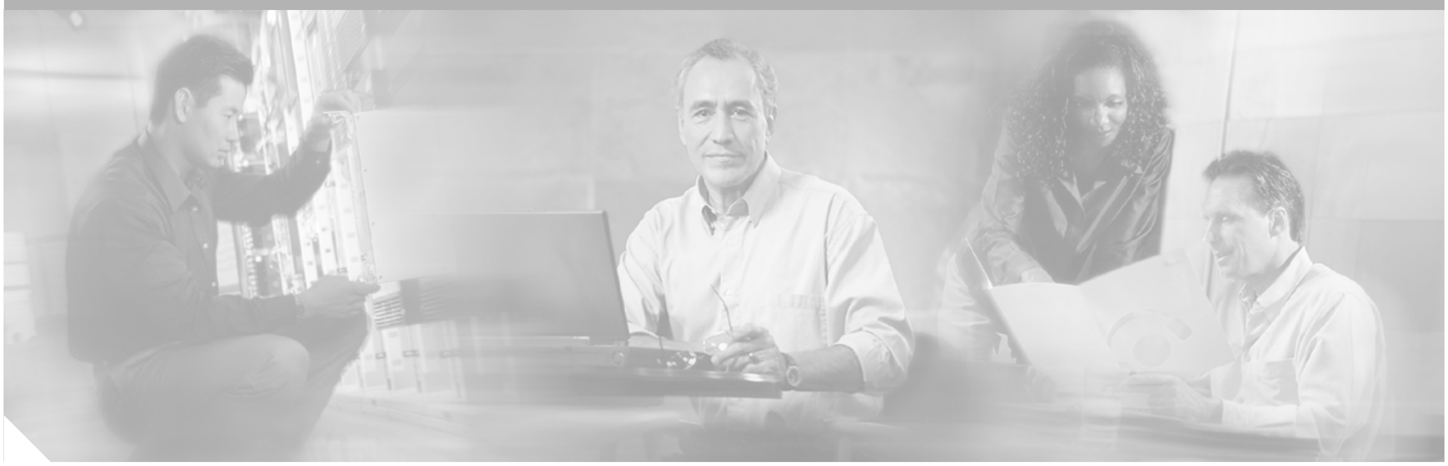

Cisco Interaction Manager Supervision Console User's Guide

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Preface

Welcome to Cisco® Interaction Manager™—multichannel interaction software used by businesses all over the world to build and sustain customer relationships. A comprehensive suite of the industry's best applications for multichannel customer interaction management, Cisco Interaction Manager is the backbone of many innovative contact center and customer service helpdesk organizations.

About this guide

Cisco Interaction Manager Supervision Console User's Guide introduces you to the Supervision Console and helps you understand how to use it to track and monitor activity in your service organization.

Document conventions

This guide uses the following typographical conventions.

Convention	Indicates
Italic	Emphasis, or the title of a published document.
Bold	The label of an item in the user interface, such as a field, button, or tab.
`Monospace`	A file name or command. Also, text that must be typed by the user.
Variable	User-specific text, which is supplied by the user.

Other learning resources

Various learning tools are available within the product, as well as on the product CD and our website. You can also request formal end-user or technical training.

Online help

The product includes topic-based as well as context-sensitive help.

Use	To view
Help button 	All topics in *Cisco Interaction Manager Help*; the **Help** button appears in the console toolbar on every screen, as well as on most windows.
F1 keypad button	Context-sensitive information about the item selected on the screen.

Document set

For more information about Cisco Interaction Manager, see the following documents. They can be found in the `Documents` folder on the product CD.

- *Cisco Interaction Manager System Requirements*
- *Cisco Interaction Manager Installation Guide*
- Other Cisco Interaction Manager user's guides

1 Console basics

A highly specialized workspace for supervisors, this console lets you create real-time monitors to observe queues, user groups, and individual users.

About monitors

A monitor provides various perspectives on the information it tracks by presenting it in the form of tables, as well as pie and bar charts.

While setting up a monitor you can:

- Configure it to run automatically, manually, or automatically whenever you are logged in to the system.
- Select the objects and their attributes that you want monitored.
- Create messages and alerts that are sent to specified recipients when certain conditions are met.

Elements of the user interface

To get to know the console user interface better, let us begin by dividing it into five functional areas:

1. **Console toolbar:** The main toolbar of the console appears at the top of the screen. It allows you to access some frequent commands with a single click.
2. **Tree pane:** The **Tree** pane presents the knowledge base folders as a tree list, allowing you to select the node (folder) that you wish to work in. When you select a folder, its first-level contents—subfolders and articles—are displayed in the **List** pane. In the **Tree** pane, you can cut paste or copy paste folders, delete folders which you have created, manage bookmarks and print folder contents.

   To expand all first and second level nodes with a single click, shift + click the plus [+] button next to the topmost node. The contents of all first and second level nodes are displayed in the **Tree** pane.
3. **List pane:** The **List** pane displays first-level contents of the folder selected in the **Tree** pane. You can view the name, description, date of creation, etc, of the displayed items. Note that you can view only those columns that the administrator has permitted for display. In this pane, you can create items or select existing ones to modify or delete them.
4. **Properties pane:** The **Properties** pane displays the contents of the folder or article selected in the **List** Pane. In this pane, you can edit the properties of the selected item.

5. **Status bar:** The status bar is present at the bottom of every screen. It displays the following information:
   - The user name with which the user has logged in the system.
   - The language currently in use.
   - The status of the system (**Loading, Ready,** etcetera).

2 Setting up monitors

Supervision Console monitors enable you to observe the functioning of three types of business objects in the system:

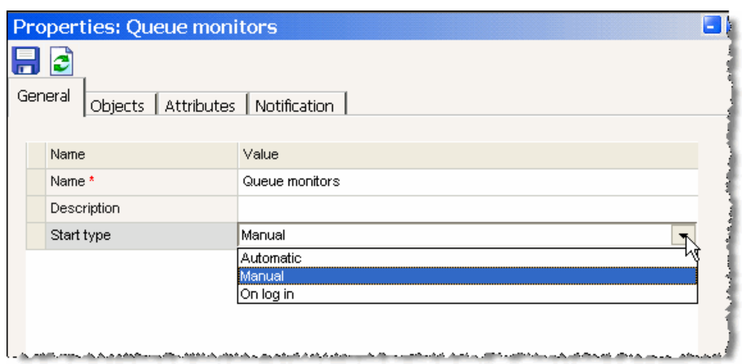
1. Queues
2. User groups
3. Users

Monitors display real time information, which is automatically refreshed every 30 seconds.

Creating queue monitors

To create a monitor for one or more queues

1. In the Tree pane, select the **Monitors** folder in department to which the monitor will belong.
2. Click the **New** button in the List pane toolbar. The Properties pane appears as shown below.



3. In the **General** tab:
   a. **Name:** Type a name for the monitor. This is required information.
   b. **Description:** Type a brief description for the monitor.
   c. **Start type:** With this option you can configure the monitor to run automatically or manually.
      - **Automatic:** Monitor runs automatically and if notification conditions are met, sends alerts automatically at a fixed time interval, irrespective of whether the user, who created the monitor, is logged in or not. The default value of the time interval when alerts are sent is 60,000 milliseconds and can

be set or modified at the respective back-end table. This setting cannot be set or modified from the UI.

- **Manual:** Monitor has to started manually by the user who created the monitor.
- **On log in:** The monitor starts automatically once the user who created the monitor logs in. And if the notifications conditions configured for the monitor are met the alerts are sent automatically.

4. Click the **Objects** tab.

Choose the queues to monitor

5. In the **Objects** tab:

   a. From the available objects select the queues you want to monitor.

   b. Click the **Add** button to slosh the selected queues in the selected objects.

Important: The attribute tab is enabled only after the you select the objects to be monitored.

6. Click the **Attributes** tab. Select the attributes that you want to monitor.

   The attributes are:

   a. **Chat - Current service level (%):** Number of serviced sessions currently in progress, which were picked up before the threshold setting configured for the department / Total number of serviced sessions currently in progress * 100.

   b. **Chat - Daily service level (%): C**hats answered before service level setting / sample set of chats completed on the day, till that point of time * 100

c. **Chat - Number in progress:** Number of chat activities assigned to agents and are being worked on (Status: Assigned- In Progress).

d. **Chat - Number not started:** Number of chat activities assigned to agents, but on which work has not yet started (Status: Assigned - New).

e. **Chat - number of agents available:** Number of agents who are logged in and 'Available', who can either be assigned chat activities from the queue or can pull activities from the queue, and whose Chat - User max load setting is not exceeded.

f. **Chat - Number unassigned:** Number of unassigned chat activities in the queue (Status: Assignment - Ready for Internal assignment).

g. **Chat - Oldest in progress:** Age of the oldest chat activity in the queue - where the activity has been assigned and been worked upon (activity status 'Assigned-In Progress'). If your calender is set in business hours it does not effect this column.

h. **Chat - Oldest not assigned:** Age of the oldest chat activity in the queue, where the activity has not been assigned (activity status 'Assignment-Ready for Internal assignment') If your calender is set in business hours it does not effect this column.

i. **Chat - Oldest not started:** Age of the oldest chat activity in the queue, where the activity has been assigned but has not been worked on (Status: 'Assigned-New'). If your calender is set in business hours it does not effect this column**.**

j. **Email - Number in progress:** Number of email activities assigned to agents and being worked on (Status: Assigned- In Progress).

k. **Email - Number in wrapup:** Number of email activities assigned to agents and being wrapped up (Status: Assigned- Wrap Up).

l. **Email - Number not started:** Number of email activities assigned to agents, but on which work has not yet started (Status: Assigned - New).

m. **Email - Number unassigned:** Number of unassigned email activities in the queue. (Status: Assigned - Ready for Internal assignment)

n. **Email - Oldest not started [hhh:mm]:** Age of the oldest email activity in the queue, where the activity has been assigned but has not been worked on (Status: Assigned - New). Age = Current date - created on date.

Important: Age is not calculated in business hours.

o. **Email - Service Level:** This is calculated by using two configured items: sample size and response time limit. It indicates the percentage of emails for which response was sent before the time limit elapsed. (This does not include auto-acknowledgments).

p. **Queue ID:** The unique ID assigned to the queue, usually a number.

q. **Queue name:** Name of the queue.

r. **Queue status:** Status of the queue. The status of the queue can be Active or Inactive.

s. **Task - Number in progress:** Number of tasks assigned to agents and being worked on (status as assigned; substatus as in progress).

t. **Task - Number in wrapup:** Number of tasks assigned to agents and being wrapped up (status as assigned; substatus as wrap up).

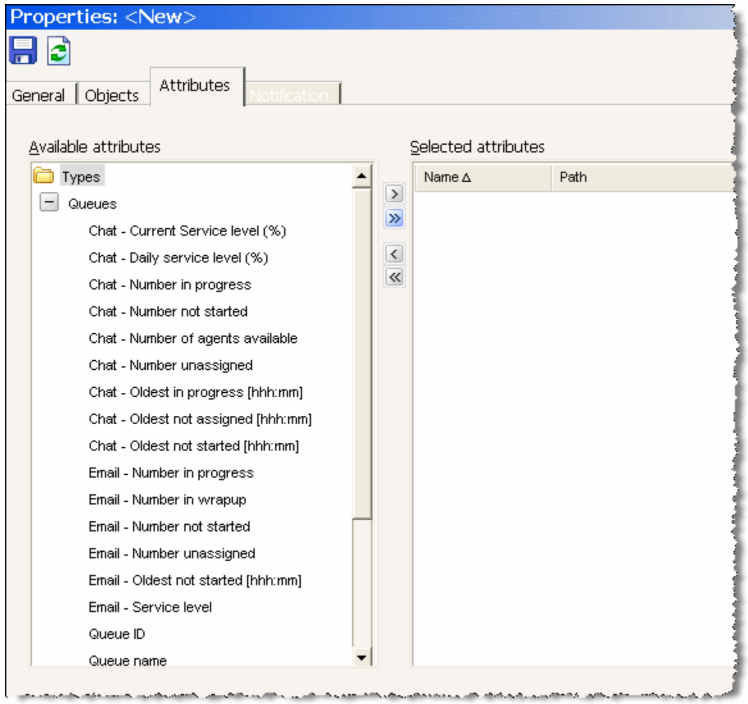
u. **Task - Number not started:** Number of tasks assigned to agents, but on which work has not yet started (status as assigned; substatus as not started).

v. **Task - Number unassigned:** Number of unassigned tasks in the queue.

w. **Task - Oldest not started [hhh:mm]:** Age of the oldest task activity in the queue, where the activity has been assigned but has not been worked on (Status: Assigned - New). Age = Current date - created on date.

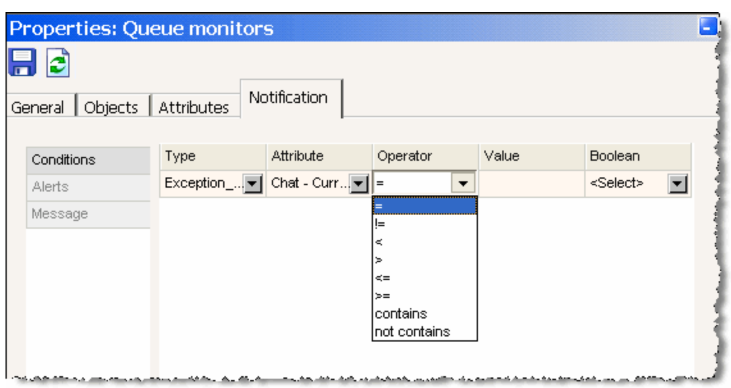
Important: Age is not calculated in business hours

x. **Users - Number logged in:** Number of agents who are currently logged into the application and can be assigned activities from the queue. These are the agents who have pull permission on the queue and agents to whom email activities can be assigned or transferred from the queue.



Specify attributes to monitor

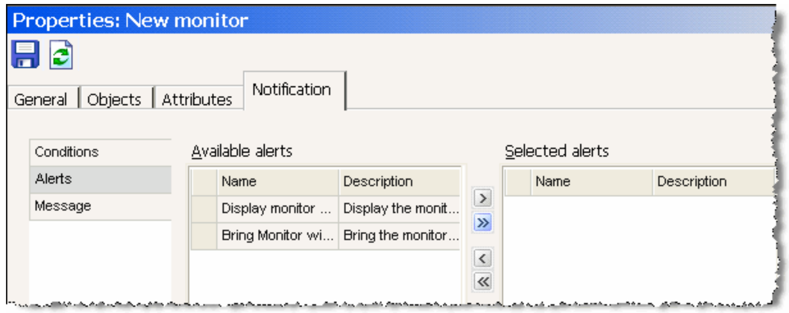
7. Click the **Save** button to enable the **Notification** tab.
8. Click the **Notification** tab.
9. Select the **Conditions** subsection, if it is not open. Specify one or more conditions to set of notifications and alerts.



Create conditions

The **Alerts** and **Messages** tabs are enabled only when a condition is specified.

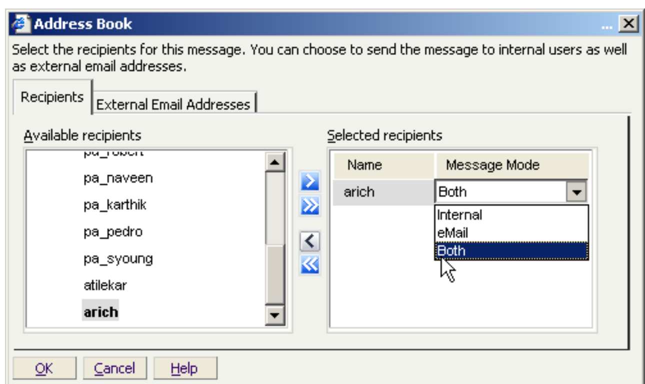
10. Click the **Alerts** tab. Select appropriate alerts from the **Available alerts** list.



Choose alerts

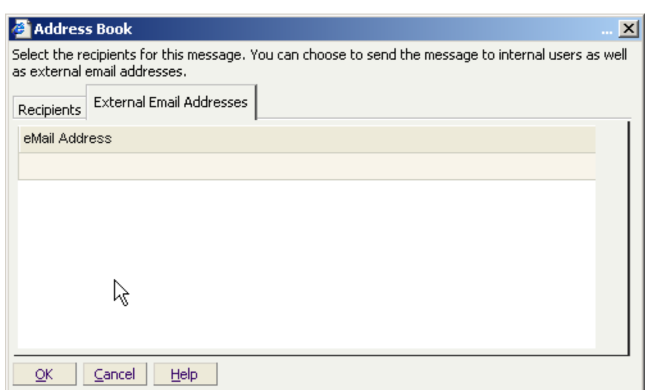
11. Click the **Message** tab. Here you can:

a. Specify the recipients of the message, that is, choose other users from the address book.



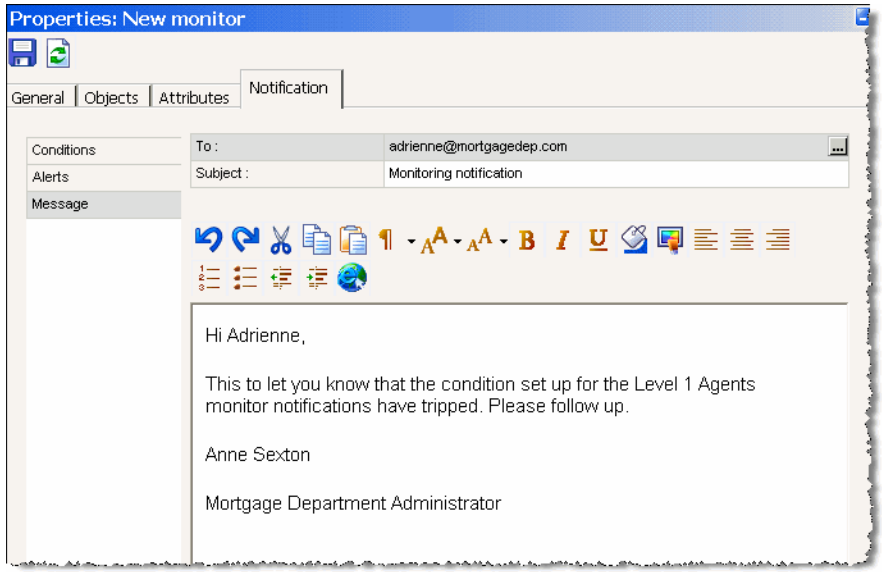
Select recipients

b. Specify external email addresses too as recipients.



Specify external email addresses

c. Type a subject for the message, and a custom message.



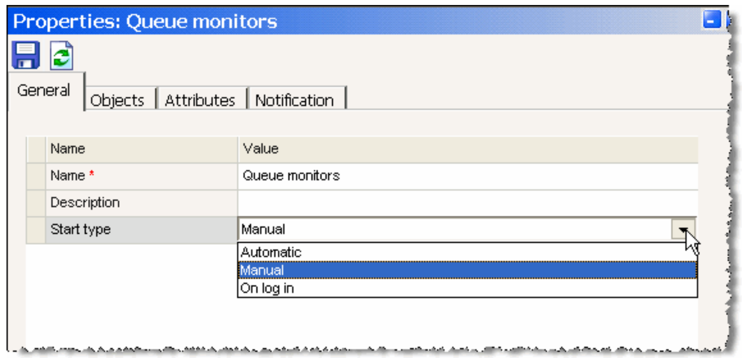
Create a custom message

12. Click **Save** in the toolbar to save the monitor.

Creating user group monitors

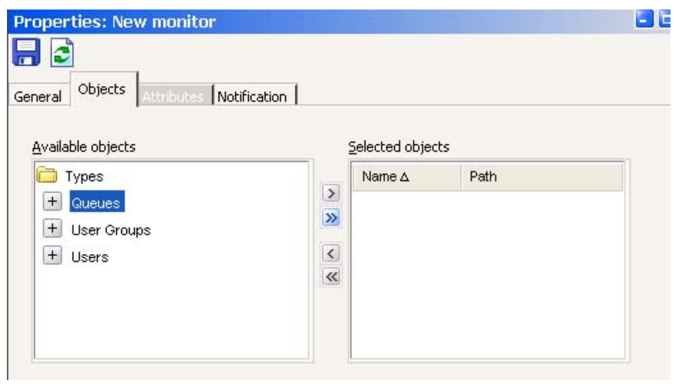
To create a monitor for one or more user groups

1. In the **Tree** pane, select the **Monitors** folder in department to which the monitor will belong.
2. In the **List** pane click the **New** button in the toolbar.
3. Now let's begin setting the properties of the monitor in the **Properties** pane. In the **General** section, enter a name, and description for the monitor. Then choose a value from the **Start Type** list:
   - **Automatic:** The monitor will start automatically after it is created, and run as long as the Services Server is running.
   - **Manual:** You will need to manually run the monitor by selecting it and clicking the **Start** button in the **List** pane toolbar.
   - **On log in:** The monitor will automatically start whenever you are logged in to the system.



Set general properties

4. Click the **Objects** tab. Specify the user groups to monitor.



Choose the user groups to monitor

5. Click the **Save** button to enable the **Attributes** tab.
6. Click the **Attributes** tab. Select the attributes that you would like monitored:
   a. **Chat - Assigned and in progress:** Number of chat activities assigned to the agents of the group and which are being worked on (Status: Assigned - In progress).
   b. **Chat - Assigned but not started:** Number of chat activities assigned to the agents of the group, but on which work has not yet started (Status: Assigned - New).
   c. **Chat - Available agents:** Number of agents logged in and available to handle chats.
   d. **Email - Assigned and in progress:** Number of email activities assigned to the agents in the group and being worked on (status as assigned; substatus as in progress).

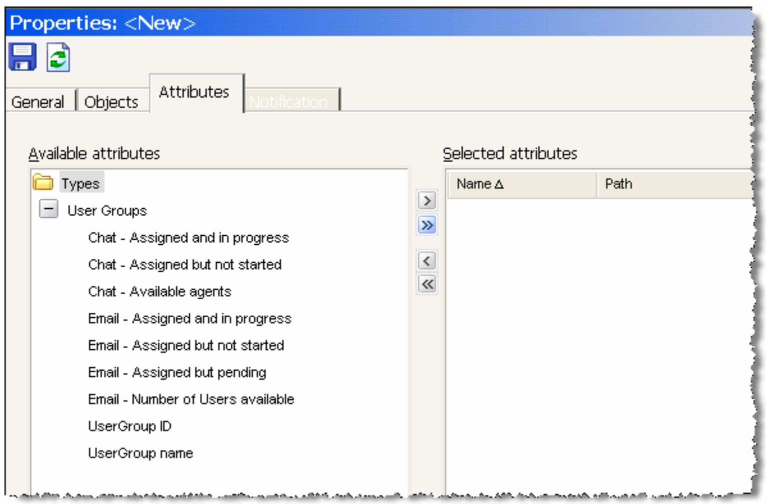
e. **Email - Assigned but not started:** Number of email activities assigned to the agents in the group, but on which work has not yet started (status as assigned; substatus as not started).

f. **Email - Assigned but pending:** Number of email activities assigned to the group, but on which work is pending (status as assigned; substatus as pending).

g. **Email - Number of users available:** Number of group members logged in and available to handle emails.

h. **User group ID:** The unique ID assigned to the user group, usually a number.

i. **User group name:** Name of the user group.

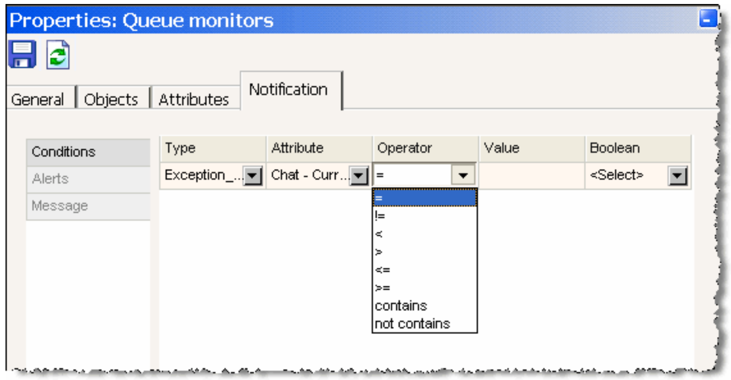


Specify attributes to monitor

7. Click the **Save** button to enable the **Notification** tab.

8. Click the **Notification** tab.

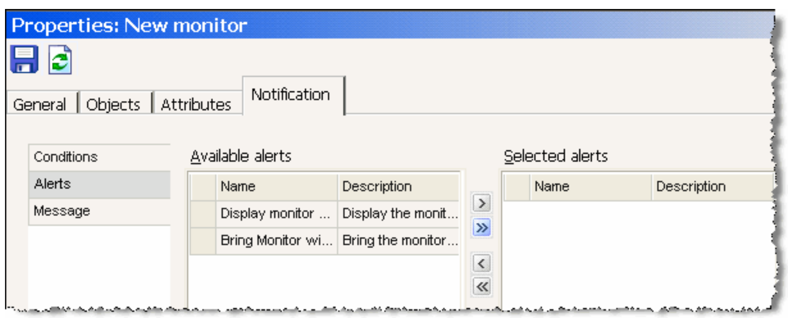
9. Select the **Conditions** subsection, if it is not open. Specify one or more conditions to set of notifications and alerts.



Create conditions

The **Alerts** and **Messages** tabs are enabled only when a condition is specified.

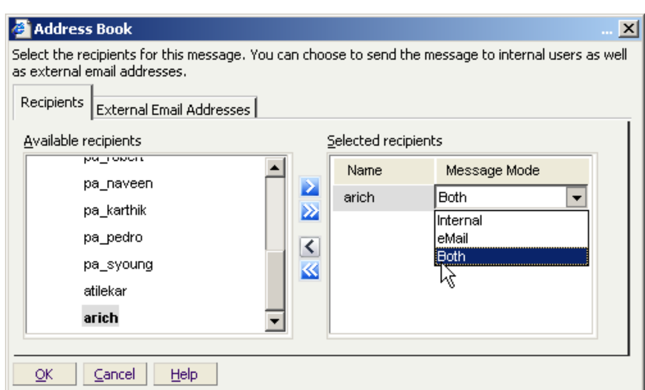
10. Click the **Alerts** tab. Select appropriate alerts from the **Available alerts** list.



Choose alerts

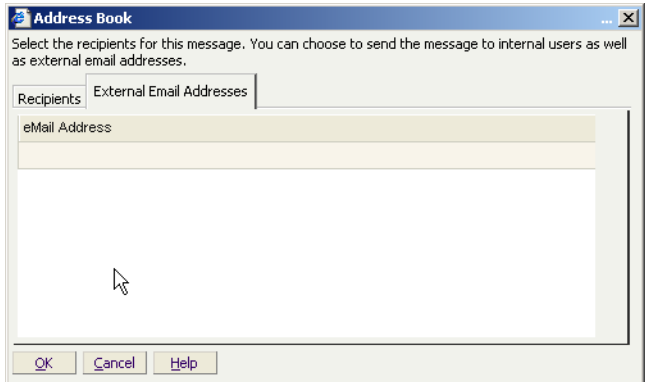
11. Click the **Message** tab. Here you can:

    a. Specify the recipients of the message, that is, choose other users from the address book.



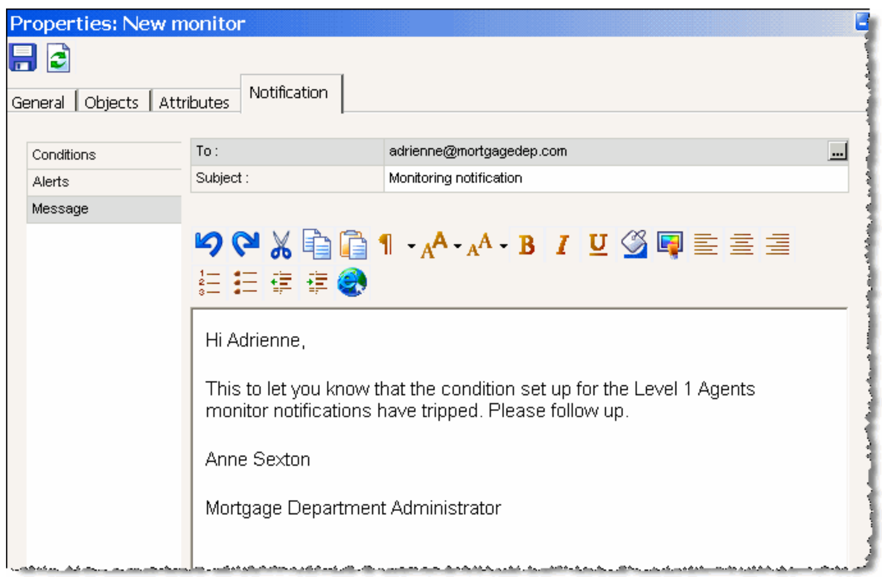
Select recipients

b. Specify external email addresses too as recipients.



Specify external email addresses

c. Type a subject for the message, and a custom message.



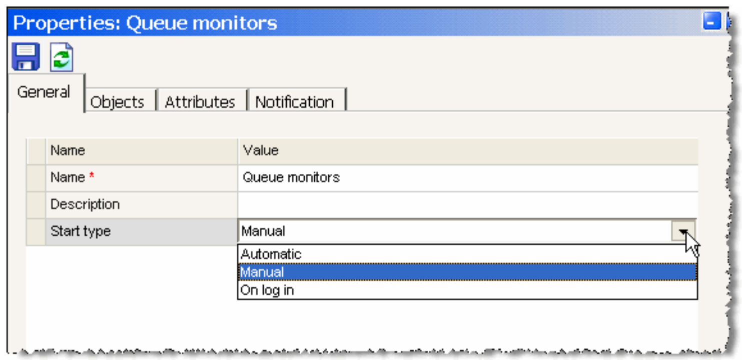
Create a custom message

12. Click **Save** in the toolbar to save the monitor.

Creating user monitors

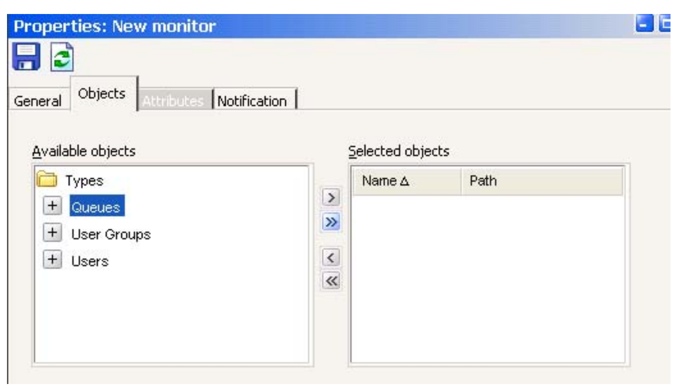
To create a monitor for one or more individual users

1. In the **Tree** pane, select the **Monitors** folder in department to which the monitor will belong.
2. In the **List** pane click the **New** button in the toolbar.
3. Now let's begin setting the properties of the monitor in the **Properties** pane. In the **General** section, enter a name, and description for the monitor. Then choose a value from the **Start Type** list:
   - **Automatic:** The monitor will start automatically after it is created, and run as long as the Services Server is running.
   - **Manual:** You will need to manually run the monitor by selecting it and clicking the **Start** button in the **List** pane toolbar.
   - **On log in:** The monitor will automatically start whenever you are logged in to the system.



Set general properties

4. Click the **Objects** tab. Specify the users to monitor.

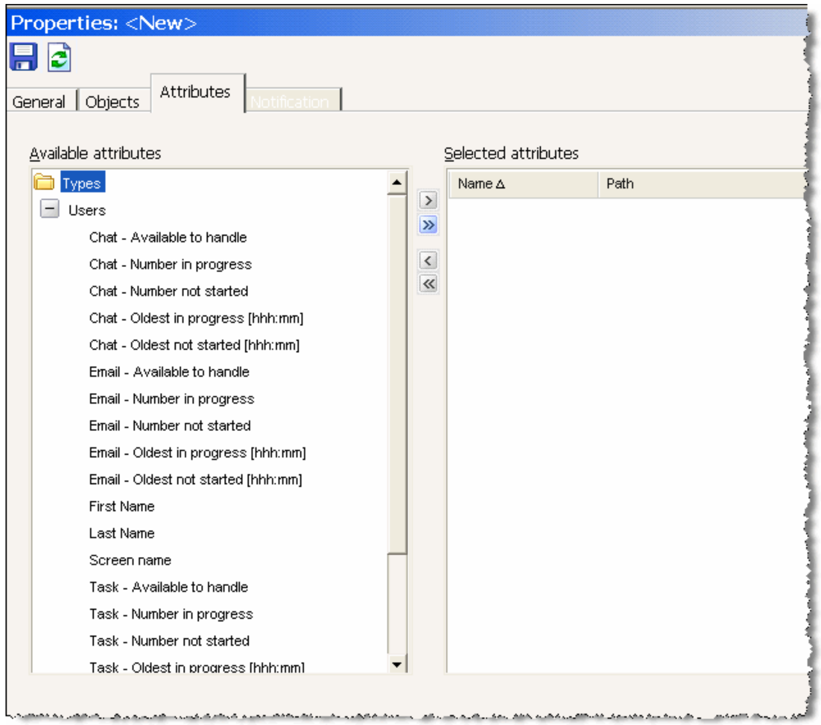


Choose the users to monitor

5. Click the **Save** button to enable the **Attributes** tab.

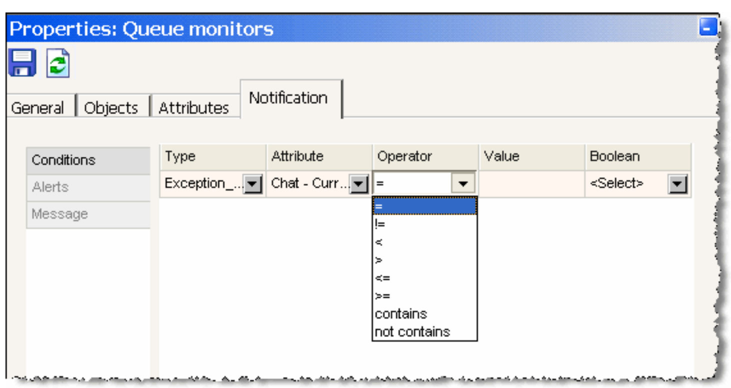
6. Click the **Attributes** tab. Select the attributes that you would like monitored:
   a. **Chat - Number in progress:** Number of chat activities assigned to agent and being worked on (Status: 'Assigned - In Progress')
   b. **Chat - Number not started:** Number of chat activities assigned to agents, but on which work has not yet started (Status: 'Assigned - New').
   c. **Chat - Oldest in progress:** Age of the oldest open chat activity assigned to the agent and been worked upon (activity status 'Assigned-In Progress') If your calender is set in business hours it does not effect this column.
   d. **Chat - Oldest not started:** Age of the oldest open chat activity assigned to the agent but has not been worked on. (Status: 'Assigned-New') If your calender is set in business hours it does not effect this column**.**
   e. **Email - Available to handle:** Is the agent available to handle emails: **Yes** or **No.**
   f. **Email - Number in progress:** Number of email activities assigned to this agent, which the agent is working on (Status: 'Assigned-In Progress').
   g. **Email - Number not started:** Number of email activities assigned to this agent, on which the agent has not yet started work (status: Assigned - New).
   h. **Email - Oldest in progress:** Age of the oldest email on which the agent is working (Status: Assigned-In Progress).
   i. **Email - Oldest not started:** Age of the oldest email on which the agent has not yet started work (Status: Assigned-New).
   j. **First Name:** First name of the user to be monitored.
   k. **Last Name:** Last name of the user to be monitored.
   l. **Task - Available to handle:** Is the agent available to handle tasks: **Yes** or **No.**
   m. **Task - Number in progress:** Number of tasks assigned to this agent, which the agent is working on (Status: Assigned - In progress).
   n. **Task - Number not started:** Number of tasks assigned to this agent, on which the agent has not yet started work (Status: Assigned - New).
   o. **Task - Oldest in progress:** Age of the oldest task on which the agent is working (Status: Assigned - In progress).
   p. **Task - Oldest in wrapup:** Age of the oldest task on which the agent is wrapping up work (Status: Assigned - Wrap up).
   q. **Task - Oldest not started:** Age of the oldest task on which the agent has not yet started work (Status: Assigned - New).
   r. **User ID:** The unique ID assigned to the user, usually a number.
   s. **User name:** Name of the user.

t. **User status:** Status of the user, whether the user is logged in or not.



Specify attributes to monitor

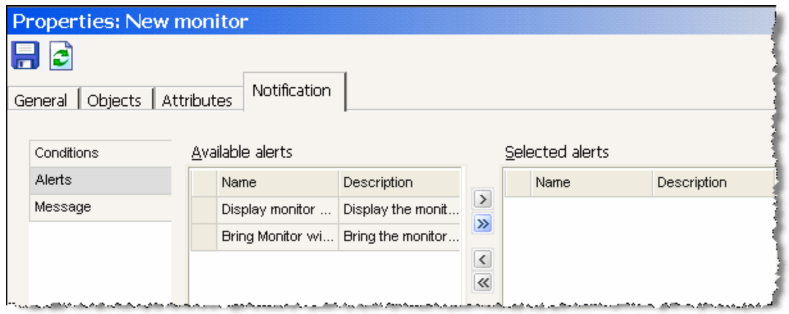
7. Click the **Save** button to enable the **Notification** tab.
8. Click the **Notification** tab.
9. Select the **Conditions** subsection, if it is not open. Specify one or more conditions to set of notifications and alerts.



Create conditions

The **Alerts** and **Messages** tabs are enabled only when a condition is specified.

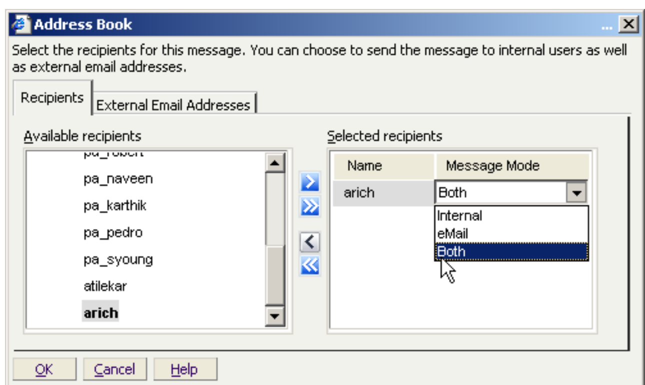
10. Click the **Alerts** tab. Select appropriate alerts from the **Available alerts** list.



Choose alerts

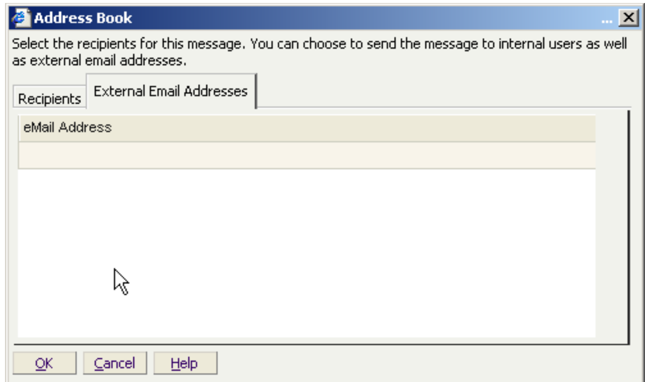
11. Click the **Message** tab. Here you can:

    a. Specify the recipients of the message, that is, choose other users from the address book.



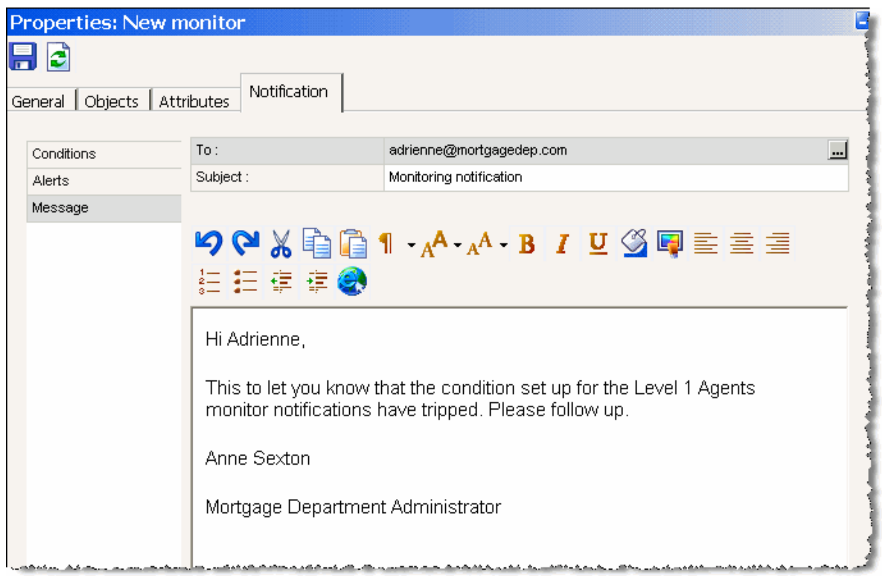
Select recipients

    b. Specify external email addresses too as recipients.



Specify external email addresses

c. Type a subject for the message, and a custom message.



Create a custom message

12. Click **Save** in the toolbar to save the monitor.

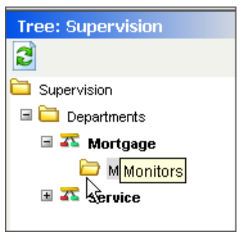
3 Running monitors

Starting monitors

Monitors that are configured to be started manually, can be started from Supervision Console.

To start a monitor

1. In the **Tree** pane, select the **Monitors** folder in department to which the monitor will belong.



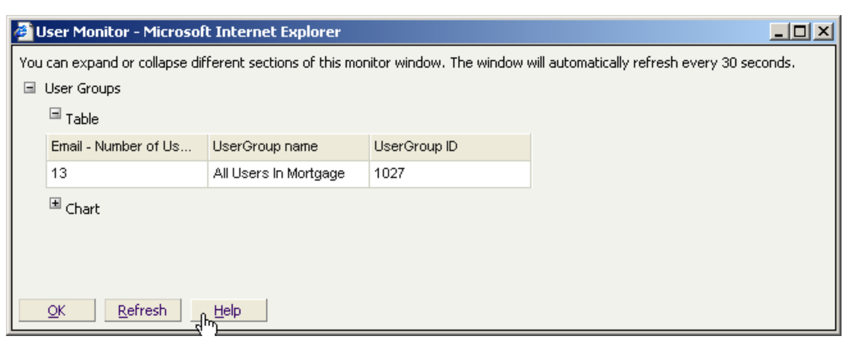
Navigate to the Monitors folder in the Tree pane

2. In the **List** pane, select the monitor to start.
3. Click the **Start** button in the toolbar.

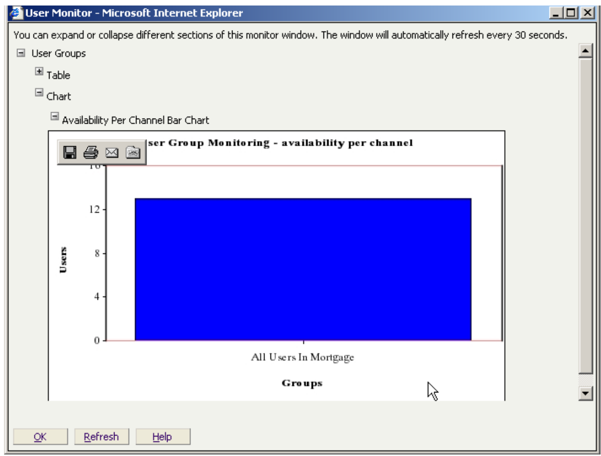
Click the Start button in the List pane

The monitor appears in a new window. The display is refreshed after every 30 seconds.

4. View the information in table or chart format or both.



A table in a monitor



A bar chart in a monitor

Deleting monitors

To delete a monitor

1. In the **Tree** pane, select the **Monitors** folder in department to which the monitor will belong.

Navigate to the Monitors folder in the Tree pane

2. In the **List** pane, select the monitor to delete.
3. Click the **Delete** button in the toolbar.

Click the Delete button in the List pane

4. Confirm the delete action when prompted.

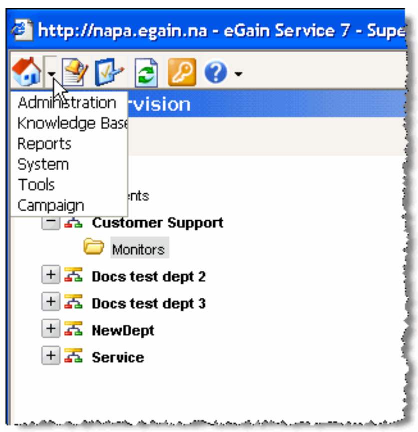
   The monitor is deleted and no longer appears in the **List** pane.

Configuring monitor-related settings in Administration Console

Settings in Administration Console allow you to configure certain display properties for monitors for the entire department.

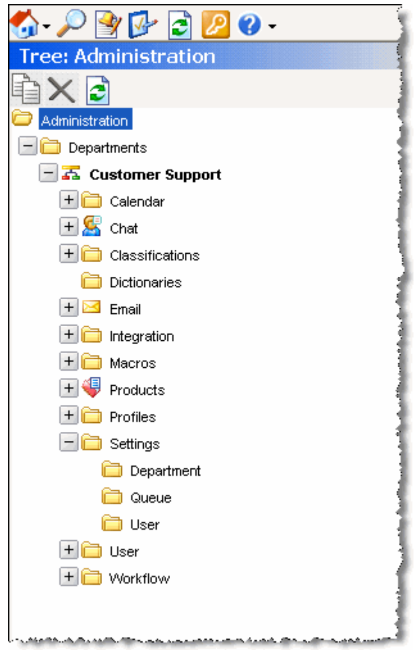
To configure these settings

1. Click the **Home** button in the console toolbar, and then select the **Administration** option to go to Administration Console.



Go to Administration Console

2. In Administration Console, navigate to **Settings** > **Department** under your department.

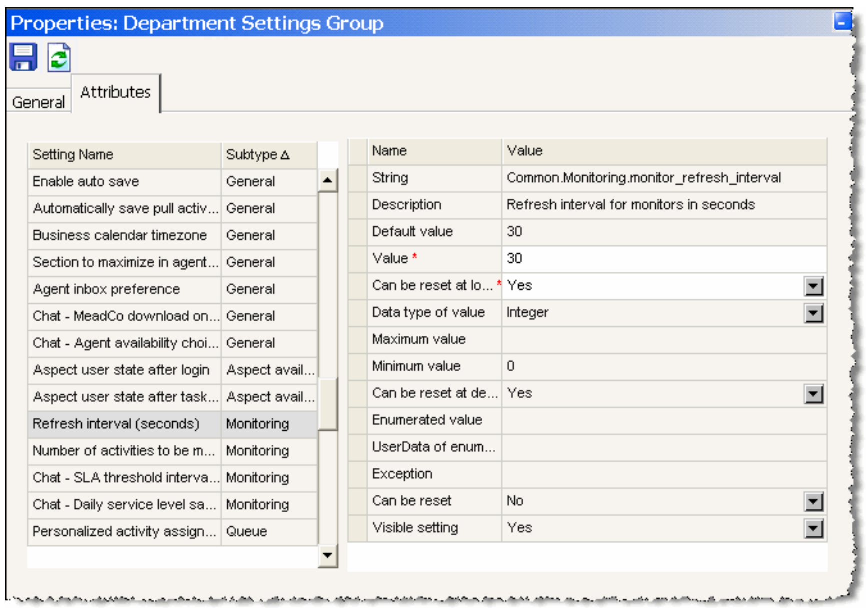


Locate the department settings folder for your department

3. In the **List** pane, select the **Department Group** of settings.
4. In the **Properties** pane, click the **Attributes** tab to configure the settings for monitors. Maximize the pane to make it easier to locate and change the settings.
5. Click the **Subtype** column to sort the settings by subtype. Look for **Monitoring** in the **Subtype** column to locate the settings.
6. Configure the four monitoring settings as desired. The settings are:
   - **Refresh interval (seconds)**: This setting determines the time period after which the monitor display is refreshed. The time is specified in seconds. The default value is 30 seconds.
   - **Number of activities to be monitored for service level**: This setting is used to specify the number of activities to be monitored for gauging service level performance in a queue.
   - **Chat - SLA threshold interval (in seconds):** This setting is required for the, Chat - Current service level (%) and Chat - Daily service level (%), queue-monitoring attributes, viewed from the Supervision Console. With this setting you can decide the threshold interval (in seconds) that all in-progress sessions are checked against, to measure what percentage had a wait time lesser than the threshold. Any session picked up after a wait time lesser than this threshold is counted as having met the service level. The service level is shown as an aggregate percentage based on how many sessions have met the service level and gives an indication of

the timely pick-up of sessions by agents. If this value is set to blank, then the "Chat - Current service level (%)" and "Chat - Daily service level (%)" attributes will show a value of 100% for all queues. The default value is 600.

- **Chat - Daily service level sample set definition:** This setting is required for the, Chat - Daily service level (%), queue-monitoring attribute, viewed from the supervision console. With this setting you can define the types of completed chats to be considered for the calculation of daily service level in monitors.The default value is All chats handled including abandoned.



Monitoring-related settings

7. Click the **Save** button in the **Properties** pane toolbar to save your new configuration.