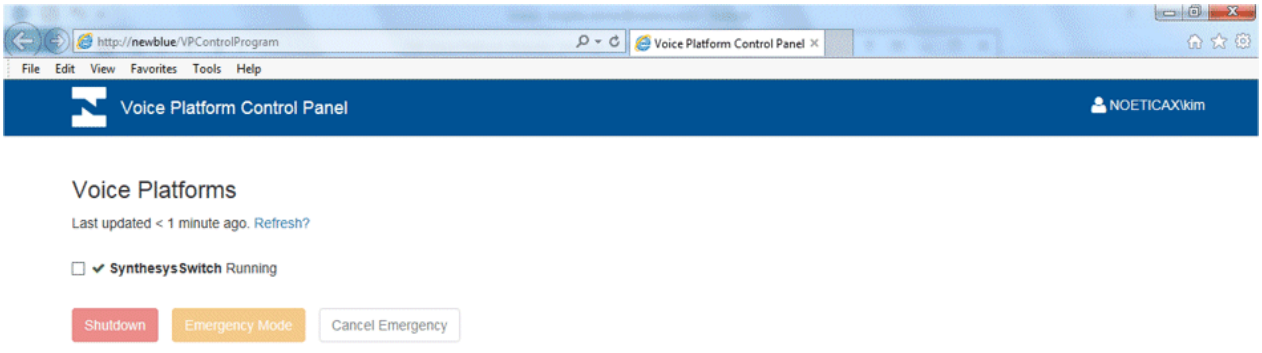


Emergency Actions	Description
Busy back incoming calls	Send a busy signal to any new incoming calls, and any calls currently in the ACD queue.
Redirect calls to	Re-direct any new incoming calls, and any calls currently in the ACD queue to another number, which can be set on a per-strategy basis.
Play message	Play an automated message to any new incoming calls, and any calls currently in the ACD queue, e.g. ‘I’m sorry but due to an emergency none of our agents are available at the moment’, before they are disconnected. For calls currently in progress, the agents are best placed to inform their customer of the situation, before disconnecting the call, depending on the emergency.

To put the switch into emergency mode in the event of an emergency, the staff members responsible must visit the designated Voice Platform website, either from within or from outside the building, to notify the switch of the action to be taken.

Putting the Switch into Emergency Mode

When an emergency arises, log into the designated Voice Platform website, to notify the switch of the action to be taken.



- Select the **Switch** that is to be put into Emergency mode.
- Select **Emergency Mode**, to activate the emergency procedures as specified in the *Emergency Drill* dialog of the Inbound Strategy.
- Select **Shutdown** to send a busy signal to any new incoming calls, and any calls currently in the ACD queue, regardless of the strategy and to prepare the switch for shutdown.
- For calls currently in progress, the agents are best placed to inform their customer of the situation, before disconnecting the call, depending on the emergency.

Action on Returning to building

On returning to the building, go to the website again and

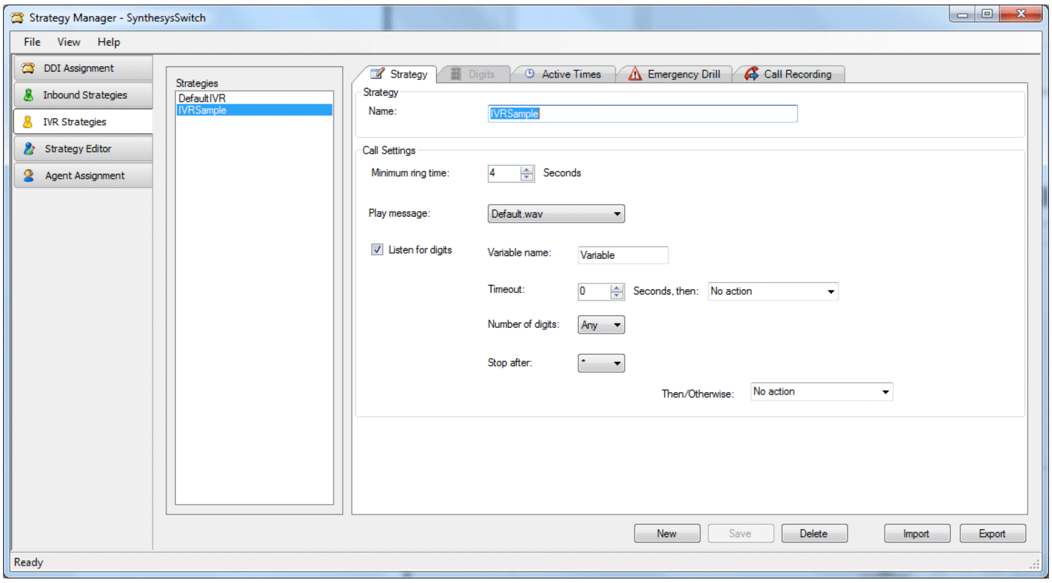
- If the **Emergency Mode** option was selected to deal with the emergency, select **Cancel Emergency,** to resume activity as normal.
- If **Shutdown** was selected to deal with the emergency, contact your IT department and ask them to bring the Voice Platform back on line.

IVR STRATEGIES

Strategy

To configure IVR Strategies to deal with response requests that require callers to enter digits on the telephone keypad

- Type a name for the new Strategy into the ***Name*** field.
- Enter or select, in seconds, the ***Minimum ring time*** before the call is answered.
- Select the message (Wav file), if one is to be played, from the **Play message** drop down list.



Tick **Listen for digits** if you wish to specify Variable settings:

- Enter a name for your variable into the **Variable names** field.
- In the **Timeout** field, enter the number of seconds the system will wait for a response, after which the selected **Timeout Action** is activated.
- If the digits to be entered on the telephone keypad are of a fixed length, specify the **Number of digits.** If there is no match, the selected **Timeout Action** will be activated. If the digits required are entered or if no timeout action has been selected, then the action selected in the **Then/ Otherwise** field will be activated.
- If the digits to be entered are of variable length, specify a **Stop after** point, i.e. a # tag, after which the selected **Inbound or IVR strategy** will be activated.

To associate single digit entries with specific Inbound or IVR strategies, enter **1** into the *Number of digits* field. Please see the next page for a list of available actions and **Digits** information.

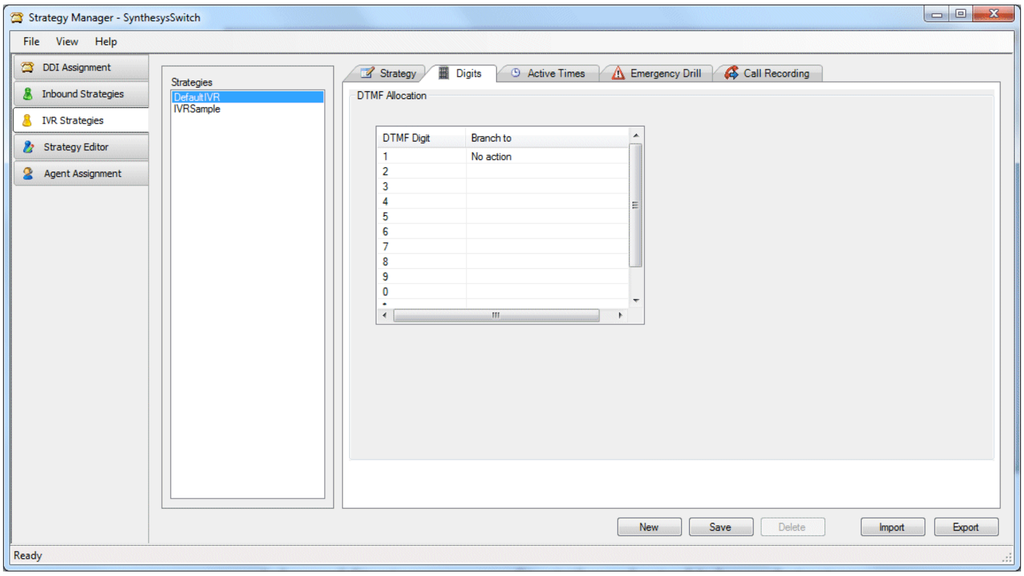
Digits

The ***Digits*** tab is enabled if the response requested from a caller requires a single digit entry on the telephone keypad and if a **1** has been entered into the ***Number of digit* field** in the IVR Strategy page.

Each DTMF digit can be associated with a specific Inbound or IVR strategy. This way callers can be routed to the next logical IVR or Inbound strategy, or action, depending on the option requested when pressing a digit on the telephone keypad, for example, 1 for Customer Service; 2 for Sales.

To associate the **DTMF Digit** with an action in the **Branch to** column

- Click into the **Branch to** column, and from the drop down menu subsequently displayed, select the required action.
- If no action is selected for the DTMF digit, then the action selected in the **Then/ Otherwise** field under the Strategy tab will be activated.

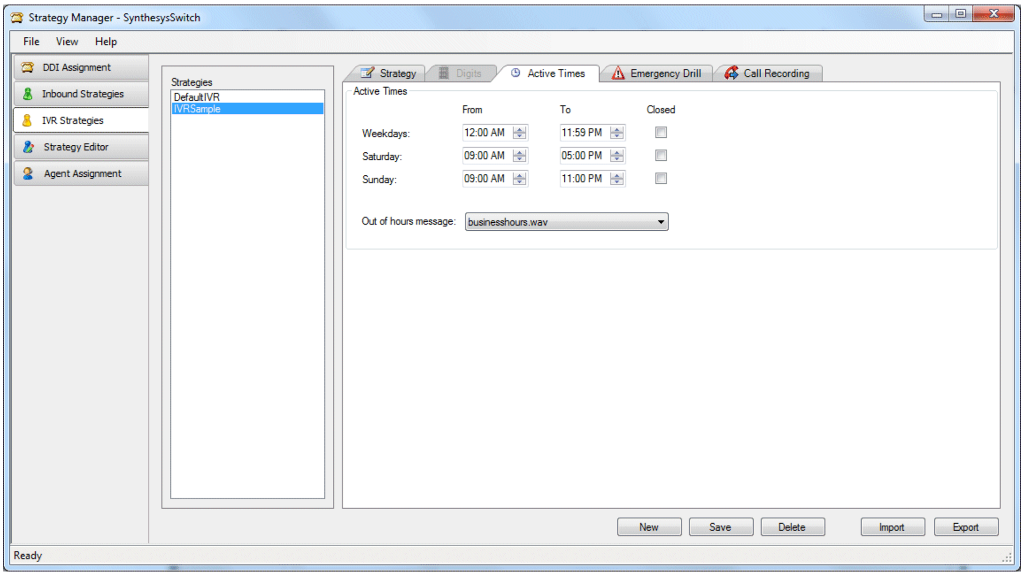


Action	Used to
Inbound Strategy	Start the selected Inbound strategy
IVR Strategy	Start the selected IVR strategy
Repeat Recording	Play the previously played recording again
Hang Up	Hang up the call
No Action	Hang up the call

Active Times

Under **Active Times**, users can select the opening hours during which the IVR strategy will be used and select an Out of hours message.

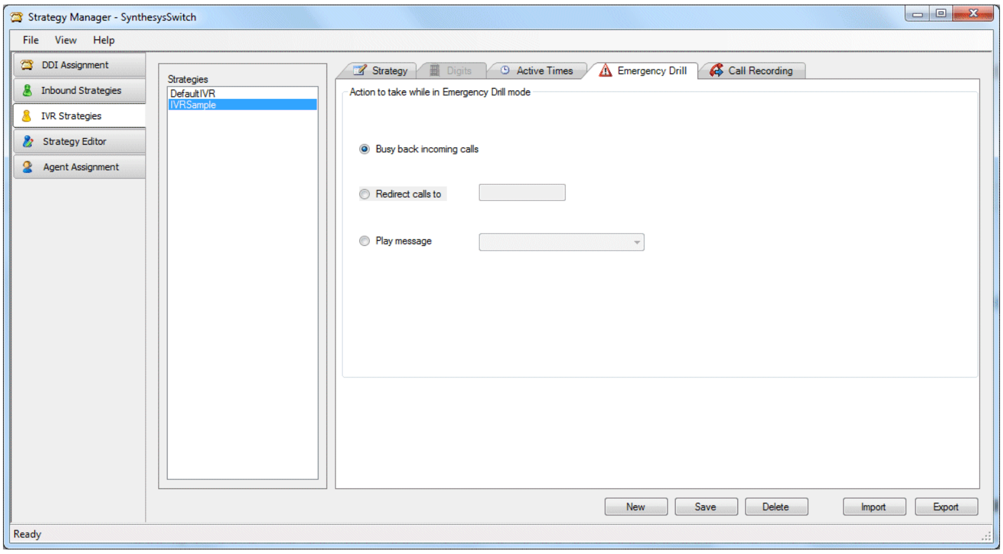
- Specify the opening hours for Weekdays, Saturday and Sunday, as required, or if the office is closed all day, place a tick into the 'Closed' box.
- Select the message to be played when the offices are closed. If no message is selected callers will hear a busy tone.



Emergency Drill

Using the **Emergency Drill** page, users can specify the action to be taken, on a per IVR strategy basis, should the Contact Centre have to be evacuated due to a fire drill or other cause. The specified action is then activated when the voice platform is put into emergency mode via the designated website.

Specifying the Action to be taken in an Emergency

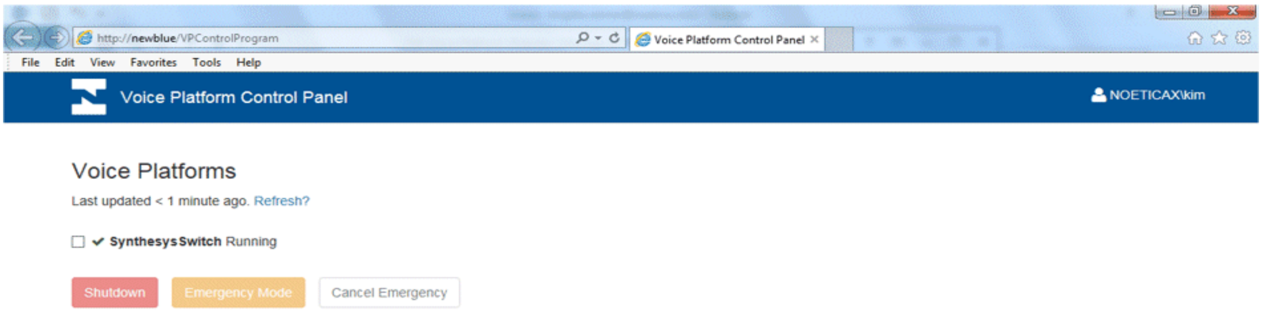


Emergency Actions	Description
Busy back incoming calls	Send a busy signal to any new incoming calls, and any calls currently in the ACD queue.
Redirect calls to	Re-direct any new incoming calls, and any calls currently in the ACD queue to another number, which can be set on a per-strategy basis.
Play message	Play an automated message to any new incoming calls, and any calls currently in the ACD queue, e.g. 'I'm sorry but due to an emergency none of our agents are available at the moment', before they are disconnected. For calls currently in progress, the agents are best placed to inform their customer of the situation, before disconnecting the call, depending on the emergency.

To put the switch into emergency mode in the event of an emergency, the staff members responsible must visit the designated Voice Platform website, either from within or from outside the building, to notify the switch of the action to be taken.

Putting the Switch into Emergency Mode

When an emergency arises, log into a designated Voice Platform website, to notify the switch of the action to be taken.



- Select the **Switch** that is to be put into Emergency mode.
- Select **Emergency Mode**, to activate the emergency procedures as specified in the *Emergency Drill* dialog of the IVR Strategy.
- Select **Shutdown** to send a busy signal to any new incoming calls, and any calls currently in the ACD queue, regardless of the strategy and to prepare the switch for shutdown.
- For calls currently in progress, the agents are best placed to inform their customer of the situation, before disconnecting the call, depending on the emergency.

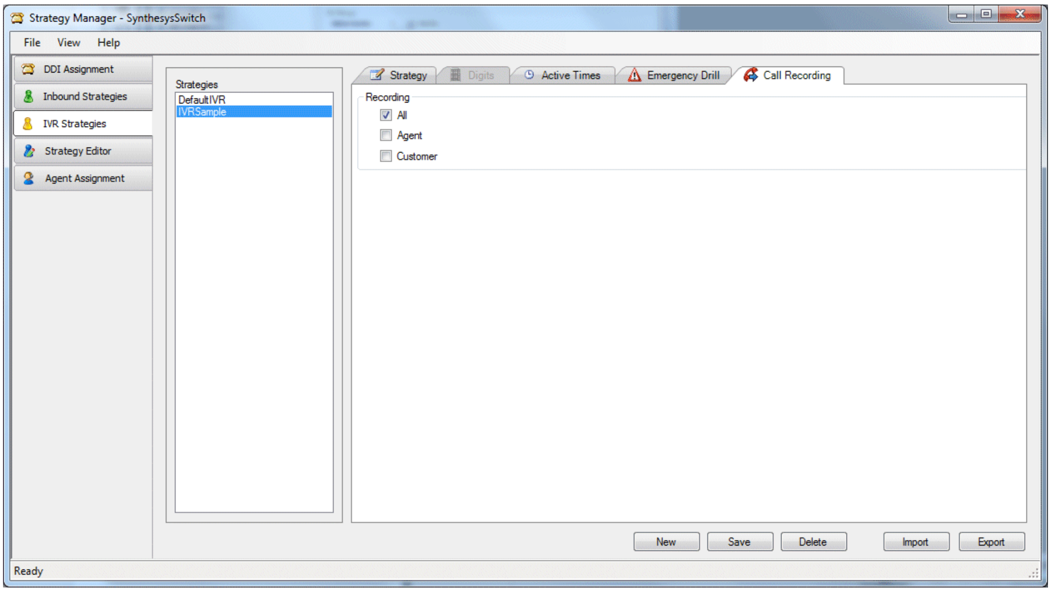
Action on Returning to building

On returning to the building, go to the website again and

- If the **Emergency Mode** option was selected to deal with the emergency, select **Cancel Emergency,** to resume activity as normal.
- If **Shutdown** was selected to deal with the emergency, contact your IT department and ask them to bring the Voice Platform back on line.

Call Recording

In the Call Recording page of your IVR Stategy you can specify the type of recording file that you wish to create.



Recording Options

Under Call **Recording,** you can either tick all options, or select any option(s) as required.

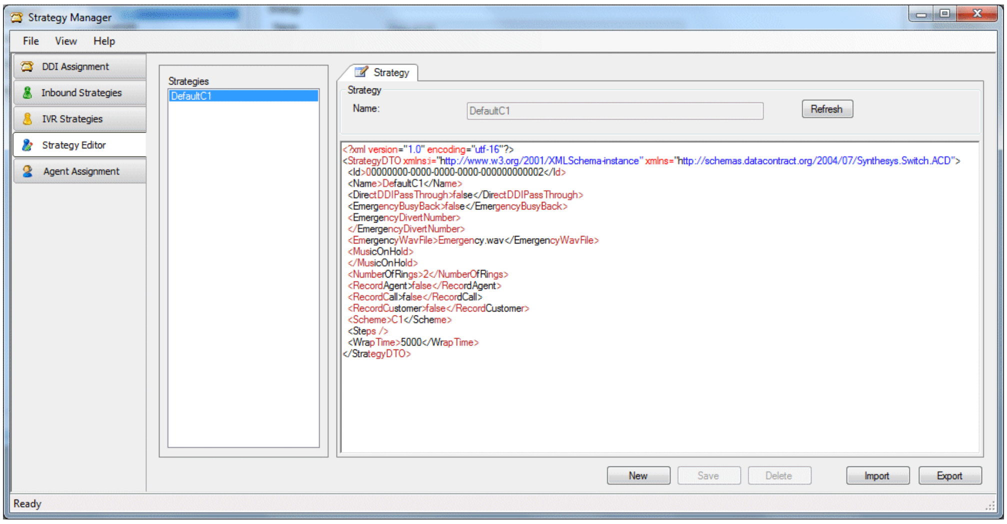
- Tick **All,** if you wish to record the conversation of both the agent and the customer.
- Tick **Agent** if you wish to create a recording file for the conversation of the agent.
- Tick **Customer** if you wish to create a recording file for the conversation of the customer.

Information related to call recordings is stored in the Phoenix_Switch_Recording table.

Information related to the Voice Recording Pause/ Resume Actions (Synthesys.Net), or Pause Recording control (Synthesys Classic and MiCC Outbound), used to stop and re-start recording at strategic points within the call, is stored in the Phoenix_Switch_Interface_Event table.

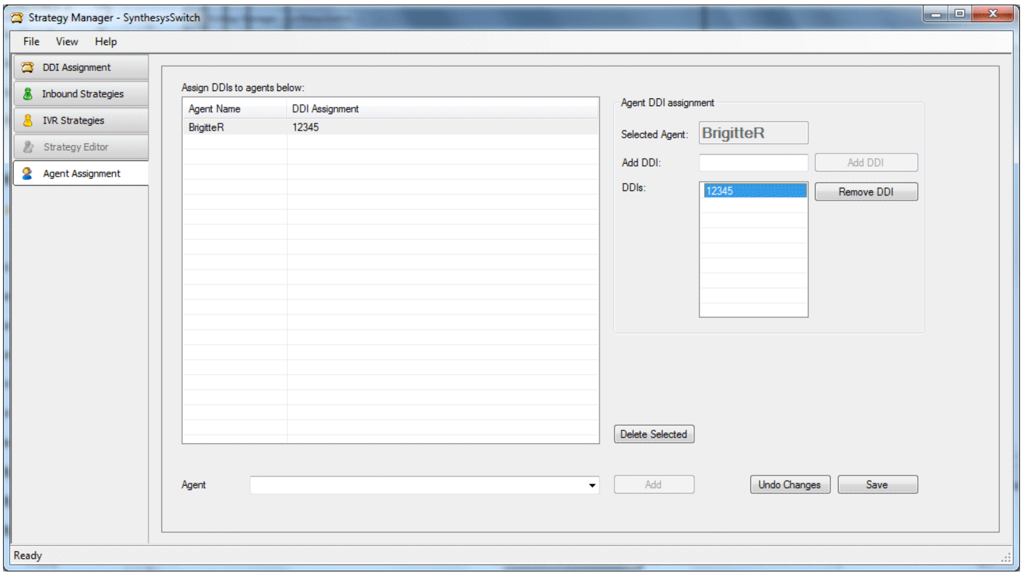
THE STRATEGY EDITOR

The Strategy Editor can hold, if requested, more complex bespoke strategies designed in XML, to add extra functionality. Please contact your Noetica Account Manager for more information.



AGENT ASSIGNMENT

The ***Agent Assignment*** tab allows users to route a DDI and associated call to a specific agent or agents, so that they can deal with a particular task.



*Before assigning a DDI to a selected agent, ensure that the DDI number is already assigned to an Inbound Strategy in the **DDI Assignment** page. Also ensure that the **Use Direct DDI** option is ticked in the Direct Agent DDIs section under the **Agent Routing** tab of the **Inbound Strategies** page.*

Assigning a DDI to a selected Agent

- Select the name of the agent to be assigned to the DDI number from the **Agent** drop down menu.
- Click the **Add** button, to add the agent name into the **Agent Name** column.
- Next, add the DDI, as entered in the *DDI Assignment* page, into the **Add DDI** field.
- Click the **Add DDI** button to add the DDI to the *DDIs* and *DDI Assignment* columns.
- Click the **Save** button and save your settings. Click *Undo changes* if you do not wish to save the changes you've made since the last save.
- To Remove a DDI, select the DDI number in the ***DDIs*** column and click the *Remove DDI* button.
- To delete a saved agent assignment, select the assignment and click **Delete Selected.**

NOETICA VOICE PLATFORM & OUTBOUND CALLING

If you are using the Noetica Voice Platform for outbound calling, you can set the following associated properties in the ***Outbound Manager Advanced options*** screen.

Noetica Voice Platform Outbound List Properties

Answer machine detection	True/ False. Turns on/ off Answer Machine Detection, providing the switch supports AMD.
AnswerMachineFaxTimeout	Number of seconds the dialler allows to classify fax machines once the answer machine detection algorithm decides the recipient is not human.
AnswerMachineTimeout	Number of seconds the answer machine detection algorithm allows before transferring the call to the agent.
Cli to present	The telephone number that will be shown on the customer phone when receiving the call.
CLIToPresentOnTransfer	Enter “CustomerNumber” as a string, to display the customer number the switch has called.
ListCleaningLinesToUse	Set the number of calls to be made concurrently by the dialler on a list cleaning campaign (ensuring the number is lower than the actual lines in use, depending on the lines\trunks available).
ListCleaningSwitchToUse	Enter the switch name, if List Cleaning is used in a multi switch environment.
No answer timeout	Set the number of seconds the switch allows the call to ring, before dropping it as no answer.
Nuisance wav file	Wav file with message to be played if the PD generates a nuisance call
TransferToIVROnAMD	Enter the DDI number as used in the Strategy Manager, to transfer calls on detecting an Answer Machine to the associated IVR strategy (Noetica Voice Platform, using DTMF step)
TransferToStrategy	Enter the DDI number as used in the Strategy Manager, to transfer a call classified as a nuisance call to the associated IVR strategy.
Recording	True/ False. Set Recording to True, to record the conversation of both the agent and the customer.
RecordingAgent	True/ False. Set RecordingAgent to True, to create a recording file for the conversation of the agent.
RecordingCustomer	True/ False. Set RecordingCustomer to True, to create a recording file for the conversation of the customer.
MusicOnHold	The name of the WAV file to be used, i.e. CypressGoats.wav. to play music when the caller is put on hold. The WAV file selected has to be stored in the Noetica Voice Platform WAV folder.