

Tasks for Supervisors and Managers


Create a Contact

To create a contact for non-call activities from the Recordings application:

Click Create Contact , complete the fields, and then click save.

Configure Your Extension for Live Monitoring ((↑))



To configure your extension Live Monitoring:


1. Click Live Monitoring in the Cisco Workforce Optimization toolbar.
2. Click Settings  in the Live Monitoring toolbar.
3. Type your extension in the Extension field under Phone Settings.
4. Choose a device from the Device drop-down list, and then click Submit.


Monitoring an Agent

To listen to an agent's active call from the Live Monitoring application:

1. Click Live Audio Monitoring .
2. While listening to the agent's call you can choose one of the following options:

To monitor an agent's screen, click Live Screen Monitoring  and then click Connect .

To enlarge an agent's screen, click Magnify .

To coach an agent on an active call, click Whisper . You can now listen to the call and provide advice to the agent.

To join the agent on an active call, click Barge In . You can now talk to the customer and agent.


To stop monitoring and agent's screen click Disconnect .

3. To end a Live Monitoring session, click End Call on your phone.

Task for Managers Only

Mark a Contact for Calibration

To mark a contact for calibration from the Recordings application:

1. Select a contact from the Contacts table.
2. Click Mark for Calibration .
3. Choose an evaluation form from the Evaluation form drop-down list, and then click OK.

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Tasks for All Users

Accessing Cisco Workforce Optimization

Cisco Workforce Optimization is a web application. Access it by entering the following URL in your browser:

https://<base server> or http://< base server>

where <base server> is the host name or IP address of the server that hosts the Unified Workforce Optimization Container.

Note: If you are using Chrome to access , the IE Tab extension from Google must be installed. To access Unified Workforce Optimization, right-click the IE icon on the Chrome toolbar, and enter the URL in the Internet Explorer Address field that appears below the Chrome URL Address field.

Validating Your PC

Before you log in to Cisco Workforce Optimization for the first time, validate your PC.

To validate your PC, access the Cisco Workforce Optimization login page and click the Validate my PC configuration link. Cisco Workforce Optimization performs the evaluation and then displays the Diagnostics page, which lists the required features for each Cisco Workforce Optimization product in your system. The Results column tells you if your PC is configured correctly or not for that feature.

If the Diagnostics page shows Bad for any feature, you must correct that before you can log in to Cisco Workforce Optimization. In some cases you will see links at the bottom of the page that will help you correct a problem. In other cases you will have to contact your supervisor or administrator for assistance.

Logging in to One Product

1. Select the Separate product logins check box.
2. Click the product icon for the product you want to log in to.
3. Select the product name check box.
4. Complete the fields on the Login page.
5. Click Login.

Logging in to Multiple Products

To log in to multiple products:

1. Clear the Separate product logins check box (this is clear by default).
2. Complete the fields on the Login page and click Login.

If your credentials are the same across the product suite, your login give you access to all those products (based on your role).

However, if your credentials are not the same for one or more of the products in the product suite, you are not notified of the error. You will be able to access only the products for which your credentials were valid.

To find out which products you could not access, log out and use the separate login option. Log in to each product in turn to find out which one is rejecting your credentials.

Search Recordings

1. Click Recordings or select Recordings > Search Contacts in the Cisco Workforce Optimization toolbar.
2. Click Filter.
3. Optional. Click Expand Search if you want to do an advanced search.
4. Complete the fields in the Search Recordings window, and then click Search.


Play a Recording

To play a recording from the Recordings application:

Double-click a contact with a Contact Type of Call or Screen Only in the Contacts table.

Export Contact Metadata

To export contact metadata for all contacts (call and non-call contacts) in the contact table to a comma separated value (CSV) file from the Recordings application:


1. Run a search in the Recordings application to locate the recordings that you want to export.
2. Click Export Table Data to CSV  in the Recordings toolbar, and follow the prompts.

The metadata is saved to CSV format. You can open it with Microsoft Excel or save it to a file.

Note: The metadata that can be exported is determined by the Quality Management administrator in Quality Management Administrator. Only exportable metadata will be saved to CSV format.

Export a Recording

To export a recording from the Recordings application:

1. Click a recording in the Contacts table, and then click Export Selected Contact .
2. Choose the format that you want for the exported recording from the Export Selected Contact dialog box, and then click Export selected contact.

Download an Exported Recording

To download an exported recording from the Recordings application:

1. Click Alerts.
2. Double-click the Export of Contact <ID> is Ready for Download message.
3. Click Here in the Alert Notification dialog box to download the file and then follow the prompts to download the recording.
4. In Microsoft Internet Explorer, click Save and choose a location from the Save as dialog box.


Managing Alerts

To view an alert, click Alerts in the toolbar and then click an alert in the list to display more information. When finished, click Close to dismiss the Alert Notification dialog box.

Tag a Call


You can change a contact with a Reason code of Archive to Archive Tagged. When you do this the Tagged retention time is applied to the contact.

To tag a call from the Recordings application:

Select a contact with a Reason code of Archive from the Contacts table, and then click Tag Call .

Mark a Contact for Quality

To mark a contact for quality from the Recordings application:

1. Double-click a recording with a Reason value of Archive from the Contacts table
2. Click More in the Media Player and choose Mark for Quality .
3. Choose an evaluation form from the Evaluation form drop-down list, and then click OK.

The Reason value changes to Marked for Quality.

The Open Evaluation button is enabled in the Media Player and the Evaluation window appears, and the evaluation form is enabled.