AVAYA PROFESSIONAL SERVICES (APS)

Avaya CMS Supervisor R19 Workbook

TABLE

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Section 1

Introduction to Avaya CMS Supervisor

1.1   Purpose

This section introduces the Call Center manager and supervisor to a high-level overview of the functionality of the Avaya CMS Supervisor software.

1.2   Section Objectives

Upon completion of this section, you will:

- Achieve a high-level understanding of Avaya CMS Supervisor.
- Know how to start the Avaya CMS Supervisor software.

1.3   High Level Overview of Avaya CMS Supervisor

The Avaya CMS Supervisor software monitors the operations of and collects data from the switch. This data is then organized into reports that help you manage Call Center facilities and personnel. These reports may be displayed in real time, historical, or integrated formats. They may be printed immediately or stored in a file.

The data tracked includes caller identification, service parameters, internal call transfers, outgoing calls, and agent statistics. Real-time reports can be updated as often as every 3 seconds. Historical reports are available by interval, daily, weekly, or monthly summaries. Integrated reports include data from any starting point in the last 24 hours up to and including the moment the report is generated.

1.4 Starting CMS Supervisor

Based on which Operating System you are running; use the steps below to start the Supervisor application:

1. Select Start from the task bar.

2. Select "Programs" or "All Programs" from the Start Menu.

3. Expand the "Avaya" group and then the "Avaya CMS Supervisor R18" group.

4. Select "Avaya CMS Supervisor R18" from the list.

- If your system administrators allow, you can right click on the Avaya CMS Supervisor R18 and select "Copy" and then right click and "Paste" it on your desktop.

The Supervisor application opens and is running. The Controller displays but you are not yet logged into the CMS Server. The Controller is the Supervisor main window. From here you will use the toolbar buttons and pull-down menus to access the CMS server.

Note: Avaya CMS Supervisor Terminal Emulator software is downloaded and installed separately from Avaya CMS Supervisor.
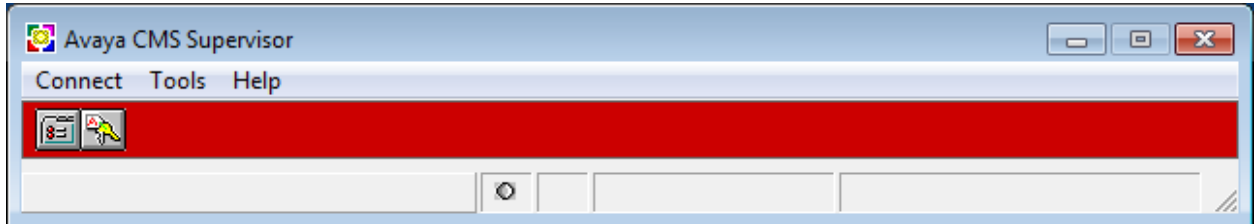
Section 2

Logging In/Out of CMS Supervisor

2.1 Purpose

This section walks you through logging in/out of the CMS Server and exiting Supervisor. It also describes the Controller Window and instructs you how to navigate through various toolbars.
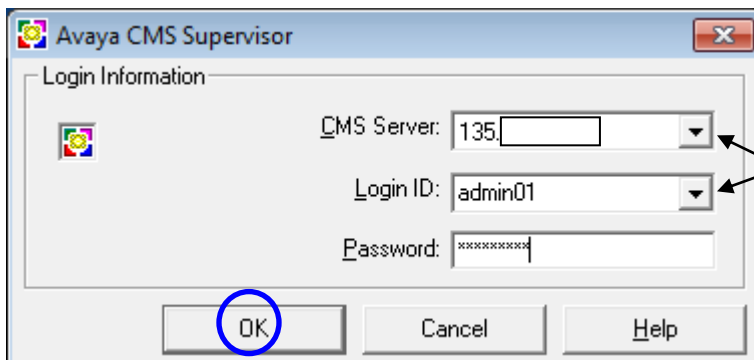
2.2 Section Objectives

Upon completion of this section, you will be able to do the following:

- Log on to the CMS Server.

- Navigate through the Control and Menu Bars.

- Utilize the toolbar icons.

- Log off the CMS Server; either closing Supervisor or leaving it open.

2.3 Automatic Login to the CMS Server

1. Select **Login** from the **Connect** menu or click the Login button [image] on the toolbar.

2. The Login Information window appears.

3. Type your CMS Login ID in the **Login ID** text box or select your login ID from the dropdown list.

4. Tab to the **Password** text box.

5. Type your CMS password in the **Password** textbox. At this point, you may see the Confirm Password window. This window reports that your password has expired and must be changed. Follow the prompts for a new password and then Select OK.

Drop down list retains the last 10 items used on a specific input item.

2.4   Logging out of the CMS Server

<u>Please note!</u> It is important to complete any of the following steps to properly log out of CMS. Improper logout/exiting of CMS can lead to unnecessary license utilization.

1. Select **Logout** from the **Connect** menu. The application will prompt you "Are you sure you want to logout?" Select OK to log off the CMS Server but keep the Supervisor application running.

2. Click on the Logout button [icon] on the toolbar or select **Exit** from the **Connect** menu. The application will prompt you "You are currently logged in. Are you sure you want to exit?" Select "Yes" to log off the server **and** to close the Supervisor application.

2.5   The Controller Window

Once logged into CMS Supervisor, the Controller Window accesses CMS features (instead of a hierarchical Main Menu as in the terminal interface to CMS). The Controller Window includes the following features:

2.5.1 Supervisor Controller Window
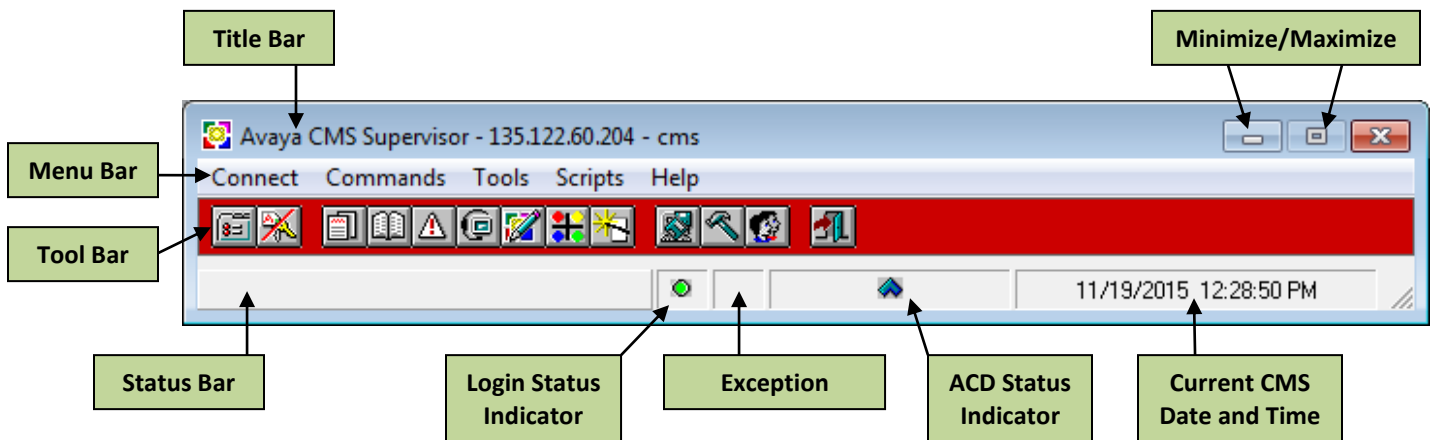
2.5.2 Menu Bar

To manually access the menu options above, click on the menu item using your left mouse button. For keyboard users depress the "Alt" key and the corresponding underlined letter within the menu option wanted.
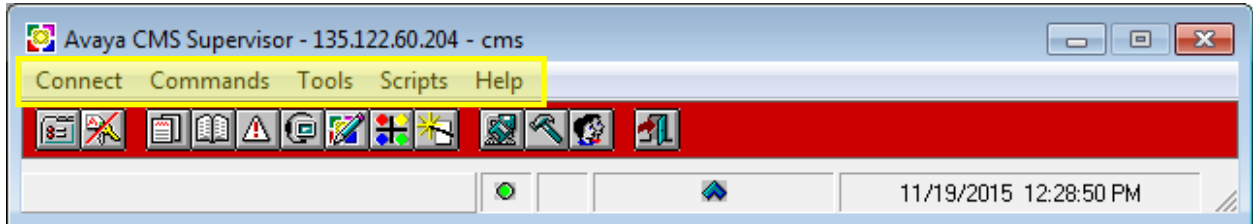
2.5.3 Tool Bar – Icon Options

When the cursor is placed over a toolbar button, the status bar gives a description of what the toolbar button does. Options available may vary based on authorized user permissions.

Options – Accesses the window needed to change the environment options.

Logout – Disconnects from the CMS server by either selecting Logout from the connect menu or the Logout button on the toolbar. Once the logout is complete, Supervisor is still open but the user is not connected to the CMS server.

Reports – Initiates the Reports command to access all system reports.

Dictionary – Allows you to assign names to split/skills, trunk groups, call work codes, reason codes, ACDs, VDNs and vectors, to enter and edit agent names and agent groups, to view and define CMS database items and calculations, and to modify split/skill and trunk string values.

Exceptions – Allows you to administer timing or count-based thresholds for exceptions and report on those exceptions.

Agent Administration – Allows you to view, add, delete, or modify Agent-related parameters on the switch, such as Change Agent Skills.

Call Center Administration – Allows you to view, add, delete, or modify call work codes, change VDN skill preferences, setup split/skill and VDN call profiles, and make trunk and VDN group assignments.

Tenant Administration – Allows you to view, add, delete, or modify resources within a Tenant and report on Agent Groups and Agents within a particular Tenant.

CMS System Setup – Allows you to view and modify information relevant to how the CMS and switch were configured during installation.

Maintenance – Indicates the Maintenance tool used to perform routine maintenance of the CMS, including backing up data, checking on the status of the connection to the switch, and scanning of the error log.

User Permissions – Indicates the Users Permissions tool where the CMS Administrator defines CMS user IDs and access capabilities each user will have.
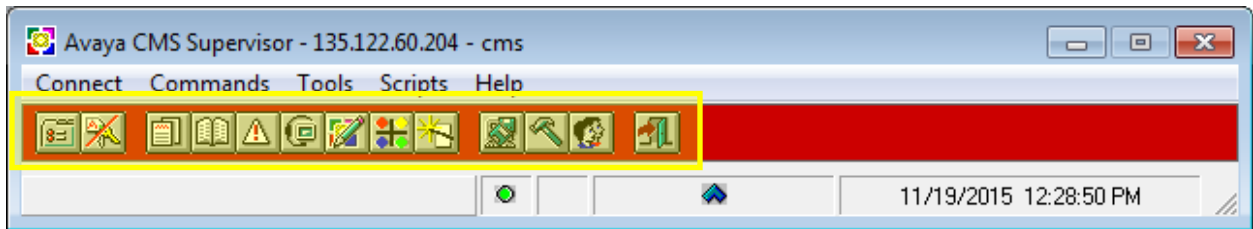
2.5.4 Status Bar and Status Indicators

The status bar indicator is located at the bottom left of the window and is used to display CMS application status. It is also used to display a brief description of each of the toolbar buttons when the mouse pointer is over the button.

Login Status Indicator – Shows a **green light** if you are connected to the CMS server, or shows a gray light if disconnected from the CMS server.

Exception Count – Gives you the current count of exceptions for all ACDs for which you have exception permissions. *The exceptions count is cleared to zero at the beginning of the interval*.

ACD Status Indicators – Show which ACDs are active/inactive. There can be up to eight ACD icons showing, depending on how many ACDs this CMS supports. If the link to any one of the ACDs is down, the icon will be crossed out. If the mouse is placed over the ACD status Indicator, a tool tip will pop up and show the name of the current ACD.

Current Date and Time – Shows the current date and time of the CMS server you are logged into.

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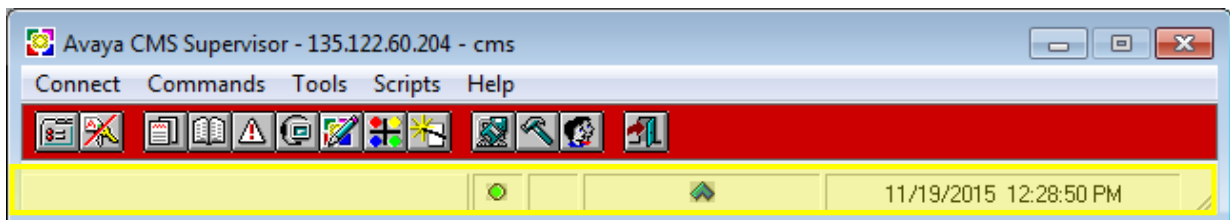
Section 3
Running a CMS Report

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3.1 Purpose

This section explains how to run CMS and other specialized reports.

3.2 Section Objectives

After completing this section, the learner will be able to:

- Define the types of reports Avaya CMS Supervisor offers.

- Explain how agent work states relate to CMS reports.

- Run a CMS report.

3.3 Report Types

Avaya CMS Supervisor offers three types of standard reports that allow you to track the call center's activities – Real-Time, Historical, and Integrated.

Real Time Reports: The data in these reports are updated based on the refresh rate that is set on the report input window (minimum is 3 seconds). When the current interval changes, all cumulative data is cleared and Avaya CMS begins counting cumulative data again starting from zero.

Integrated Reports: These reports contain a combination of current (real-time) information and cumulative information from the beginning of the day.

Historical Reports: There are four types of historical reports offered in CMS:

- **Interval** – Provides statistics by pre-determined system intervals. These reports can be generated once the interval has completed or for an entire day. This type of data is typically stored for *31 days* and can be stored up to *62 days*.

- **Daily** – Provides a summary of daily activity. These reports are available on the day following the day the data was collected (the default time is 12:35 AM the following day). This type of data is typically stored for *387 days* and can be stored up to *5 years*.

- **Weekly** – Provides a summary of weekly activity. These reports are available after the

last day of the week has been archived (the default time is 2:35 AM the following Sunday, if the first day of the week is Sunday). This type of data is typically stored for *53 weeks* and can be stored up to *10 years*. **NOTE!** When running weekly reports, you must enter the first day of the week into the Date input window.

- **Monthly** – Provides a summary of monthly activity. These reports are available on the first day of the following month (the default time is 4:35 AM on the first day of the following month). This type of data is typically stored for *13 months* and can be stored up to *10 years*. **NOTE!** When running monthly reports, you must enter the first day of the calendar month into the Date input window.

3.4   Review of the Agent Work States

Any time an agent enters a work state, the information is sent from the switch to be reported in CMS. The following is a list of agent states that may appear on reports:

LOGON – The agent is logged into a split or skill. Agents will only appear on Real-Time reports if they are logged in.

LOGOFF – The agent logged out of a split or skill

ACDIN – The agent is on a split/skill call.

ACDOUT – The agent is on an outbound ACD call (applies only to the Outgoing Call Management application of ASAI).

ACW – The agent is engaged in After Call Work and is not available to receive an ACD call. An agent's time in ACW includes the time an agent is on incoming or outgoing calls while in ACW, as well as the time in ACW when the agent is not connected to any calls.

ACWIN – The agent is on an inbound call while in After Call Work (Real-Time only).

ACWOUT – The agent is on an outbound call while in After Call Work (Real-Time only).

AUX – The agent is engaged in Auxiliary work or is staffed and not available to receive an ACD call. Reason codes can be used to describe the reasons the agents are in the AUX work mode.

AUXIN – The agent is on an inbound call while in AUX work or AVAILABLE (Real-Time only).

AUXOUT – The agent is on an outbound call while in AUX work or AVAILABLE (Real-Time only).

AVAILABLE – The agent is able to accept an ACD call. An extension is AVAIL in AUTO-IN or

MANUAL-IN mode any time a station does not have a call active or on hold.

DACD – The agent is on a direct-agent ACD call.

DACW – The agent is in the after-call work state for a direct agent ACD call.

OTHER – On agent reports, the agent has put a call on hold, is dialing to place a call or activate a feature or has a non-ACD call ringing. On split/skill reports, the agent has a call for that skill on hold, is dialing to place a call or activate a feature or has a non-ACD call ringing. In a multi-skill environment, OTHER displays on real-time reports when the multi-skilled agent is doing work for a skill other than the skill being viewed.

RINGING – The time a call rings at an agent's voice terminal after leaving the queue and before the agent answers the call. This time is part of the average speed of answer (ASA).

UNKNOWN – CMS does not recognize the agent's current state. UNKNOWN remains until the condition is cleared (corrected) and/or the agent completes the current ACD call and any associated ACW, or a current agent state message is sent to Avaya CMS from the switch.

3.5 Running a CMS Report

3.5.1 Select a Report

1. Click on **Commands – Reports** or select the **Reports** button on the toolbar.
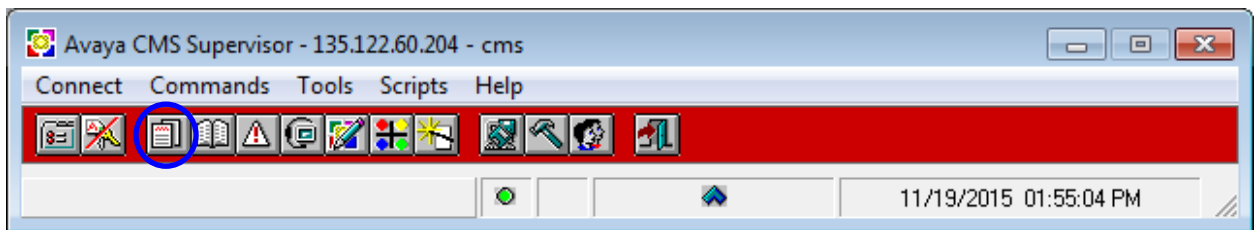
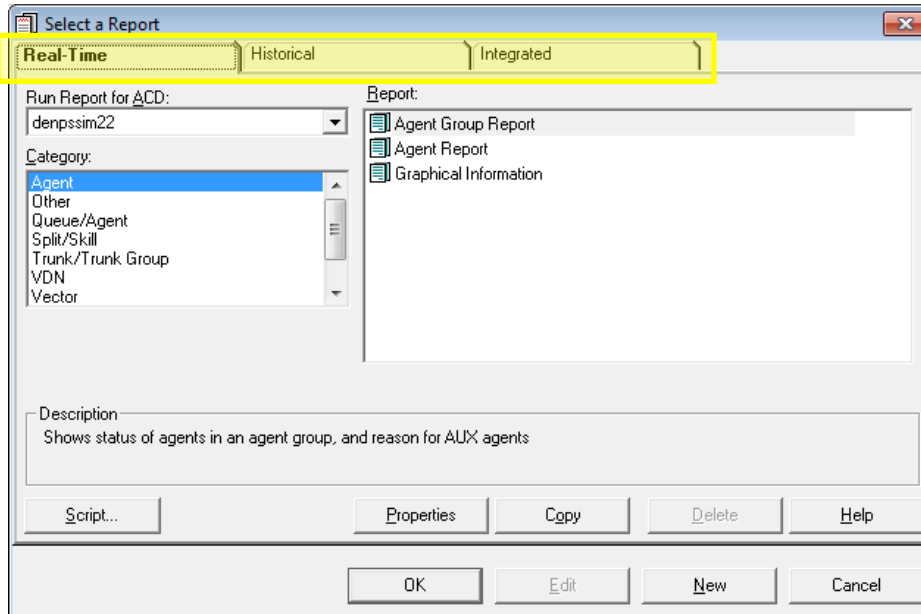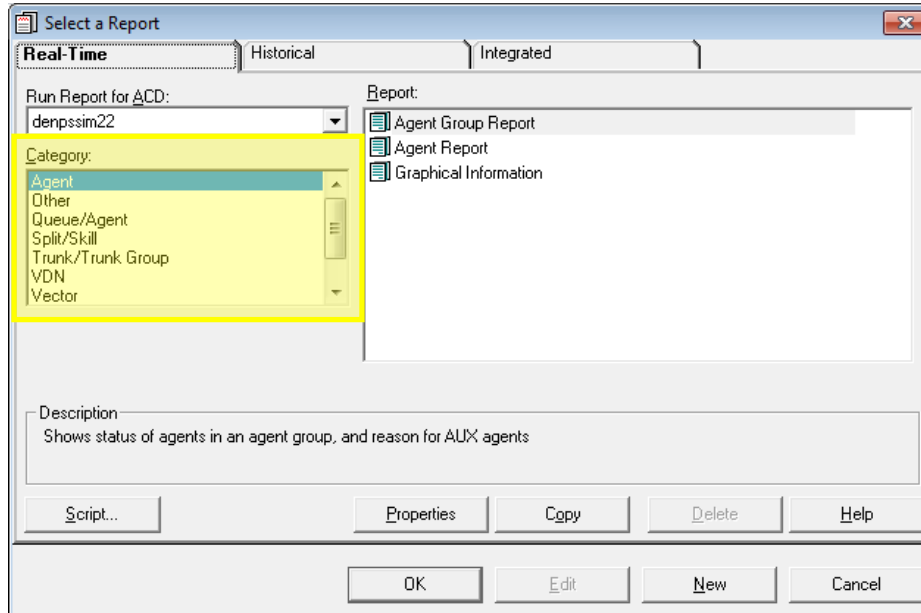2. From the Report Selector window, choose the tab corresponding to the desired type of report (Real Time, Historical, or Integrated).

3. Select the appropriate reporting Category (Agent, Other, Queue/Agent, Split/Skill, Trunk/Trunk Group, VDN, Vector, Designer, or Custom).

4. Select a report from the list in the "Report" box.
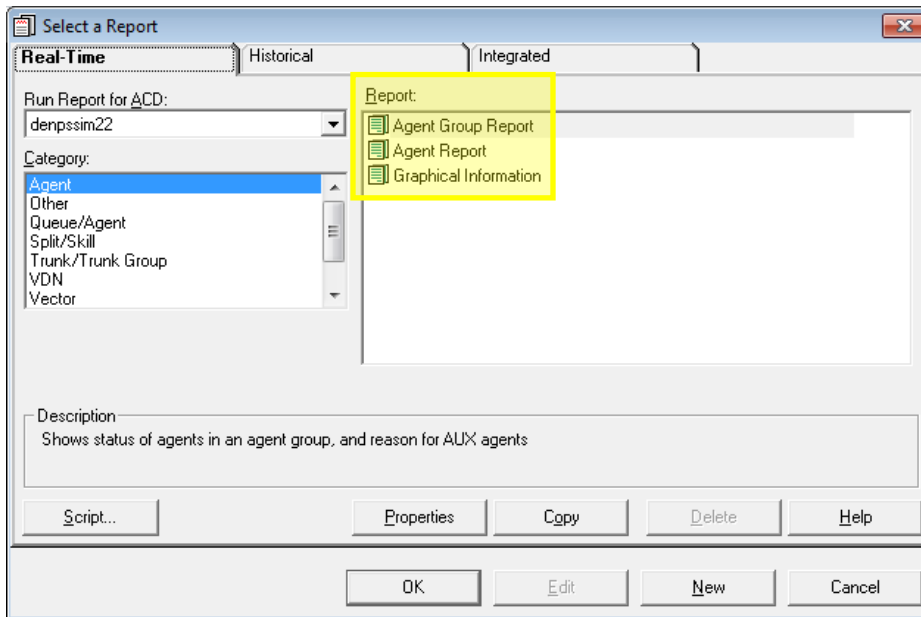
5. Select the ACD for which you want to run the report (if applicable) and then click on "OK" or double-click on the report name.
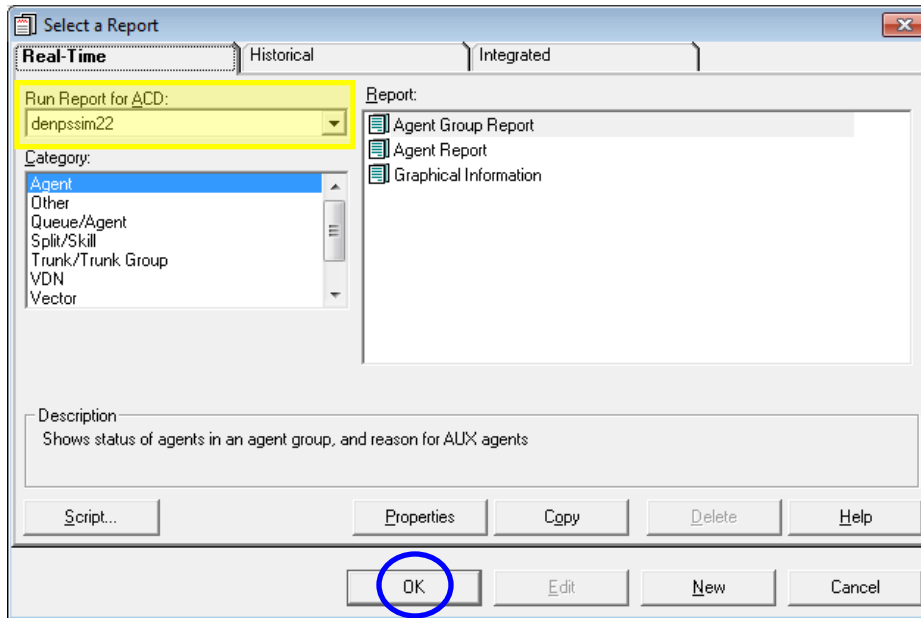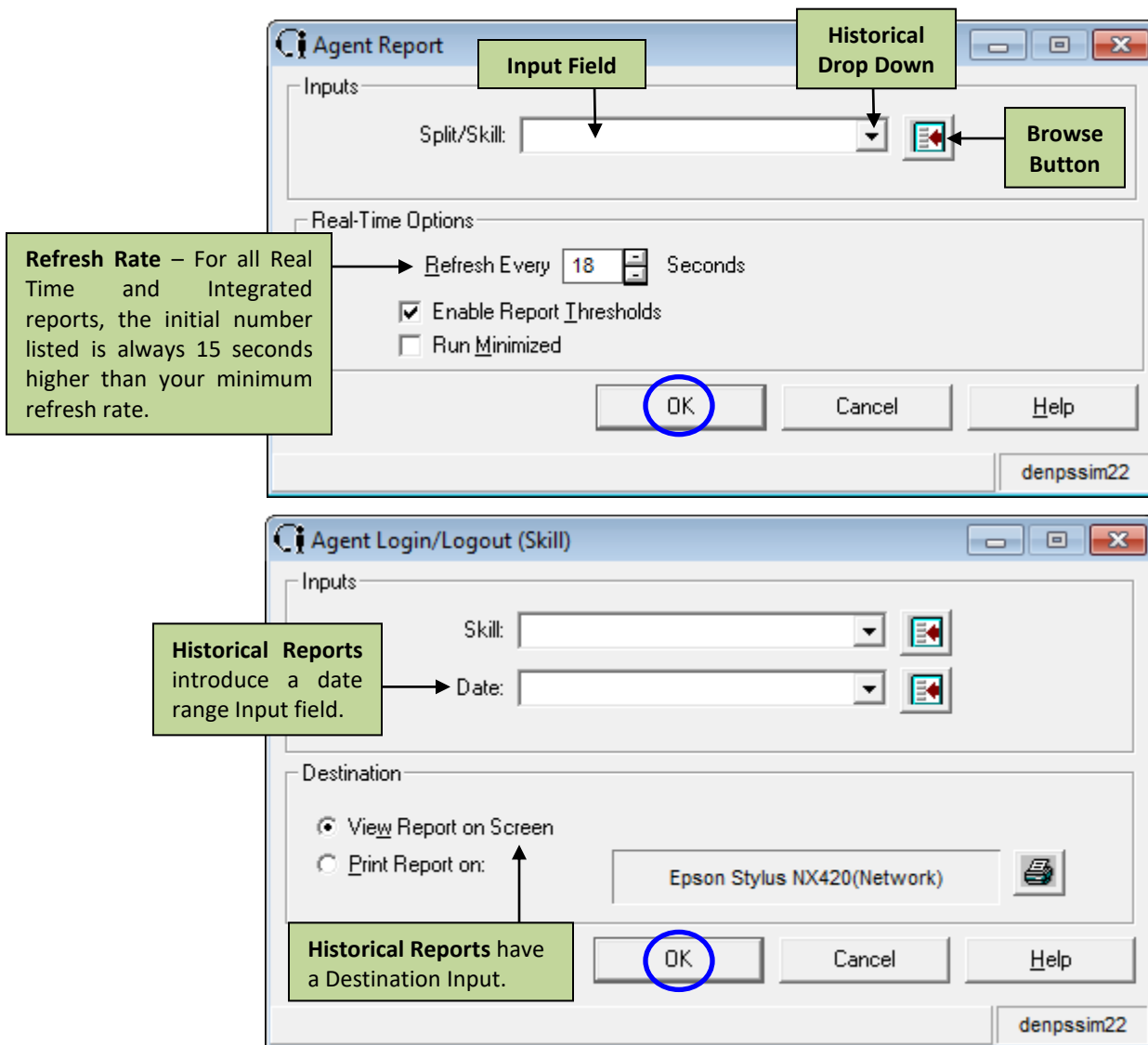
Please Note: In addition to the reports listed in the Report Selector window, reports are also located in the **Dictionary** – Reports tab, **Exceptions** – Reports tab, **Call Center Administration** – Reports tab, and **Maintenance** – Reports tab. The Reports tab under Agent Administration is not used.

3.5.2 Completing the Input Window

Depending on the report selected to run, the Input Window fields will vary. The following represents typical steps to complete the Input Window. When the inputs are set, click "OK".

1. Fill in the input field(s). Specify the information for which you are running the report. To complete the input field, you can do any type in the **name** or **number** of the input.

2. Press the Browse button [icon] to view all available inputs. The Browse button serves as a "list all" to view and select the input needed.

3. Click on the drop-down menu button to choose from a list of the last 10 items you have selected.

3.6   Exiting or Restarting a Report

To **Exit** a report, do one of the following:

- Double click the System Button (in the upper left corner).

- Select "Close" from the System Button menu.

- Select "Exit" from the Report Menu.

To **Restart** a report (with different inputs):

- Select "Restart" from the Report menu.

- Complete the input fields and click OK to rerun the report.

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Section 4
Real Time Reports

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4.1   Purpose

This section will familiarize the learner with Real-Time Reports and Input Windows required to run Real Time reports.

4.2   Section Objectives

Upon completion of this section, the learner will have an understanding of the following:

- Real-Time Reports and how they are used.

- Real-Time Report Thresholds.

- Drill-Down in Real Time Reports.

4.3   Overview – Real Time Reports

Real-Time reports give snapshots of a call center's current performance and status. When running Real-Time Reports, you will have input fields to complete:

- Unique VDN, Split/Skill, Agent ID or Multiple entries within each category.

- Refresh rate – How often the report updates (minimum of 3 seconds).

4.4   To Run a Real Time Report

Step 1: Click on **Commands – Reports – Real Time – Agent – Agent Report** and then click on OK, or you can double click on the name of the report. (Or start by clicking the "Reports" icon in the red toolbar).
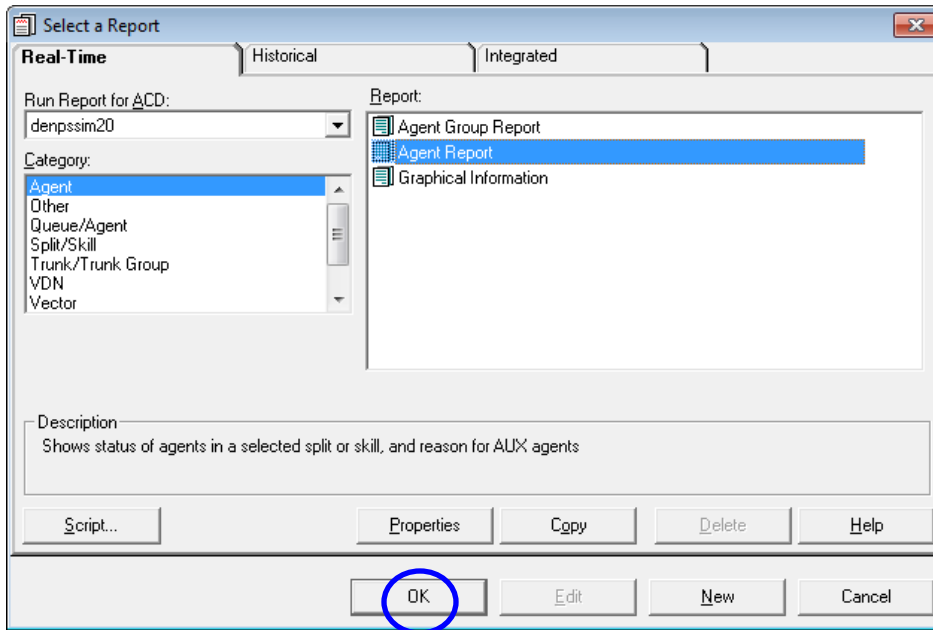
Step 2: Fill in the input field(s). Input fields are where you specify the information for which you are running the report.

To complete the input field, you can do any of the following:

- Type in the name or number of input requested. Please note that Dictionary names are case sensitive.

- Press the Browse button ![browse] to view all available inputs.

- Click on the drop-down menu button to choose from the up to 10 previous items that you have used.
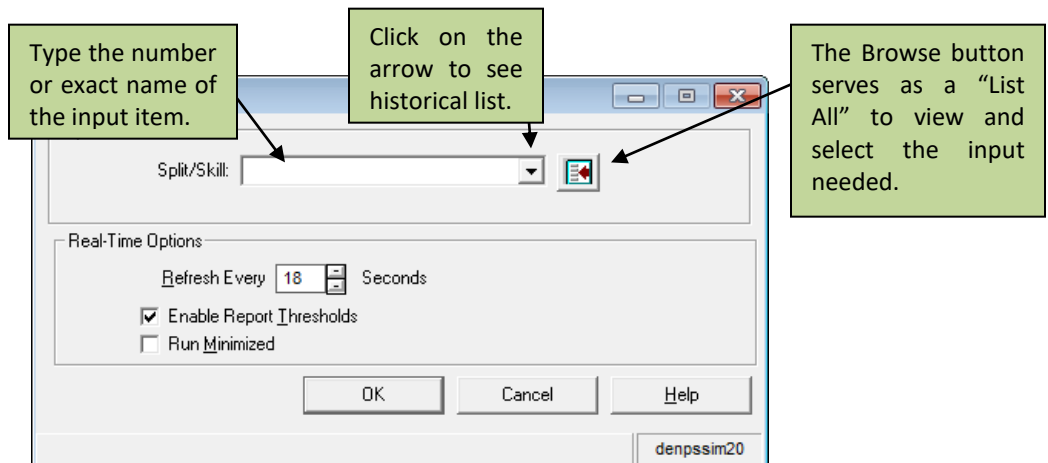
Step 3:

If you chose the Browse button, this screen will appear:

- Select the skill you want from the list and click on OK to get back to the report window, and then OK again to run the report.

Step 4:

From the report screen you can perform the following functions:

4.4.1 Sorting

Right click on any of the headers, such as "Agent Name", and select "Sort by" from the sub-menu. This will:

- Allow sorting by the category selected e.g., "Agent Name".

- Allow sorting in ascending or descending order.

When done with the selections for sorting, click on "Apply" and then "OK'.
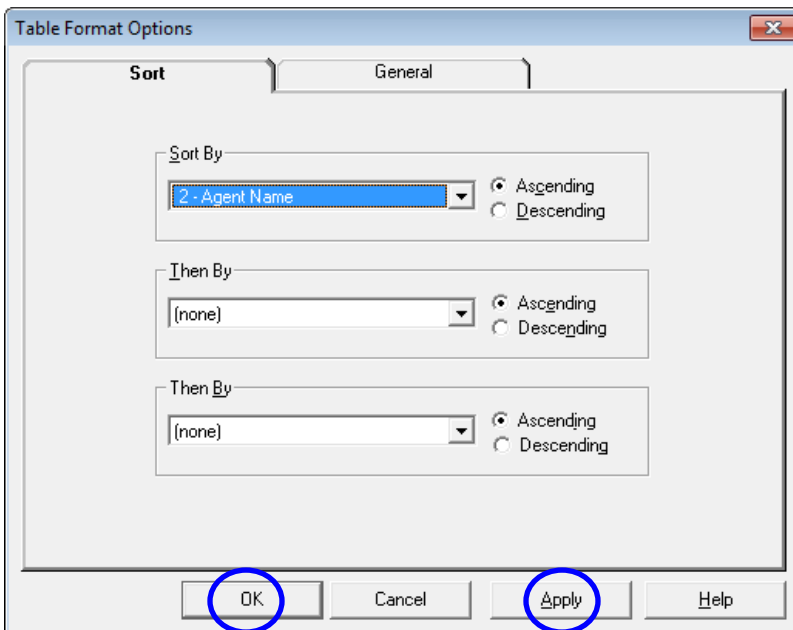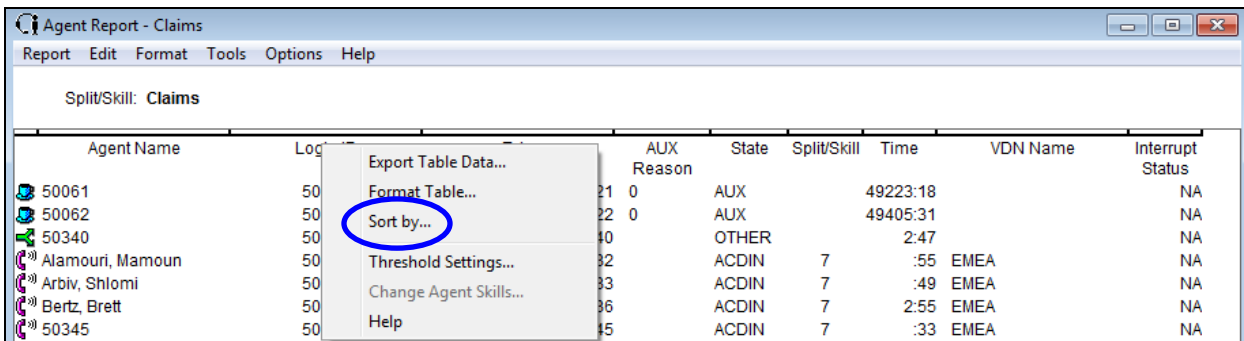
4.4.2 Threshold Settings

Right clicking in the time column on an actual time opens the shortcut window to select the "Threshold Settings" option to set thresholds. Thresholds allow you to monitor performance levels and to be notified by Caution & Warning Indicators. **Threshold settings can only be used on a number field that allows threshold measurements**. When the mm:ss has been entered

click on "OK".

Low Warning/Caution: Notification when a threshold of less than "x" has been triggered, such as when an agent's talk-time is less than 10 seconds, a possible indicator that a queue has been cleared.

High Caution/Warning: Notifies user that a threshold has been met and/or exceeded. An example would be if an agent's AUX-time exceeded a break or meal time frame.

4.5   Drilling Down in Real Time Reports

Drilling down in Real-Time Reports gives very specific information on a particular agent or work state. Double click or right click on any Agent Name, and select "Real-Time Agent Information". This action allows monitoring of the current individual agent's performance levels.
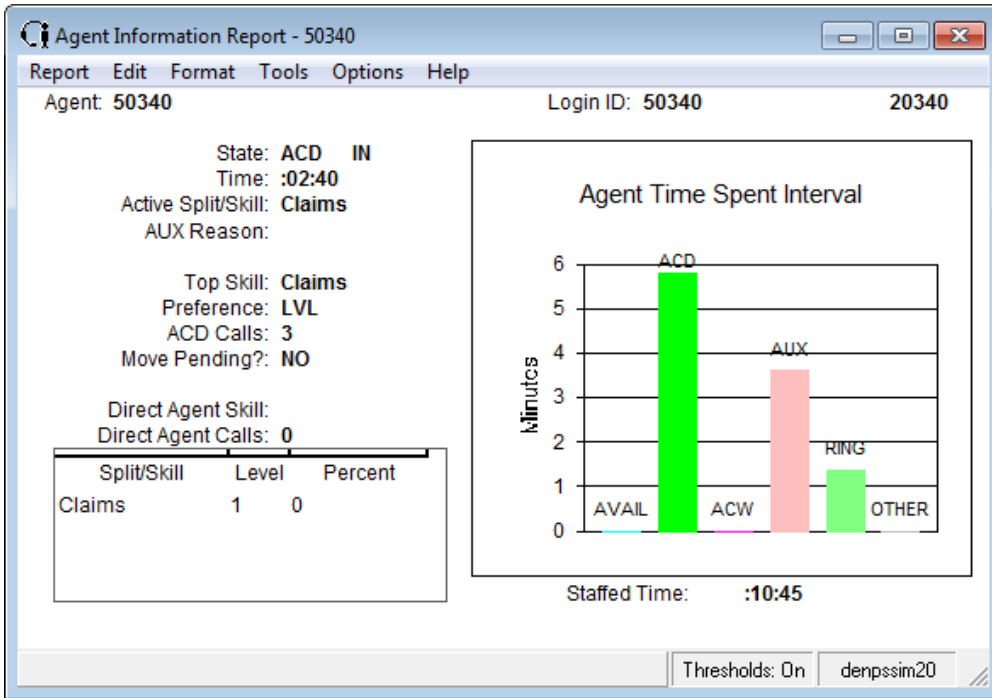
You can also right click on any Agent Name, and select "Integrated Graphical Agent Information". This report combines both Real Time and Historical information cumulative since Midnight of that day.
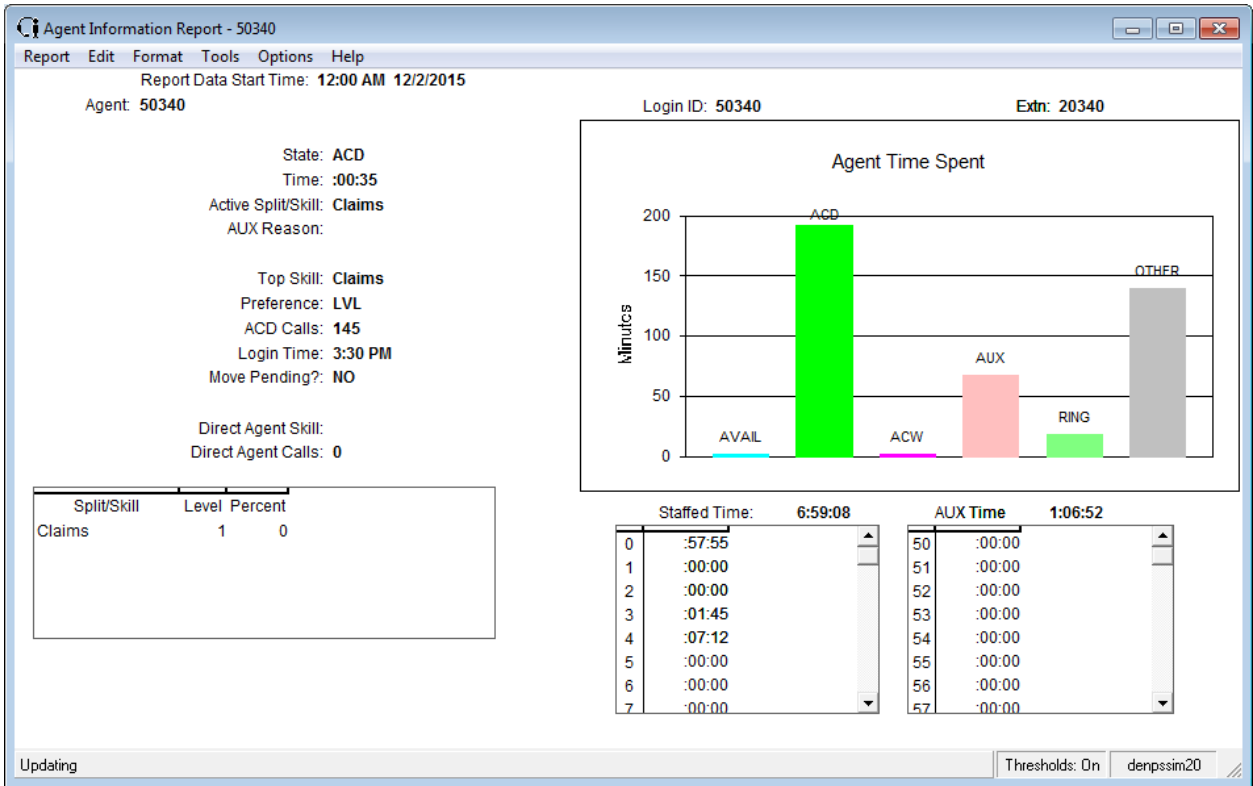
4.6   Change Agent Skills

Dependent upon your permissions, agent skills can be changed directly from the report also. You can accomplish this by following the steps below. While you have the report open click on the Agent's Name first, then Right-Click and select "Change Agent's Skill" from the sub-menu. When done with the changes, click on "OK".

Click on the number in the left-hand column. This will highlight the entire row and enable you to choose from Add, Delete, or Make Top Skill.

When changing an agent's skill be sure to verify the proper skill level is applied by clicking in the "Level" field and choosing the new level.

The interrupt type is for skills which allow ACD calls to be offered to agents while in an AUX state. This is driven from CM programming.

Use the Change Agent Skills window to:

- View an agent's or template's current skill assignments.

- Change one or more skills and the associated skill type or skill level (1-16) with Expert Agent Distribution and also Reserve 1 and 2 used with Avaya Business Advocate.

- Select an agent's top skill by highlighting the skill and clicking on Make Top Skill Button.

- Apply an agent template to a group of up to 50 agents. Scripting can be used to run a script

that changes the skill assignments for up to 50 agents at a time (depending on how many digits are used in the dial plan).

4.7 Example of a Real Time Report – Split/Skill Status

The Split/Skill Status Reports gives the agent status, time in an agent state, and split/skill statistics for a specific split/skill. Select the Reports Tab ▤ from the Controller Window and then make sure the ACD is correct, chose the Split/Skill Category and chose the Graphical Status report, then click on OK or just double click on the report name.
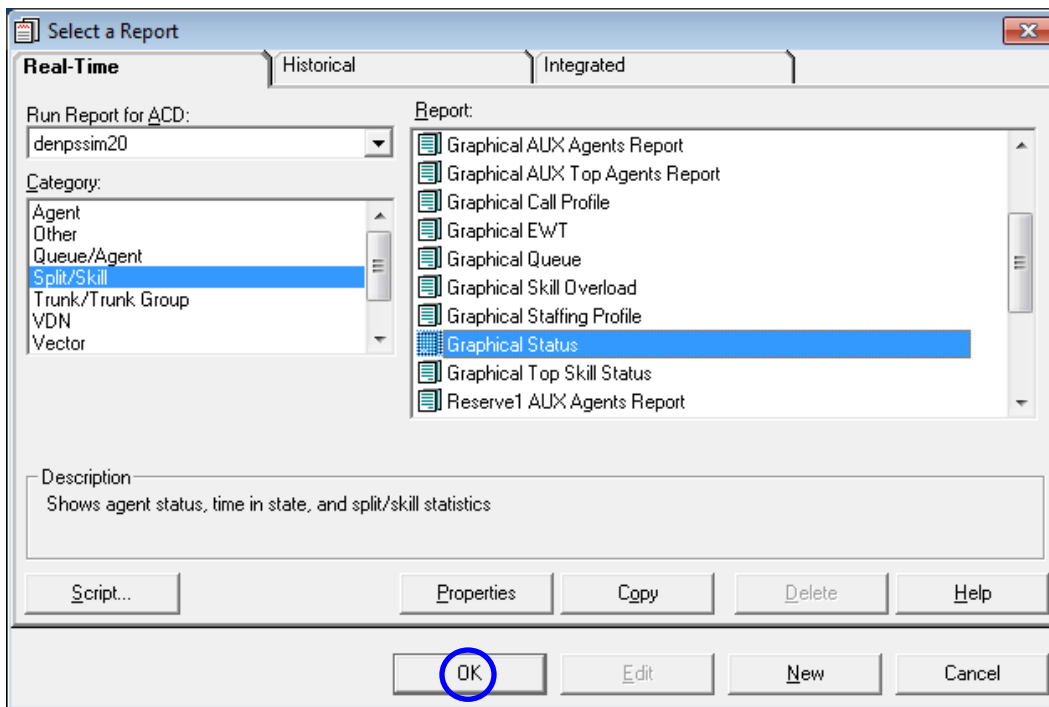
Set up the input window with the appropiate information and click OK:
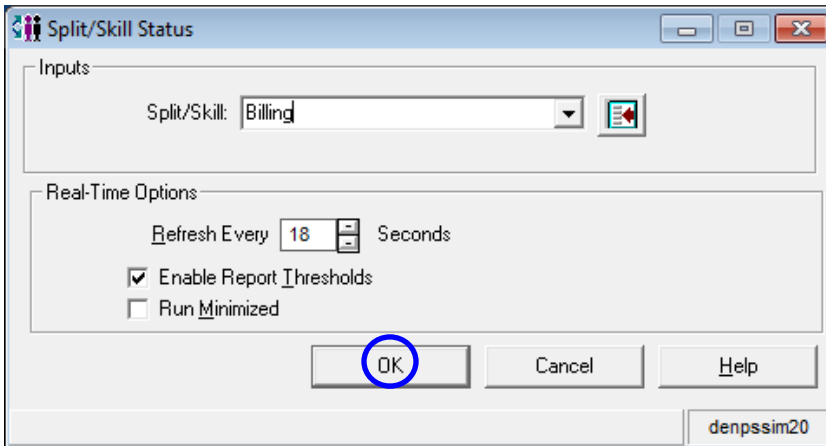
The Report will run and display as shown:

By clicking on the chart with your left mouse button, you can select "format chart" and alter the chart format, e.g., pie chart, bar graphs, charts, etc. You can also right click and drill down to AUX States.

By clicking on the chart with your left mouse button, you can drill down to the individual agent reports or agent administration.

By double-clicking on any piece of the pie or Legend item -it will open up an additional report that will list only those agents in that particular work mode state.

Section 5
Historical Reports

5.1 Purpose

The following section will familiarize the learner with Historical Reports and Input Windows required to run reports.

5.2 Section Objectives

Upon completion of this section, the learner will have an understanding of the following:

- Historical Reports and how they are used.
- Historical Report organization in Avaya CMS Supervisor.
- VDN, Split/Skill, and Agent Reports – which to use for specific information.

5.3 Overview – Historical Reports

Historical reports summarize the past performance of the ACD. When selecting Historical Reports, you will have the following input fields to complete:

- Unique VDN, Split/Skill, or Agent ID or Multiple entries within each category.
- Date or a range of dates.
- Time interval.

5.4 Organization of Historical Reports

The following list shows how the Historical reports are organized in Avaya CMS Supervisor.

- VDN, Split/Skill, and Agent.
- Each category is stored as Interval, Daily, Weekly, and Monthly.
- **Interval reports** – Contains breakdowns by the system intervals.
- **Daily –** Display provides one line per day and can only be run when day has completed.
- **Weekly –** Display provides one line per week, is run by entering the first day of the week, and can only be run when the week is completed.

- **Monthly –** Display provides one line per month, is run by entering the first day of the month, and can only be run when the month is completed.

- Data is stored based on type. Historical reports can be run for the following timeframes (<u>be sure to check with your CMS system administrator for your company's storage capabilities</u>):

  ➢ **Interval:** 31 Days

  ➢ **Daily:** 387 Days

  ➢ **Weekly:** 53 Weeks

  ➢ **Monthly:** 13 Months

- When running a report, input fields will need to be completed to determine specific data to be retrieved. When the field is plural, you can enter multiples of the requirement. When the field is singular, you can only enter a single item for that requirement. For example, when retrieving a Split/Skill report, the field may show:

  ➢ SPLIT/SKILL: _____, *enter a single Skill,* **or,**

  ➢ SPLITS/SKILLS: _____, *enter one or multiple Skills.*

5.5   Historical Agent Reports

Avaya CMS Supervisor Historical Agent reports give you access to specific information about your agents. For example, you can obtain information about:

- Every agent activity and the time it occurred for a particular agent using the Agent Trace by Location Report.

- An individual agent's performance by split or skill using the Agent Split/Skill Report.

- How a group of agents are performing using the Agent Group Summary Report.

5.5.1 Running Agent Reports

Input fields are demonstrated in the following sample:

All input windows give the option of a Browse Key for the required input.

By clicking on this Browse Key for dates, you can specify a date, range of dates, or any combination of dates needed. The same applies to input windows requesting timed intervals, day(s), week(s), and month(s).

All input windows give the option to send directly to the printer or view it on the screen. If "Print Report on:" is selected, the report will not be displayed to your PC.

The input window tells you the specific printer designated for your reports and gives the standard printer setting options when pressing the printer icon button

Date Browsing Window

5.5.2 Example of the Agent Split/Skill Daily Report

This report displays an agent's day by day performance for each skill assigned:

Historical ⟶ Agent ⟶ Split/Skill Daily:

Date	Split/Skill	ACD Calls	ACD Time	ACW Time	Extn In Calls	Extn In Time	Extn Out Calls	Extn Out Time	Assists	Held Calls	Hold Time	Trans Out
Totals		412	9:54:39	:29:31	0	:00:00	0	:00:00	0	120	6:48:59	0
11/16/2015	Claims	146	3:33:54	:03:38	0	:00:00	0	:00:00	0	46	2:39:22	0
11/17/2015	Claims	88	2:10:35	:11:11	0	:00:00	0	:00:00	0	24	1:26:59	0
11/18/2015	Claims	141	3:13:56	:04:22	0	:00:00	0	:00:00	0	42	2:19:22	0
11/19/2015	Claims	37	:56:14	:10:20	0	:00:00	0	:00:00	0	8	:23:16	0

5.5.3 Example of the Trace by Location Report

This report captures an agent's phone related activity, second by second, throughout one or multiple days and is meant to be used to understand where an agent may need help in the call process. Please note that Traces need to be activated first; please see section 10.5 for further information.

Historical ⟶ Agent ⟶ Trace by Location:

Date	Time	Seq	Location ID	Logout Reason	AUX Reason	State	Split/Skill	Time	Hold	Rec	Malicious Call	Rls	Calling Party	Call Work Code	Dialed Digits	Asst	Conf	Trans Out
12/9/2015	3:30:03PM	10				LOGON		:00	n	n	n		n	20331			n	n	n
12/9/2015	3:30:03PM	20				UNKNOW		:00	n	n	n		n				n	n	n
12/9/2015	3:30:03PM	30			0	AUX		:01	n	n	n		n				n	n	n
12/9/2015	3:30:04PM	10				AVAIL		:00	n	n	n		n				n	n	n
12/9/2015	3:30:04PM	20				RING	8	:00	n	n	n		n				n	n	n
12/9/2015	3:30:04PM	30				AVAIL		:00	n	n	n		n				n	n	n
12/9/2015	3:30:04PM	40				RING	8	:02	n	n	n		n				n	n	n
12/9/2015	3:30:06PM	10				ACD	I	8	:01	n	n	n	y	001D09009			n	n	n
12/9/2015	3:30:07PM	10				AVAIL		:00	n	n	n		n				n	n	n
12/9/2015	3:30:07PM	20				RING	8	:00	n	n	n		n				n	n	n
12/9/2015	3:30:07PM	30				ACD	I	8	4:02	n	n	n	y	001D09004			n	n	n
12/9/2015	3:34:09PM	10				AVAIL		:07	n	n	n		n				n	n	n

5.5.4 Example of the Agent Group Summary Daily Report

An Agent Group Summary Report compares agents within a group (or team). The Agent Group must be defined in the Dictionary prior to running this report. A group can be defined with as

many (up to 99) or as few agents as needed so that reports can be ran for individual sections or teams of agents within an overall department or company.

This report is very helpful for Team Leaders or Supervisors that need to see only their specific agent's activities. Please note for very large groups (over 99 members) a Skill(s) based report is recommended.

Historical ⟶ Agent ⟶ Agent Group Summary Daily:

5.6   Historical Split/Skill Reports

Avaya CMS Supervisor Split/Skill Reports give you access to specific information about your business. For example, you can obtain information about:

- Every split/skill activity and the date it occurred for a particular skill, detailing the agents assigned with that skill in the Split/Skill Daily Report.

- An individual split/skill's performance by interval for the business hours of operation in the Split/Skill Summary Interval Report.

- How an individual split/skill performs day by day in the Split/Skill Summary Daily Report.

- How an individual Split/Skill performed against the business requirements in the Split/Skill Call Profile Daily Report.

5.6.1 Example of the Split/Skill Daily Report

This report compares all agents within a specific skill to each other for a single day with regards to the skill that was used for the input of the report. The report lists the time each agent spends in each summary status available in CMS.

Historical ⟶ Split/Skill ⟶ Report Daily:

Split/Skill Report Daily - Billing

Report Edit Format Tools Options Help

Date: **11/22/2015**
Split/Skill: **Billing**

Agent Name	ACD Calls	Avg ACD Time	Avg ACW Time	ACD Time	ACW Time	Agent Ring Time	Other Time	AUX Time	Avail Time	Staffed Time	Assists	Trans Out
Totals	456	1:29	:00	11:18:03	:00:00	:52:01	48:21:47	22:44:57	:43:18	84:00:06	0	0
Agent Names listed here	81	1:27	:00	1:56:52	:00:00	:06:54	8:20:30	1:34:51	:01:02	12:00:09	0	0
	80	1:27	:00	1:55:40	:00:00	:11:26	7:50:02	1:59:09	:03:42	11:59:59	0	0
	103	1:32	:00	2:38:15	:00:00	:07:03	7:54:41	1:18:33	:01:26	11:59:58	0	0
	66	1:27	:00	1:35:12	:00:00	:19:12	10:14:45	11:29:06	:21:45	24:00:00	0	0
	126	1:31	:00	3:12:04	:00:00	:07:26	14:01:49	6:23:18	:15:23	24:00:00	0	0

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5.6.2 Example of the Split/Skill Summary Daily Report

This report gives a day by day comparison for a specific skill. It details the skill's daily activities rather than individual agents and provides a snapshot of multiple days of call data. This is one of the most popular reports to use for troubleshooting as you can see if certain days received or abandoned a high or low number of calls in comparison to other days.

Historical ⟶ Split/Skill ⟶ Summary Daily:

Split/Skill Summary Daily - Billing

Report Edit Format Tools Options Help

Split/Skill: **Billing**

Date	Avg Speed Ans	Avg Aban Time	ACD Calls	Avg ACD Time	Avg ACW Time	Aban Calls	Max Delay	Flow In	Flow Out	Extn Out Calls	Avg Extn Out Time	Dequeued Calls	Avg Time to Dequeue	% ACD Time	% Ans Calls
Totals	2:10	3:38	1177	1:52	:00	193	5:00	483	483	0		0		25.43	63.52
12/9/2015	1:48	2:38	630	1:59	:00	78	5:00	374	374	0		0		27.47	58.23
12/10/2015	2:36	4:18	547	1:44	:00	115	5:00	109	109	0		0		23.14	70.95

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5.6.3 Example of the Split/Skill Summary Interval Report

This report shows a specific skill's activities by the pre-determined interval (15 minute, 30 minute, or hourly based on system configuration) and is a great report to better understand how the volume of calls may fluctuate over the day.

Historical ⟶ Split/Skill ⟶ Summary Interval:

Split/Skill Summary Interval - Billing																	
Report Edit Format Tools Options Help																	
Date: **11/22/2015**																	
Split/Skill: **Billing**																	

Time		Avg Speed Ans	Avg Aban Time	ACD Calls	Avg ACD Time	Avg ACW Time	Aban Calls	Max Delay	Flow In	Flow Out	Extn Out Calls	Avg Extn Out Time	Dequeued Calls	Avg Time to Dequeue	% ACD Time	% Ans Calls	Avg Pos Staff	Calls Per Pos
Totals		3:00	4:17	456	1:29	:00	190	5:00	100	100	0		0		13.53	61.13	3.5	130
5:30 -	5:45AM	2:42	1:35	10	1:56	:00	1	4:11	2	2	0		0		25.51	76.92	5.0	2
5:45 -	6:00AM	1:32	5:00	6	2:34	:00	3	5:00	2	2	0		0		19.20	54.55	5.0	1
6:00 -	6:15AM	2:12	2:15	9	1:47	:00	3	5:00	4	4	0		0		20.82	56.25	5.0	2
6:15 -	6:30AM	1:44		11	2:30	:00	0	3:14	2	2	0		0		42.47	84.62	5.0	2
6:30 -	6:45AM	:50		10	2:39	:00	0	2:39	1	1	0		0		30.71	90.91	5.0	2
6:45 -	7:00AM	1:43	3:36	8	1:39	:00	2	5:00	6	6	0		0		19.84	50.00	5.0	2
7:00 -	7:15AM	:56		12	2:09	:00	0	2:32	3	3	0		0		31.96	80.00	5.0	2
7:15 -	7:30AM	1:42		7	1:48	:00	0	3:44	3	3	0		0		16.69	70.00	5.0	1
7:30 -	7:45AM	1:16	3:23	9	1:52	:00	2	5:00	6	6	0		0		21.82	52.94	5.0	2
7:45 -	8:00AM	3:14	3:17	4	1:17	:00	6	5:00	4	4	0		0		9.84	28.57	5.0	1
8:00 -	8:15AM	2:04	1:57	9	1:36	:00	5	5:00	11	11	0		0		17.11	36.00	5.0	2
8:15 -	8:30AM	3:32	3:40	7	1:00	:00	8	5:00	4	4	0		0		8.42	36.84	5.0	1

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5.6.4 Example of the Split/Skill Call Profile Daily Report

This report compares the day's call activities against the Split/Skill business requirements. The Split/Skill Call Profile would need to be completed in the Call Center Administration prior to retrieving this report. Profile Reports detail the calls answered and abandoned within the specific service levels defined and details where the greatest amount of calls answered and abandoned occurred for an individual day.

Historical ⟶ Split/Skill ⟶ Call Profile Daily:

5.7 Historical VDN Reports

Avaya CMS Supervisor VDN reports give access to specific information about call types. For example, you can obtain information about:

- Every VDN activity and the date it occurred for a particular call type for multiple days in the VDN Report (Skill) Daily.

- An individual VDN's performance by intervals for a single day in the VDN (Skill) Interval Report.

5.7.1 Example of the VDN (Skill) Daily Report

This report shows total call volume for specific call flow designs. It is important to understand how your calls flow through your environment to run these specific reports. The report compares day by day call activity VDN.

Historical ⟶ VDN ⟶ Report (Skill) Daily:

5.7.2 Example of the VDN (Skill) Interval Report

This report shows the same information as the VDN (Skill) Daily Report. It is a useful report to run when checking to see how many calls are coming into your environment before or after your normal business hours.

Historical ⟶ VDN ⟶ Report (Skill) Interval:

5.8 Time Zone Offsets in Historical Reports

Beginning with CMS R16, for historical interval reports, CMS Supervisor has a menu choice to specify a time zone to display the report. CMS displays the data according to a time zone specified while generating a report. The default time zone is the time zone of the Communication Manager where the report is generated. The data is stored in the CMS database based on where the Communication Manager is installed. New database items to support the UTC time zone reporting have been added to the database. With the introduction of CMS R18, there is a new level of time zone offset by adding a feature called Tenancy. If your login ID is associated with a specific Tenant, that tenant may have a time zone already associated with it. Please contact your CMS Administrator for specifics if you are to use a Tenant login ID or a Normal (non-Tenanted) Login ID.
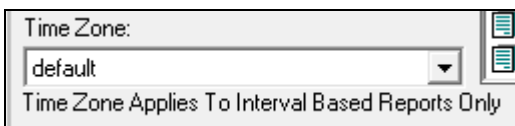
This feature is on the Historical Reports window prior to selecting a report to run.

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Section 6

Integrated Reports
</div>

6.1 Purpose

This section will familiarize the learner with Integrated Reports.

6.2 Section Objectives

Upon completion of this section, the call center manager or supervisor will have an understanding of the following:

- Integrated Reports and how they are used.
- Agent Information, Split/Skill Comparison, and Split/Skill View reports and how they may be used.

6.3 Overview – Integrated Reports

Integrated Reports show the current status and accumulated data for up to the past 24 hours of ACD, agent, split/skill, trunk/trunk group, vector, and VDN activities.

- An Integrated Report combines real-time and up to the last 24 hours of historical data for a current view of the day.

6.3.1 Example of the Agent Graphical Information Report

The following report shows information and statistics for an agent for a specified start time and brings in the real time components as agent state and how long an agent has been in the specific state.

Integrated ⟶ Agent ⟶ Graphical Information:

6.3.2 Example of the Split/Skill Comparison Report

Call Center supervisors or administrators who are responsible for several splits/skills can use this report to see if splits/skills have comparable talk times, abandon rates, and average speed of answer figures up to a certain point in the day.

Integrated ⟶ Split/Skill ⟶ Comparison Report:

6.3.3 Example of the Split/Skill Comparison Report

Call Center supervisors or administrators who are responsible for several splits/skills can use this report to see if splits/skills have comparable talk times, abandon rates, and average speed of answer figures up to a certain point in the day.

Integrated ⟶ Split/Skill ⟶ Comparison Report:

6.3.4 Example of the Graphical Split/Skill View Report

Use this report if you have large numbers of agents in one split or skill who need split/skill status, but do not want to consume the PC resources required to display the individual agent status of many agents.

<div align="right">
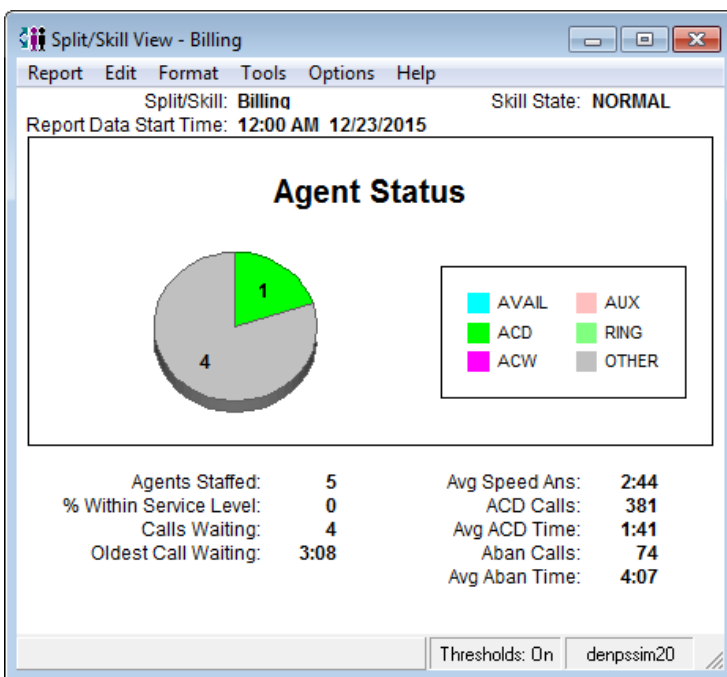
Section 7
Exporting Report Data

</div>

7.1 Purpose

The purpose of this section is to instruct the learner to export data from reports to be used by other software applications.

7.2 Section Objectives

Upon completion of this section, you will be able to export data from reports by utilizing two methods; Exporting to Clipboard and Exporting to File. Exporting to Clipboard is recommended for simple data analysis to an Excel spreadsheet. Exporting to File is recommended for more detailed call volume reporting when using database software that requires specialized field formatting.

7.3 Exporting Report Data to Clipboard

Select the report whose data you wish to export. Once you have opened the report, go to the top of the report and select **Edit/Export All Data**

• The following screen will appear:
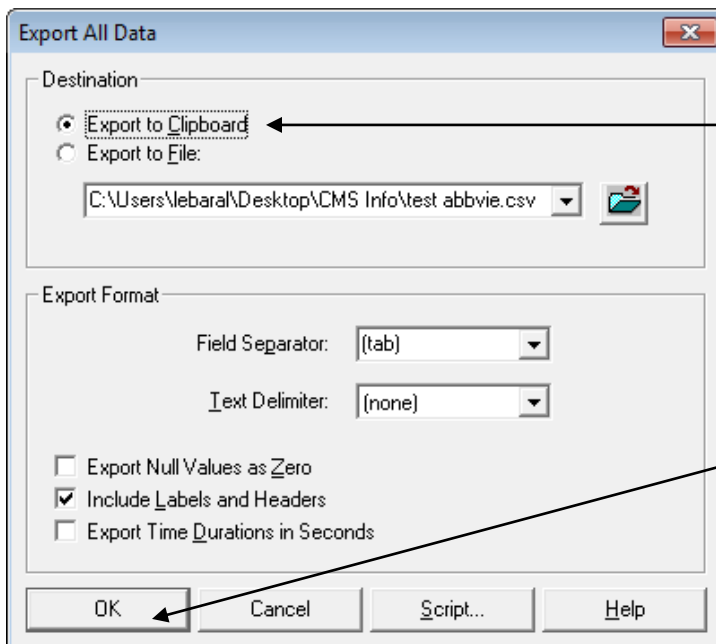
Select "Export to **Clipboard**"

Then select one or more items:
a) Export Null Values as Zero
b) Include Labels and Headers
c) Check Export Time Duration in Seconds (only if you are using data for conversion purposes).

Then click on OK. You will see a confirmation window indicating how many records have been "saved" to the clipboard. The data can then be imported to any application that accepts pasted data from the clipboard.

Complete the following steps to export the data to an Excel spreadsheet:

1. Open Microsoft Excel

2. In the Excel spreadsheet place cursor on upper left corner or on the specific cell you want to populate.

3. Right click and select paste **or** select the paste icon button.

From this point, you can manipulate the data, create custom fields, calculations, or formulas, and create continuous worksheets and graphs day by day, week by week, or month by month.

7.4 Exporting Report Data to File

Select the report whose data you wish to export. Once you have opened the report, go to the top of the report and select **Edit/Export All Data**

• The following screen will appear:
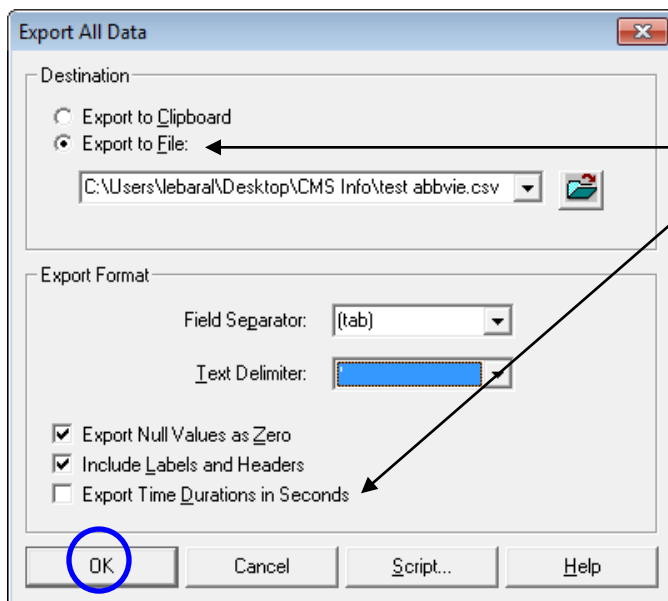
Select "**Export to File**"

Then select one or more items:
a) Export Null Values as Zero
b) Include Labels and Headers
c) Check Export Time Duration in Seconds only if you are using data for conversion purposes.

Once everything is set as you need, click on OK, you will see a confirmation window indicating how many records have been "saved". The following steps show exporting the data to an Excel spreadsheet. However, the file could also be imported to a database software application for managing daily to monthly call volume statistics.

1. Open Microsoft Excel

2. In the Excel spreadsheet place cursor on upper left corner or on the specific cell you want to populate.

3. Select File/Open, and select the file you just exported. You will see the following screen:
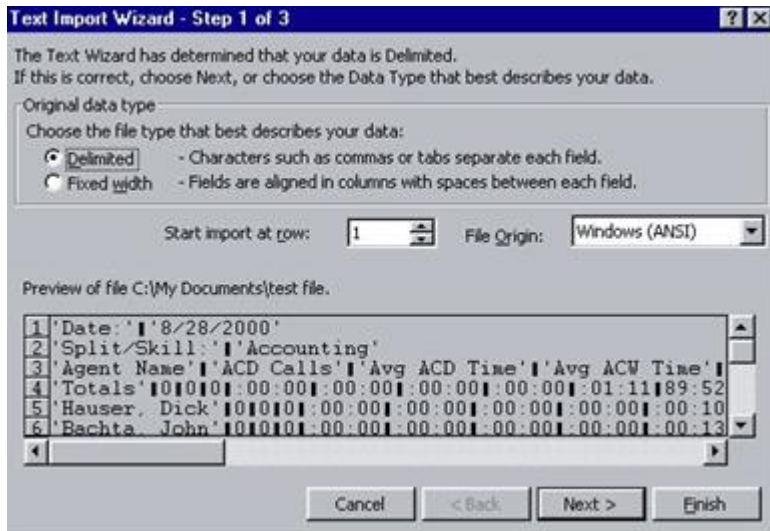
4. This is the Text Import Wizard in Excel. You will need to walk through the Wizard by selecting the Next button to determine column widths and formats for each column. This allows you to format each column based on your database or excel requirements. (Please see the Excel help screens for specifics to importing files.)

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Section 8
Dictionary
</div>

8.1   Purpose

This section instructs you in using the Operations tabs in the Avaya CMS Supervisor Dictionary.

It also gives you information on performing tasks that are specific to the Dictionary command.

8.2   Section Objectives

Upon completion of this section, the learner will:

- Understand the scope of the Dictionary subsystem.

- Know the functionality of Dictionary.

- Be able to use Dictionary.

- Be familiar with the Dictionary Operations tabs and input windows.

8.3   Overview – Dictionary

The Dictionary subsystem can be used to assign names to call center entities, including login IDs, split/skills, call work codes, ACDs, AUX reason codes, logout reason codes, trunk groups, VDNs, and vectors. The assigned names then appear on reports, making them easier to interpret.

8.4   About Dictionary

From the **Dictionary** command, you can perform the following functions:

- Enter Avaya CMS login IDs and corresponding agent names.
- Assign names to splits/skills, trunk groups, call work codes, ACDs, AUX reason codes, logout reason codes, VDNs, and vectors.
- Create agent groups.
- Modify agent, split/skill, and trunking string values.
- View standard Avaya CMS database items and calculations.
- Define your own calculations, constants, and custom database items.

- Globally search for anything in **Dictionary** subsystem and search for patterns from any data entry field.

- Obtain a report on most parts of the **Dictionary** subsystem.

8.5 Starting Dictionary

To select any **Dictionary** item, perform the following steps:

1. Choose Dictionary from the Commands menu, or, Select the Dictionary Button 📖 on the toolbar.
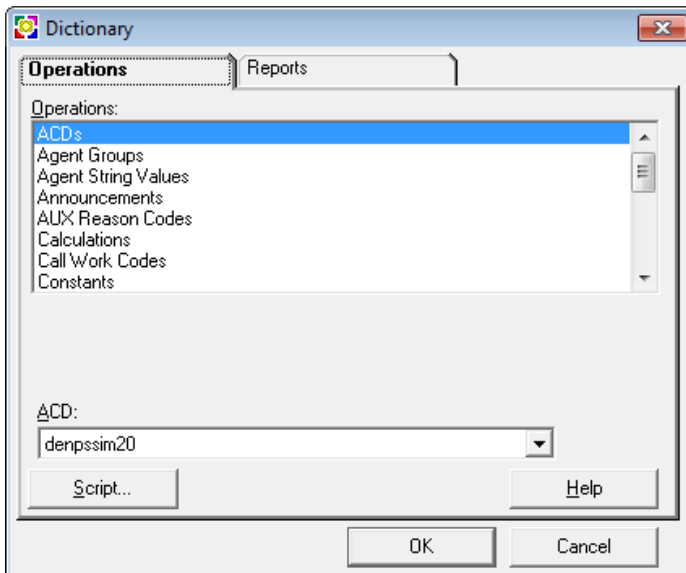
2. The Dictionary window appears. You can select from the following tabs:

- Operations: To **edit** Dictionary items.

- Reports: To create a list of Dictionary items that can be viewed or printed.

The above screen shows the Dictionary Operations window available in Supervisor. Splits/Skills, Standard CMS Items, Trunk Groups, String Values, VDNs, and Vectors are not shown in the visible window area when the window first opens. Use the scroll bar to the right of the Operations list box to display these options.

8.6 Dictionary Operations Tab

You may choose the following items from the **Dictionary** Operations Tab:

- **ACDs** – Used to assign names to any real or pseudo ACDs located on the switch or in the

ACD administration.

- **Agent Groups** – Used to create and name, copy, or delete agent groups. Use this window to add, delete, or list the agents in a group.

- **Agent String Values** – Used to modify the descriptive words, dealing with agent states, which appear as field values on reports. For example, you may modify names of states such as "ACD," "ACW," or "AVAIL" so that they display as "On Call", "Wrap-Up", and "Ready".

- **Announcements** – Used to assign names to announcements.

- **AUX Reason Codes** – Used to assign names to AUX reason codes. AUX reason codes enable a call center to track an agent's time more precisely when the agent is in the AUX state.

- **Calculations** – Used to define names for calculations that are used in reports on Avaya CMS. Caution! Please do not alter any calculations without consulting with your CMS System Administrator. Any changes to standard calculations would change the way CMS presents the data on multiple reports.

- **Call Work Codes** – Used to assign names to call work codes.

- **Constants** – Used to define items with fixed numerical values that you can enter into the database and use in custom reports.

- **Custom Items** – Used to define your own database items that are stored in their own tables within the CMS database.

- **Generic String Values** – Used to enter a character for Yes or No that you want to appear on custom reports.

- **Global Search** – Used to search for anything in **Dictionary** (e.g. Login ID).

- **Location IDs** – Used to assign a number to a port network, including voice terminals and trunks.

- **Login Identifications** – Used to assign agent names to CMS login IDs.

- **Logout Reason Codes** – Used to assign names to logout reason codes. These codes enable an agent to specify the reason for logging out, such as the end of a shift or training.

- **Split/Skill String Values** – Used to modify the descriptive words (that appear as field values) on Split/Skill Call Profile Reports.

- **Splits/Skills** – Used to assign names to your ACD splits or skills (to make your reports easier to identify and read).

- **Standard CMS Items** – Used to display the names of columns in CMS database tables. CMS uses the database tables to collect, store, and retrieve report information.

- **Trunk Groups** – Used to assign names to your trunk groups (to make your reports easier to identify and read).

- **Trunk String Values** – Used to modify the descriptive words (that appear as field values) on trunk reports.

- **VDNs –** Used to assign names to VDNs so that names, instead of VDN numbers, appear on VDN reports and administration windows.

- **Vectors –** Used to assign names to vectors so that names, instead of vector numbers, appear on vector reports and administration windows.

8.7 Dictionary Operations Input Window

When you select an item from the Dictionary Operations tab, an input window displays. Below is an example if one of the input windows that you will see.

8.8 Creating Agent Groups

To create an agent group, perform the following steps:

1. Click on **Commands** and select **Dictionary** from the drop-down menu, or, select the **Dictionary** button on the toolbar 📖.

2. Select **Agent Groups** from the Operations tab. Make sure the ACD that you want to add/modify/delete the dictionary items for is accurate.
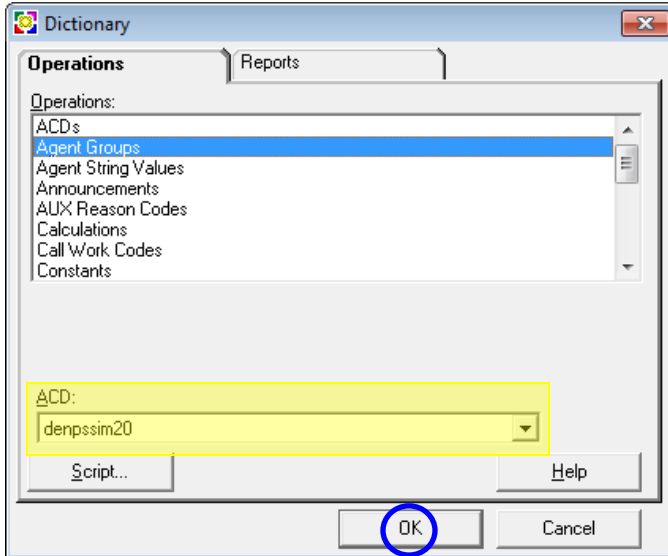
3. Select OK and the Agent Groups input window displays:
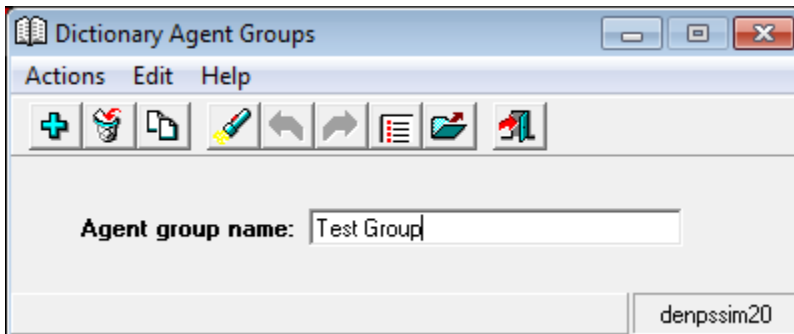
4. Type the name of the agent group you want to create.

5. Click on **Actions** and select **Add** from the drop-down menu, or, select the **Add** button ➕ on the toolbar.

6. Once added, click on **Actions**, and select **Get Contents** from the menu, or select the **Get Contents** 📂 button on the toolbar. The Dictionary Agent Groups-Get Contents window displays:
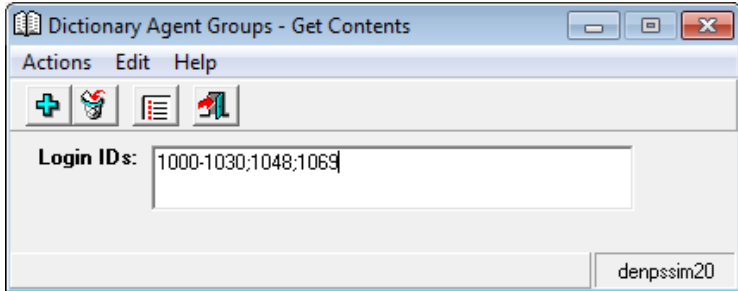
7. Type the Login IDs of the agents you want to add to this group in the text box (there is no Browse button for this section). Please note the recommended max amount of agents in an Agent Group is 99.

8. Click on **Actions** and select **Add** from the drop-down menu, or, select the **Add** button on the toolbar.

9. When the last agent login ID is added to the desired group, close the window.

NOTE: When entering login IDs, type a dash "-" if in a range (example: 2009-2015), or a semi colon ";" if not in sequence (example 2035;2037). You can use a combination of both as displayed in the example above.

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Section 9
Exceptions

</div>

9.1   Purpose

This section teaches you how to use the Operations and Reports tabs in the **Exceptions** command. It also gives you information on performing tasks that are specific to the **Exceptions** command.

9.2   Section Objectives

Upon completion of this section, the learner will understand how to do the following:

- Use the Exceptions command.
- Start Exceptions.
- Set the Exceptions conditions.
- Navigate the Operations and Reports tabs.
- Run Exceptions Reports.

9.3   Overview – Exceptions

The exception conditions which you set in the **Exceptions** command are different from those which you define using report threshold highlights. The **Exceptions** feature allows you to administer time-or count-based thresholds and to be alerted when times or counts exceed or fall below those thresholds. This allows monitoring "by exception", to be alerted when something is not behaving as expected. Exceptions are system wide and thresholds are login specific. By default, the PC gives an audible alert to notify you of an Exception. You can deactivate the sound as follows.

1. From the controller window, select **Tools**, then **Options**.

2. Select the General Tab.
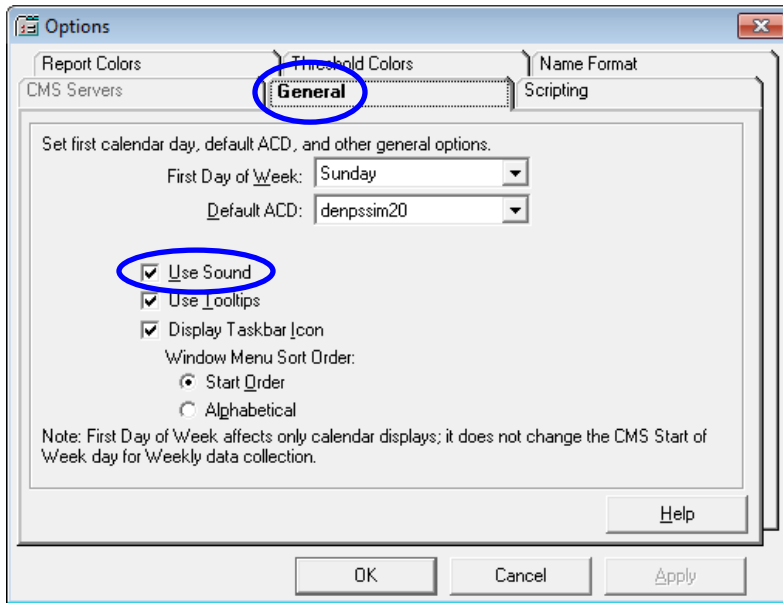
3. Uncheck the box "Use Sound". This will stop the Exception notifications from being audible alerts using your Windows Notifications Alert sound.

9.4   Using the Exceptions Command

Use the Exceptions Command to perform the following actions:

*   Define exception conditions for ACD activity for which you want notification. Activities may include agents, splits/skills, trunks or trunk groups, vectors, and VDNs. You do this through the Exception Operations tab.

*   Generate reports on agent, split/skill, trunk and trunk groups, vector, VDN, malicious call trace, and data collection exceptions. You do this through the Exception Reports tab.

*   Run the Real-time Exception Log.

NOTE: The Real-time Exceptions Log is located under the **Operations** tab, not the Reports tab. In standard CMS, the log is a separate submenu item.

9.5   Starting Exceptions

To select any exceptions item in Avaya CMS Supervisor do the following steps:

1. From the controller window, choose **Exceptions** from the **Commands** menu **or**, select the Exceptions button on the toolbar.

2. The Exceptions Window appears. You will see the following tabs:

    - Operations
    - Reports

The following graphic display shows the Exceptions Operations available in Avaya CMS Supervisor.

Agent - Used to set and define agent exceptions.
Real-time Exception Log - An interval Real-Time report used to list exceptions as they occur.
Split/Skill - Used to set/define split/skill exceptions
Trunk Group - Used to define and identify trunk group exceptions
VDN - Used to set and define VDN exceptions.
Vector - Used to set and define vector exceptions.
Agent Reason Codes - Used to set and define exceptions for aux work reason codes 0-99.

9.6   General Rules for Administering Exceptions

- For any exception type, the occurrence threshold must be from 0 to 999.

- For timed exceptions, the time limit for each occurrence must be from 0 to 28,800 seconds (the equivalent of 8 hours).

- Whenever you define or change exceptions, Avaya CMS starts checking for the exceptions immediately, as long as data collection is on.

- If you enter a time limit for an activity, you must also enter an occurrence threshold for the same activity.

When you select an item from the Exceptions Operations list, an input window displays. Below is an example of one of the input windows that you will see. Note: you can set exceptions for more than one data item at a time. To do this, use the Browse button to list all available choices and select the ones needed.
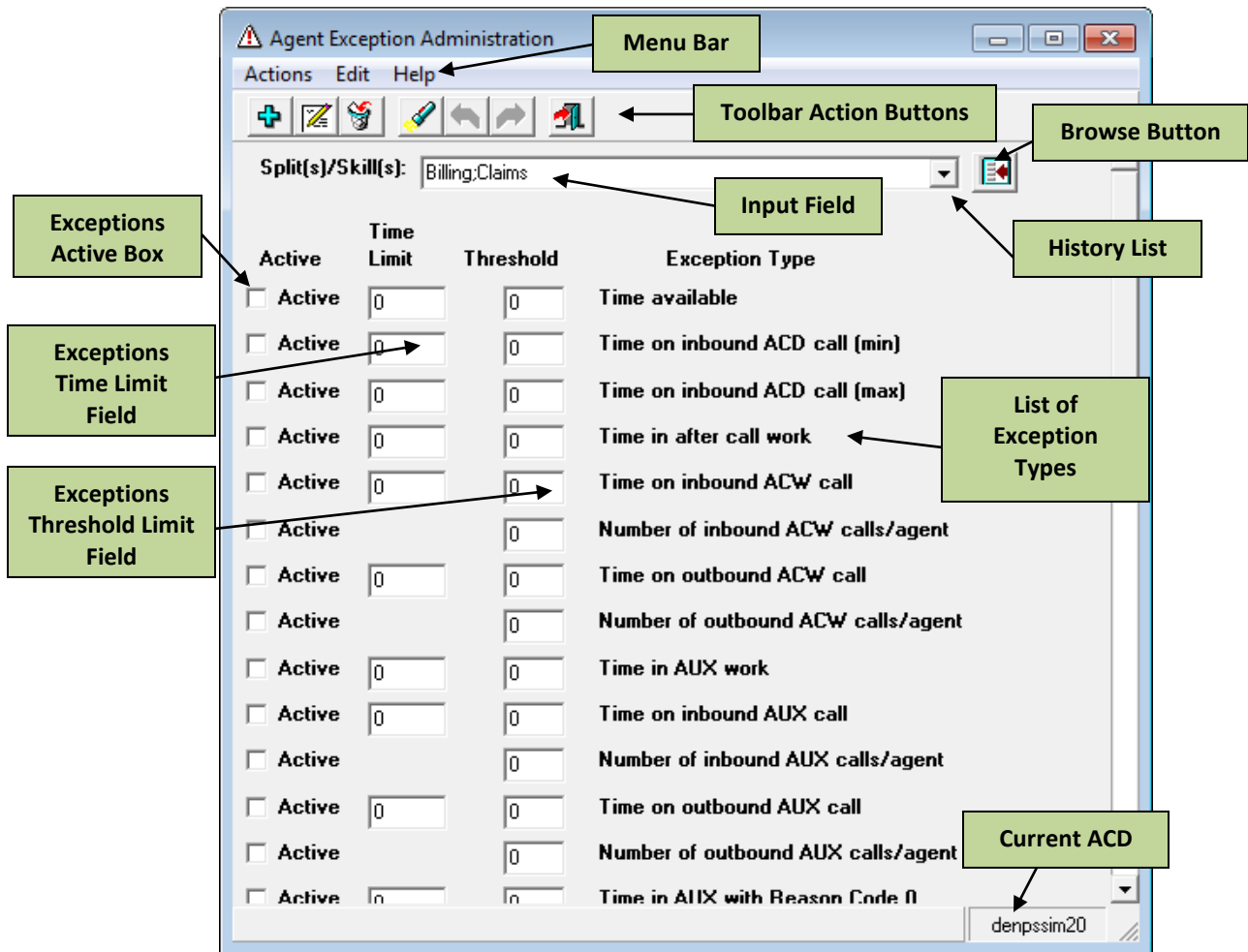
9.7   Setting the Exceptions Conditions

1. Select the exceptions for which you want to be notified by clicking in the "Active" box to enable the check box.

2. Set the Time Limit (if applicable) for the exceptions of which you will be notified. The time limit is the amount of time that must pass before occurrences are counted against the threshold limit.

3. Set the Threshold for the exceptions of which you will be notified. The threshold is the number of acceptable occurrences. For example, if you set the threshold to ten, that

particular exception can occur ten times before you will be notified. On the eleventh occurrence, you will receive an exceptions notification.

4. When you are done setting the thresholds, select **Add** from the **Actions** menu, **or** select the Add button ➕ on the toolbar.

5. If you are setting exceptions for an entity that has already had exceptions set, use the Modify 📝 action instead of **Add.**

9.8   Exceptions Reports Tab

The following graphic shows the Exceptions Reports available in Supervisor.
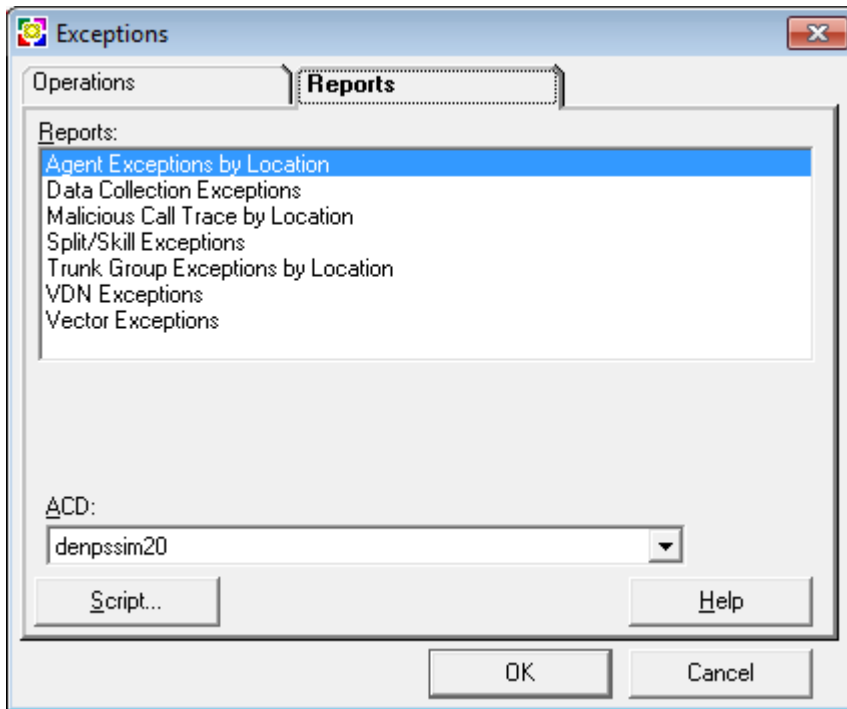
9.9   Exception Report Input Windows

To run an exceptions report, complete the following steps:

1.   Select Exceptions from the Commands menu or select the Exceptions button ⚠ on the toolbar.

2. Select the Reports Tab.

3. Select the type of exceptions reports you want to run. The report input window displays.

Below is an example of an input window:
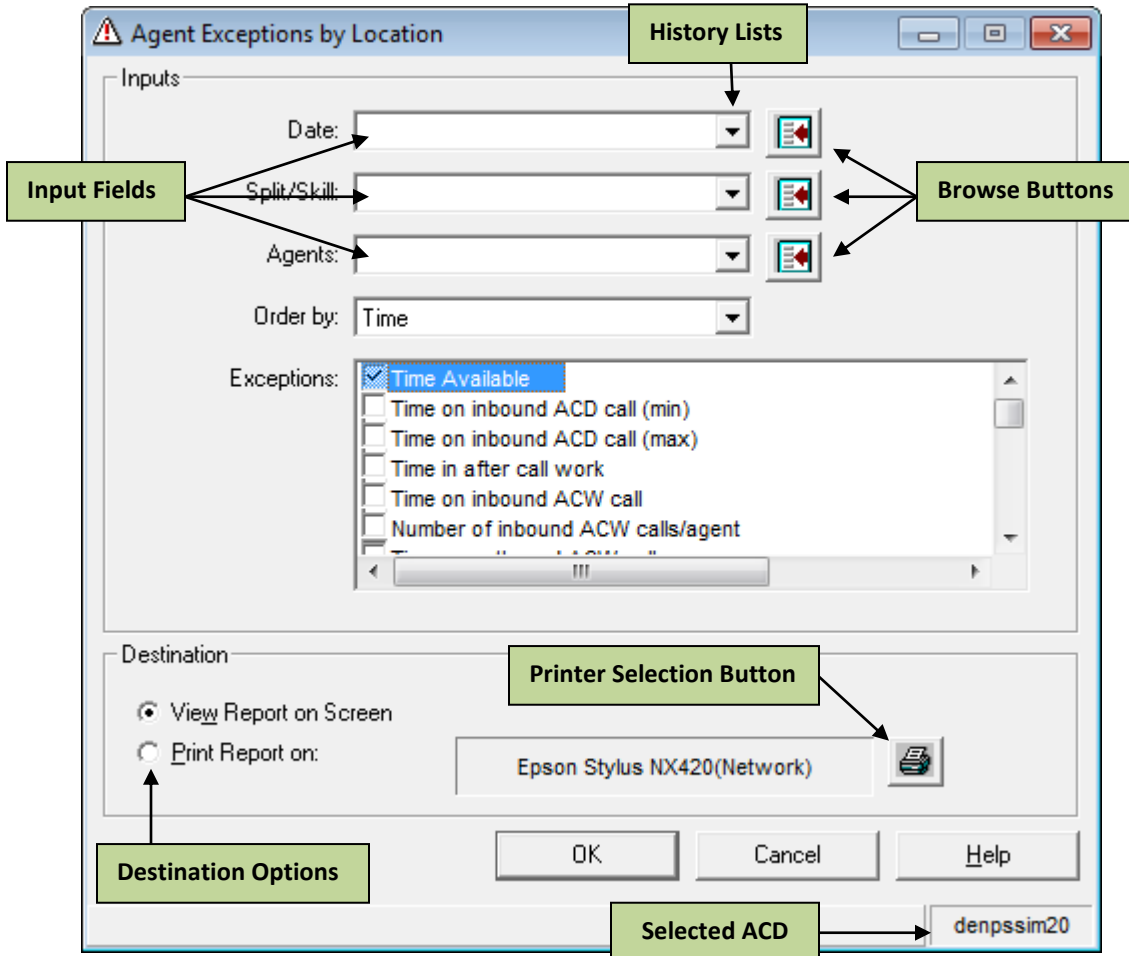
9.10   Real Time Exception Log

Located under the Exceptions Operations Tab, the following is a sample of a Real-Time

Exception Log:

About the Real Time Exception Log

The Real-Time Exception Log holds and displays exception records for up to the last 100 exceptions. The log lists exception records in chronological order, with the oldest exception listed first.

As each new exception occurs, Avaya CMS adds a new record to the log. If the log already contains 100 records, Avaya CMS deletes the oldest exception record from the log at the same time that it adds the new exception record.

The log simultaneously displays exception records for all elements on the ACD or ACDs for which you have exception permissions, regardless of whether the exceptions involve agents, splits or skills, trunk groups, VDNs, or vectors.

You can use the Real-Time Exceptions Log in two ways:

- Access the log periodically, or whenever you get notification of an exception, to see exactly what happened.

- Maintain the log as an open window so you can monitor exceptions as they occur

Each exception record in the Real-Time Exception Log gives you the following information:

The date and time the exception occurred.

- The ACD name for which the exception occurred.

- The specific ACD item, such as specific agent, split/skill, or VDN that was involved in the exception. If you have defined names in the Dictionary subsystem, the names display. These names may have truncated if they are longer than the space allowed in the exception record. Otherwise, numeric identifiers display.

- The conditions you set up for exception checking in the associated Exceptions Administration window.

The record tells you that an activity has fallen outside of the exception conditions you set. Thus, for a peg count exception, the exception record shows the occurrence threshold you set, even though the actual number of occurrences may be substantially greater. For a timed exception, the exception record shows the time limit you set, not the actual duration of an occurrence.

<div align="right">

Section 10
Agent Administration

</div>

10.1 Purpose

This section teaches you how to use the Operations and Reports tabs in the **Agent Administration** command. It also teaches you how to perform tasks that are specific to the **Agent Administration** command.

10.2 Section Objectives

At the end of the section, the learner will understand the following:

- Tasks that can be performed from Agent Administration

- Starting Agent Administration

- Agent Administration with EAS capabilities

- Input Windows

10.3 Overview – Agent Administration

Avaya CMS and the Avaya CMS Supervisor applications are primarily used to collect information about Agent related activities from the switch, store the information, and produce real-time and historical reports. You can also use Avaya CMS Supervisor to view, add, delete, or modify agent-related parameters on the switch. The following are some of the Agent administration tasks you can perform from CMS Supervisor, assuming your switch supports the related features and you have permissions to do so:

- Add agents to, remove agents from, or move agents (extensions) between splits/skills.

- Change an agent's assigned skills or change one skill for as many as 50 agents simultaneously (depending on how long the agent extensions are).

- Create or apply an agent template.

- Start or stop an agent trace or list the agents being traced.

10.4   Starting Agent Administration

To select any Agent Administration item in Supervisor, do the following:

1. Select **Agent Administration** from the **Commands** menu, **or**, select the Agent

    Administration button 🖻 on the toolbar.

2. The **Agent Administration** selector window appears. You will see the following tabs:

    • Operations

    • Reports
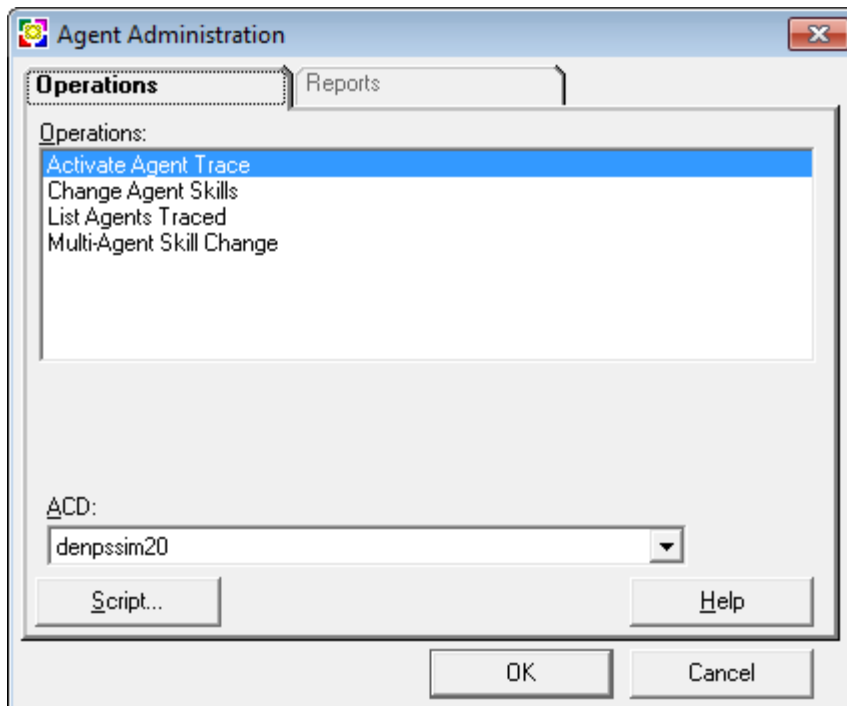
10.5   Agent Administration with EAS –Feature List

*   **Activate Agent Trace** – Starts or stops Avaya CMS Tracing of agent activities.

*   **Change Agent Skills** – Lets you change an agent's assigned skill set.

*   **List Agents Traced** – Lists the agents and dates for which agent trace data is available
    for the current ACD. Check with your Systems Administrator for the length of time in
    which the records will be available.

*   **Multi-Agent Skill Change** – Lets you move, add or delete one skill for as many as 32
    agents simultaneously for any agents that are currently logged in.

10.6 Input Window Displays

10.6.1Activate Agent Trace

To start or stop an agent trace, do the following:

1. Select **Agent Administration** from the **Commands** menu, **or**, select the Agent

    Administration button 🖻 on the toolbar.

2. Choose the ACD for which you want to start or stop the agent trace.

3. Select **Activate Agent Trace** from the Operations tab and then click OK.
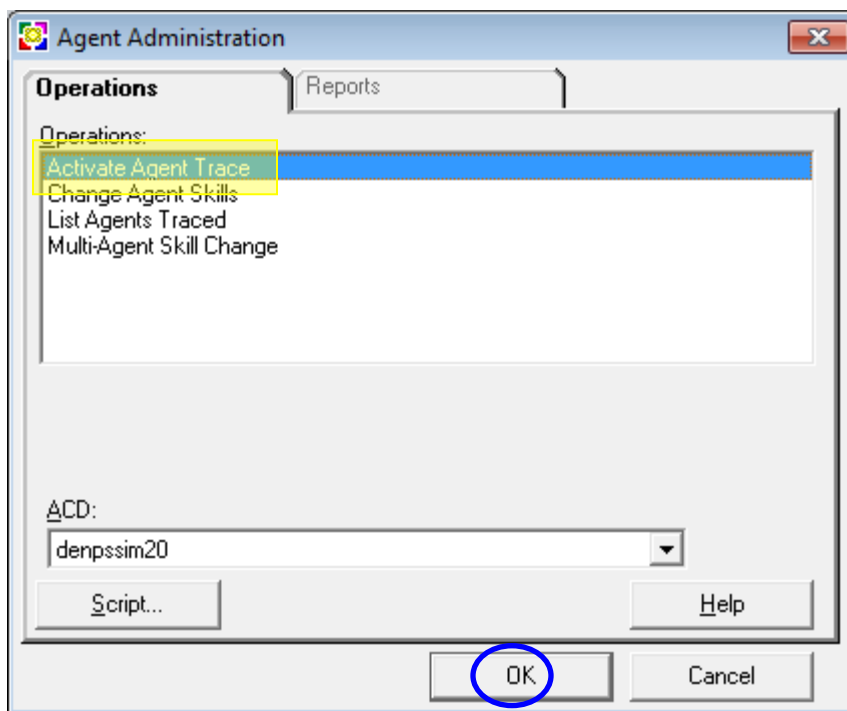
4. From the Agent names or logins list box, enter or select the name or the login ID of the agent for whom you want to start or stop a trace.
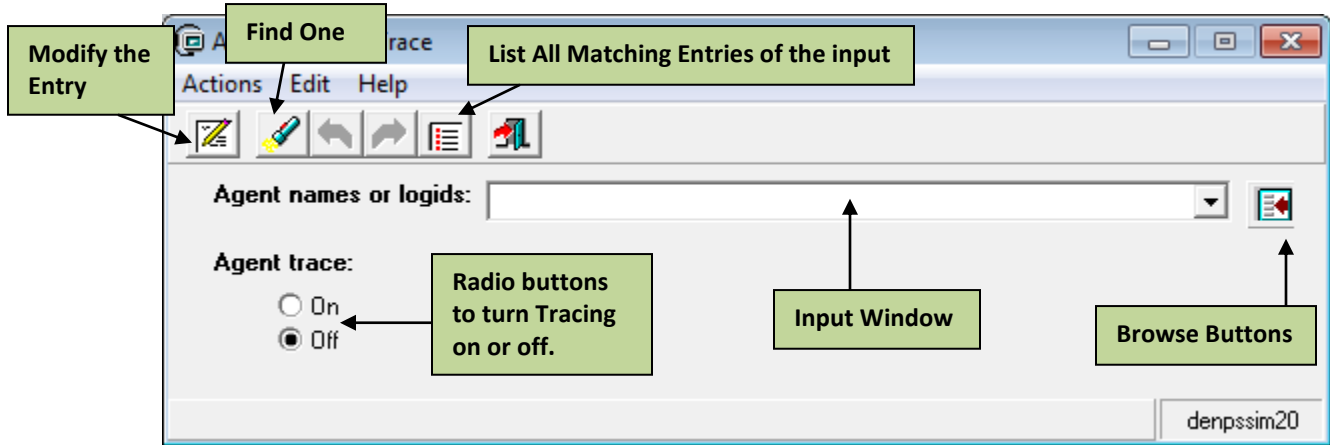
5. To start an agent trace, select the **On** option. To stop an agent trace, select the Off option.

6. Select **Modify** from the **Actions** menu or select the Modify button [icon] on the toolbar.

10.6.2 List Agents Traced

To list agents who are currently being traced, complete the following steps:

1. Select **Agent Administration** from the **Commands** menu or select the ACD Administration button [icon] on the toolbar.

2. Select the ACD that the agent traces reside on from the ACD list box.

3. Choose **List Agents Traced** from the Operations list box and then click on OK.
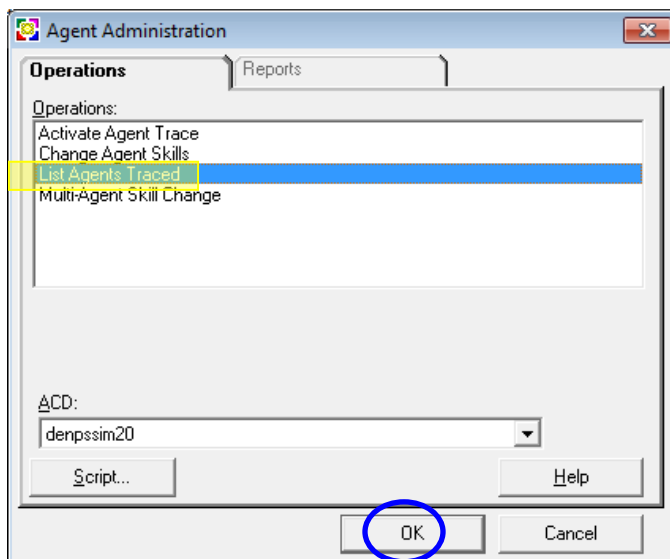
4. Type in the names or numbers of the agents you want to list, or use the Browse button , or the drop-down list to select agents to list. Leave this field blank to list all agents for which there is trace data.
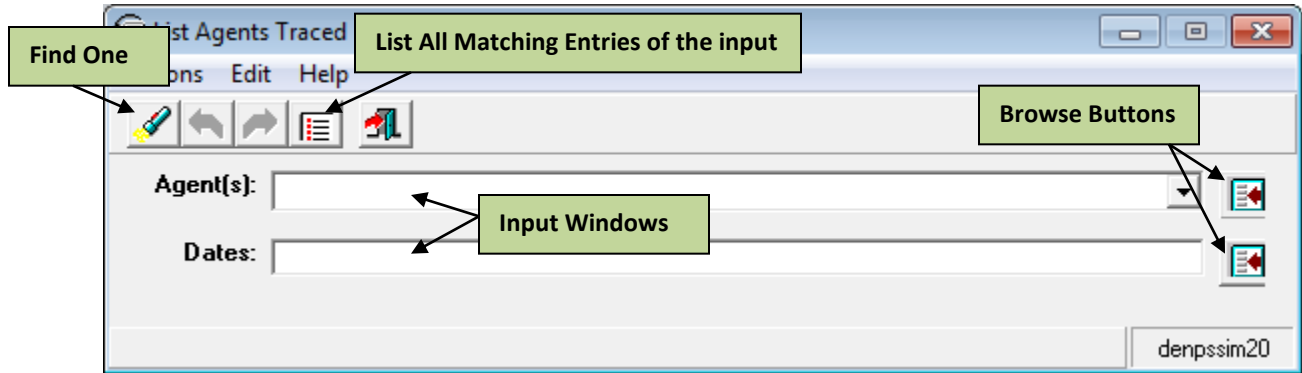
5. Type in the date(s) you want to include on the list or use the Browse button . Leave this field blank to list all agents for which there is trace data.

6. Select **List all** from the **Actions** menu or select the List all button on the toolbar to list information on all agents and dates you entered.

7. Select **Find one** from the **Actions** menu, select the Find One button on the toolbar.

10.6.3 Changing Agent Skills

Individual agents or groups can be changed at one time through Avaya CMS Supervisor. Agents do not have to log out for the skill changes to take effect (changes may be pending while the agent is on an ACD call or in ACW).

Use the Change Agent Skills window to view an agent's or template's current skill assignments or to change one or more skills and the associated skill type or skill level (1-16) for any Communications Manager with Expert Agent Selection Preference Handling Distribution and also Reserve 1 and Reserve 2 if Avaya Business Advocate is optioned.

You may also use the Change Agent Skills window to apply an agent template to a group of up to 50 agents (depending on how many digits are utilized in the dial plan). One may use Scripting to run a script that changes the skill assignments for up to 50 agents at a time. For additional information on automating agent administration actions, see Scripting, Chapter 13.

To change the skills and the associated skill level/type, do the following:

1. Select the **Agent Administration** button or click on Commands then select Agent Administration from the Command Bar.

2. In the ACD field, select the ACD for which you want to change agent skills. Then select **Change Agent Skills** and click on OK.
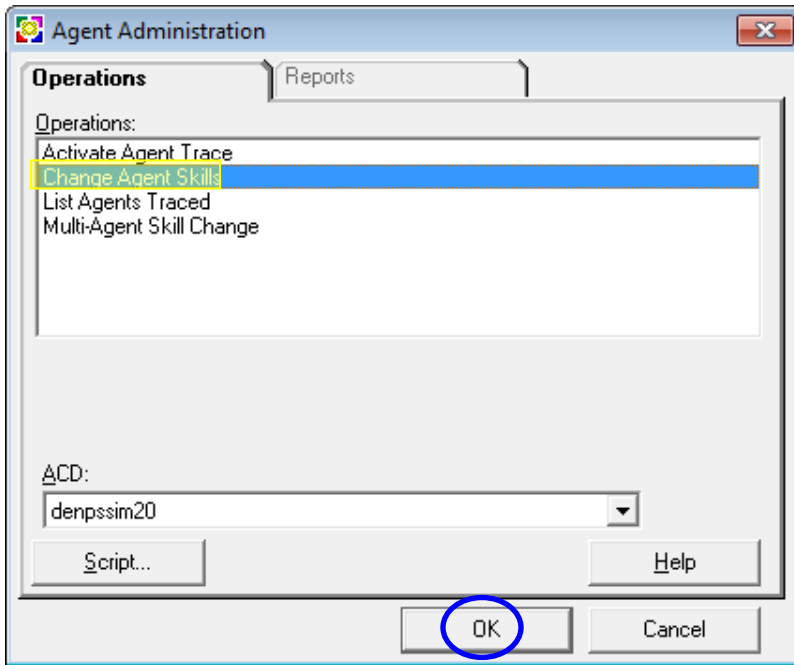
3. The Select Agent / Template window appears. On the Select Agent/Template window, type the Agents login ID number, or template/agent whose skills you want to view, or select the login ID from the drop-down list, or click on the browse button and select the agent's name. Then click ok.
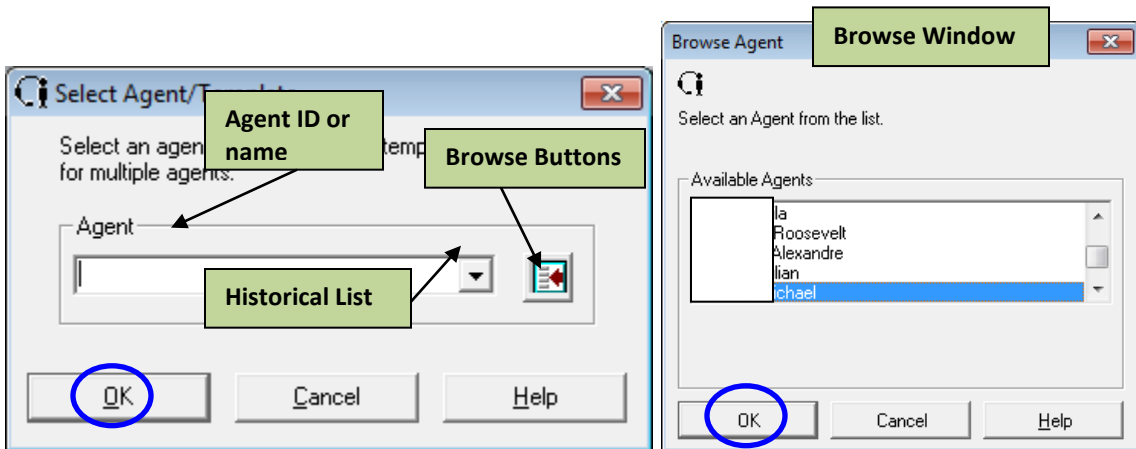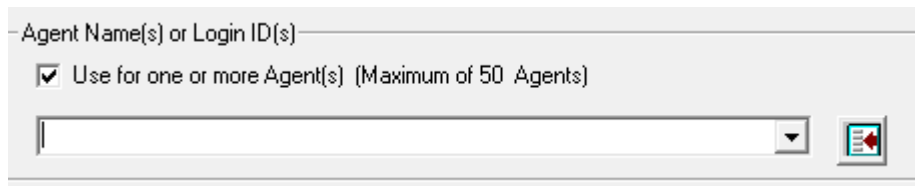
4. The skills for the agent you named in the previous window, along with the associated skill levels, are displayed in the Assigned Skills box. To change which calls an agent gets first, select Skill Level, Greatest Need, or Percent Allocation under Call Handling Preferences. The concept of "Top Skill" and the levels associated with skills are significant only for agents whose call handling preference is "Skill Level".
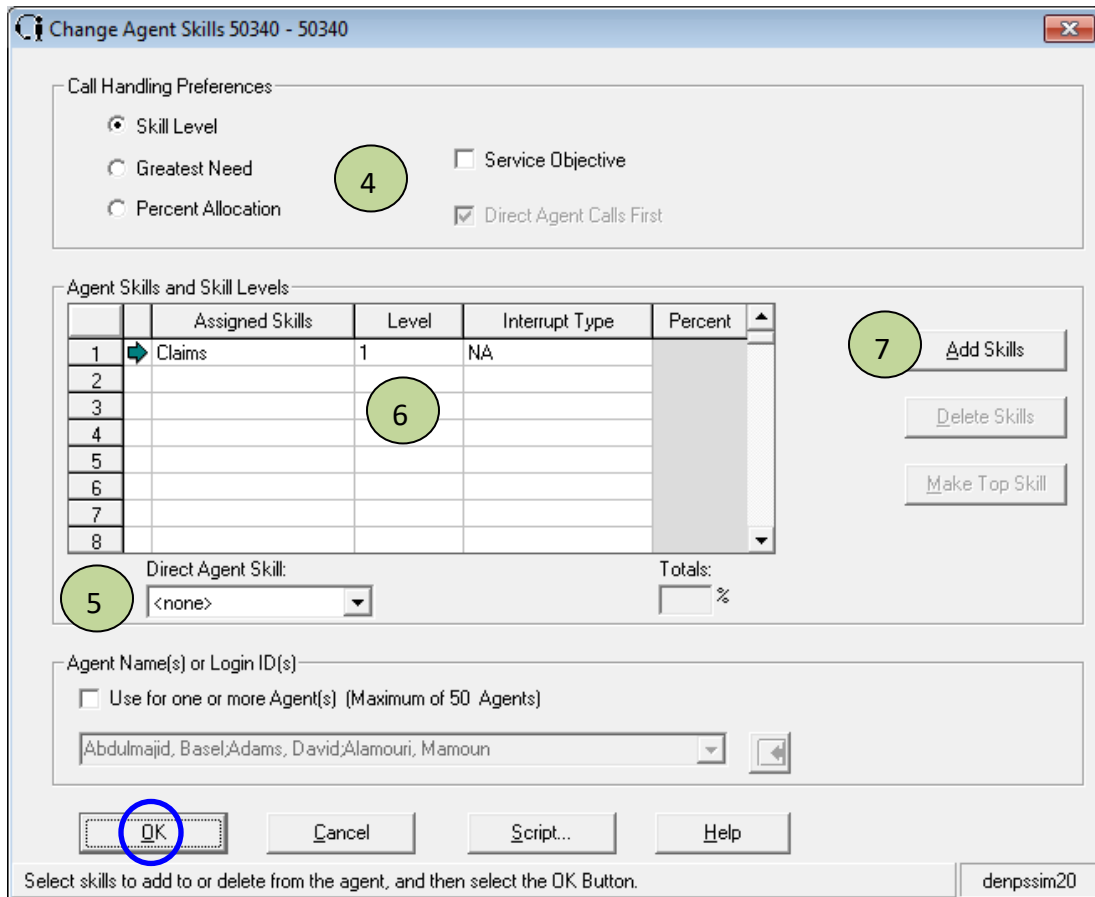
5. To change the skill used to queue an agent's direct agent calls, type the skill name or number under Agent Skills and Skill Levels, or select the number from the drop-down list. If the agent has only reserve skills (not on the list) you cannot give that agent a direct agent skill.

6. To change the level on an already assigned skill, select the level from the drop-down list. If Skill Level Call Handling is enabled, an arrow icon points to the agent's top skill. Select a new skill-level value. Select OK to save your changes or select cancel to ignore your changes.

7. To change which skills are assigned to this agent or template, select the skill on the drop-down list. Assigned skill must have either a skill level or reserve level. To assign one or more skills, select **Add Skill**.

8. Choose from the following:

   • If using Avaya Business Advocate, to set a new percent allocation, select Percent and select Yes. If an agent or template already has a reserve level, the Percent field is blank.

   • To make an assigned skill the top skill for this agent, select the skill and select **Make Top Skill**.

   • To apply your changes to a group of up to 50 agents, select "**Use** for one or more agent(s)", type the agent login IDs, or select the names or login IDs on the drop-down list, or select Browse. Select OK.

   • To change skill assignments for the other agents or templates, select another agent or template in the Select Agent/Template window and repeat steps 1 through 7.

9. If you are done making changes, select OK to save your changes and exit this procedure.

Note: **No changes shown on this window are submitted to the Avaya CMS server until the *OK* button on the "Change Agent Skills" window is selected. If a change is pending, a message tells you that the changes will not be made until the pending conditions are resolved (i.e.   if the agent is on an ACD call or if in ACW). If you are applying changes to a group of up to   50 agents, a status field shows the status of each change.**

10.6.4 Creating or Applying an Agent Template

To create an agent template or to apply an agent template to a group of agents:

1. From the controller window, select **Commands** then **Agent Administration**, or click on the Agent Administration button on the toolbar. The Agent Administration selector window opens:

2. In the ACD field, select the ACD for which you want to change agent skills. Then select

    Change Agent Skills and click on OK.
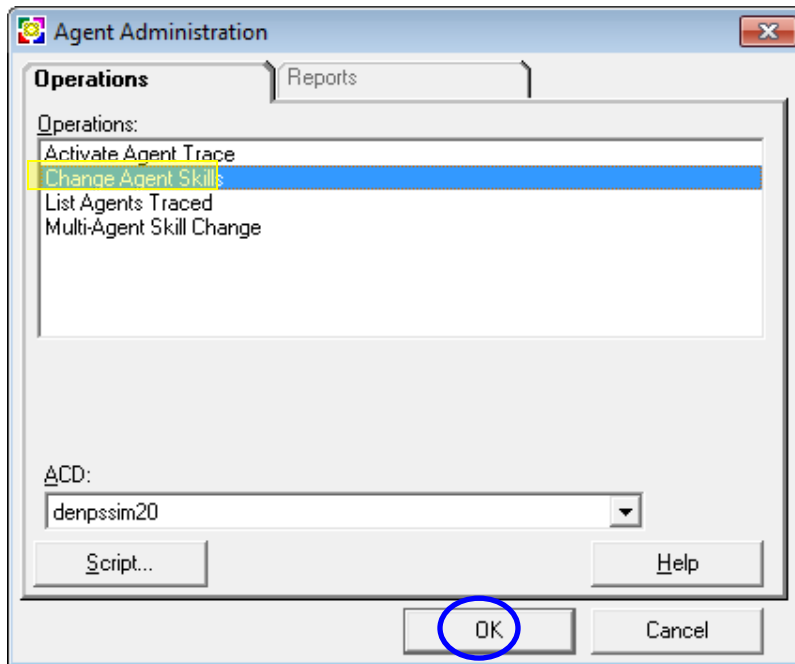
3. The Select Agent/Template window opens. Choose from the following:

    a. To create a template from an existing agent login ID, on the drop-down list select the

        agent name or login ID of the agent whose skill assignments you want to use as a

        template, or select Browse to choose from a list of agents. Then select OK.

    b. To apply an existing template to a group of agents, type the name or agent login ID of

        the template whose skills you want to apply to a group of agent. Then select OK.

The Change Agent Skills window opens with the template name and login ID on the title bar.

The skills and skill levels for the template you named in the preceding window are shown in the

Assigned Skill field.

10.6.5 Multi-Agent Skill changes

To change one skill for multiple agents:

1. From the controller window, select **Commands** then **Agent Administration**, or click on the

    Agent Administration button ![icon] on the toolbar. The Agent Administration selector

    window opens

2. In the ACD field, select the ACD for which you want to change agent skills. Click on **Multi-**

Agent Skill Change and select OK.
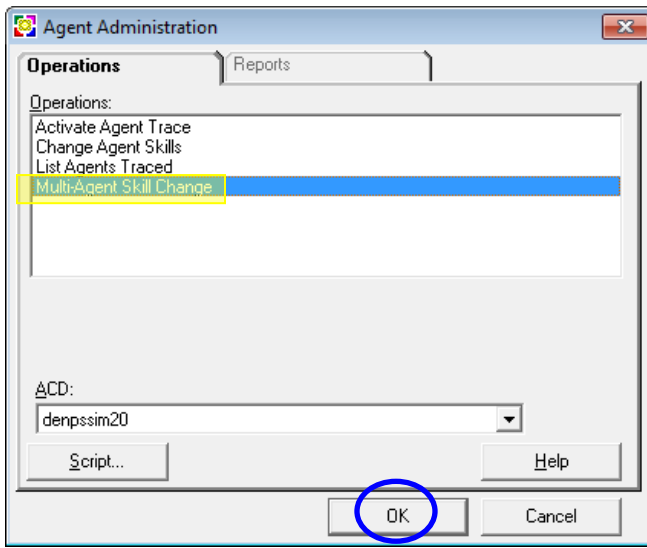
3. To move, add or delete agents from skill to skill, do one of the following steps:

    • Select one Agent Name/Agent ID, drag it to the new skill, and release the mouse button. If you hold down the *CTRL* key while dragging and dropping the agent name, the agent is added instead of moved to the destination skill.

    • Hold down the *CTRL* key on your keyboard and select multiple agent names (as many as 32) in one skill, then drag the agents to the new skill and release the mouse button. If you hold down the *CTRL* key while dragging and dropping the agent names, the agents are added instead of moved to the destination skill.

    • Hold down the *Shift* key and select the first agent name and the last agent name in a range to select those agents listed between the two. Drag the agents (as many as 32) to the new skill and release the mouse button. If you hold down the *CTRL* key while dragging and dropping the agent names, the agents are added instead of moved to the destination skill.
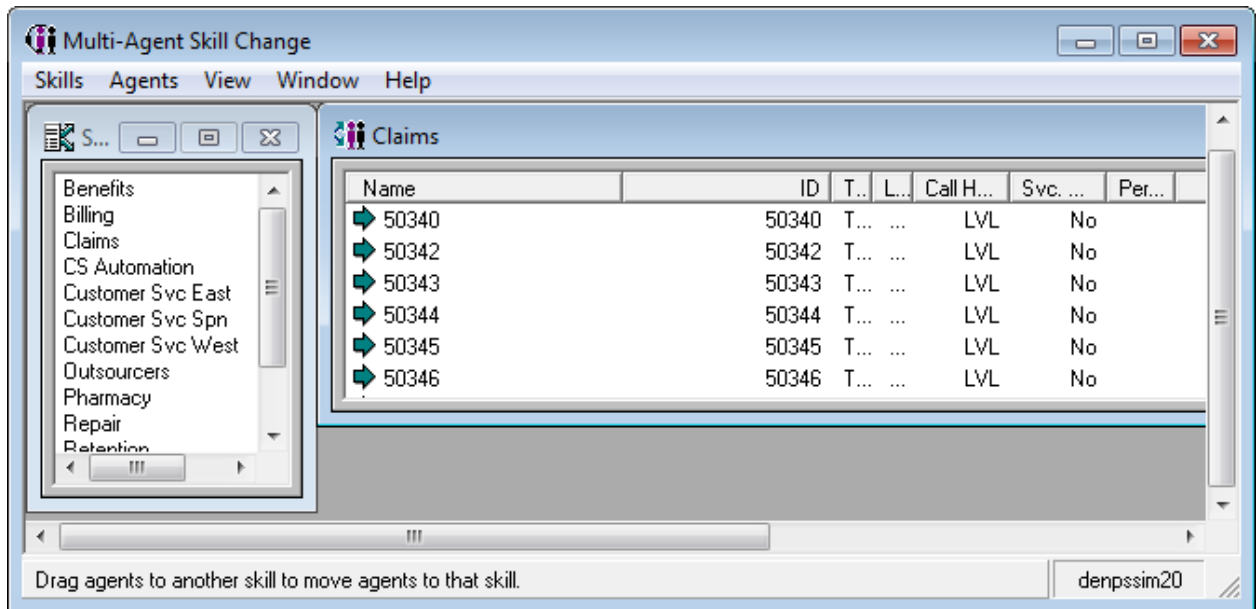
A confirmation window shows the agents you moved in the left-hand field, with the agent's call handling preference, reserve level, or skill level, service objective, and percent allocation for the skill (if using Avaya Business Advocate.) The right-hand field shows the from-to skill information.

4. When Moving or Adding, type a skill-level value for each agent moved/added to this new skill. If using Avaya Business Advocate, Reserves 1 and 2 are also valid skill levels.

   - On the **Move Agents between Skills** window, select **Preserve Original Level**, to keep the agent's original skill levels. This deactivates the Level field so you cannot type a skill level or reserve level for the destination skill.

   - To complete the move, select OK or select Cancel to ignore you changes.

5. If one or more moves fail, a status window shows the moves that were not made and the reason, or it shows the pending status.

6. When you are done, the Move or Add window will automatically close after you select OK. If you are not done, repeat the preceding steps.

<div align="right">

Section 11
Options

</div>

11.1 Purpose

This section teaches you how to use the **Options** tool to change the setup of the Avaya CMS Supervisor Application.

11.2 Section Objectives

Upon completion of this section, the learner will understand the following:

- Functionality and capability of Options.
- Starting Options.
- Report Colors and Threshold Colors.

11.3 Overview – Options

Use **Options** to do the following actions:

- Establish connections to a CMS server (CMS Servers Tab).
- Set the first calendar day for weekly reports (General Tab).
- Set the ACD and other general options that Supervisor will default to when you log in. (General Tab).
- Set up the colors that you will be using in your graphical reports (Report Colors Tab).
- Set up the colors that will be used in reports to tell you when threshold highlights (not exceptions thresholds) have been reached (Threshold Colors Tab).
- Choose or create formats for how CMS items, entities, or numbers will be displayed in reports (Name Format Tab).

11.4   Options – Not Logged into the CMS Server

To select any Options item in Avaya CMS Supervisor, do the following:

- Choose **Options** from the Tools menu.
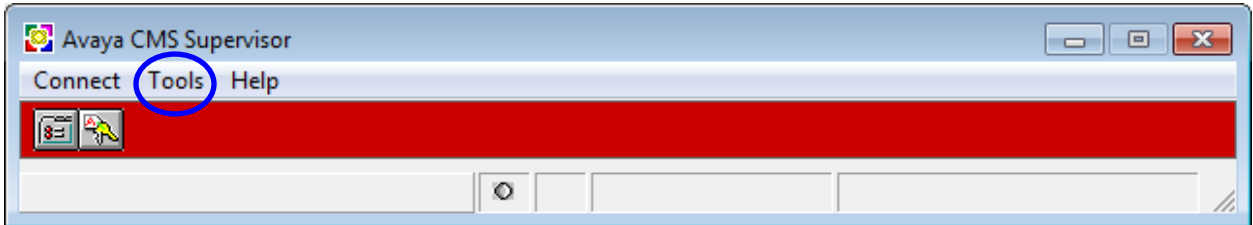
- When not logged into the CMS Server, only the CMS Server tab will appear in the Options window. This is meant to set up the CMS servers needed to log in to the CMS Client. Typically this is a one-time set up.
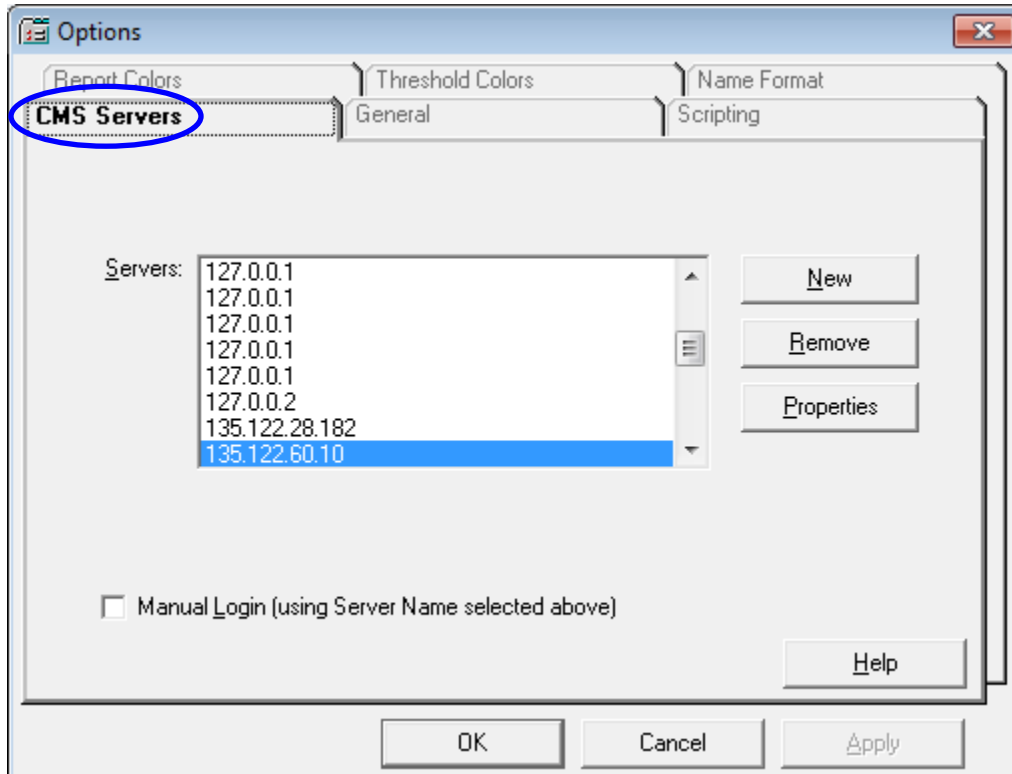
11.5   Options – Logged into the CMS Server

When logged into the CMS Server, the following tabs appear in the Options window:
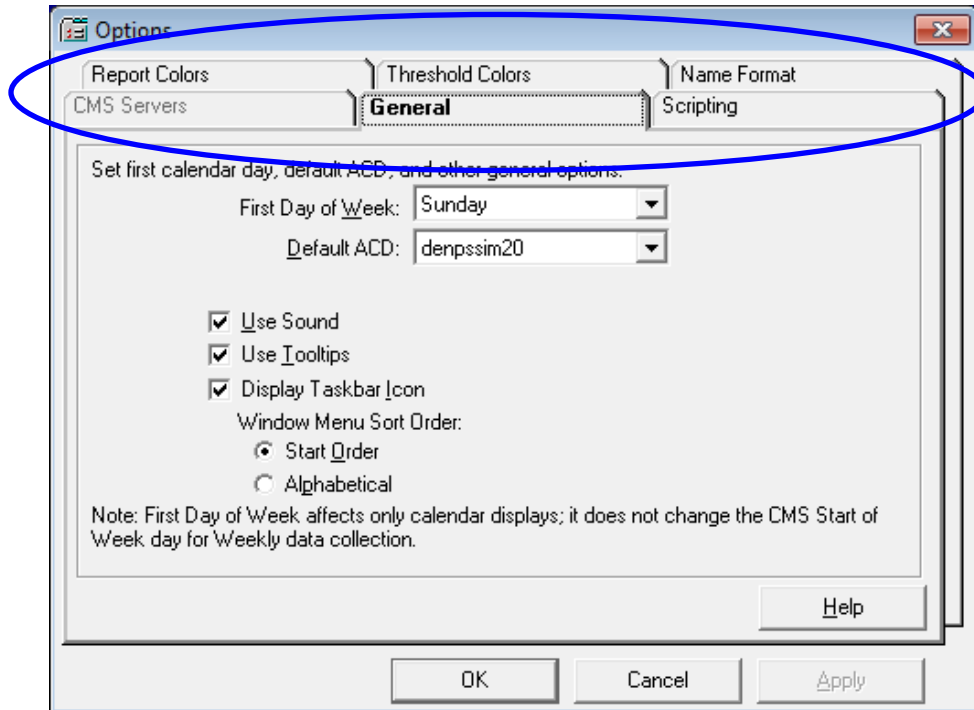
- General Tab
  - ➢ **First Day of Week:** This option affects only how the calendar displays for the individual user, not for the CMS Data collection. It is important to know what the First Day of the week is so that the Historical Weekly reports are ran appropriately.
  - ➢ **Default ACD:** This is the ACD that will be the default listed in the multiple function windows (example: the Reports window). If your environment has multiple ACDs, make sure the one you spend the most time running reports for is the default.
  - ➢ **Use Sound:** To provide a sound alert when the Exceptions Indicator box is updated. The sound you hear is the sound chosen for the exclamation event associated with your PC (checked by default).
  - ➢ **Use Tooltips:** To make the tooltips visible. Tooltips are the small boxes that hover over a toolbar item to let you know what you're about to select (checked by default).
  - ➢ **Display Taskbar Icon:** This box will ensure that the Avaya CMs Supervisor icon will

be displayed in the system tray (checked by default).
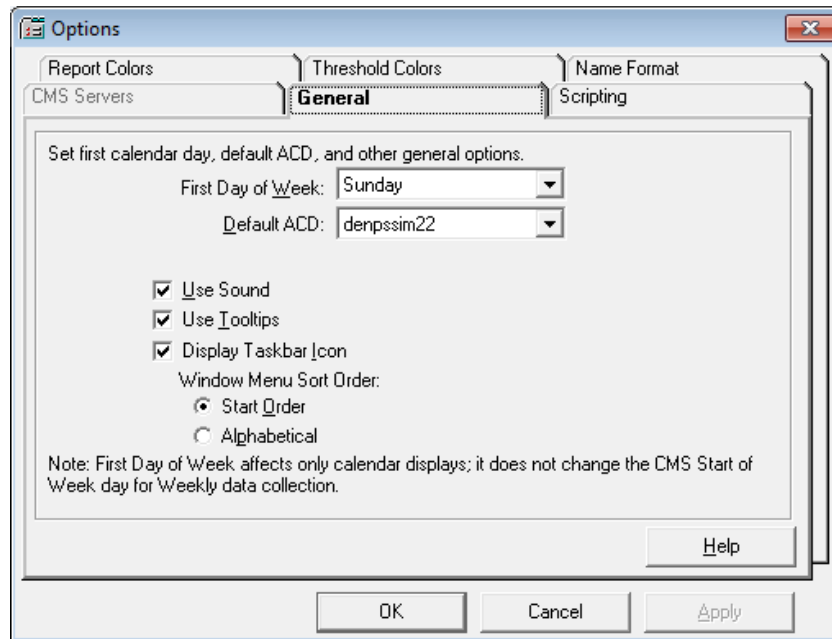
- Report Colors Tab

  ➢ **Scheme:** Choose from 10 different color schemes. For any scheme chosen, right click on any of the individual bars to select a different color or pattern.

  ➢ **Background:** Chose *White* for an all-white background on Graphical Reports or *Automatic* to make the background of all reports match the color that you have set up for your system in Windows.
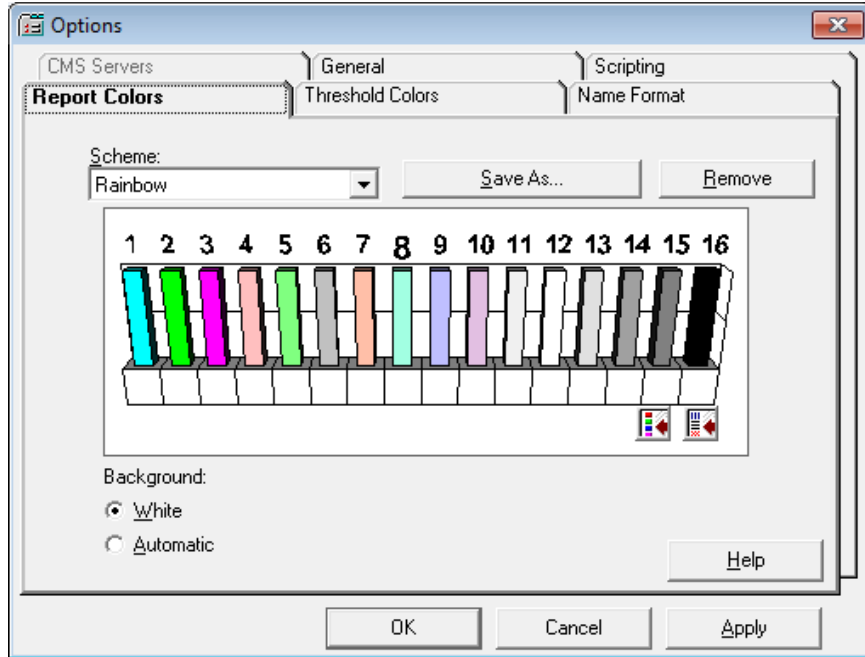
- Threshold Colors Tab
  - ➢ By focusing on the *Caution* and *Warning* features, you can browse to change the color or pattern of the thresholds that are displayed in the Real Time reports.
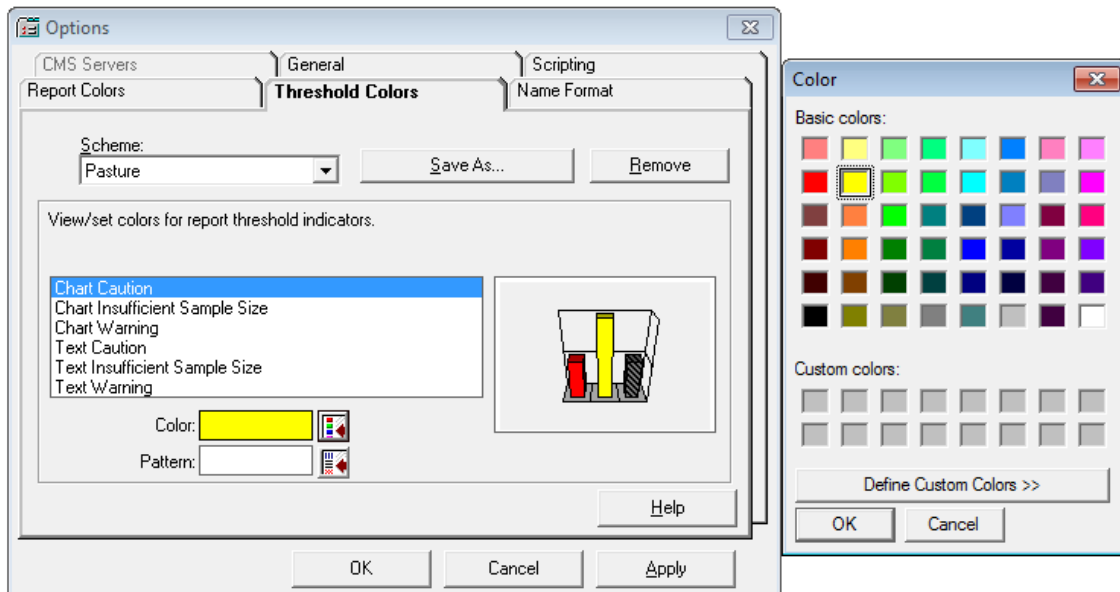
- Name Format Tab
  - ➢ Use this tab to choose or create formats for how Avaya CMS entities (ACDs, Agents, Call Work Codes, Skills, Trunk Groups, VDNs, and Vectors).
    1. To use this feature, select the item for which you want to set formats from the

Entity box.

2. In the *Format* box, choose a name format in the drop down box or create your own using {name} for dictionary Name, {entity} for an entity type, and {number} for entity number.

- Scripting Tab

Use the Scripting tab to set the user ID used to run scripts, adjust the logging level, and set the file used for logging.

➢ **User ID**: The login ID for a CMS user. A User must be specified and password must be set before any automatic scripts can run. To set this information, click on the "Set User" button and the "Save as Script - User Information" dialog box will open.

➢ **Logging Level**: This option group allows the logging levels in configuring the amount of information that is recorded during the use of scripting

- ❖ **Minimum:** The only activities that will be logged are errors and messages from Supervisor that would have been displayed to the window as if the user performed the scripted activity manually

- ❖ **Normal:** All of the above activities are logged plus the start and stop time of each task of the script. The script name is also included.

- ❖ **Maximum:** All of the above activities are logged plus additional information that may be useful for debugging a script. Any message that displays as the script runs is logged.

➢ **Log File Path:** Enter the path and filename of the logfile in this field. You may also

use the Browse button to the right of this field to select an existing file on the PC.

➢ **Log File Size:** This field determines how large the script log file can get before it is begins replacing the oldest data. The field defaults to a value of 200KB.

➢ **View Log Button:** Select this button to view the script log file.

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Section 12
Editing the Toolbar

</div>

12.1 Purpose

This section instructs you in the creation of buttons, removing buttons, and reorganizing buttons on the toolbar.

12.2 Section Objectives

Upon completion of this section the learner will be able to:

- Add buttons

- Remove buttons
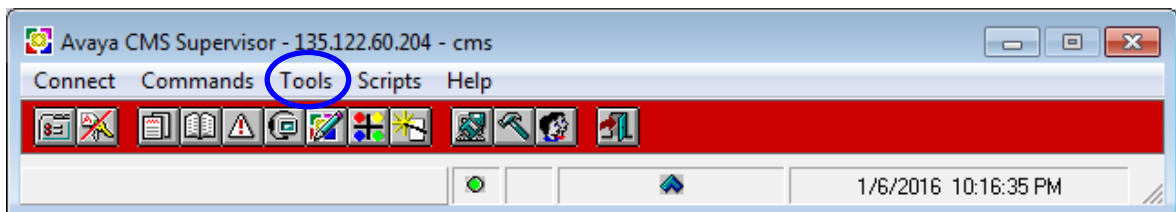
- Reorganize buttons

- Edit Buttons

12.3 Adding a Button to the Toolbar

You can add a standard or custom toolbar button to the toolbar using the Add Button wizard.

To add a button, do the following:

1. Select **Add Button** from the **Tools** menu. This starts the Add Button Wizard and steps you through the process of creating a custom or standard button and adding it to the toolbar.

2. The following screen will display, click on Next.
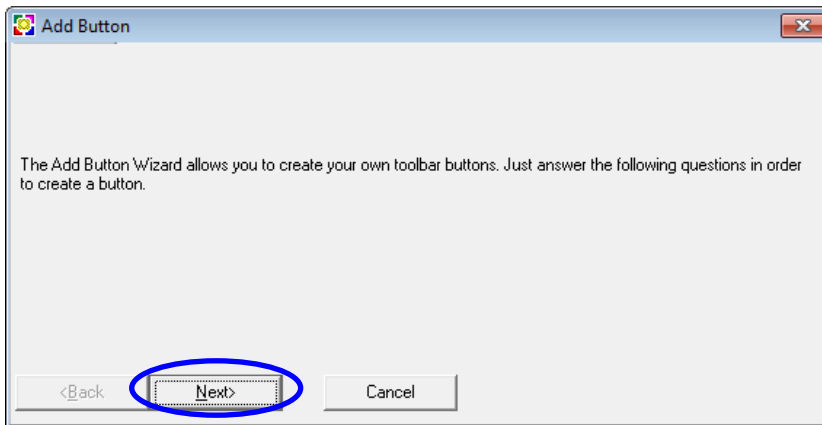
3. Select the action that the button you are creating will perform. In this example, we are adding a button to run a report, so highlight **Run a Report** and click on Next.
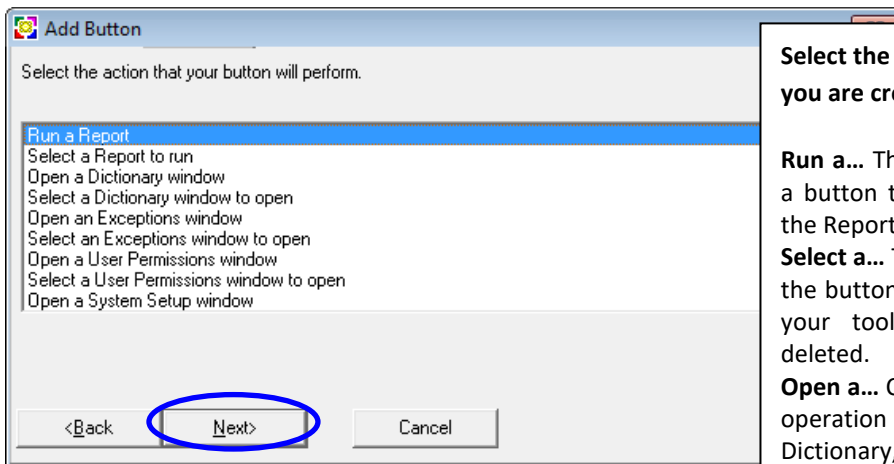
> **Select the action that the button you are creating will perform…**
>
> **Run a…** The "Run a" action creates a button that starts a report from the Reports command.
> **Select a…** The "Select a" actions are the buttons that already appear on your toolbar in case they get deleted.
> **Open a…** Creates a button that's an operation or report from the Dictionary, Exceptions, or Agent Administration Command.

4. Select the type of report that will run. In this example, select **Real-Time Folder** and click on Next.
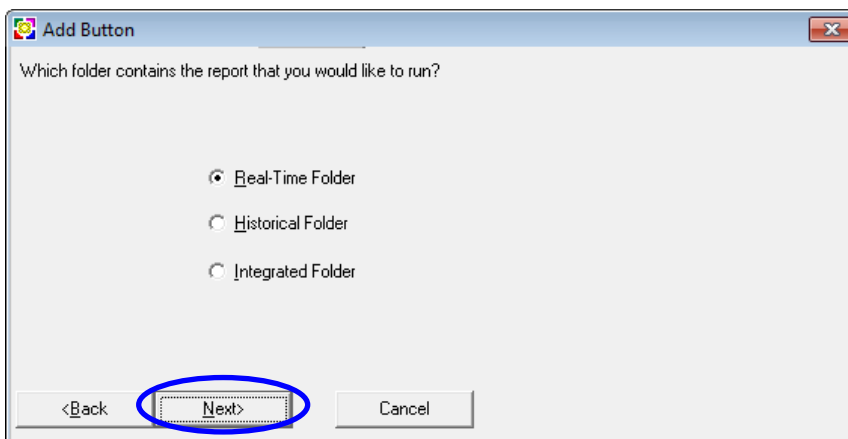
5. The following window displays and allows you to select three items:

- On the left side, highlight the report Category of report you want.

- On the right side, highlight the Report you want to run.

- Select the ACD for which you would like to run the report.

When everything is set as you want, click Next.

6. The following window appears and allows you to customize your button further:

- **Description:** Type in the Description you want to display in the status bar for this button.

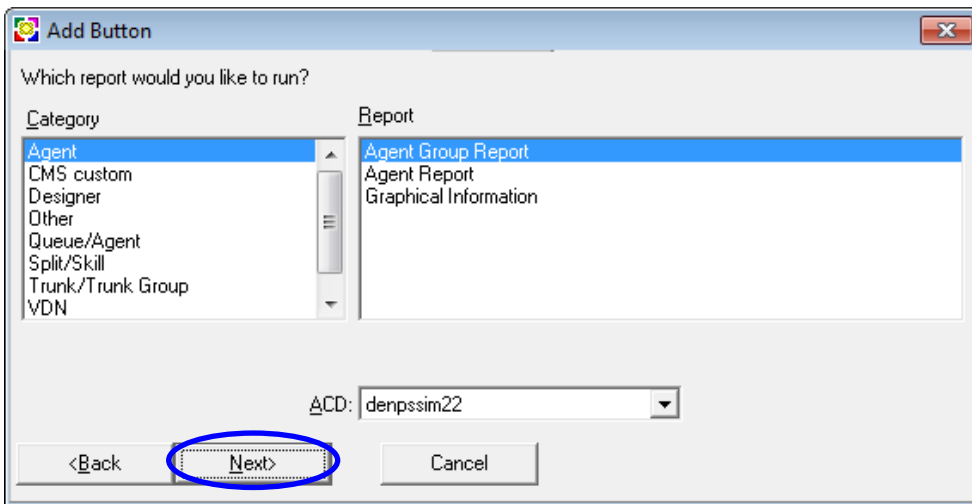- **Tooltip:** Type a one or two word description of the button, which will display as the tooltip when the mouse cursor is hovering on the top of the button.

- **Button Face:** Click on "Edit". A new window opens. Click on the "Clear" button. By using the left and right mouse button on the list of colors, you are able to click on the grid and make your own button face and click OK and then click on Finished.
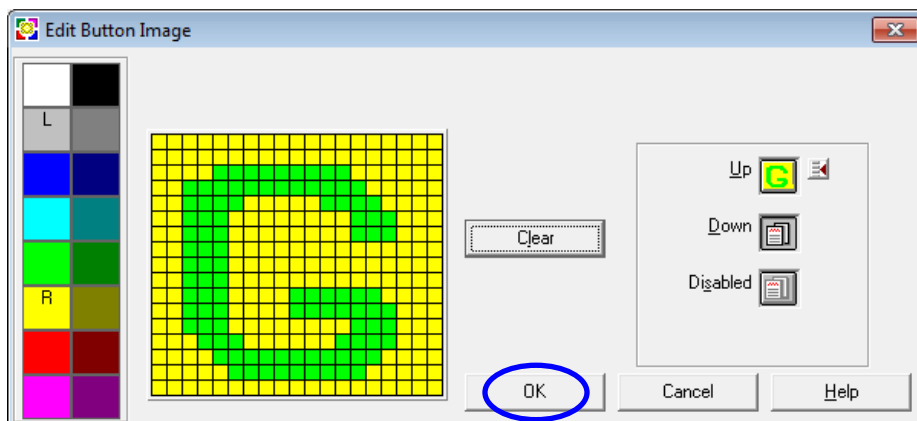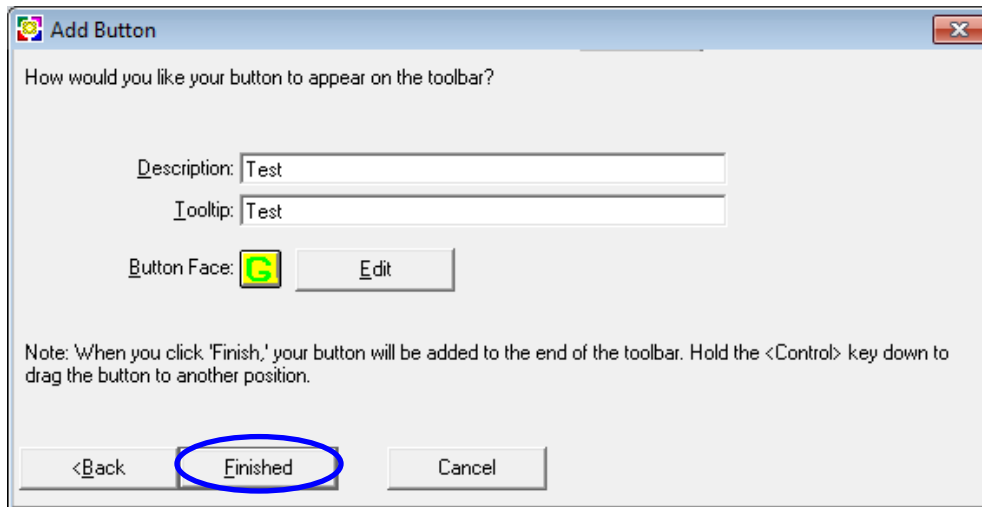
7. You will then see the button on the Toolbar.
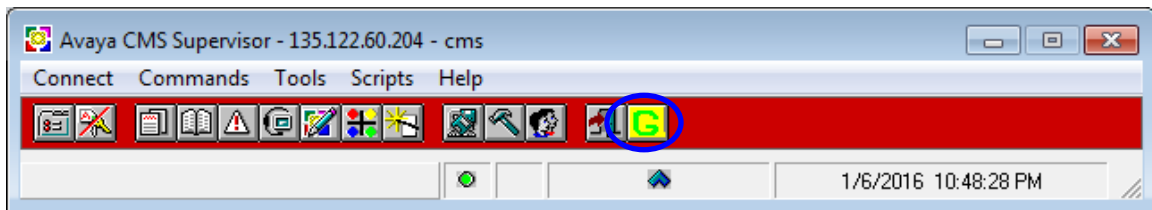
12.4 Editing a Button on the Toolbar

You can define the design (paint) of any custom buttons that you define in Supervisor. To paint a custom button, do the following steps:

1. Right click on the custom button and choose "Change Button Properties".

2. You will be back to step 1 of section 13.3 and can change what the report does or how it looks.
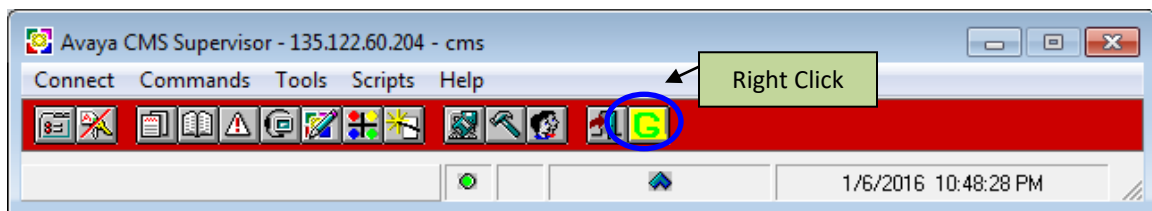
12.5 Removing a Button from the Toolbar

To remove a button from the toolbar:

1. Right click on the custom button and choose "Remove This Button".

2. A window will pop up and ask if you are sure? Click yes.
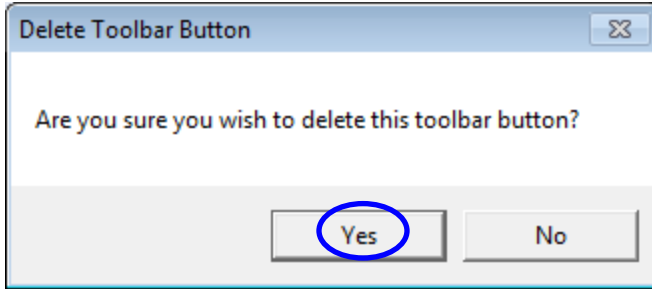
12.6 Rearranging a Button on the Toolbar

You can rearrange the order in which buttons appear on the **Controller** toolbar using the drag and drop method (click on a button, hold the mouse button down, drag your cursor to the position in which you want the button to be located, and release the mouse button.)

You can rearrange the order in which buttons appear on the toolbar and add spaces between buttons using the following steps:

1. Move the mouse cursor so that it is over the button that you want to move.

2. Hold down the CTRL key.

3. Press the left mouse button and move the cursor to the position where you want the button to be placed

4. Release the mouse button and then the CTRL key. The button is moved.

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Section 13
Scripting

</div>

13.1 Purpose

The purpose of this section is to explain the basics of creating and modifying scripts.

13.2 Section Objectives

This section will provide an understanding of the how to accomplish the following:

- Use Scripting

- Modify a Script

- Make a Script a Desktop Icon

13.3 Overview – Scripting

Scripting allows you to create a timesaving shortcut to perform the tasks used most often in Avaya CMS Supervisor. Creating scripts to open reports is the most popular, although you can also create scripts for other tasks such as opening dictionary or other administrative windows, or call center and agent administration.

13.4 How to use Scripting

There are two basic ways to create a script to run a report:

- **From the Report Manager**: When a script is created using this method, the script will take you to the input screen for the report, where you can select the proper input and then run the report. This method is useful if you frequently run a particular report, but you make different input selections each time you run it.

- **From inside a report that is already displayed on the screen**: When a script is created using this method, the script will actually display the report on the screen, using the same data input as when the script was created. This method is nice for quickly running a report where the data input does not change. For example, every day you run a Historical-Skill-

Summary Interval Report for Skill 55, for the previous day. In this case, the input is always the same:
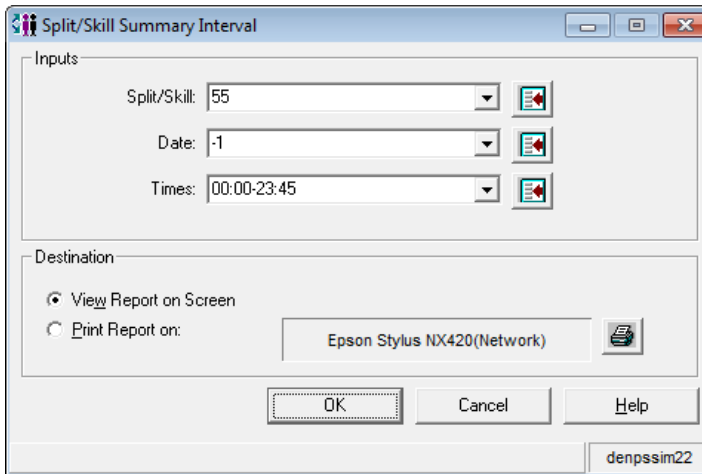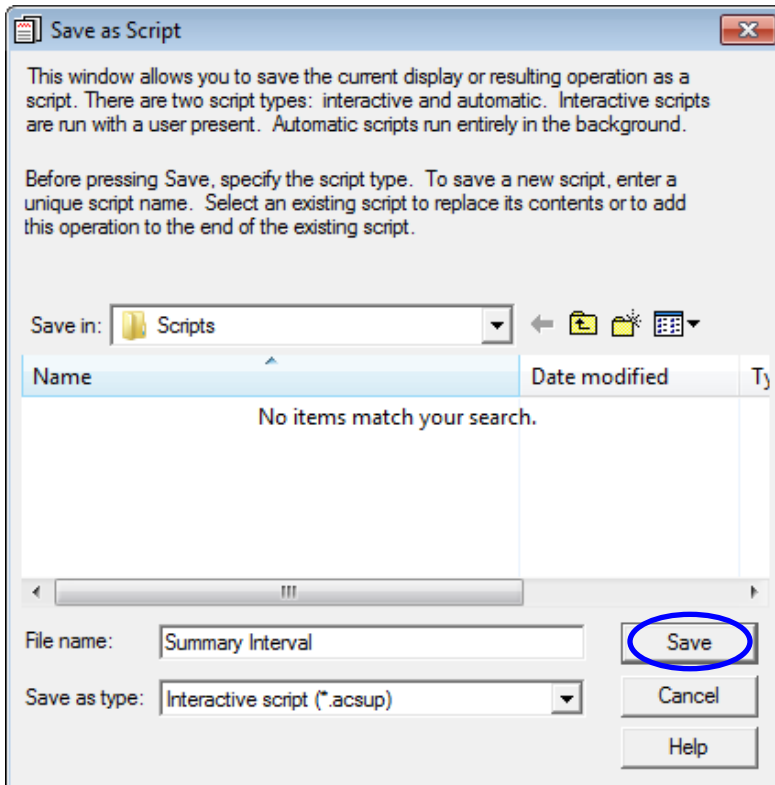

13.4.1 Creating a Script from the Report Manager

1. Click on Commands, then Reports from the Controller Window. This will display the Report Manager. Highlight the report you want to script and then select the "Script" button on the bottom left of the Report Manager.
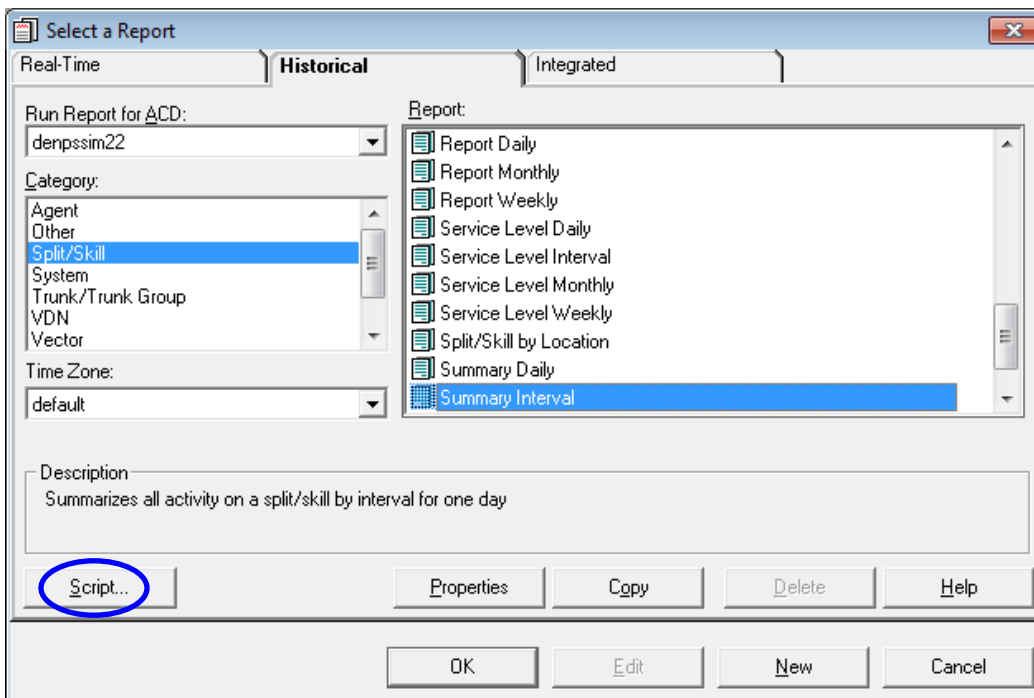
2. A "Save as Script" Window opens. At the bottom of the screen there are two fields:

    - **File Name:** This field will be pre-populated with the name of the report you selected. If you prefer, you can type in a different file name.

    - **Save As Type**: Identify the script type as *__interactive__*. (Very important!)

    Once all the items are changed, click on the "Save" button.

3. Once the script has been saved, you may access it from the Script menu on your main Avaya CMS Supervisor Tool Bar.

13.4.2 Creating a Script from Inside a Report

Note: Before you create a script using this method, make sure the report is displayed on the screen the way you want to see it in the future. For example, if you want the script to

automatically sort the report, then also include the sorting before you save the script. Same for thresholds if you want to add them. Also, if you would like the report to be located in the upper right-hand corner of your computer screen make sure to position it there prior to creating the script. Once you have the screen organized, do the following**.**

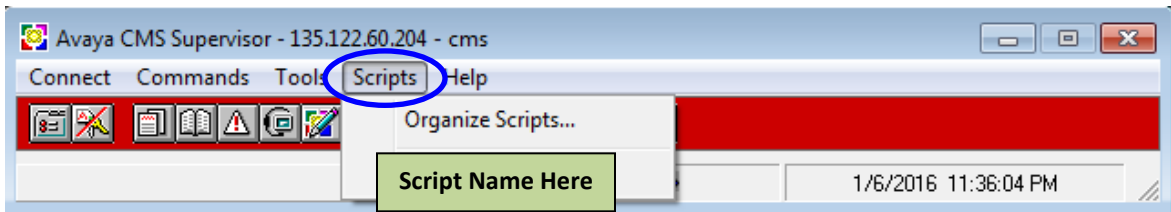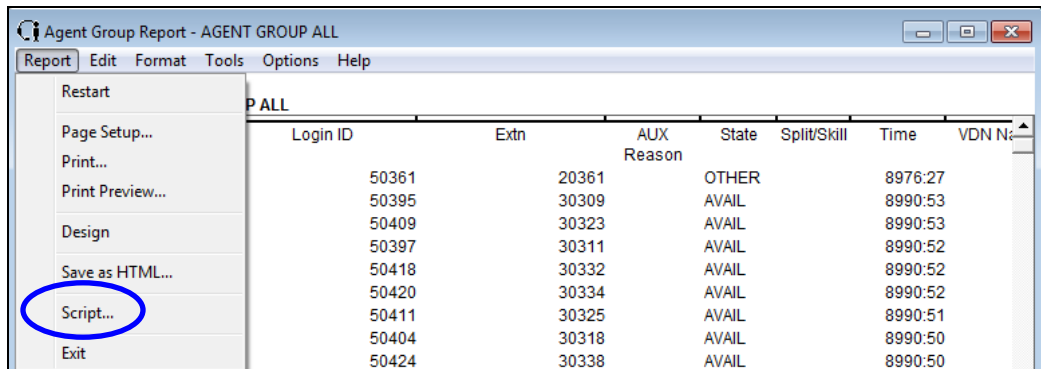1. From within an open report, click on "Reports" and then Script.

4. A "Save as Script" Window opens. At the bottom of the screen there are two fields:

- **File Name:** This field will be pre-populated with the name of the report you selected. If you prefer, you can type in a different file name.

- **Save As Type**: Identify the script type as *__interactive__*. (Very important!)

Once all the items are changed, click on the "Save" button.
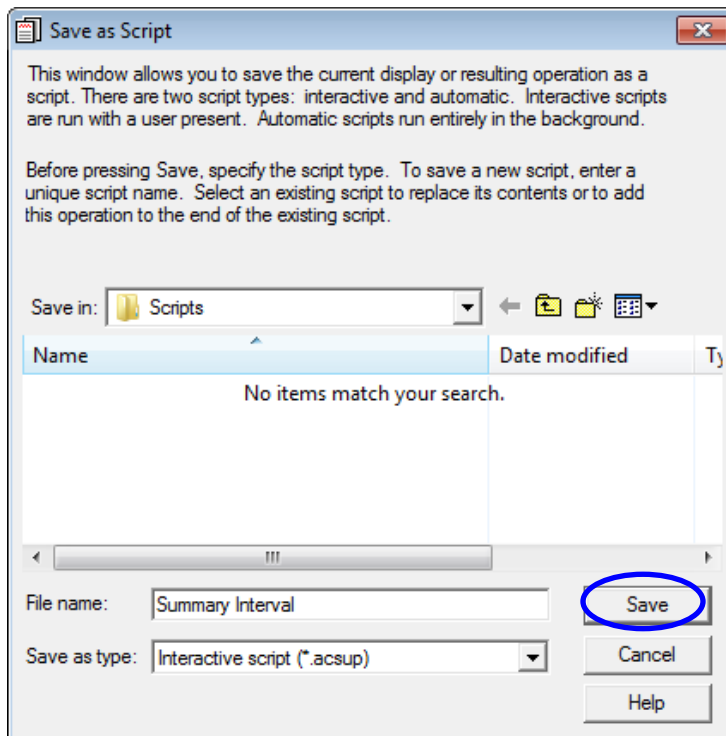
5. Repeat this procedure for <u>each</u> report you want displayed on your screen. When you add each additional report, once you change the type to interactive, you will see the name you created for the first report. Simply click on the name in the middle of the "Save as Script" window and it will populate the File Name for you.

Once the script has been saved, you may access it from the Script menu on your main Avaya CMS Supervisor Tool Bar. This will generate the report/task(s) with the data inputs included (e.g., skill name or number, refresh rate) in the script.

You may want to have multiple script files for the same report with different data (e.g., Skill Graphical Status with different skills), or have multiple scripts for the same reports, but sorted with different criteria.

Once the script file has been saved, you may also create a shortcut and place it on your desktop by following the standard windows procedure for creating and moving shortcuts (see instructions below).

13.4.3 Modifying a Script File

To add an additional report to an existing script, perform the following steps:

1. Select the report that will be contained in the script file and open the report with the appropriate data (skills, agent group name, etc.)
2. Select **Script** from the **Report** menu. This opens the save script dialog box.
3. Identify the script type as **<u>interactive</u>**.
4. Select the name of the existing script that this report is to be added to.
5. Select the **Add** function to add this report to the existing script.

13.4.4 Making a Script Desktop Icon

1. Select the **Script** menu item from the CVS Controller Bar.
2. Select **Organize Scripts** from the Script Menu.
3. Locate the script to be saved as a desktop icon and single click to highlight the report.
4. Right-mouse click and select create shortcut. (A new copy of the icon with a small arrow in

the upper left-hand corner will appear).

5. Click on the short-cut icon (the one with the arrow) and drag it out to the desktop.

6. Close the Organize Scripts dialog box.

Section 14
Avaya CMS Supervisor Help

14.1 Purpose

This section explains how to use **Help** screens in CMS.

14.2 Section Objectives

At the end of this section, the learner will be able to use the **Help** screens to assist in understanding report data.

14.3 How to use Help

You can access Supervisor On-Line Help from all windows by doing any of the following steps:

Pressing the F1 key – Displays help specific to the current window.

**Selecting Help from the Menu Bar** (shown below) – Allows you to choose from the following options:
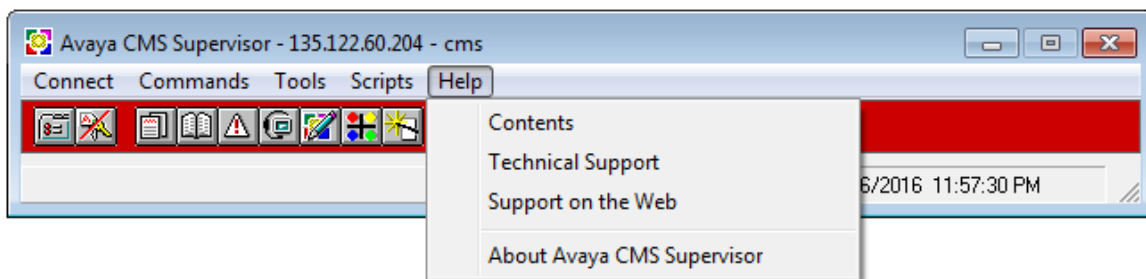
Contents: Opens the Supervisor On-Line Help table of contents.

Technical Support: Opens a window that provides information on where to find any additional technical support about CMS (directs you to support.avaya.com).

Support on the Web: Directs you to support.avaya.com.

About Avaya CMS Supervisor: Opens the Supervisor Help About window which shows the software version number.
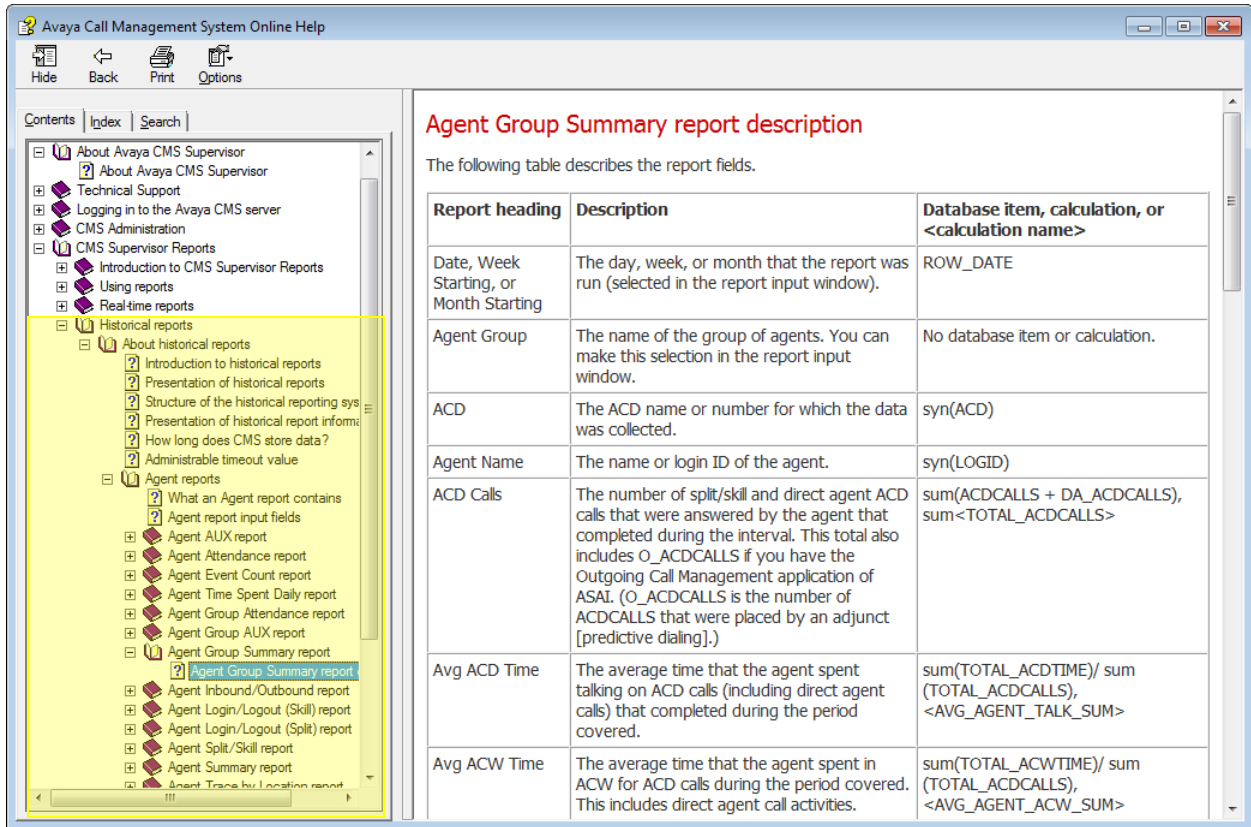
Under the **Contents** tab select the topic item such as "*Historical Reports*", expand the section.

You can continue to expand each category or section until you find the report you are looking for. When you reach the report you can:

• Review report header and input window definitions

• Database items – Identifies in which CMS tables the items are located

• Calculations – Specifically identifies the calculation in which the formulas are written.

NOTE: All items within the Avaya CMS Supervisor **Help** function are for the Standard reports loaded during the installation of the Communications Manager and Avaya Call Management System equipment. Custom Reports that are not standard reports will not reflect any information as to description(s) and/or calculation(s), dependent upon whether the designer of the custom reports manually updated the CMS with that information.