# OnTraQ

# User Guide

Version 6.X

# ONTRAQ USER GUIDE



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# Overview

Welcome to OnTraQ! OnTraQ is designed to be ready to use out of the box after implementation is complete. Your route control groups and ACD groups defined on your switch are imported by OnTraQ and displayed as Service Groups and Agent Teams in OnTraQ, so you can see information about them in OnTraQ as soon as you select them for monitoring.

This document assumes the CAP Server has been configured for use with OnTraQ and that the OnTraQ server has been set up. If not, contact Impact Technologies Customer Service for assistance.

This guide contains the following chapters:

***Section 1: Administrative Tasks*** discusses initial setup and configuration options you will use to prepare OnTraQ for daily use, including selecting the Service Groups and Extensions that will be monitored by OnTraQ. You will learn how to define sessions, set alarm colors, and more. You may want to define some organization-wide Service Groups and Agent Teams, and perhaps add names to the Agent IDs, or you may prefer to let each OnTraQ user define the groups and teams he or she will be monitoring.

***Section 2: User Tasks*** discusses the options users will perform with OnTraQ on a day-to-day basis. You will learn how to build Service Group Pools, Agent Teams, how to view your OnTraQ data and how to modify the way data is displayed within OnTraQ, including OnTraQ reports.

***Section 3: Appendix: Menu Options*** describes the menu options available from the main OnTraQ display.

This document stresses the process and flow of activities, without trying to explain everything you see on-screen. OnTraQ is easy to use and the displays of data are intuitive. You choose the data to display and how to display it.

# Section 1: Administrative Tasks

This section discusses the administrative tasks you will perform to ready OnTraQ for daily use.

## 1.1. Creating OnTraQ User Accounts

To create OnTraQ user accounts, you need to do so in Traffic Analyst Admin Server. Go to the Traffic Analyst Admin Server and select the System – Users option. The Users window displays.

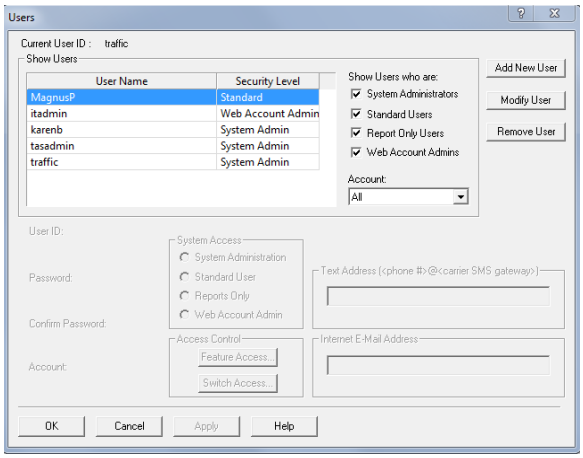



*Figure 1: Traffic Analyst Users window*

This is the window where you define Traffic Analyst users. Users can belong to a group which defines their level of privileges within OnTraQ and other Traffic Analyst modules. The groups are:

**System Administration**, which allows a user complete permission to perform any OnTraQ action.

**Web Account Admin**, which allows a user permission to perform any OnTraQ action within that user's assigned Account.

**Standard User**, which allows access to all options except to the Configure OnTraQ Servers option, ACD Object Access option, ANI/DNIS Groups option, and Transaction Codes option. In addition, the System Preferences and Service Group Thresholds options are view-only for Standard Users.

**Reports Only**, has the same user privileges as a Standard User. We recommend that you use the Standard User designation rather than Reports Only, however.

The **Access Control** section is where User IDs are assigned permissions to features and switches.

Note that the Pager section does not apply to OnTraQ. OnTraQ alarms will be displayed within the OnTraQ module but will not trigger pager and email alerts.

### 1.1.1. User Accounts

The User Accounts window defines accounts and allows Web Admin users to be set up for new accounts. Accounts have assigned switches and features that can be accessed by a particular user. When a switch is assigned to an account, that account name will appear in brackets to the right of the switch name in Traffic Analyst. Select the System – User Accounts option. The following window displays.

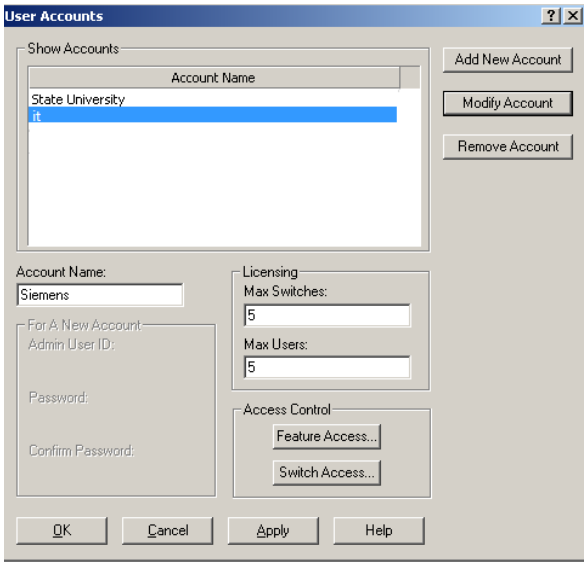



*Figure 2: Traffic Analyst User Accounts window*

Enter the **Max Switches** and **Max Users** to designate the maximum number of switches and users that can be assigned to the account.

Choose the **Feature Access and Switch Access** buttons to set which switches and features are viewable in this account. Available features, including OnTraQ, are determined by the Traffic Analyst modules you have purchased.

You also can create a new user in your dashboard client. To do this, go to Tools, Users, and then select All Users. To add a new user, click “New” button from All Users screen and the window below appears. Enter the user data, select the switches the user should have access to in the Explorer tree and feature access (typically Network and/or Call Detail).

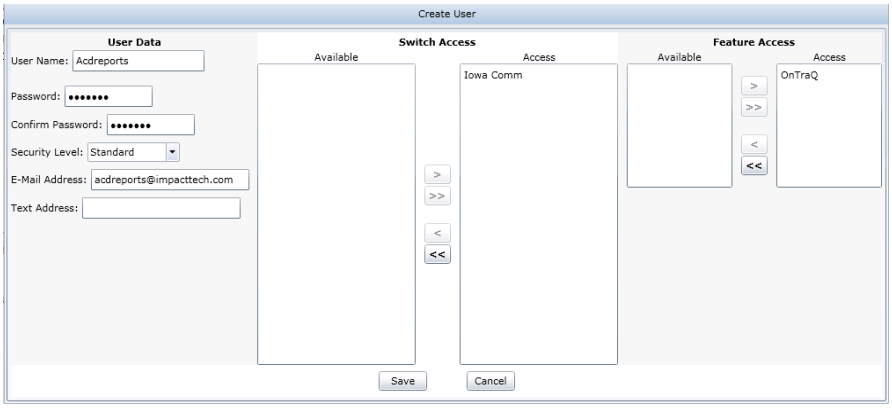



*Figure 3: Creating a new user*

## 1.2. Defining OnTraQ's Primary Hours and Days in Traffic Analyst

When you create reports in OnTraQ, you select day and hour types as part of the reporting criteria. OnTraQ recognizes Primary Days and Primary Hours, as well as Non-Primary Days and Hours too. Primary Days and Hours are defined in Traffic Analyst in the Switch Properties on the Definition tab. Define these report criteria as part of your OnTraQ setup tasks.

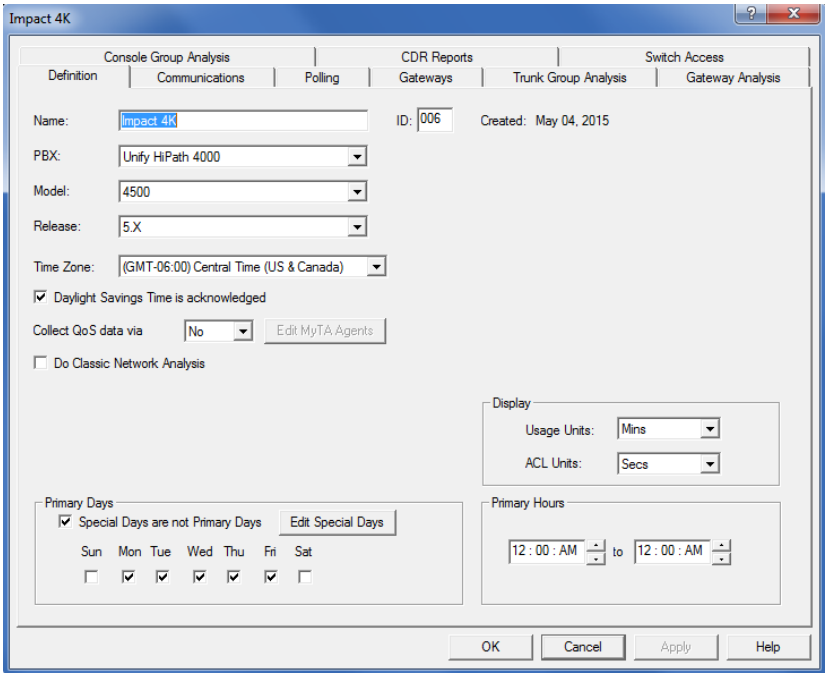



*Figure 4: Switch properties*

In the Primary Days area, select the days that will define your organization's Primary Days by putting a check in the checkbox under the day. Also define Special Days (e.g., holidays) as being Non-Primary by selecting that checkbox.

In the Primary Hours fields, enter the time range that will define your organization's Primary Hours.

## 1.3. Administrative Setup in OnTraQ

After you set up user accounts in Traffic Analyst Administrator, you are ready to begin doing administrative setup work in OnTraQ. You will have to start OnTraQ and log in before you can perform these administrative tasks. See 2.1.1 *Logging In* for information on starting OnTraQ and logging on.

Some of the global settings within OnTraQ you may wish to set up before anyone else uses OnTraQ include Alarm Colors and Sounds, Session Boundaries, queue bands, how long some kinds of data will be retained, and the URL that will provide OnTraQ access to Traffic Analyst.

Note: When an OnTraQ server is connected directly to an IPDA, the time zone of the host PC must be set to the time zone of the OpenScape/HiPath 4000, not the local time zone of the IPDA. This is because the event received by OnTraQ from the switch (through CAP) uses the switch's time zone.

### 1.3.1. Session Boundaries (shifts)

You can define Session Boundaries in OnTraQ to reflect the shift times your organization uses. This will organize the information OnTraQ displays in a way that mirrors the shifts your organization members' work.

Go to Tools – System Preferences to define Session Boundaries. The System Preferences window displays.

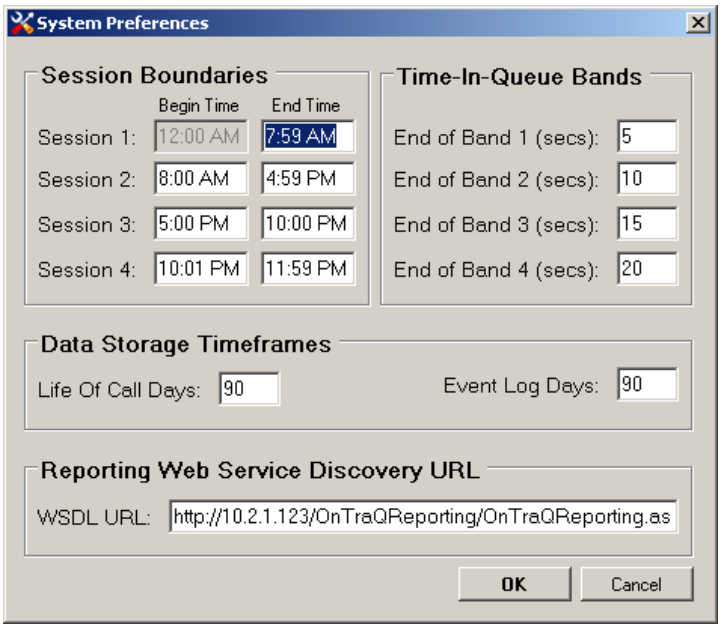



*Figure 5: System Preferences (Session Boundaries)*

You can define up to four Session Boundaries to mirror the work shifts within your organization. Enter a Begin Time and an End Time to define each Session, which can be identical to your work shift begin and end times. You must enter the time in the HH:MM format and include an AM or PM.

### 1.3.2. Time-In-Queue Bands

Time-In-Queue Bands allows you to organize the way call queue times are sorted and grouped by OnTraQ.

You can define up to four Time-In-Queue Bands for your organization. These are defined in seconds. To define these bands, go to Tools – System Preferences. The System Preferences window displays.

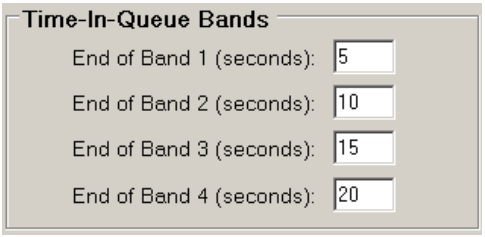



*Figure 6: System Preferences (Time-In-Queue Bands detail)*

Enter the End of Band for each band. In the example above the first Time-In-Queue Band is the initial five seconds of the call, the second Time-In-Queue Band will be for calls that have been in queue for more than five seconds and fewer than ten seconds, and so on.

### 1.3.3. Data Storage Time Frames

The Data Storage Time Frames lets you define for how many days data will be stored for the Life of Call and Activity Log reports.

### 1.3.4. Reporting Web Service Discovery URL

This URL is simply the URL that OnTraQ will use to access Traffic Analyst.

### 1.3.5. Alarm Colors and Sounds

When alarm conditions are met, an alarm will display and sound. (OnTraQ users can define the Alarm Thresholds for the groups and agents they monitor.) To change the Alarm Colors and Sounds, select the “Alarm Colors/Sounds” button from the button bar on OnTraQ’s main window or select the “Change Alarm Colors/Sounds” option from View menu. The Alarm Colors/Sounds window displays.

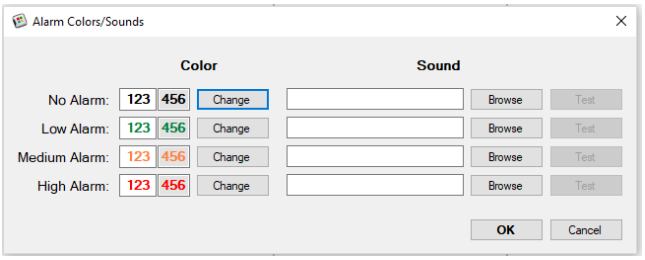



*Figure 7: Alarm Colors and Sounds*

To change a color, select the Change button to the right of the alarm state you wish to change. The Color window displays (this is a standard Windows option).

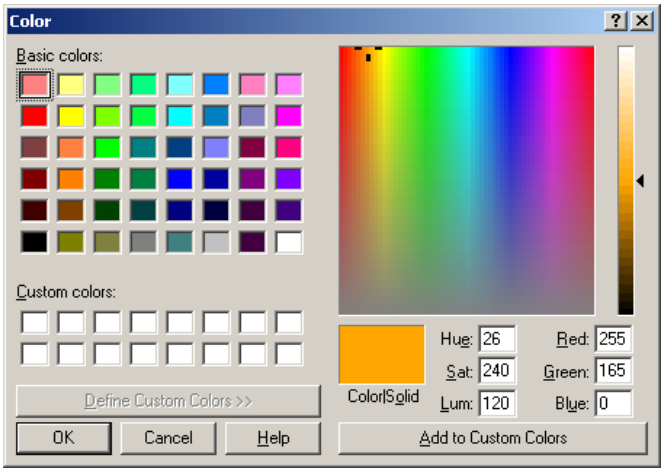



*Figure 8: Standard Windows Color window*

Use this window to change the color associated with the Alarm Threshold. You can click on a color swatch in the grid to select that color, or use the larger color display to select a custom color.

To change a sound, select the Browse button and locate the sound file you wish played when the alarm condition is met. Sound files must be WAV files that are formatted as PCM (8 bit or 16 bit sampling) or ADPCM (4 bit sampling).

When updated, click OK. As a final step to save your changes, assure your desktop is how you like it and select “Save Window Layout” from Windows menu.

### 1.3.6. Common Organization Definitions

OnTraQ imports Route Control Groups and Agent ID information from your switch. Route Control Groups are renamed Service Groups in OnTraQ, but otherwise are the same. Route Control Groups are created on your switch by your switch administrator. Typically, a Route Control Group will be used to route calls to the appropriate extensions.

Your OnTraQ users are not limited to these groupings, however. They can create new Service Group Pools which are comprised of multiple Service Groups.

Your OnTraQ users can also group the Agent ID information into Agent Teams. Initially, all the Agent IDs are imported. The ACD Groups defined on the switch

are imported and the agent IDs associated with those groups are stored in OnTraQ as separate Agent Teams. In other words, each ACD Group on the switch will be represented by a corresponding Agent Team within OnTraQ. All of the agent IDs on the switch are also imported and stored together in another Agent Team.

This all-inclusive Agent Team is there as a convenience. You can also create new Agent Teams and copy the Agent ID information into these teams through a simple drag-and-drop utility. You may find it easier to reference the all-inclusive Agent Team when creating new Agent Teams rather than trying to find the Agent IDs you want in the various Agent Teams created from ACD Groups.

While your OnTraQ users may want to create their own Service Group Pools and Agent Teams, there may be some groups and teams you want to create beforehand.

We recommend that you adopt naming conventions for renaming Agent IDs and for naming Service Group Pools so that your OnTraQ users will be consistent when they apply new names to Agent IDs and other objects.

#### 1.3.6.1. Service Groups and Pools

The Route Control Groups that OnTraQ imports are called Service Groups by OnTraQ. Route Control Groups are set up to route calls, so your switch administrator may create a route control group for sales calls, one for service calls, etc. OnTraQ will mirror this structure when it imports. The benefit of Service Groups in OnTraQ then is that it gives you a way to monitor and measure types of calls. You may very well have different service goals for sales calls as opposed to customer service calls, for example. Service Groups help you sort the call information.

In addition, you can also create Service Group Pools which include more than one Service Group. This allows you to organize your OnTraQ information in ways that make sense for your organization and which will allow you to more quickly view the information you want to see.

For example, you might create a Sales Service Group Pool and include a Sales Service Group, a Sales Engineering Service Group, and an After Sale Support Service Group in it.

You can also create Service Group Pools (and Agent Teams) that are comprised of Service Groups (and Agents) from different telephone switches. These “cross-switch” Pools and Teams can only be used in historical reports and not in real-time displays. Further, historical data for these cross-switch teams will only be available starting the next day.

For more information on creating Service Group Pools, see 2.2.1.1 Creating Virtual Groups.

#### 1.3.6.2. Agent and Agent Teams

OnTraQ imports Agent IDs and ACD Groups from your switch. You can add the actual agent names in OnTraQ. Each ACD Group on your switch will be displayed as an Agent Team in OnTraQ.

Since you can rename Agent IDs, you may want to define a naming convention for all OnTraQ users to employ so that the Agent IDs, as represented in OnTraQ, are similar.

In addition, you can create Agent Teams to group agents in various teams. In fact, an agent can belong to more than one team.

For example, you might have five new agents in your customer service group. You would probably want them to be in your Customer Service Agent Team, but you might also want them in a group labeled “New Agents” so you can more quickly monitor their status.

For more information on creating Agent Teams, see 2.2.2.2 Creating Virtual Teams.

## 1.3.7. ACD Object Access

The ACD Object Access option, found under the Tools menu, lets you define the Agent Teams, Agent IDs (or agent names if you have renamed IDs), and Service Groups that an individual OnTraQ user can see and access.

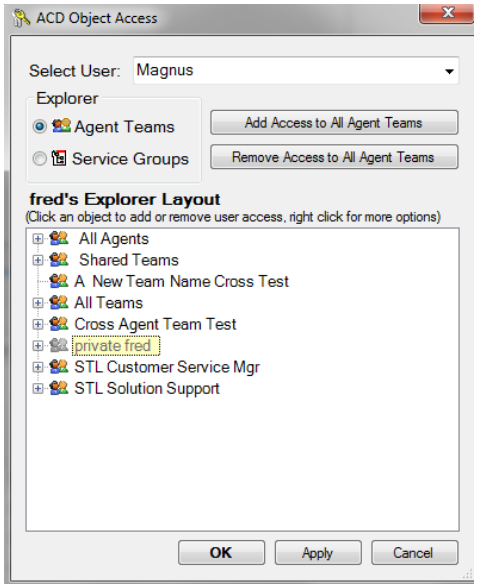



*Figure 9: The ACD Object Access window*

By default, new users will not have access to any agents or groups. You need to give them access to selected agents or groups, or give them access to all agents or groups.

To grant selective access to agents or agent teams, find the agent or agent team in the selection tree and click on the name if the name is grayed out. Any grayed out name means that the user does not have access.

To restrict access to an object, click on it and it will turn gray to indicate that the user will no longer have access to it. If you click on an Agent Team name, all the Agent IDs in that team will turn gray. You can also choose to restrict access to individual Agent IDs by clicking on them.

You can also right-click on an object and get an option to grant or limit access to that object to all users.

The same steps can be used to restrict access to Service Groups as well.

### 1.3.8. Object Monitoring

The Object Monitoring option, found under the Tools menu, lets you select which Service Groups and Extensions will be monitored by OnTraQ.

The default is that none are monitored, so you will need to use this option to select Service Groups and Extensions for monitoring after OnTraQ is installed

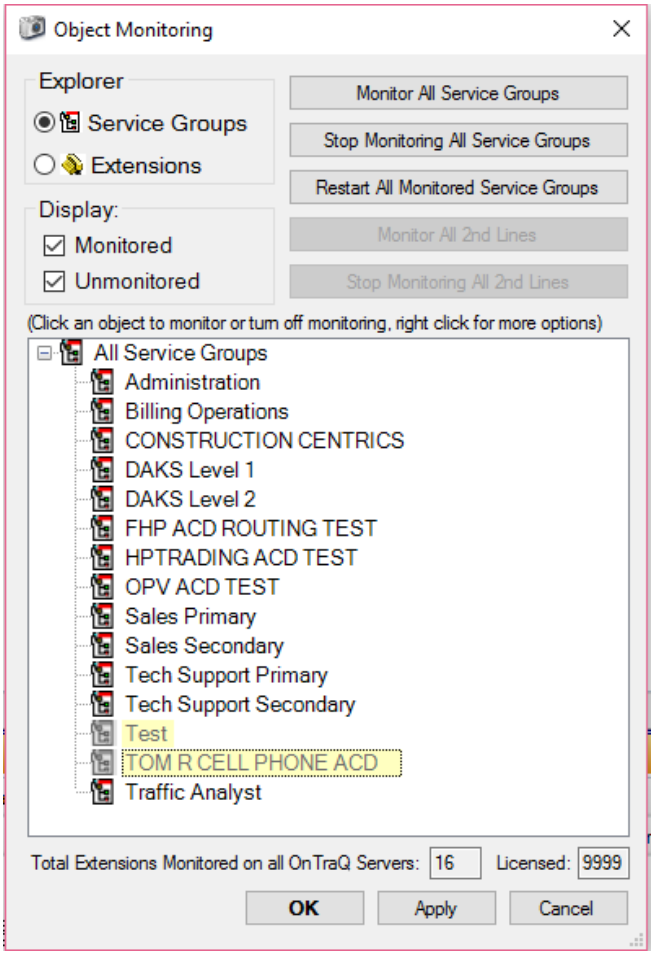



*Figure 10: Object Monitoring window*

You can quickly choose to monitor all Service Groups by clicking on the Monitor All Service Groups button. Likewise, you can choose to not monitor all Service Groups by clicking on the Stop Monitoring All Service Groups button. The Restart All Monitored Service Groups button will stop and restart all currently monitored Service Groups. This is typically used for implementations when the CAP server stops sending events for one or more Service Groups. Note that you can also right mouse click on a Service Group in the Explorer tree and select the “Restart Monitor” option to stop and start a single Service Group.

The Monitored and Unmonitored checkboxes let you see the list of Service Groups displayed in this window.

To monitor or stop monitoring selected Service Groups, click on the group name in the list. If a name is grayed out and highlighted, it means it is not being monitored. Clicking on the group name toggles its monitor status.

Right-clicking on a Service Group name gives you several options – including monitoring all or monitoring none of the Service Groups.

The Extensions button allows you to toggle the display from Service Groups to Extensions. The monitoring options discussed above work in a similar method for Extensions, both for Primary and 2nd Lines.

The license information at the bottom of this window displays the number of extensions being monitored and your licensed capacity. If you need to exceed your licensed capacity, you will need to purchase additional licensing.

### 1.3.9. ANI/DNIS Groups

The ANI/DNIS Groups option, found under the Tools menu, lets you define the ANI/DNIS groups that will then be available for use in your Service Group reports.

ANI stands for Automatic Number Identification, which in OnTraQ refers to the phone number of the calling party in a Service Group call. DNIS stands for Dialed Number Identification Service, which in OnTraQ refers to the phone number dialed to reach the Service Group.

You don't need to define ANI/DNIS Groups, but it does give you a way of subdividing the calls that come into your organization for tracking purposes.

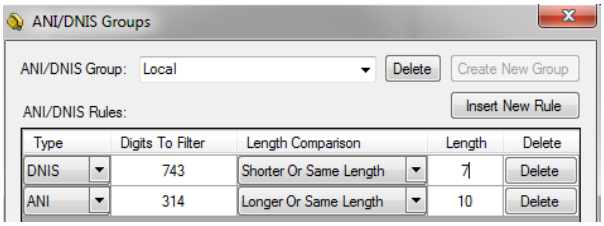



*Figure 11: The ANI/DNIS Groups window*

To create an ANI/DNIS Group, type the name of the group you wish to create in the ANI/DNIS Group field and then click Insert New Rule. A dialogue box will pop up asking you to confirm the creation of the new group. Select Yes. The group is now created.

A blank row has also appeared in the ANI/DNIS Rules display. Now, you can add ANI and DNIS rules that will track specific kinds of calls and callers for this group.

Under the Type heading, select either ANI or DNIS from the drop-down menu. Under Digits to Filter, enter a string of digits (e.g. area code) that will match what the ANI or DNIS phone number starts with.

Use Length and Length Comparison to enter rules for the length of the phone number. For example, if you have entered an area code in the Digits To Filter field, you might set the Length field to 10 digits and the Length Comparison field to Longer Or Same Length. By doing so, phone numbers that are not within the area code, but begin with these digits (e.g. internal, local) would be filtered out. In the example above, for instance, a call from extension 3144 would not be accidentally lumped in with calls from the area code 314.

To add additional rules, click on Insert New Rule.

When you have finished creating the group, click Apply at the bottom of the ANI/DNIS Group screen. You may then exit the screen, or click Create New Group to add another new ANI/DNIS group.

Use the Delete column to delete a rule. To delete an entire ANI/DNIS Group, use the Delete button to the right of the ANI/DNIS Group field.

Use the ANI/DNIS Group drop-down menu to select groups for editing.

### 1.3.10. Transaction Codes

The Transaction Codes option, found under the Tools menu, lets you define the Transaction Codes that OnTraQ will display in the Transaction Code report.

You define the codes, in the form of the digits your agents enter to designate calls, and assign labels to each code. OnTraQ then matches the codes you defined to the codes it sees in the data coming over from the switch.

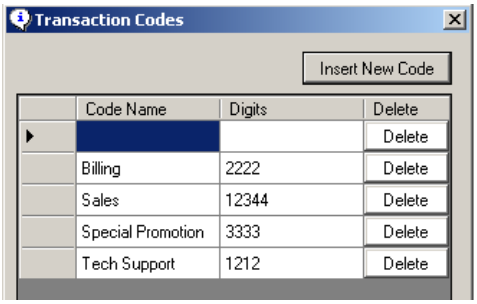



*Figure 12: Transaction Codes*

To define a Transaction Code, click on Insert New Code. A blank row will display. Enter a name for the code in the Code Name column and then enter the digits that correspond to the digits your agents use when assigning that code to a call.

### 1.3.11. Custom Routing

Custom Routing, found under the Tools menu, supports integration to a customer-specific database via an ODBC Connector. The integration supports a lookup to route calls to a specific Service Group or agent based on the incoming ANI. Please contact Impact Technologies Customer Support for additional information.

### 1.3.12. Number Translations

The Number Translations option, found under the Tools menu, allows you to add digits to ANI and DNIS numbers for display purposes. For instance, you can expand a four digit dialing scheme to be displayed as 7 or 10 digits by prepending the NXX or NPANXX, respectively.

## 1.4. Maintaining OnTraQ servers

During implementation, OnTraQ was configured to connect to your switch(es). Should you need to change any of this configuration information, select the File – Configure OnTraQ Servers option. The OnTraQ Servers window displays.

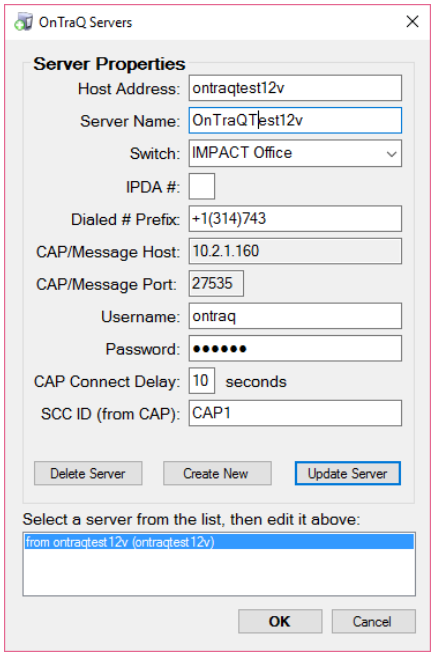



*Figure 13: OnTraQ Servers*

To edit existing server information, double click on the server displayed in the bottom of the window. The fields display the server configuration information. To change the information, edit any of the fields and then select the Update Server option.

- Host Address – the IP address (IPV4 only) or Computer Name of the OnTraQ server
- Server Name – any descriptive name you want to give it
- Switch – the Traffic Analyst switch
- IPDA # - Only applicable if the OnTraQ server directly connected to IPDA, the IPDA number. An IPDA is a remote switch access point connected to the switch via IP. It can act like an independent switch.
- Dialed # Prefix – the number used to dial into the switch (Please note only applicable for OpenScape/HiPath 4000. As this is a phone number

you are entering, you do not need to include a trunk access number, such as a 9.) The format you must use is:

Single area code: **+1(area code)prefix** For example: **+1(314)743**

Multiple area codes with 10-digit extensions: **+1**

- CAP/Message Host – IP address of the CAP Server for OpenScape/HiPath 4000
- CAP/Message Port – IP port for the CAP Server for OpenScape/HiPath 4000
- Username – this must match the username on the CAP server
- Password – this must match the password on the CAP server
- CAP Connect Delay – the time that OnTraQ waits before attempting to connect to the CAP server. The default is 60 seconds. Applicable only for OpenScape/HiPath 4000.
- SCC ID (from CAP) – SCC configured in CAP.

To delete the server, select the Delete Server option.

To copy the server, select the Create New option and then edit the information.

## 1.5. Custom Agent States

OnTraQ gives you the ability to define custom agent states for when agents are in Work or Unavailable states. Only Administrators have the ability to create and edit custom states.

Custom Agent States allow you to drill deeper into Current and Historical Reports, as well as providing you with the greater understanding of what agents are doing when they are, for example, in an Unavailable state for an hour, or a Work state for two hours.

### 1.5.1. Creating Custom Agent States

To create a custom agent state, click on the Tools dropdown menu and select Custom Agent States. The Custom Agents States window will display. Click “Add State” and a new row will appear and be highlighted. Choose either Unavailable or Work from the State dropdown.

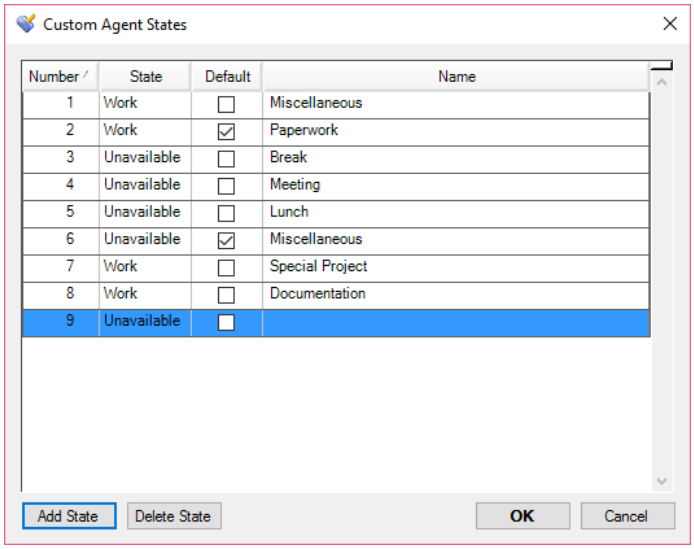



*Figure 14: Custom Agent States*

Next, choose a Name for this custom state. Remember to choose a name that describes what agents in this state are doing.

Finally, if you would like to mark a custom agent state as the Default (i.e. the state an agent is automatically placed in when their ACD line is set to Unavailable or Work) simply check the Default box.

Note: When utilizing Custom Agent States, the administrator must assign one Work and one Unavailable state (assuming they are creating both) as the default, so the system knows which one to set in the automatic assignment case. If Custom Agent States is not being used, the preexisting Work and Unavailable states are already defaulted.

When you are done creating a custom agent state, click OK for the changes to take effect.

Note: You do not need to specify whether a custom state is an Unavailable or Work state in the Name field. The Activity Log and Reports pages automatically concatenate the State and Name (e.g. Work – Special Project). The Work and Unavailable columns in the Agent Team Display have State fields that indicate custom states.

### 1.5.2. Editing Custom Agent States

You may edit Custom Agent States very easily by going to the Tools – Custom Agent States option. However, we suggest that you avoid making major changes to custom states that already exist, because this can affect data in Historical Reports.

If you wish to edit a custom state, access the Custom Agent States window and click on the field you would like to change. This is particularly useful in the case of fixing typos or adding detail to a custom state. For example, let's say you want to add a second Work – Special Project state. You may wish to edit the Name of the first custom state to be Special Project 1, and when you create the second custom state, you could label it Special Project 2.

Unless completely necessary, we recommend not changing the State field for custom states.

## 1.6. Distributing Reports: The OnTraQ Report Viewer

When your users create OnTraQ reports, they can distribute the reports to others in your organization who do not have the OnTraQ client installed through four different methods:

- The report output can be saved in an Excel spreadsheet format (.xls, .xlsx).
- The report can be saved in Adobe Acrobat format (.PDF).
- The report can be saved in XML Paper format (.xps).
- The report output can be saved in a native OnTraQ report format (.otr).

If users save the output in an Excel, XML, or PDF format, it's simply a matter of distributing the saved file to anyone who wants to view it in that format.

If users save the output in OntraQ's native format, others in your organizations will need the OnTraQ Report Viewer to view the report file. This is a standalone report viewer that is free to download from Impact Technologies' website at http://www.impacttech.com/OnTraQSupport/.

Once the Report Viewer is downloaded and installed, it creates a desktop icon. You can start the Report Viewer by double-clicking the desktop icon or right-clicking it and selecting the Run option. Once started, you can open an OnTraQ report from the File menu, though you will need to know the location of the file you want to open.

An alternative method of starting the Report Viewer is to double-click the OnTraQ report file you want to view. If the Report Viewer is installed, double-clicking the report file will open the Report Viewer and display the report file.

# Section 2: User Tasks

This section discusses some of the ways in which you can use OnTraQ on a day-to-day basis in your organization.

OnTraQ is extremely flexible in the way in which you can view the information it tracks. There isn't a right or wrong way to view this information, so think of this section as offering some guidelines. To really get the most use from OnTraQ, determine what information is most important and build your OnTraQ displays around that goal.

## 2.1. Getting Started and Basic Concepts

OnTraQ organizes your switch data into Service Groups and Agent Teams. You can even arrange several groups into a Service Group Pool. In the same manner, you can create new Agent Teams and group them together under other teams.

Also note that these groups and teams can appear in more than one place in OnTraQ. For example, you may want to have quick access to a group dedicated to after-sales support. You might group them under both a Sales Service Group Pool and a Customer Service Service Group Pool so you can access their data quickly, no matter what Service Group Pool you are viewing.

The following pages detail how to access OnTraQ and build and use your groups and teams.

### 2.1.1. Logging In

To log in to OnTraQ, click Start – Programs - OnTraQ. The OnTraQ Supervisor Login window displays.

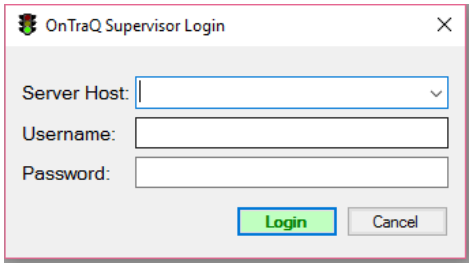



*Figure 15: OnTraQ Supervisor Login window*

Enter the IP address of an OnTraQ server and your Username and Password.

The IP address should be listed in the drop-down list. If it isn't listed, you can enter it directly by typing it.

The default username is **traffic** and the default password is **impact**.

After entering the information, click Login to start OnTraQ. The OnTraQ window displays. It will initially be blank, but the screen layout you have when you log out of OnTraQ will be reproduced when you log in again.

### 2.1.2. Logging Out

To log out of OnTraQ, go to File – Logout. The Confirm Logout window displays:

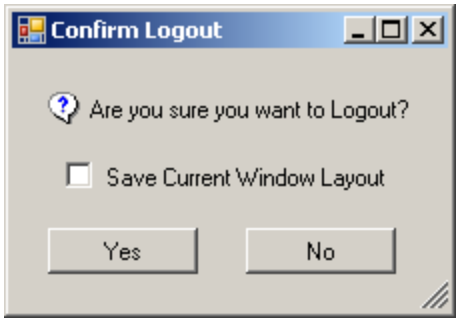



*Figure 16: The Confirm Logout window*

If you have made any changes to the default layout, you can save those changes so that next time you log in, the OnTraQ display will be as you left it. To save those changes, select the Save Current Window Layout checkbox.

Note: Multiple historical reports cannot be saved to the window layout.

### 2.1.3. OnTraQ's Dashboard

The window OnTraQ operates in is referred to as a Multiple Document Interface, or MDI. Essentially, this means that OnTraQ consists of a main window which is subdivided into smaller paned windows. Each pane is a separate display. Since Panes can be overlaid on top of one another, panes that are behind other panes will be accessible through tabs.

For our purposes, we will refer to this main OnTraQ window as the "Dashboard." This dashboard can consist of multiple window panes.

OnTraQ is very flexible in the way it displays its information. Two OnTraQ users may choose to view information differently, and the result may be two OnTraQ dashboards that look very dissimilar.

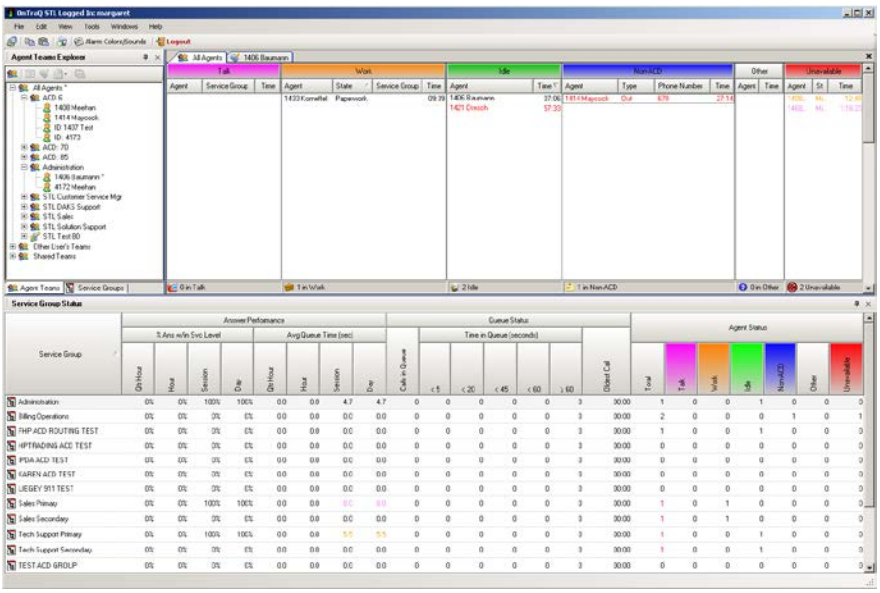


*Figure 17: OnTraQ's Dashboard with several panes displayed*

## 2.1.4. Viewing Panes and Wallboard Displays

OnTraQ information is always displayed in a pane, though you can make a pane into a separate window outside of the OnTraQ dashboard.

The following sections describe the different options you have for working with OnTraQ's panes.

### 2.1.4.1. Right-Click Options with Panes

If you right-click with your mouse on many objects in OnTraQ you will see a menu of options. Depending on the object you right-click on, the menu will contain different options. If you click on the title bar of a pane, you may get the following options:

- Dockable
- Hide
- Floating
- Auto Hide
- Move to Next Tab Group/Previous Tab Group
- New Horizontal Tab
- New Vertical Tab

#### 2.1.4.1.1. Docking Panes

If you choose to Dock a pane, that will lock the pane in an open position somewhere inside the OnTraQ dashboard. If the pane was floating, you can move the pane with the mouse and see an indication of where it will dock when you release the mouse button.

#### 2.1.4.1.2. Hiding Panes

If you hide a pane, that pane disappears. This option is the same as closing the pane.

#### 2.1.4.1.3. Floating Panes Outside the Dashboard and Wallboard Displays

You can float a pane outside the main OnTraQ dashboard. When you float a pane, you can then drag it outside the main OnTraQ display and it will then act as a separate window.

This is handy for some panes, such as speedometers, histograms, and other data displays. You can float one or more of these outside the OnTraQ dashboard and then minimize the dashboard to free up desktop space on your monitor.

Floating a pane outside the OnTraQ dashboard can be especially helpful if you want to display it on a wallboard. OnTraQ supports multiple computer monitors, you can float a pane and make it into a separate window, and then drag it into a wallboard monitor.

#### 2.1.4.1.4. Auto Hiding Panes

You can Auto Hide a pane, meaning that the pane will not display when the mouse pointer is moved away from the pane. When a pane is Auto Hidden, you can view it again by hovering over the pane name displayed in the window frame.

You can Auto Hide a pane via the right-click options, or you can also click on the thumbtack icon in the upper right corner of the pane to Auto Hide it. This thumbtack icon is a toggle, so clicking it again will turn off Auto Hide.

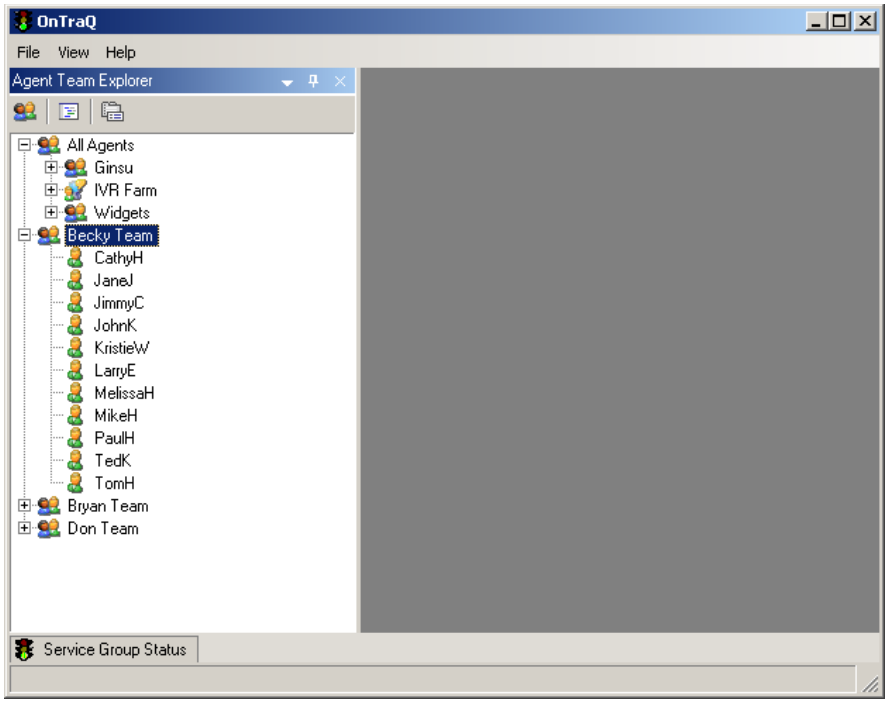



*Figure 18: Service Group Status pane with Auto Hide option*

In the example above, the Service Group Status pane is Auto Hidden. You would hover over the title in the lower left corner to display the Service Group Status pane again.

#### 2.1.4.1.5. Closing Panes

If you choose to close a pane, the pane disappears. This is the same as hiding the pane.

#### 2.1.4.1.6. Move to Next Tab Group/Previous Tab Group

If you have enough panes open so that they are layered and accessible via tabs, you can move a pane from one tab group to the next tab group on the immediate right. You can also then move the pane back to the original tab group with the Previous Tab Group option.

#### 2.1.4.1.7. New Horizontal and New Vertical Tab

If there is more than one group open in a paned display, you will have the option to display that group in a new horizontal or vertical pane within the pane. In other words, these options split the selected pane into two horizontally aligned panes or two vertically aligned panes, depending on your selection.

#### 2.1.4.1.8. Tabbing Between Panes

If you have multiple panes open, sometimes they are layered and you only see the pane on the top layer. The lower layered panes will each have a tab that allows you to access the pane. Simply click the tab to bring that pane to the top layer.

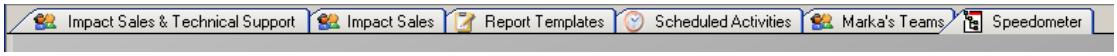



*Figure: 19: Tabbing Between Panes*

If there are enough panes open, you will be able to access tabs for panes you cannot see via arrow buttons that scroll the display of tabs left and right.

#### 2.1.4.1.9. Dragging and Dropping Objects

On many of the OnTraQ panes there are data objects you can move by dragging and dropping them. For example, you can change the order of report columns by dragging and dropping them to rearrange the report.

## 2.2. Explorers

The upper left corner of the OnTraQ dashboard is reserved for OnTraQ's Explorers. The Explorers are designed to work just like the Windows Explorer you are familiar with. They list objects in a tree format, and you can select the objects you want to view. When you open explorers, an asterisk will appear next to the opened object until you close it.

There are two explorers you can access from the OnTraQ View menu, Service Groups Explorer and Agent Team Explorer. Once you have displayed these explorers, you can toggle between them using tabs in the explorer pane.

To search either explorer tree, type the text in the box in the Explorer toolbar that you wish to search for in the tree and hit the arrow ( ). The first occurrence of the text will be highlighted in the tree. Repeated hits of the arrow will continue to find the next occurrence until the last occurrence is highlighted. The search is not case sensitive.

### 2.2.1. Service Groups

Route Control Groups for Unify are imported from the switch and displayed as Service Groups in OnTraQ. You are not limited to groups you import from the switch, however. You can create Service Group Pools, which allow you to group two or more Service Groups together.

You can right-click on a Service Group and see a Properties window for it.

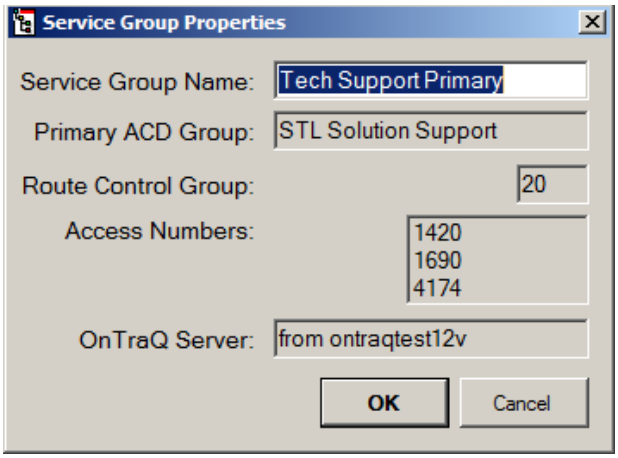



*Figure 20: Service Group Properties window*

This Properties window displays information about the Service Group as it is defined on the switch. You can edit the name only. Note that the Primary ACD Group is the first ACD group in the route steps for the Service Group and is important is it drives the data you will see in real-time displays and historical reports.

#### 2.2.1.1. Creating Virtual Groups

OnTraQ allows you to organize your Service Groups into Service Group Pools. For example, you might have a dozen Service Groups total, with four dedicated to sales, six dedicated to customer service, and two dedicated to administrative use. You could create a Service Group Pool named Sales and include all the Service Groups dedicated to sales, and then do the same with a Customer Service Service Group Pool and an Administrative Service Group Pool.

You organize your Service Groups with Service Group Explorer, a pane on the OnTraQ window. Below is an example. The All Service Groups tree has been expanded, and beneath that tree are user-created Service Group Pools.

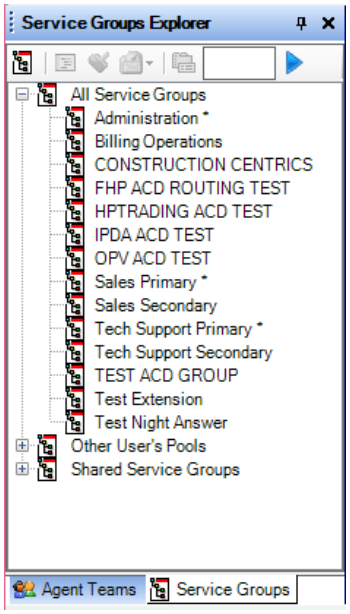



*Figure 21: Service Groups Explorer*

To create a Service Group Pool, right-click in the Service Groups Explorer pane and select the "Create Service Group Pool" option. A new Service Group Pool will be created. You can also click on the Service Group icon in the upper left corner of the explorer to create a new Service Group.


*Figure 22: Newly created Service Group Pool*

Type the name of the new Service Group Pool to replace the default text that is highlighted. After you type the new name, the Add Service Groups and Sub-Pools window will display.

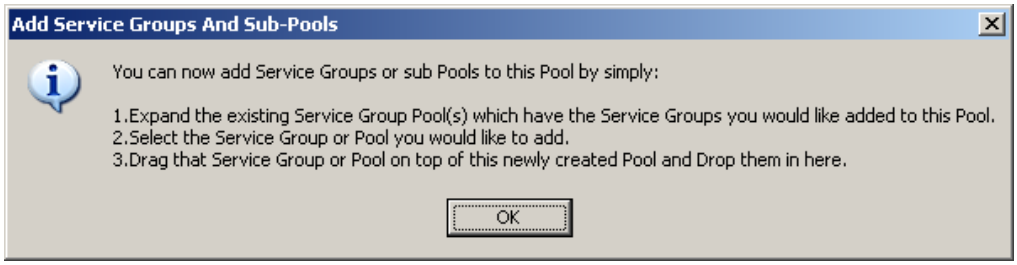



*Figure 23: Add Service Groups and Sub-Pools window*

To add Service Groups to your new Service Group Pool, find the groups in the Service Groups Explorer tree and drag and drop them onto the new group. You may have to expand some Service Group Pools to find the groups you want.

You can also drag and drop existing Service Group Pools onto the new pool as a quick way of adding multiple Service Groups.

You can also create Service Group Pools that are comprised of Service Groups from different telephone switches. These “cross-switch” Pools can only be used in historical reports and not in real-time displays.

### 2.2.1.2. Properties

You can edit Service Group Pools. By Right-clicking on the Service Group Pool name you will get a menu of options.

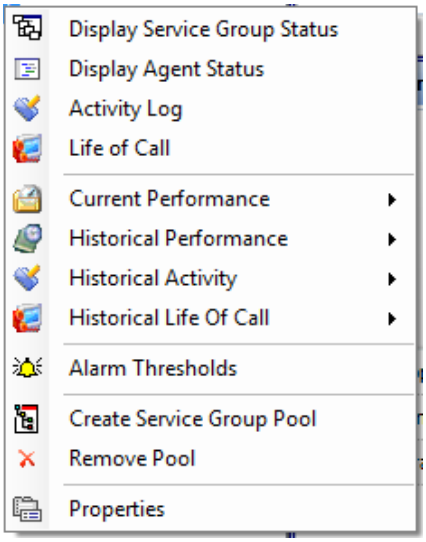



*Figure 24: Modifying Service Group Pools*

Many of these options are associated with viewing data for the Service Group Pool. The options that let you modify the Service Group Pool include Alarm Thresholds, Remove Service Group Pool, and Properties.

The Alarm Thresholds option is discussed later in this document.

Remove Pool lets you delete the Service Group Pool.

Properties displays the Service Group Pool Properties window. If you are displaying Properties for a newly created Service Group, you will receive some instructions for adding new members to the Service Group Pool.


*Figure 25: Service Group Pool Properties*

Use this window to change the Service Group Pool name and to either restrict access to it or make it viewable by all OnTraQ users. Select You to restrict access or Everyone to make it viewable by all. Note that the Accessible By fields only display for Service Group Pools you have created.

### 2.2.2. Agent Teams

OnTraQ imports ACD Group information from your switch to get the Agent information it displays. OnTraQ will then display the ACD Group information in the form of individual Agent Teams, where an Agent Team corresponds to an ACD Group on the switch.

You can organize this Agent information into Agent Groups, much like how you organize Route Control Groups into Service Group Pools. The following is an example of the Agent Teams Explorer pane displaying Agent Teams and Agents.

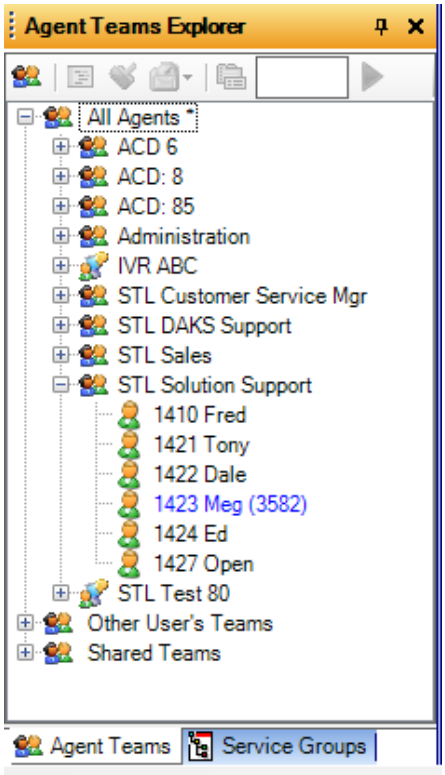



*Figure 26: Agent Teams Explorer*

You can see examples of user created Agent Teams, such as Sales and Customer Service (expanded). You can organize your agents however you want, and agents can belong to multiple teams. For example, you might have some newly hired agents handling sales calls. You can have these agents in both the Sales Agent Team and create a new team called Sales New Agents and place them in this new team to more quickly view their performance.

Note that when an agent is logged in, the agent entry in the tree will be in blue font and include the extension number in parenthesis after the name/ID. In example above, Meg is logged into extension x3582.

### 2.2.2.1. Adding Names to Agent IDs

When your agent information is imported from the switch, it does not include the names of the agents since this information isn't stored on the switch. You see the ID number.

You can add names to these ID numbers so that you can more easily understand the agent information that is being displayed in OnTraQ. You may find it easier to understand that ID: 1421 is also an agent named Dresch for example.

We recommend that your center adopt a naming convention so that all your OnTraQ users will apply similar conventions when renaming Agent IDs.

#### 2.2.2.1.1. How to Edit an Agent Name

To rename an agent, find the agent ID on the Agent Teams Explorer tree and right-click on the ID. A list of options displays.

Select the Properties option. The Agent Properties window displays.

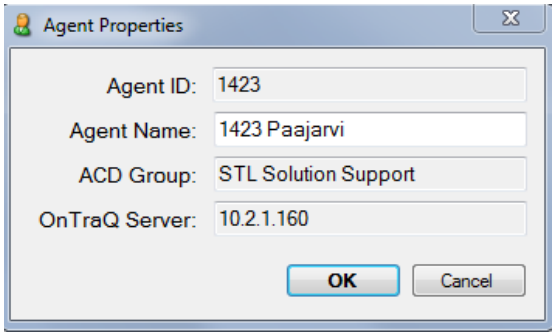



*Figure 27: Agent Properties window*

You can view the agent status on this window, but you can also rename the agent by entering an Agent Name.

Type a new name in the Agent Name field. Please note that while you can retain the ID number, you must delete the colon. You cannot use colons in the Agent Name field (even though by default one is displayed since this is how the information is imported from the switch).

For example, if agent 1423 is named Paajarvi, you could delete the current Agent Name…

**ID: 1422**

…and enter the new Agent Alias as follows:

**1423 Paajarvi**

Thereafter on the Agent Teams Explorer tree, agent 1423 will display as 1423 Paajarvi.

### 2.2.2.2. Creating Virtual Teams

To create a new Agent Team, right-click in the Agent Teams Explorer pane and select the Create New Team option. A new Agent Team will be created and display in the Agent Teams Explorer tree.


*Figure 28: Creating a new Agent Team*

Type the name of the new Agent Team to replace the default text that is highlighted. After you type the new name, the Add Agents and Sub-Teams window will be displayed.

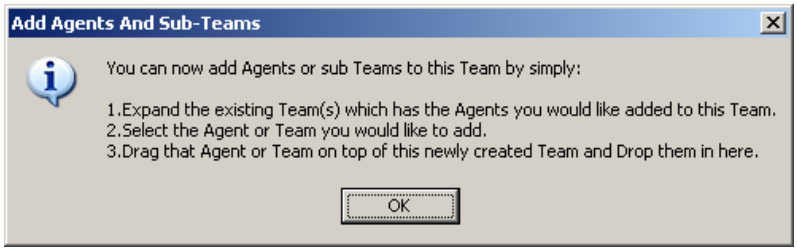



*Figure 29: Add Agents and Sub-Teams*

To add Agents to your new Agent Team, find the agents in the Agent Teams Explorer tree and drag and drop them onto the new team. You may have to expand some Agent Teams to find the agents you want.

You can also drag and drop existing Agent Teams onto the new team as a quick way of adding multiple Agent Teams to the new team.

You can also create Agent Teams that are comprised of Agents from different telephone switches. These “cross-switch” Teams can only be used in historical reports and not in real-time displays.

### 2.2.2.3. Properties

You can edit Agent Teams by right-clicking on the Agent Team name to get a menu of options.

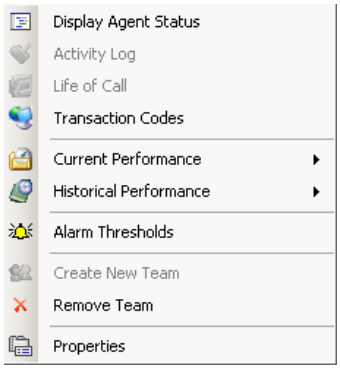



*Figure 30: Modifying Agent Teams*

The options that allow you to modify the selected team are; Remove Team and Properties.

Remove Team deletes the team. Note that the team is deleted, but the agents are not.

Properties allows you to edit the Team Name and to change the Team Type. There are three Team Types, ACD Group, IVR Farm, and Multi Agent User. Since agent information is imported from the switch, only groups defined on the switch as ACD Groups and IVR Farms will appear as that team type in OnTraQ. You cannot create a new Agent Team and designate it as an ACD Group or IVR Farm. Likewise, since Multi Agent User teams are specific to OnTraQ, only new teams you create within OnTraQ can receive this designation.

You can also use the Agent Team Properties window to either restrict access to this team or make it viewable by all OnTraQ users.

ACD Groups are simply agents that belong to the same ACD Group. IVR Farm are for the Agent IDs that correspond to your automated answering systems. There are fewer call states associated with IVR Teams.

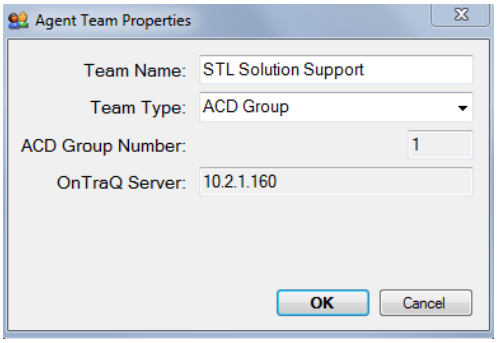



*Figure 31: Agent Team Properties for a standard Team*

Note that you can see the OnTraQ server name on this display.

Multi Agent Users are a special Team Type that help you keep track of agents who tend to float from group to group.

### 2.2.2.4. Defining Multi-User (Floater) Agents

You can also create an Agent Team that contains agents who float from group to group on an as-needed basis, if your organization supports that kind of agent activity.

Create a team for an individual floater agent. Let's call him Magnus. You create a Magnus Team, designate it as a Multi-User team in Properties, and then you can assign Magnus' different Agent IDs to this team. In other words, if Magnus floats from Sales to Customer Service to Technical Support and has a unique Agent ID for each group you can save yourself time trying to find him. You can do this by putting each of Magnus' Agent IDs into his Magnus Team, and then you can simply look at the Magnus Team and see what group he is currently working in. It's easier than looking for Magnus in the Customer Service team, then the Tech Support team, and finally finding Magnus in the Sales team.

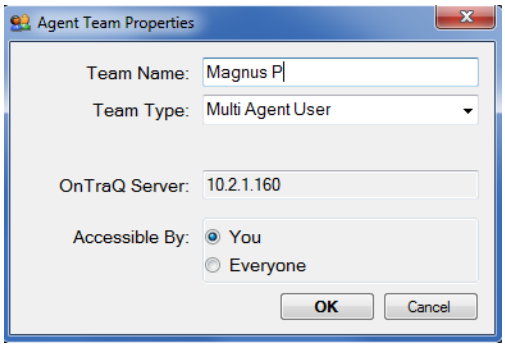



*Figure 32: Agent Team, Floaters*

## 2.3. Creating Cross-Switch Pools and Teams

You can also create Service Group Pools and Agent Teams that are comprised of Service Groups and Agents from multiple switches. The data you can see for these cross-switch Pools and Teams is only historical data, however, and won't be available until the next day after you create a new cross-switch object.

To create a cross-switch Pool or Team, you first need to log into both of the switches you want to draw from. Your switches are listed under the File menu. The current switch you are logged into will be displayed with a checkmark. Simply select the second switch and you will be logged into it as well, and then the Agent and Service Group selection trees will display objects from both switches.

Next, create a new Pool or Team. The following window will display:


*Figure 33: The Select OnTraQ Server window*

Use the drop-down list and select the Enterprise (All Servers) option, and this allows you to populate your new Pool or Team with objects from all the switches you are currently logged into.

The Properties window for the new Pool or Team you create will display the server name as Enterprise (All Servers). You can also define this Pool or Team to be accessible to everyone or only to you.

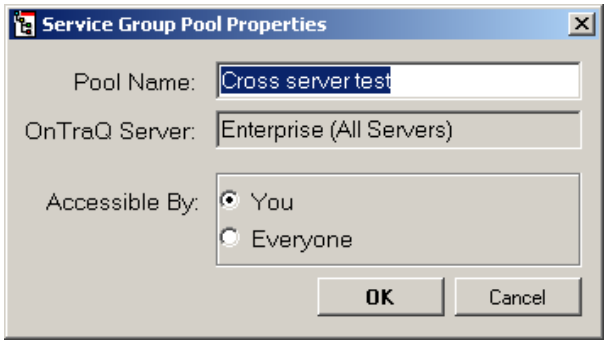



*Figure 34: The Properties window for an Enterprise (All Servers) Pool or Team*

Note that cross-switch Pools and Teams can only be used to display historical data, and that data only becomes available the day following the creation of the Pool or Team.

## 2.4. Defining Alarm Thresholds

You can define Alarm Thresholds for Service Groups, Agent Teams, and individual agents. Alarm Thresholds allow you to define the color in which data displays and the alarm sound used to indicate an alarm. The colors and sounds each indicate a different alarm state.

If an entity – that is, a Service Group, Agent Team, or agent – doesn't have Alarm Thresholds defined, it will inherit the Alarm Thresholds defined for a parent entity.

For example, you can have several Service Groups associated with sales activities all grouped under a Sales Service Group Pool. You could define Alarm Thresholds for each of these Service Groups, or you could leave the definitions blank and define Alarm Thresholds for the Sales Service Group Pool. All the Service Groups under the Sales Service Group Pool would then inherit its Alarm Threshold definition.

Once an entity's Alarm Thresholds are defined, those definitions will be static and will not change even if the entity is moved to a different group with different Alarm Thresholds. For example, if an agent belongs to Agent Team A and inherited Alarm Thresholds from that group, that agent's definitions will remain in place if the agent is moved to Agent Team B. You will have to manually change those definitions.

(Service Groups cannot have their own definitions and still inherit parent definitions. You need to remove definitions if you want them to inherit definitions from a parent entity.)

### 2.4.1. Service Group Alarm Thresholds

Select the Tools – Alarm Thresholds option. The Alarm Thresholds window displays. Make sure the Service Group Pool tab is selected.

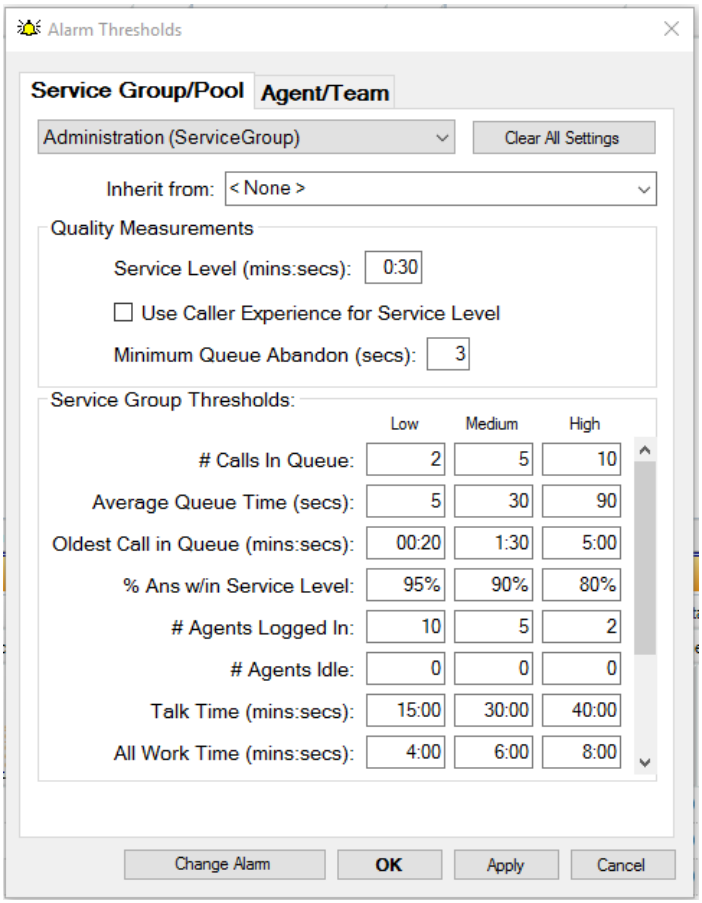



*Figure 35: Alarm Thresholds, Service Groups*

To have the Alarm Thresholds be identical to another group's settings, select the group you wish to copy with the Inherit From drop-down list. The Alarm Thresholds settings from that group will be copied to this window and you will see them displayed in pink, to indicate that they are inherited settings. To have the settings inherited, click on the Set Pool Members to Inherit these Settings button.

You can define the Service Level and the Service Group Thresholds on the Service Group Pool tab. (The drop-down list shows the current Service Group. You can select a different Service Group with this list if you desire. This is just a quick way of changing groups you wish to edit.)

Under Quality Measurements, set the following options:

- The Service Level is the maximum time in which you want calls to stay in queue before being answered. It drives the % Answered within Service Level real-time Service Group Answer Performance metrics.

- Check the "Use Caller Experience for Service Level" box to have the "% Calls Answered within Service Level" and "Average Time in Queue"

columns in the Service Level section of the Service Group reports calculated based on the total time elapsed since the call entered the ACD system (caller experience), as a call potentially passes through multiple queues before being answered. If unchecked, the columns are calculated based only on the time the call was in the queue that the call is answered from. Note this setting is applicable per Service Group.

- Minimum Queue Abandon option sets the minimum duration a customer must wait in queue before being counted as an abandoned call. For instance, if set to 3 seconds and caller hangs up after two seconds, the call will not be assigned as an "abandon queue" call but as a "hang up."

The Service Group Thresholds consist of three time bands of Low, Medium, and High. These correspond to the alarm states you want to monitor. You can define Thresholds for…

- # Calls in Queue – the number of calls waiting to be answered
- Average Queue Time – the average time a call waits in queue before being answered
- Oldest Call In Queue – the oldest call still waiting to be answered
- % Ans w/in Service Level – the percentage of calls answered before the service level threshold is reached
- # Agents Logged In – the number of agents logged into the ACD
- # Agents Idle – the number of agents ready to answer a call but not currently working on a call
- Talk Time – the amount of time spent talking on a call
- Work Time – the amount of time spent in after call work (Note: If custom work states are defined there will be an entry for "All Work Time" and then individual entries for all custom states.)

### 2.4.2. Agent Team Alarm Thresholds

You can define different Alarm Thresholds for different Agent Teams. For example, you might want all calls to your Sales Team to be answered more quickly than calls to your Customer Service Team. You can define different Alarm Thresholds for each team to support this.

To set Agent Team Alarm Thresholds, select the Tools – Alarm Thresholds option. The Alarm Thresholds window displays. Make sure the Agent Teams tab is selected.

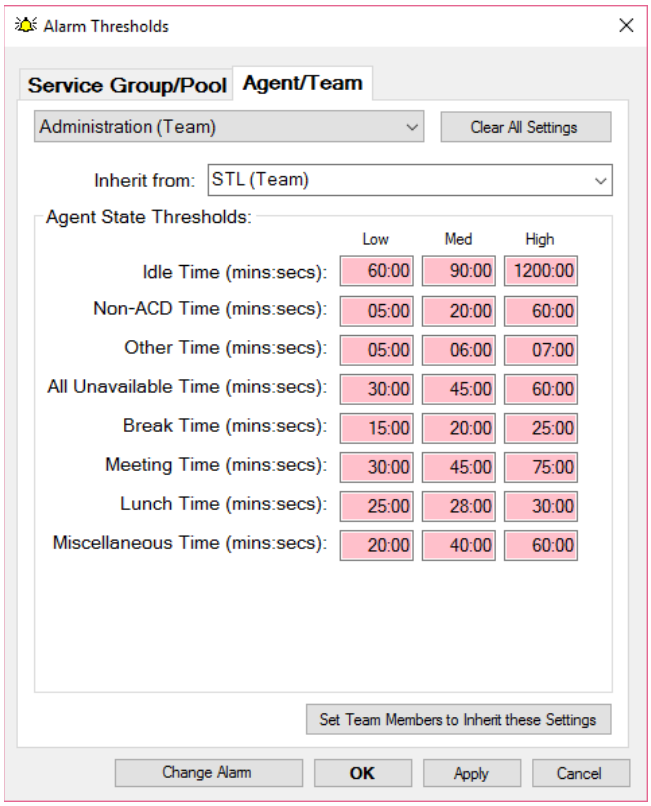



*Figure 36: Alarm Thresholds, Agent Teams*

To have the Alarm Thresholds be identical to another group's settings, select the group you wish to copy with the Inherit From drop-down list. The Alarm Thresholds settings from that group will be copied to this window and you will see them displayed in pink, to indicate that they are inherited settings. To have the settings inherited, click on the Set Pool Members to Inherit these Settings button.

You can define the Agent State Thresholds on the Agent Teams tab. (The drop-down list shows the current Agent or Agent Team. You can select a different Agent or Agent Team with this list if you desire. This is just a quick way of changing Agents or Agent Teams you wish to edit.)

The Agent State Thresholds consist of three time bands, Low, Medium, and High. These correspond to the alarm states you want to monitor. You can define Thresholds for…

- Idle – the time an agent is ready to answer calls but not active on a call
- Non-ACD – the time in which an agent spends on Non-ACD calls
- Other – the time spent in the other state
- Unavailable – the time in which an agent is in the unavailable state. (Note: If custom unavailable states are defined there will be an entry for "All Unavailable Time" and then individual entries for all custom states.)

Another option, Set Team Members to Inherit these Settings, allows you to override any individual Alarm Threshold settings you may have defined for agents in this selected group.

### 2.4.3. Changing Alarm Colors and Sounds

The Alarm Colors and Sounds are defined system-wide for OnTraQ. In other words, you cannot define different Alarm Colors and Sounds for different OnTraQ users. Normally, these are defined by your OnTraQ administrator. For more information on defining alarms, see 1.3.5 Alarm Colors and Sounds.

## 2.5. Status Displays

OnTraQ can display dynamic information that captures what is happening in your center at any given moment through its status displays.

You can display Agent Team Status and Service Group Status for each Agent Team and Service Group you have defined. Further, you can have more than one Status displayed at a time. For example, you could have five Agent Teams displayed and three Service Groups displayed.

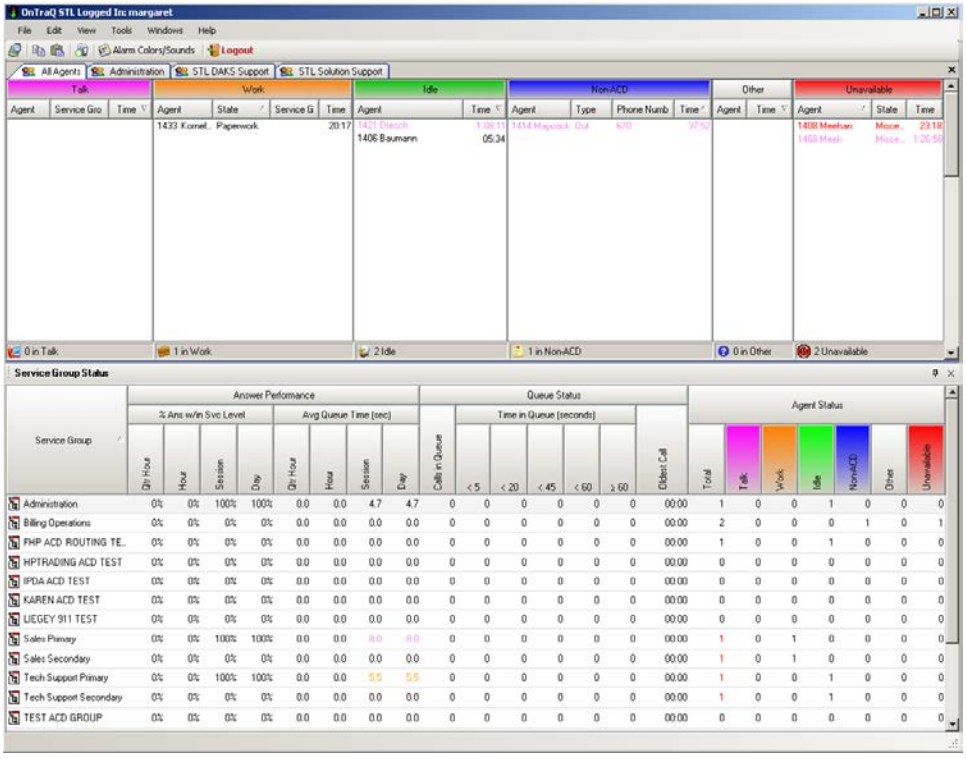



*Figure 37: Status displays in OnTraQ*

In the example above, several Agent Status displays for different Agent Teams are displayed in the top half of the OnTraQ dashboard, and the Service Group Status is displayed in the lower half of the dashboard.

### 2.5.1. Service Group Status

To view the Service Group Status pane, go to Windows – Service Group Status. This displays a pane for Service Groups and Service Group Pools. (The default is to display the Service Group Status pane, but if it's closed for any reason, you can redisplay it.)

The Service Group Pool will show totals for all the Service Groups that belong to the Service Group Pool. You can also see those Service Groups displayed individually in the Status Display as well.

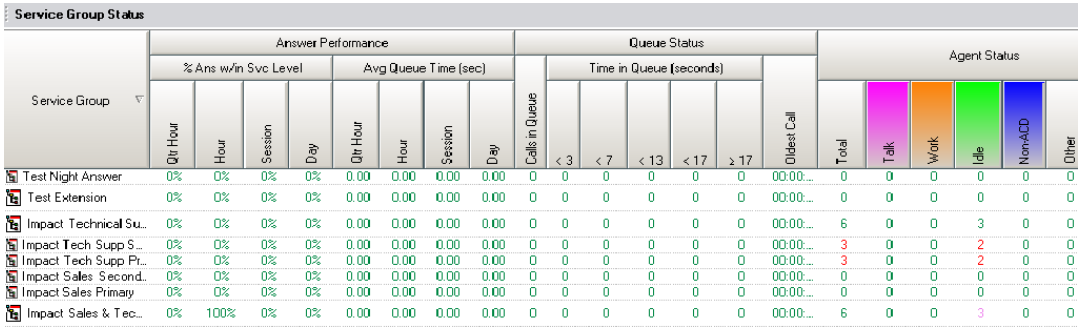



*Figure 38: Detail from the Service Groups status display*

The data that is displayed represents the Alarm Color states your OnTraQ administrator defined. Like other Panes in OnTraQ, you can hide, auto hide, float, and dock the Service Group Status Display.

There are three metrics for Service Group Status you can view. These are discussed below.

#### 2.5.1.1. Metrics

The three metrics you can view are Answer Performance, Queue Status, and Agent Status. These are displayed in the Service Group Status Display. You can choose to hide any of these by right-clicking on either the metric itself or the labeled Service Group area on the left side of the Service Group Status Display.

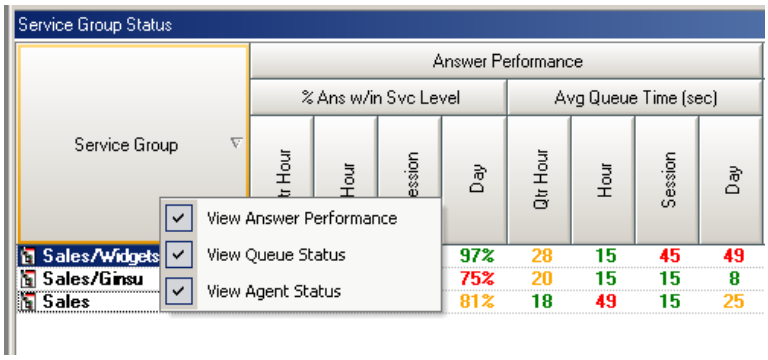



*Figure 39: Selecting the information you want to view*

You can also use this right-click menu to redisplay a metric you have hidden.

When you click on the Service Group column header located on the left side of the Service Group Status display, a small arrow appears to the right of the "Service Group" text. Use this arrow to reorder the Service Group display. Click on it to reverse the order. Click again to revert back to the original order. This option works for all columns in the display.

You can also right-click on the title bar of each metric and choose to hide or redisplay individual metrics. For example, in the Agent Status metric you can right-click and choose to hide the Idle column. In the Answer Performance metric you can choose to hide all of the Average Queue Time data. To redisplay something you have hidden, right-click in the appropriate area and you will get a menu of items you can hide and redisplay.

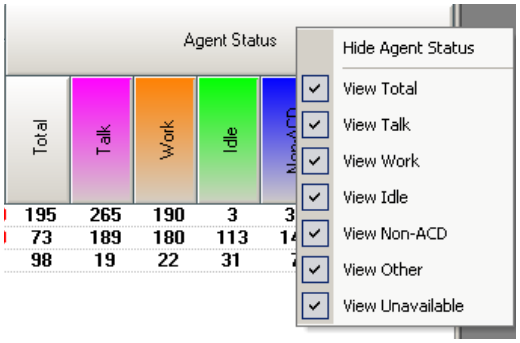



*Figure 40: Hiding columns*

#### 2.5.1.1.1. Answer Performance

The Answer Performance metric defaults to display the percentage of calls answered within the defined service level and the average queue time for calls for each data interval, as shown below. Additional available metrics include average answer time and the number of calls abandoned. The data intervals are Quarter Hour, Hour, Session and Day, with Session hidden as default.

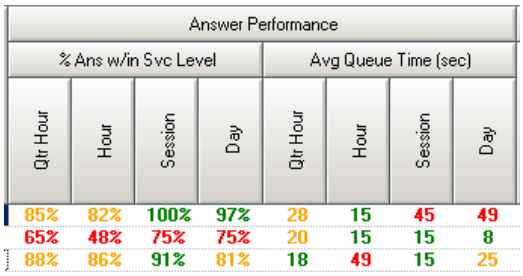



*Figure 41: Answer Performance detail*

The service level target for the percentage of calls answered is defined in System Preferences.

To display the additional metrics of average answer time and abandons, right-click on the Answer Performance heading and click the metric you want to add to the display.

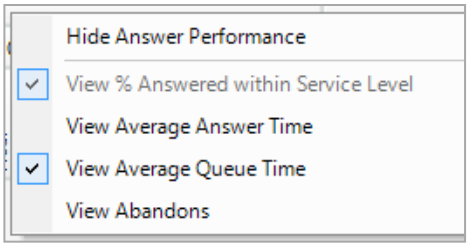



*Figure 41B: Answer Performance Additional Metrics*

#### 2.5.1.1.2. Queue Status

The Queue Status metric displays the current calls in queue and segments them by the time bands your OnTraQ administrator defined for your organization. You will also see the total number of calls in queue as well as the length of time the oldest call in queue has been waiting.

You can right-click anywhere in the Queue Status display to get an option to hide the entire Queue Status display.

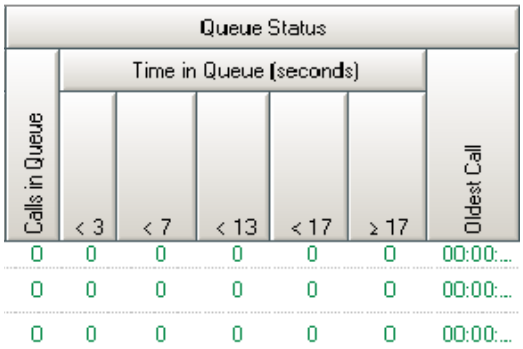



*Figure 42: Queue Status detail*

#### 2.5.1.1.3. Agent Status

The Agent Status metric displays the work state the Service Group's agents are currently in. The colors for the work states do not correspond to the Alarm Colors.

You can see the total number of agents logged in and how many are in the following work states:

- Talk – handling an ACD call
- Work – in after-call or any non-call work state
- Idle – waiting to receive an ACD call
- Non-ACD – on a Non-ACD call
- Other – in the other state such as ringing or off hook
- Unavailable – not available to handle a call

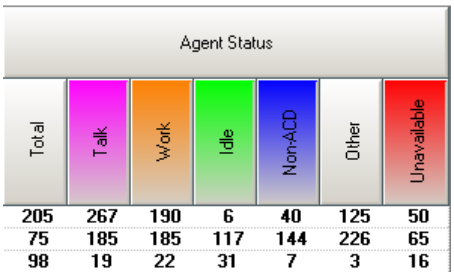



*Figure 43: Agent Status detail*

Talk and after-call work (as a subset of Work) is for any agent who answers an ACD call for Service Group or Service Group Pool. For the other non-call states (including non-call work), only agents in the Primary ACD Group for given Service Group will be included. For Service Group Pools, the non-call states include all agents that can answer calls for any Service Group in the pool.

### 2.5.1.2. Graphical Displays

There are two kinds of graphical displays in OnTraQ, Histograms and Speedometers. Histograms can be single-state or multi-state. Histograms and Speedometers are explained below.

Single-State Histograms will display the selected data item color-coded with the appropriate Alarm Color to represent the alarm state it is in.

Multi-State Histograms display agents and the work states they are in.

Speedometers are like Single-State Histograms. They display the same data in a different format, and if Alarm Colors are applicable for the data item, those are displayed as well.

To display a Histogram or Speedometer, right-click on the data object you want displayed. You will see a menu that lets you choose the kind of display you want.

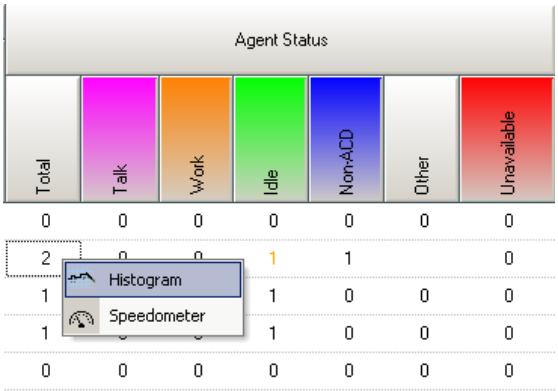



*Figure 43: Right-Click menu for displaying a graph*

These graph types are discussed in greater detail below.

#### 2.5.1.2.1. Histograms

Histograms can be displayed as column graphs or area graphs. After displaying a Histogram, click on the Options button to display the available graphing options. You can select the Interval, Range, and Chart Type.

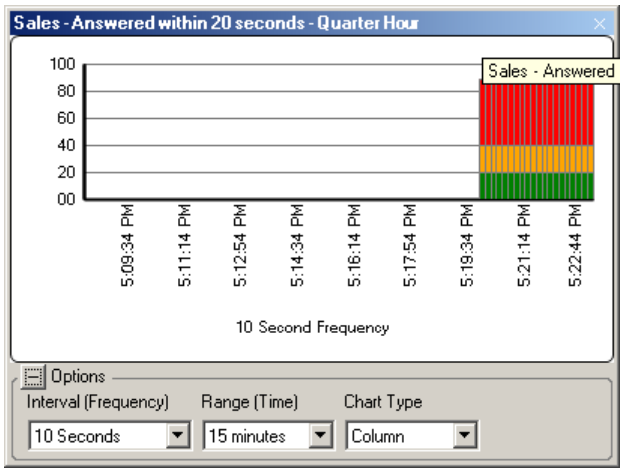



*Figure 45: A Histogram with data displayed in columns*

The Interval will let you select the data frequency that is graphed on the X axis – in other words, what each column or area represents in terms of time. If you select 10 Seconds as the interval, for example, then each bar or column represents 10 seconds worth of data.

Range indicates the time range displayed in the graph. For example, if you select 15 minutes, the entire display will show the most recent 15 minutes of data.

Chart Type lets you select either a Column or Area display.

The colors displayed in the graph indicate the alarm state of t he object being graphed. This is valid only for a normal Histogram. Multi-State Histograms do not show alarm colors.

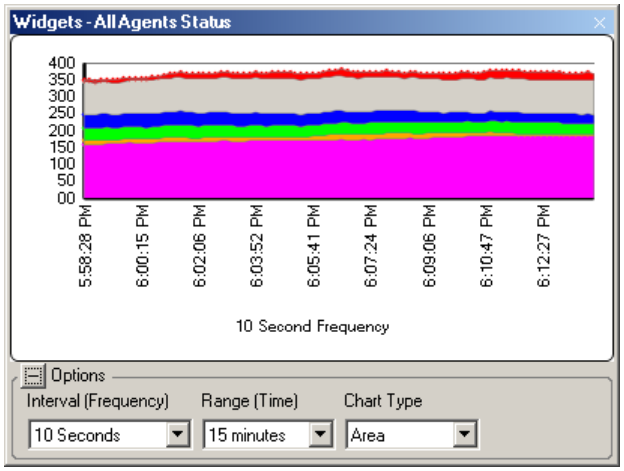



*Figure 46: A Histogram with data displayed as an area*

You can also format the Y Axis information in the chart. To do this, right-click anywhere inside the graph to access the Format Y Axis window.

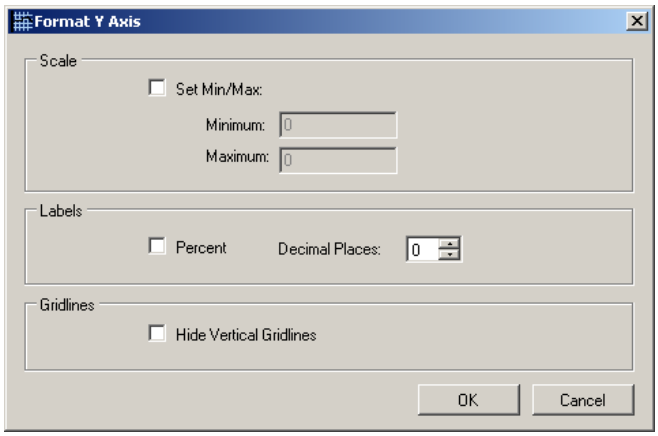



*Figure 47: Format Y Axis window*

This window allows you to set the scale of the Y axis, choose either percent or decimal places for the labels, and hide or display vertical gridlines in the histogram.

### 2.5.1.2.2. Multi-State Histogram

You can elect to display a Multi-State Histogram instead of a regular Histogram. Instead of showing data for one object, a Multi-State Histogram graphs the states for that object. If the object you are graphing is Agent Status, those states will display in the Histogram with a color that corresponds to the Agent Status display within the Server Group Status pane.

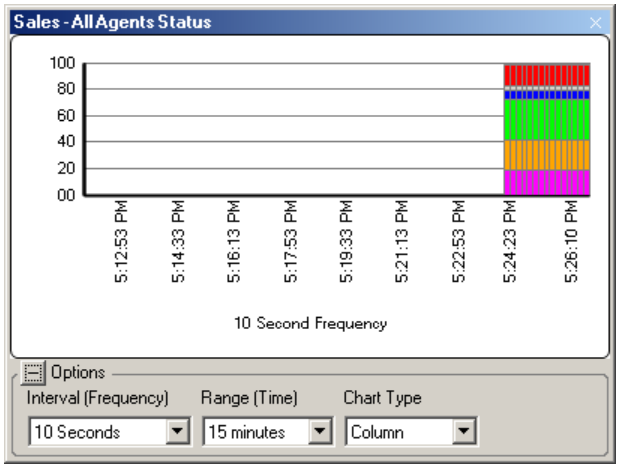



*Figure 48: A Multi-State Histogram display*

The options for Multi-State Histograms are the same as the ones described in the previous section on regular histograms.

#### 2.5.1.2.3. Speedometers

You can choose to display performance information from the Service Group Status Pane in the form of a speedometer. This gives you an “at-a-glance” format. To display information, right-click on the data field for which you want to see the information graphed in the Speedometer format.

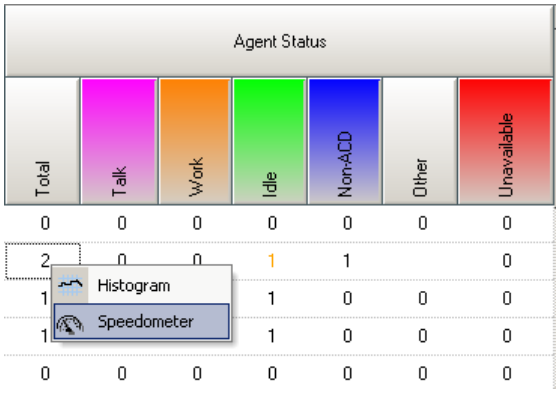



*Figure 49: Selecting the Speedometer option*

After you right-click and select the Speedometer option, the Speedometer Pane will be displayed. You may want to use the Float option to reduce the size of the speedometer display.

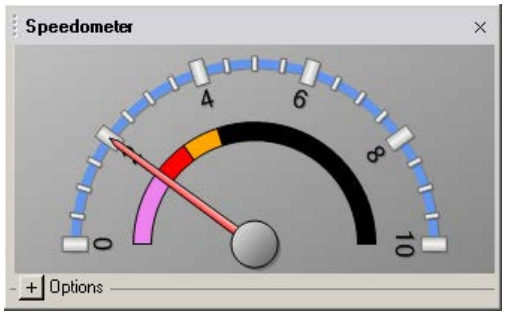



*Figure 50: A Speedometer display*

You can use the Options button to access parameters that set the scale for the Speedometer. The various colors on the arc below the numbered scale represent the Alarm Thresholds.

You can also create more than one Speedometer. In this way, you can monitor multiple data items quickly. You can, for example, create several Speedometers, float them outside the OnTraQ dashboard, and then minimize the dashboard.

## 2.5.2. Agent Status

When you choose to view Agent Team Displays, you can view a display for Agent Teams and Agents. These displays will be arranged via tabs on the dashboard to make for easy switching between the teams and agents you wish to view.

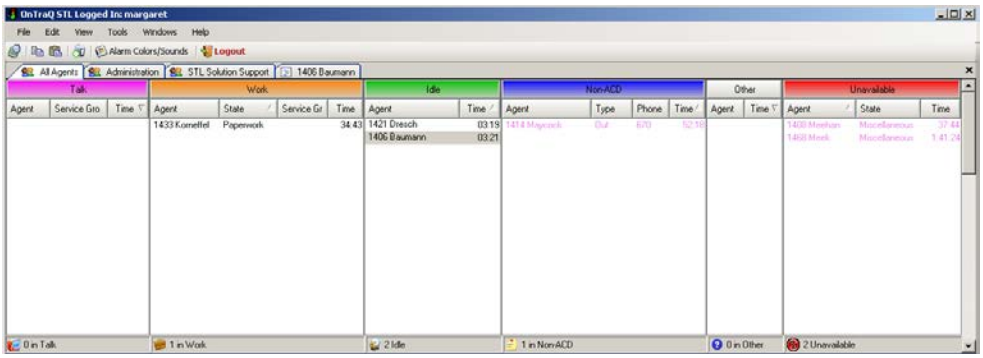


*Figure 51: Agent Teams and Agent displays*

You can view agent status by agent states, so that each agent is displayed in a column representing the state that the agent is currently in. To view this, right-click on an Agent Team in the Agent Team Explorer and select Display Agent Status to see the status of all agents in the Agent Team.

Each column also displays the time that the agent has been in the current state. You can order the display of agents in each state by longest or shortest amount of time in that state by clicking on the arrow to the right of the Time label.

Note: An Agent ID may appear in a different color font if their status is currently in an alarm state (e.g. in an idle state for more than 60 minutes). An Agent ID that is highlighted gray indicates the agent is currently using their second phone line.

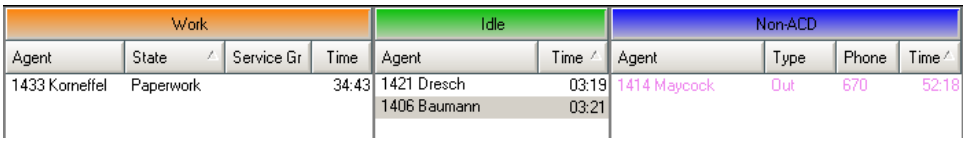



*Figure 52: Detail from the Agent Display*

Agent state columns, as well as the columns within each state, can be hidden and unhidden, depending on what you are interested in viewing. Simply right-click the header of an agent state column and options will be displayed. For example, if you right-click the Non-ACD header, you have the ability to hide the entire Non-ACD column, or you may hide just the Agent, Type, Phone Number and/or Time columns. Columns that are not currently hidden will have checkmarks next to them, while columns that are hidden will not. You may also hide and unhide columns within a state (e.g. Agent, Type, Phone Number, Time) by right-clicking the headers of these columns and selecting what you want hidden or not hidden.

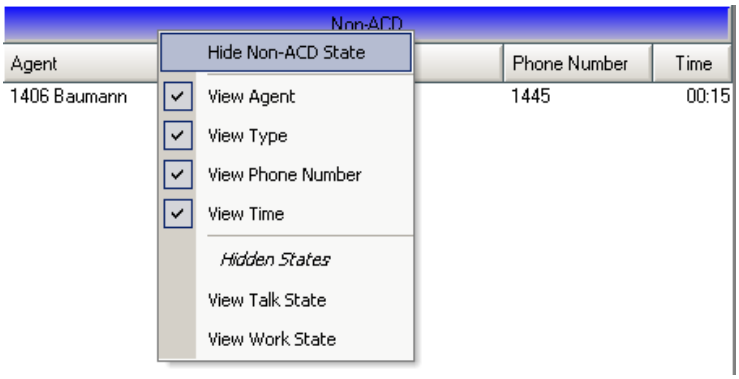



*Figure 53: Detail from the Agent Display*

Notice that agent states that are currently hidden are shown at the bottom of the right-click menu in the *Hidden States* section. To unhide one of these hidden states, simple select it from this menu.

Note: If a window layout with the Agent Team Display has been saved, any columns that are hidden will remain hidden upon logging out and logging back in to OnTraQ. Alternately, if a logged-in user closes the Agent Team Display and then reopens it, it will always be opened in the default view, which includes all agent state columns. However, any time a user logs in to OnTraQ, the Agent Team Display will still be formatted as it was for the saved window layout (with hidden columns, etc.).

## 2.6. Agent State

OnTraQ allows users to view and modify individual agent's states, in addition to being able to view multiple agents' statuses simultaneously. To view individual agent states, right-click on an agent in the Agent Team Explorer and select Modify Agent State. When you display an agent state individually, you see the agent's current state, and you can also change their state from this window.

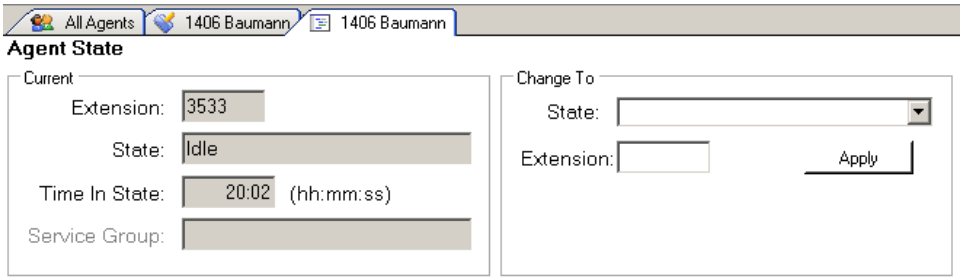



*Figure 54: Modify Agent State display*

### 2.6.1. Modifying Agent State

Once you have accessed an Agent State display, you can view a real-time display of the agent's current Extension, State, Time in State and Service Group. You also have the ability to change the agent's current state by selecting the desired new state from the State dropdown in the Change To section of this window. Default states for agents currently logged on to their phones include

Logoff, Idle, Unavailable and Work. (Note that the Administrator may define additional Work and Unavailable states. See section 1.5 for more details.)

After you have selected the State to change an agent to, press Apply for the change to take effect. If the agent is in a non-call state, you will instantly see the change reflected in the Current fields in the top half of the Agent State window. If the agent is in a call state, the changes will take effect as soon as the call has ended.

Agents that are offline may be logged on through this window as well. To log an agent on to their phone, simply display their Agent State window and select Logon from the Change To State dropdown. Click Apply for the change to take effect.

Note: If you try to logon an invalid extension or one that exists but has no phone plugged in, an error message will appear in the Change To section of the Agent State display shortly after you click Apply.

## 2.7. Activity Log

### 2.7.1. Agent Activity Log

The Agent Activity Log displays information about the selected agent's work status. You can choose to display either current or historical data for three different categories of activities, Agent States, System Events, and Alarm Thresholds. Right-click on an Agent ID (or name if you have renamed IDs) in Agent Explorer to select the Agent Activity Log option.

- 2nd Line Events – any event that utilized an agent's second line during the selected time period.
- Agent States – the history of the states the agent was in for the selected time period.
- Alarms – any alarm thresholds that were breached during the selected time period.
- System Events – any system events that were recorded during the selected time period.

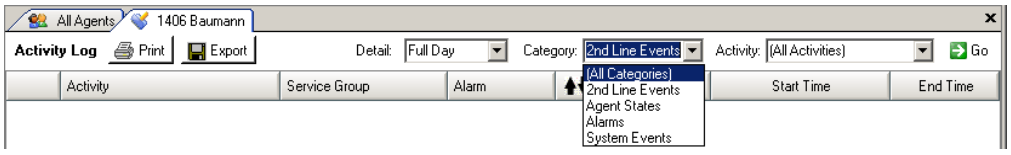



*Figure 55: Agent Activity categories*

Please note that the Activity Log uses the time zone information pertaining to the switch that hosts the Agent Group to determine the time ranges for the last quarter hour, hour, and current session.

#### 2.7.1.1. Using the Agent Activity Log

To display information in the Agent Activity Log, you must select the Detail, Category, and Activity for which you want to display information. These are all drop-down menus that filter the information that will be displayed in the report. Note: You can print any of these displays or export them to Excel using the Print and Export buttons in the upper left corner of the Activity Log pane, respectively.

For the Detail drop-down menu, your choices are Qtr Hour, Hour, Session, Full Day, and Pick Date (to see historical data). The data interval you select will then display with a rolling total that is updated in real-time, unless you selected Pick Date.

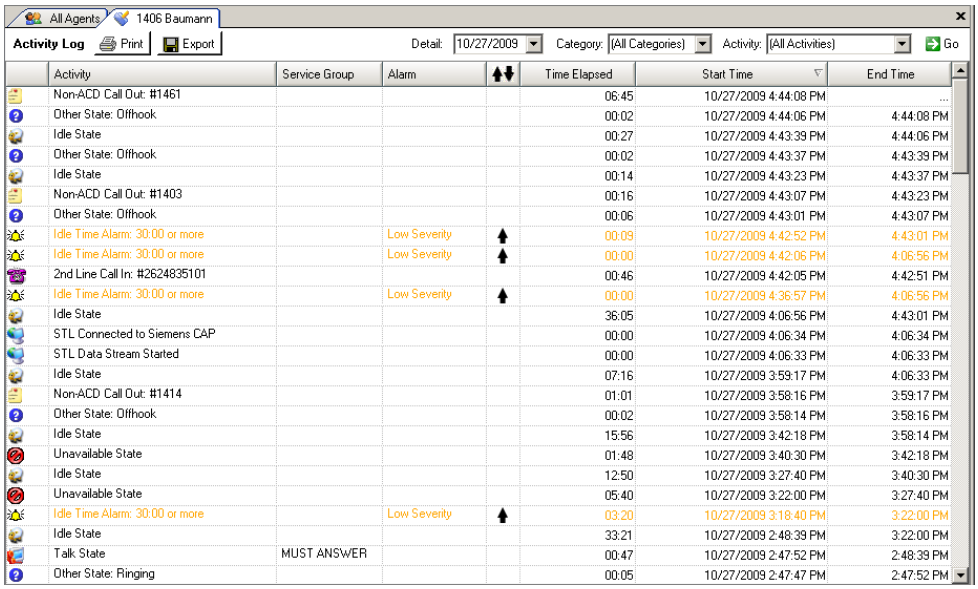
(To see historical data, select the Pick Date option to display a calendar and then select the past date for which you want to view Historical data.)

For the Category drop-down menu, you select the type of information you want to display -- Agent States, Alarm States, System Events, and All Categories. All Categories will include information from each of the categories in the report.

For the Activity drop-down menu, you can select one activity or All Activities. Available activities are based on the Category selection. For example, if you selected Alarm Thresholds in the Category drop-down, your Activity drop-down selections will be based on alarm thresholds. If you select All Categories in the Category drop-down, then the Activity drop-down will display all the activities associated with the three categories.

Once you have data displayed, the following data items are included in the report:

- Activity – the activities the agents performed as recorded by the ACD.
- Service Group – the service group that the call was routed through before being answered by the agent.
- Alarm – any alarm conditions that occurred.
- Up Arrow/Down Arrow column (to the right of the Alarm column) – this column will show whether the alarm condition is trending upwards or downwards.
- Time Elapsed – the total time in each state.
- Start Time – the time the agent entered a state.
- End Time – the time the agent left the state.




| Activity | Service Group | Alarm | Time Elapsed | Start Time | End Time |
|---|---|---|---|---|---|
| Non-ACD Call Out: #1461 | | | 06:45 | 10/27/2009 4:44:08 PM | ... |
| Other State: Offhook | | | 00:02 | 10/27/2009 4:44:06 PM | 4:44:08 PM |
| Idle State | | | 00:27 | 10/27/2009 4:43:39 PM | 4:44:06 PM |
| Other State: Offhook | | | 00:02 | 10/27/2009 4:43:37 PM | 4:43:39 PM |
| Idle State | | | 00:14 | 10/27/2009 4:43:23 PM | 4:43:37 PM |
| Non-ACD Call Out: #1403 | | | 00:16 | 10/27/2009 4:43:07 PM | 4:43:23 PM |
| Other State: Offhook | | | 00:06 | 10/27/2009 4:43:01 PM | 4:43:07 PM |
| Idle Time Alarm: 30:00 or more | | Low Severity | 00:09 | 10/27/2009 4:42:52 PM | 4:43:01 PM |
| Idle Time Alarm: 30:00 or more | | Low Severity | 00:00 | 10/27/2009 4:42:06 PM | 4:06:56 PM |
| 2nd Line Call In: #2624835101 | | | 00:46 | 10/27/2009 4:42:05 PM | 4:42:51 PM |
| Idle Time Alarm: 30:00 or more | | Low Severity | 00:00 | 10/27/2009 4:36:57 PM | 4:06:56 PM |
| Idle State | | | 36:05 | 10/27/2009 4:06:56 PM | 4:43:01 PM |
| STL Connected to Siemens CAP | | | 00:00 | 10/27/2009 4:06:34 PM | 4:06:34 PM |
| STL Data Stream Started | | | 00:00 | 10/27/2009 4:06:33 PM | 4:06:33 PM |
| Idle State | | | 07:16 | 10/27/2009 3:59:17 PM | 4:06:33 PM |
| Non-ACD Call Out: #1414 | | | 01:01 | 10/27/2009 3:58:16 PM | 3:59:17 PM |
| Other State: Offhook | | | 00:02 | 10/27/2009 3:58:14 PM | 3:58:16 PM |
| Idle State | | | 15:56 | 10/27/2009 3:42:18 PM | 3:58:14 PM |
| Unavailable State | | | 01:48 | 10/27/2009 3:40:30 PM | 3:42:18 PM |
| Idle State | | | 12:50 | 10/27/2009 3:27:40 PM | 3:40:30 PM |
| Unavailable State | | | 05:40 | 10/27/2009 3:22:00 PM | 3:27:40 PM |
| Idle Time Alarm: 30:00 or more | | Low Severity | 03:20 | 10/27/2009 3:18:40 PM | 3:22:00 PM |
| Idle State | | | 33:21 | 10/27/2009 2:48:39 PM | 3:22:00 PM |
| Talk State | MUST ANSWER | | 00:47 | 10/27/2009 2:47:52 PM | 2:48:39 PM |
| Other State: Ringing | | | 00:05 | 10/27/2009 2:47:47 PM | 2:47:52 PM |

*Figure 56: Agent Activity Log*

Note that there's also a column of icons to the far left of the display. These icons correspond to the activity state.

You can hide or display any of the columns by right-clicking on a column heading to see a list of available columns. Uncheck or check a column name to hide it or display it.

You can also display a Life of Call report for any object in the Activity Log report. Right-click on the object to access an option to display the Life of Call report.

### 2.7.1.2. Agent Activity Log: 2nd Line Events

2nd Line Events will report on the following data items:

- 2nd Line Call In – displays when an agent is handling an incoming call to their second line.
- 2nd Line Call Out – displays when an agent makes an outgoing call from their second line.
- 2nd Line Talk – displays the time spent by an agent on a second line call.

### 2.7.1.3. Agent Activity Log: Agent States

Agent States will report on the following data items:

- Idle – displays when an agent is available to take a call but not currently on a call.
- Logged In – displays the start and end times for the agent being logged in, and the total duration of the login time.
- Logged Out - displays the time the agent logged out.

- NonACD Call In – displays when an agent is handling an incoming NonACD call.
- NonACD Call Out – displays when an agent is making an outgoing NonACD call.
- Other – displays the off hook time for an agent.
- Talk – displays the seconds spent on the call by this agent.
- Unavailable – displays the time spent in the unavailable state by the agent.
- Work – displays the time spent in the work state by the agent.

#### 2.7.1.4. Agent Activity Log: Alarms

Alarms will report on the following data items:

- Idle Time – the alarm threshold state of an agent's time waiting for a call.
- Non-ACD Call Time – the alarm threshold state of an agent's time spent on Non-ACD Calls.
- Other Time – the alarm threshold state of an agent's time spent in the Other state.
- Talk Time – the alarm threshold state of an agent's time spent in the Talk Time state.
- Unavailable Time – the alarm threshold state of an agent's time spent in the Unavailable state.
- Work Time – the alarm threshold state of an agent's time spent in the Work Time state.

#### 2.7.1.5. Agent Activity Log: System Events

System Events reports on switch- and server-related OnTraQ activity and will report on the following data items:

- Connected to Switch – the time OnTraQ has spent connected to the switch.
- Data Stream Started – the time at which OnTraQ began receiving data from the switch.
- Data Stream Stopped – the time at which OnTraQ stopped receiving data from the switch.
- Lost Switch Connection – the time at which OnTraQ may have lost its connection to the switch.

- OnTraQ Server Started – the time at which the OnTraQ server was started.

## 2.7.2. Service Group Activity Log

The Service Group Activity Log displays information about the selected service group status. You can choose to display either current or historical data for System Events and and Alarm Thresholds. Right-click on the Service Group name in Service Group Explorer to select the Service Group Activity Log option

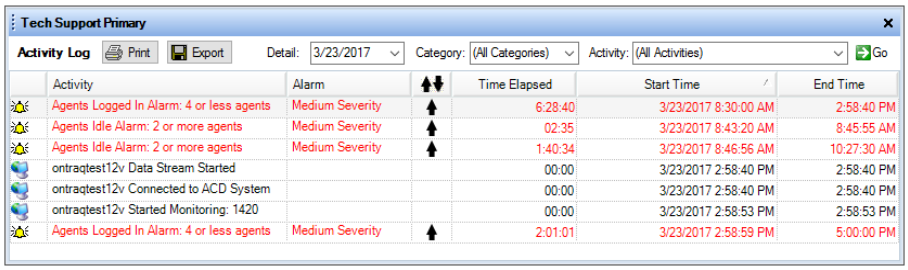



*Figure 57: Service Group Activity Log*

## 2.7.3. Historical Activity

In addition to displaying the Activity Log in the dashboard and exporting the data, the Historical Activity report allows you to save your report criteria and be able to schedule the report. From either the Agent Teams or Service Group Explorer, right mouse click on the object you want to see and select "Historical Activity" option. You may select a Personal or Shared report template or create a new report.

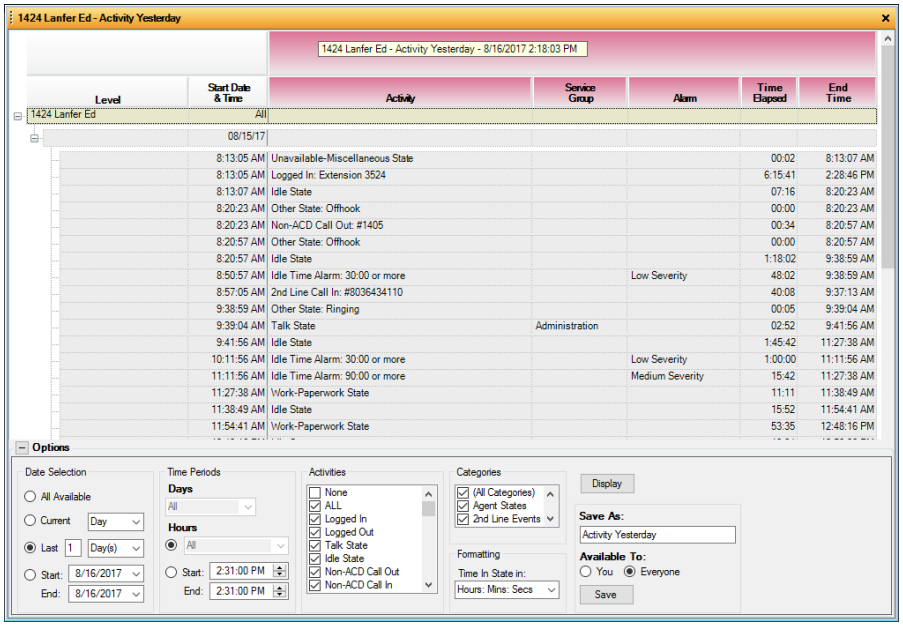



*Figure 58: Historical Activity report with Options*

When the report displays, use the Options at the bottom of the screen to build your report criteria. You can select the dates, time periods, activities and categories to include in the report. Name the report in the "Save As" box and save your report to be available for only you or everyone. You can also simply display the report in your Dashboard by hitting "Display" button. Refer to section 2.10.2.1 for more information on Report Options.

## 2.8. Life of Call

You can access a Life of Call report for individual agents, ACD Groups, or Service Groups. To see a Life of Call report, right-click on the Agent ID (or agent name if you have renamed Agent IDs), ACD Group name, or Service Group name and select the Life of Call option. You can also access a Life of Call report by right-clicking on an object in the Activity Log or in any current or historical report and selecting the Life of Call option. This will display a Life of Call report for the selected object.

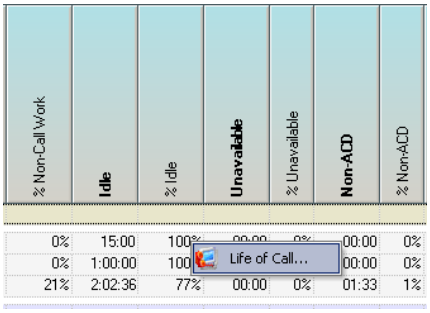



*Figure 59: Detail from Reports Window for Life of Call report option*

The Life of Call report displays a chronology of the call activity. It presents a "snapshot" of the call as captured whenever the user chooses to display the Life of Call report. You select the Date, Start Time, and End Time for which you want to view Life of Call information, and then click on the Go button to display the information.

The Life of Call report is segmented into call states for the call being tracked. Each call has a summary row in the report and this is all that initially displays, but this summary row can be expanded via the control button to the left of the summary row to show the various call states that the call experienced.

Please note that the call state displayed in the summary row is the final call state that the call experienced. If you expand the summary row to show all the call states for the call, remember that the summary row does not display the initial call state but displays the final call state.

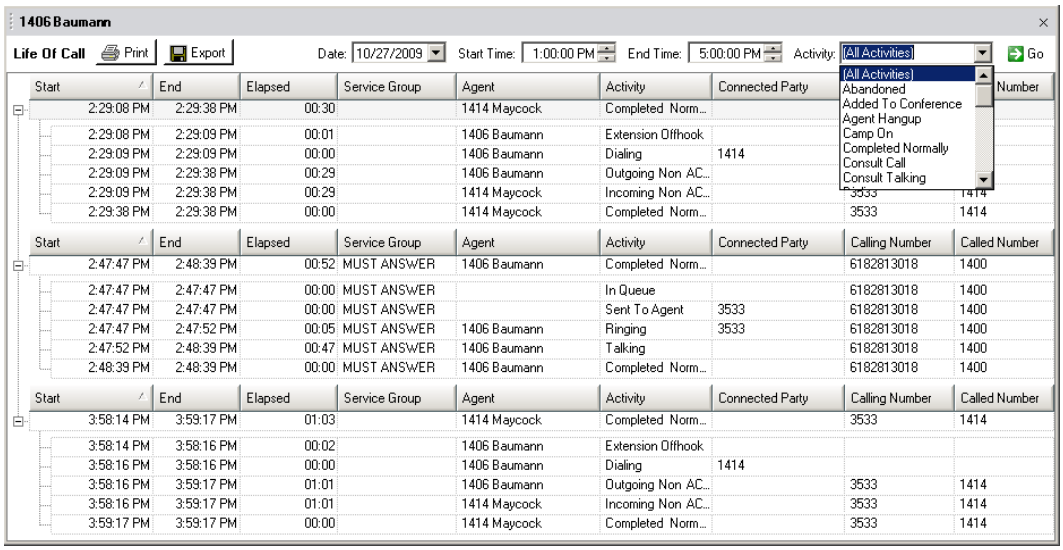



*Figure 60: Life of Call*

The data fields associated with the call you see in this report are:

- Start – when the call state began
- End – when the call state ended
- Elapsed – the total time of the call state
- Service Group – the Service Group that the call was routed to before it was answered by an agent
- Agent – the agent who handled the call
- Activity – the different call states the call progressed through, such as Call in Queue, Call Ringing, Call Talking, etc.
- Connected Party – the party associated with the Activity
- Calling Number – the number originating the call
- Called Number – the number dialed by the originating number

Note: “Unknown” appears in the Calling Number and/or Connected Party fields when the number is unavailable.

To expand the Life of Call information, click on the control button to the left of the first column. This will show you detailed information about each activity state the call progressed through.

You can filter the display to show only calls that had a selected Activity occur, such as all calls that were completed normally, all calls that were sent to an agent, etc. To filter the calls, select the Activity you want to use as the filter from the Activity drop-down list.

You can also drag and drop the columns to rearrange them.

To hide or redisplay any of the columns, right-click on a column heading to see a list of columns, uncheck or check a column name to hide it or redisplay it.

To print a Life of Call display or export it to Excel, use the Print and Export buttons in the upper left corner of the Life of Call window, respectively.

### 2.8.1. Historical Life of Call

In addition to displaying the Life of Call in the dashboard, the Historical Life of Call report allows you to save your report criteria and be able to schedule the report. From either the Agent Teams or Service Group Explorer, right mouse click on the object you want to see and select "Historical Life of Call" option. You may select a Personal or Shared report template or create a new report.

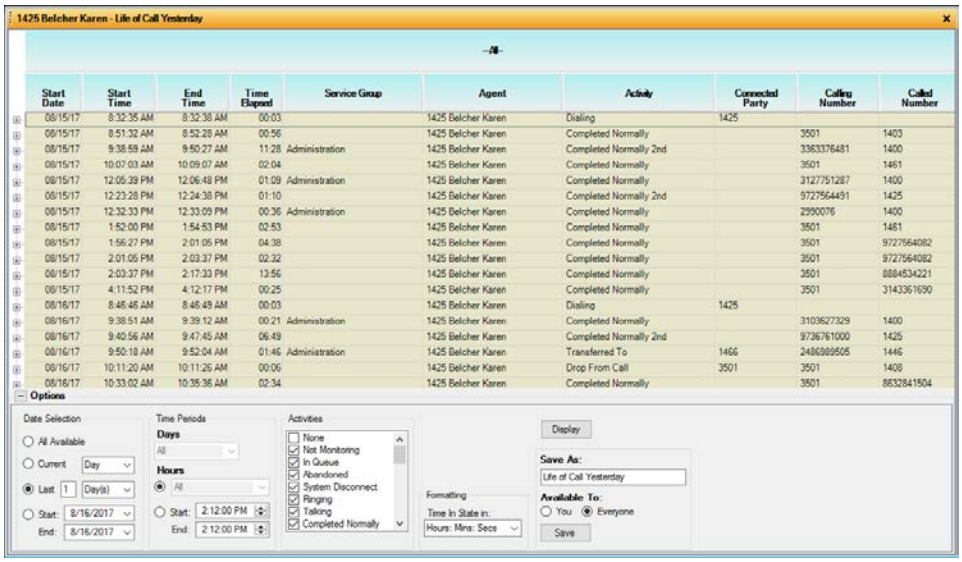



*Figure 61: Historical Life of Call report with Options*

When the report displays, use the Options at the bottom of the screen to build your report criteria. You can select the dates, time periods and activities to include in the report. Name the report in the "Save As" box and save your report to be available for only you or everyone. You can also simply display the report in your Dashboard by hitting "Display" button. Refer to section 2.10.2.1 for more information on Report Options.

## 2.9. Transaction Code

The Transaction Code report lets you see the number of calls for a selected date and time range that were assigned a transaction code by your agents when they handled the call.

Before you can create a Transaction Code report, you must define within OnTraQ the different transaction codes. Once these codes are defined, OnTraQ will be able to create reports based on this information.

To define codes, you need to go to the Tools – Transaction Codes option. The Transaction Codes window will display. Note that this option is reserved for Administrative users only. Other users will not see it as a menu option.

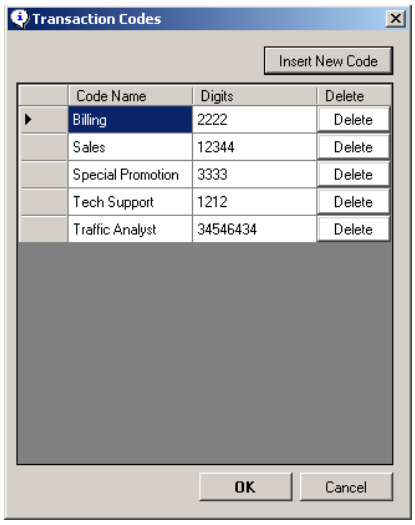



*Figure 62: Transaction Code window*

To define a code, click on Insert New Code. A blank row for the new code will display.

In the blank row, enter a code name and the digits for the code as defined on your switch.

### 2.9.1. Transaction Codes Report

The Transaction Codes display will display the transaction codes entered by your agents as they received calls for the selected date and time range. To view the report, right-click on an Agent Team and select the Transaction Code Report option from the menu that displays.

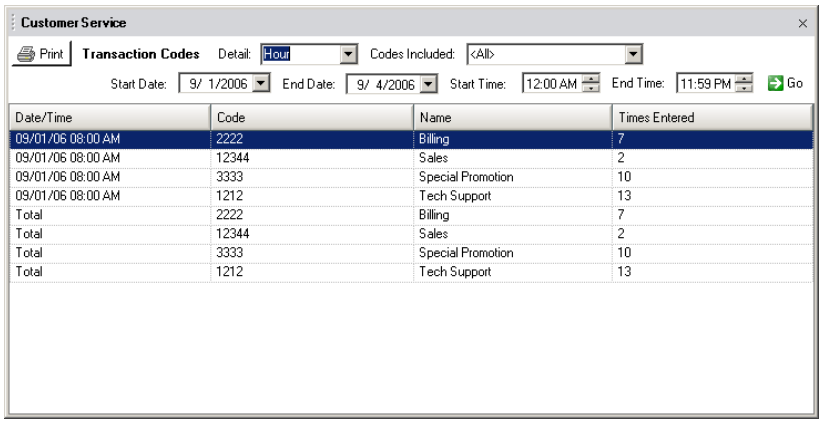



*Figure 63: The Transaction Code Report*

Once you display this pane, you can select the date and time range for which you want to see calls that were designated with transaction codes. You can also select the level of detail, either quarter hour, hour, day, week, or month.

You will only see intervals that contain calls that were designated with transaction codes. For those intervals, you will see the date and time, the code, the name of the code, and the number of times that code was entered during that interval.

You can also hide or redisplay any of the columns by right-clicking on a column heading and getting a list of columns. Uncheck or check a column name to hide it or redisplay it.

## 2.10. Performance Reports

OnTraQ lets you create Performance Reports for your Service Groups, Service Group Pools, Agent Teams and Agents. There's a wide variety of report columns you can include in these reports. For example, you can create a Performance Report that shows, for the Agents selected, the number of calls received, the number of calls unanswered, the number of calls abandoned, and the number of calls picked up. Those are just four of the data items you might build a report around. There are many more you can include, such as Total Talk Time per call, Total Idle Time, and so on.

OnTraQ provides the framework for building performance reports. You add to the framework by selecting the columns you want to see in the report. You might design one report that tracks just a few data items and another that tracks a dozen or more.

You can also share your saved report templates with other OnTraQ users or keep them private for your own use. When you share a report template, that allows other users to generate reports based on that template, and it also lets them take your template and modify it and save it under a new report name. You may have some data items in your report that another user isn't interested in seeing, so he or she can remove them and save the report template under a new name. Likewise, another user may wish to add other data items that you didn't include.

You can also share reports with others in your organization, even if they are not OnTraQ users. You can save the report output to an Excel spreadsheet format, or you can save output to OnTraQ's own report writer format.

You can download a version of this report viewer from Impact Technologies' website (http://www.impacttech.com/OnTraQSupport) and any OnTraQ historical report data saved in the native OnTraQ format can then be viewed with this free report viewer. This report viewer is used to view historical report data exported to a file or e-mailed as an attachment.

Refer to OnTraQ Data Dictionary for more information about the data items.

### 2.10.1. Current and Historical

You can create Performance Reports that display historical data and you can create reports that display current data in a dynamic fashion, including rolling totals for hours, quarter hours, sessions, and days. Current Reports will update their displays in real-time to reflect changing data.

Further, you can create current and historical reports for Service Groups, Service Group Pools, Agent Teams, and Agents.

To create a report, just right-click on the object (the group, team, or agent) you want to include in the report. See the following example:

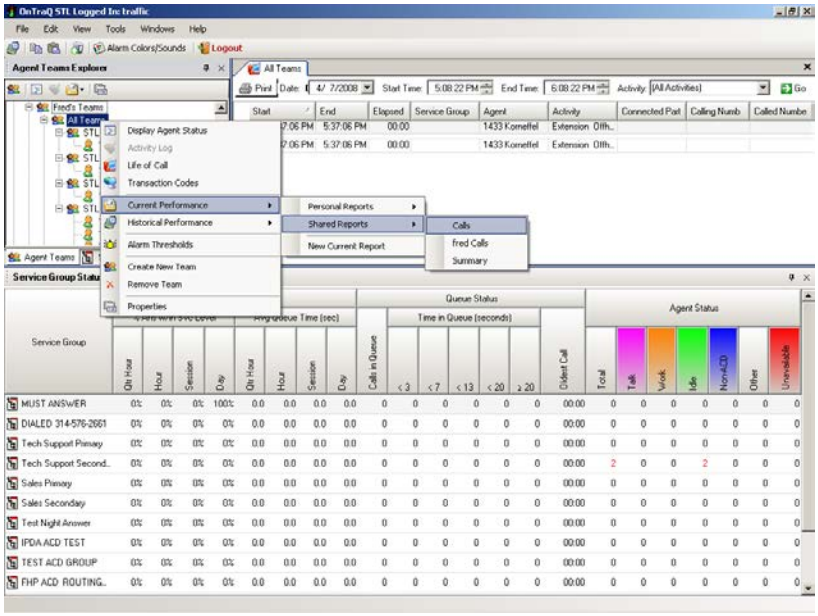



*Figure 64: The Current Performance Report option for an Agent Team*

In this example, the user is selecting a Current Performance Report for the Agent Team All Teams. The user has selected a Shared Report, meaning a report format that an OnTraQ user has previously defined and shared with all users. The name of the report the user is selecting is Calls.

Note: You can also access a Life of Call report from any current or historical report. Right-click on the object to access an option to display the Life of Call report.

#### 2.10.1.1. A Note About Historical Reports and Day Totals

Please note that any historical reports with day totals must be scheduled for 30 minutes after the end of day time setting in Traffic Analyst or else the day totals won't be accurate. Normally, this setting in Traffic Analyst is the default switch setting for the end of day time, which is 2:30 AM for the OpenScape/HiPath 4000. Traffic Analyst users can change the end of day time in Traffic Analyst, however.

### 2.10.2. Service Groups and Agent Teams

You can choose to create and display reports for your Service Groups, and Service Group Pools, and Agents, and Agent Teams.

Right-Click on the object you want to generate a report for, either a Service Group or Service Group Pool in the Service Groups Explorer, or the Agent name or Agent Team name in the Agent Teams Explorer.

After right-clicking, select either Current Performance or Historical Performance to see either a current dynamic display that updates in real-time, or a historical display of past data. Under either Current or Historical you will see the default reports and any user-defined reports that are available for all users to view.

You can also choose to design a new report for either Current or Historical by selecting the New Current Report or New Historical Report options.

### 2.10.2.1. Report Options

Report Options are the building blocks of Service Group and Agent Team Performance Reports.

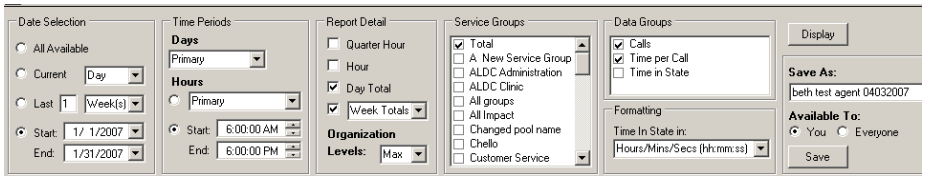



*Figure 65: Detail from Report Criteria*

The following criteria are available when you create new Service Group or Agent Team Performance Reports:

- Date Selection (for Historical Reports only)
- Time Periods (for Historical Reports only)
- Report Detail
- Service Groups (Agent only)
- ANI/DNIS (Service Group only)
- Data Groups
- Formatting
- Save As and Available To

These are explained in detail in the following sections.

#### 2.10.2.1.1. Date Selection

Date Selection allows you to choose the date range for displaying a Historical Performance Report.

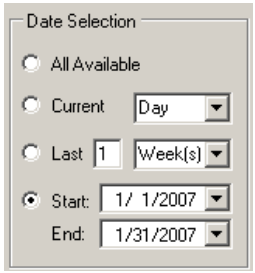



*Figure 66: Date Selection for reports*

You can select:

- All Available – all available historical data for the selected Agent Team or Service Group.

- Current – the current day.
- Last X number of Y – where X is number of units and Y is the type of unit, days, weeks, or months. Weeks are Sunday through Saturday and days are midnight to midnight. Note that you cannot change these Sunday through Saturday and midnight to midnight range designations.
- Start and End – a beginning and ending date range. Selecting this option will display a calendar that allows you to select the date range.

#### 2.10.2.1.2. Time Periods

Time Periods lets you select the time range for the Performance Report.

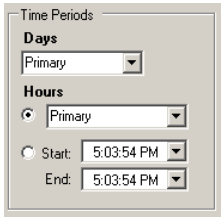



*Figure 67: Time Periods for reports*

You can select:

- Days – All days, Primary days, or Non-Primary days
- Hours - All hours, Primary hours, or Non-Primary hours
- Start and End – a beginning and ending time range in the HH:MM:SS AM/PM format

Note that Primary days and hours are defined in Traffic Analyst.

#### 2.10.2.1.3. Report Detail

Report Detail lets you select the granularity of data displayed in the Performance Report.

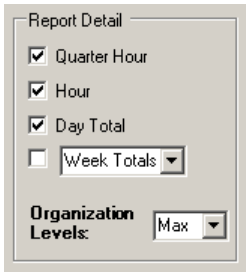



*Figure 68: Report Detail*

You can display any or all of the following:

- Quarter Hour
- Hour

- Day
- Week or Month Totals (not both)

You can also display information by Organization Level, choosing to display all levels (Max) or levels 1 through 6. The way levels work is by designating the object you initially select to generate the report as the parent object, and all objects underneath it as children objects.

For example, if you select a Sales Agent Team as the initial object for your report then this becomes the parent object, or the level 1 object. Every object directly underneath becomes a level 2 object. Any objects beneath those become level 3 objects, and so on. When you select Organizational Level 1, you would only see a report with cumulative information for the Sales Agent Team. If you selected Organizational Level 2, you'd see both the cumulative Sales Agent Team data and also cumulative data for each child object directly beneath the Sales Agent Team.

Please note that any historical reports with day totals must be scheduled for 30 minutes after the end of day time setting in Traffic Analyst or else the day totals won't be accurate. Normally, this setting in Traffic Analyst is the default switch setting for the end of day time, which is 2:30 AM for the OpenScape/HiPath 4000. Traffic Analyst Administrative users can change the end of day time in Traffic Analyst, however.

#### 2.10.2.1.4. Service Groups (Agent and Agent Team Reports Only)

The Service Groups section displays only when you are creating an Agent or Agent Team Performance report. This section allows you to select the Service Groups for which you want report information displayed.

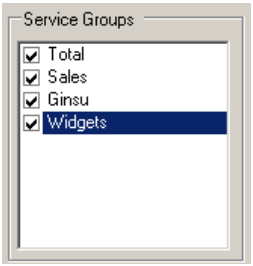



*Figure 69: Service Groups selection for reports*

Click on the checkbox next to the name of the group if you want to see it represented in the report.

#### 2.10.2.1.5. ANI/DNIS (Service Group Reports Only)

The ANI/DNIS section displays only when you are creating a Service Group Performance report.

This section allows you to select the ANI/DNIS for which you want report information displayed.

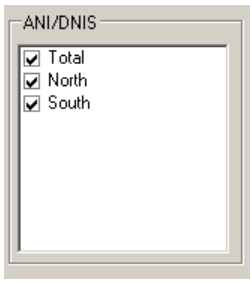



*Figure 70: ANI/DNIS selection*

Click on the checkbox next to the name of the ANI/DNIS if you want to see it represented in the report.

#### 2.10.2.1.6. Data Groups

The Data Groups section lets you select the columns you want displayed in the report.

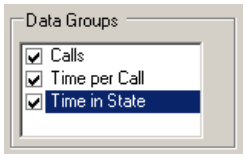



*Figure 71: Data Group selection*

Click on the checkbox next to the name of the Data Group if you want to see it represented in the report. Each Data Group is comprised of several individual columns. If you deselect a Data Group, all of the columns associated with that Group will no longer be displayed in the report.

You can also deselect individual columns within a group to remove them from the report by right-clicking on the report column with the Data Group to get a list of columns to select and deselect. See 2.10.3.1 Report Columns for more information.

Note that the Data Groups available for use in a report vary by report format. For more information on the Data Groups refer to the OnTraQ Data Dictionary.

#### 2.10.2.1.7. Formatting

Formatting allows you to set the times display in reports.

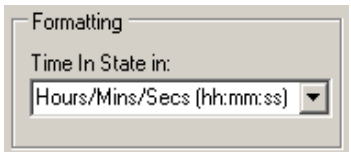



*Figure 72: Formatting*

You have the following choices you can select from the drop-down list:

- Hours/Mins/Secs (hh:mm:ss) – this shows the time for the report item in hours, minutes, and seconds.

- Hours No Decimals – this shows the time in hours, with the time rounding up to the next hour. For example, if talk time were one hour and 46 minutes, Hours No Decimals would display that as two hours.

- Hours One Decimal – this shows the time in hours extended out to one decimal, with the time rounding up to the next decimal. For example, if talk time were one hour and 46 minutes, Hours One Decimal would display that as 1.8 hours.

- Hours Two Decimals – this shows the time in hours extended out to two decimals, with the time rounding up to the last decimal. For example, if talk time were one hour and 46 minutes, Hours Two Decimals would display that as 1.76 hours.

#### 2.10.2.1.8. Save As and Available To

The Save As and Available To options allow you to save a report format you have created and determine who else can use that format.

You can reserve the use of the report format to yourself by selecting the You radio button, which means it is only usable by you, or you can make it available for use to anyone else by selecting the Everyone radio button.

The advantage of limiting the use to yourself is that it will not clutter up the list of available report formats that others will see if the format you create isn't of interest to other OnTraQ users.

### 2.10.3. Displaying the Report

Once you have selected the Report Criteria you desire, click on the Display button to generate the report and display it in the Report window. The upper portion of the window will display the report.

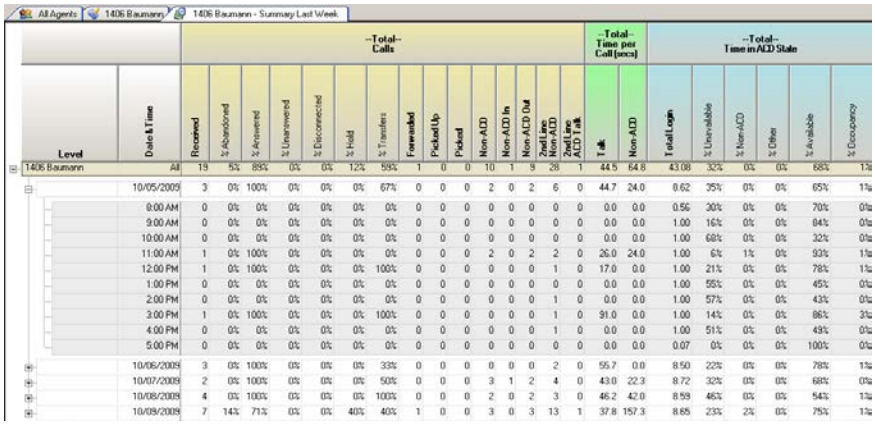



*Figure 73: Detail from the Reports window*

Any report row with a tree control button (the plus or minus sign) next to it can be expanded or collapsed. You can also hide the Report Criteria by clicking on the Options button (also a plus or minus sign) next to the Criteria label. That will free up space in the window to display more of the report.

You can also modify your report by using the Report Options. Change the settings you find under Options to get the custom report you need.

### 2.10.3.1. Report Columns

You can manipulate the columns in a report. You can drag and drop columns to rearrange the report display, and you can also choose to display or hide Data Type columns. To hide or display a Data Type column, right-click on the section header to see a list of the columns; uncheck a Data Type column to hide it, and check a Data Type column to redisplay it. Click "OK" to save your changes.

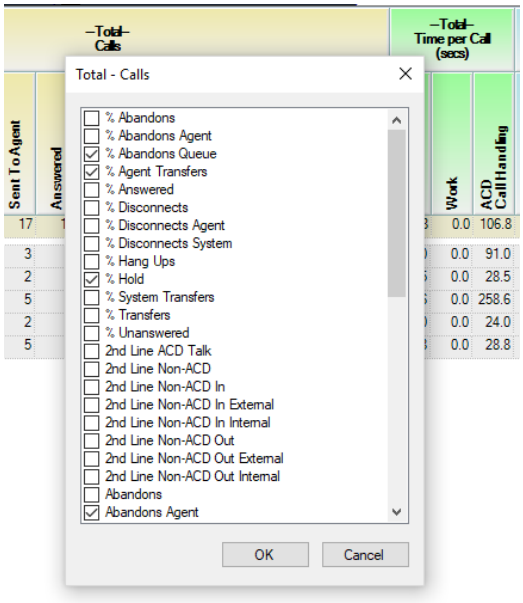



*Figure 74: The checklist for the Total Calls section of this report.*

## 2.10.4. Graphing Options – Ad Hoc and Template

You can also choose to graph the information from a historical report. Right-click on a data point in the report and then select the Chart Data option. This brings up a graph with two tabs in the Options section, Ad Hoc and Template.

The Ad Hoc tab lets you design a report to be displayed in the graph for one-time use. The Template tab lets you design a report chart that will be saved and made available for use every time the report template to which it belongs is used.

Within the Ad Hoc tab, there are two more tabs you can view. The Fields Chart tab will display information for one agent, with the ability to display multiple Data Fields for that agent's performance (shown below).

The Agent's Chart (not shown below) will display information for multiple agents for one selected Data Field.

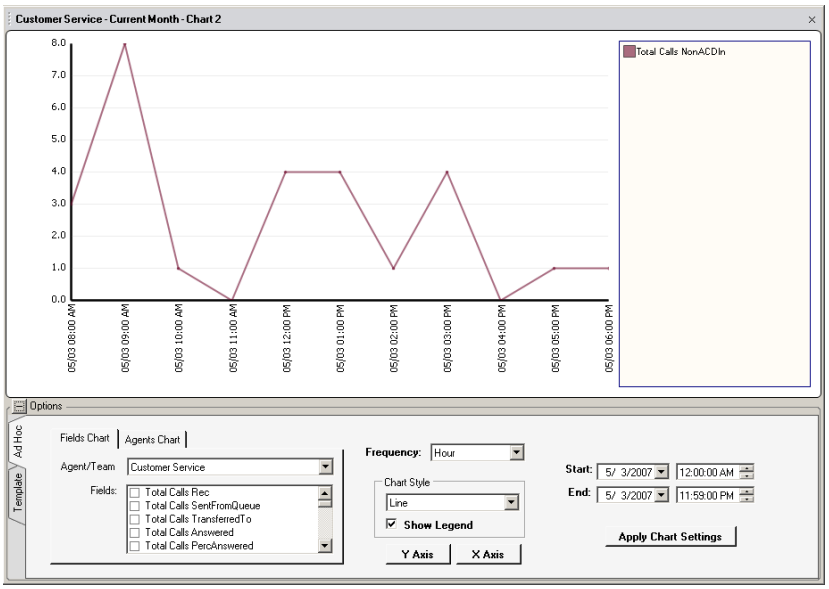



*Figure 75: Agent Performance Fields Chart*

The tabbed Charts let you select the following:

- Agent/Team (Ad Hoc only) – the selected Agent or Agent Team that will be graphed
- Fields – the data items that will be graphed
- Frequency – the granularity of the graph
- Start and End – the beginning and ending time range that will be graphed
- Chart Style – Line or Area
- Show Legend – check to show the legend to the right of the graph or uncheck it to enlarge the graph
- Y Axis and X Axis – change the font size of the labels, the time units and the label on the Y axis
- Name (Template only) – enter a name for the chart you designed
- Front Chart Displayed (Template only) – select which chart will be displayed by default when the charting option is selected for this report template, or choose to display a different chart the chart currently displayed.

After you make any changes, you need to click on the Apply Chart Setting button to redisplay the graph with the changes reflected.

### 2.10.4.1. Formatting the X Axis and the Y Axis

You can edit the values for the X and Y axes to change the font size of the labels, the time units, and the label on the Y axis. Click on the X Axis or Y Axis buttons or right-click anywhere in the graph to access these editing options.

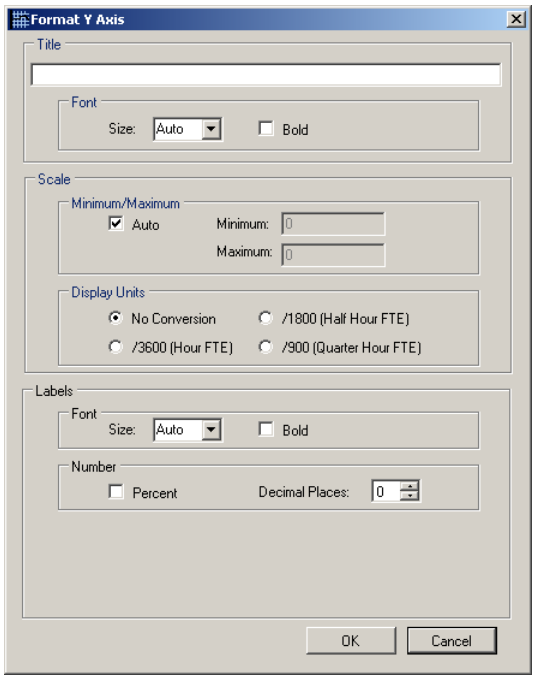



*Figure 76: The Y Axis Format options*

When you format the Y axis, you can change the title (label) of the Y axis and font size of the lettering of the title, the scale of the Y axis, and font size, type, and format of the scale enumerators on the Y axis. Type will be number, percent, quarter-hour, half-hour, or hour. The format will be the number of decimals used.

The X axis format options let you change the font size of the enumerators and also select the kind of time and date units that will be displayed, either 12 hour time or 24 hour military time, and the date in either month-year format or month-day-year format.

Remember, you can try different values and settings and use the Apply Chart Settings button to redisplay the graph with your new settings. Try different combinations until you find settings that give you the kind of graph you need.

### 2.10.5. Saving, Exporting and Scheduling

When you define a report by selecting the Report Criteria, you can save your format for reuse.

You can also export the report data in four formats – an Excel spreadsheet format (.xls, .xlsx), OnTraQ's own report format (.otr), Adobe Acrobat format (.PDF), and XPS, which is Microsoft's alternative to PDF.

You can also choose to print your reports.

Finally, you can also schedule reports to be generated at a later time and date.

Please note that any historical reports with day totals must be scheduled for 30 minutes after the end of day time setting in Traffic Analyst or else the day totals won't be accurate. Normally, this setting in Traffic Analyst is the default switch setting for the end of day time, which is 2:30 AM for the OpenScape/HiPath

4000. Traffic Analyst users can change the end of day time in Traffic Analyst, however.

#### 2.10.5.1. Saving a Report Design

To save a report design, enter a name for the report in the Save As field.

Next, select whom you want to make this report format available to, You or Everyone.

Finally, click Save to save this report format.

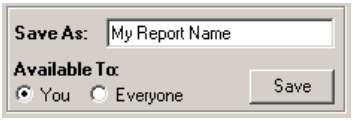



*Figure 77: Saving report formats*

#### 2.10.5.2. Exporting Reports

You can also export the report data in four formats – an Excel spreadsheet format (.xls, .xlsx), OnTraQ's own report format (.otr), Adobe Acrobat format (.PDF), and XPS, which is Microsoft's alternative to PDF.

To export a report, right-click anywhere in the data portion of the report. Then, click the Export option. When you select the Export option, you are presented with the standard Windows file save dialog that lets you select the file name and location that the exported file will be saved to.

The OnTraQ Report Viewer is a standalone application that anyone in your organization is welcome to install and use. The report viewer is available at Impact Technologies' website (http://www.impacttech.com/OnTraQSupport) or through installation from the OnTraQ CD.

#### 2.10.5.3. Scheduling Reports

To schedule a report, you need to create a new scheduled activity. This new activity will not contain any report information. Follow these steps to create a report schedule.

1. Create a new scheduled activity within OnTraQ (not the OnTraQ Report Viewer). If you do not have the Scheduled Activities pane open, go to Tools and select the Scheduled Activities option. This will display the Scheduled Activities pane. Right-click anywhere inside the Scheduled Activities pane and select the Create Scheduled Activity option. A new object appears with the default name of "A New Scheduled Activity".

2. Rename the new scheduled activity object. Once you rename, the following window displays with instructions for creating your scheduled activity. Click on OK.

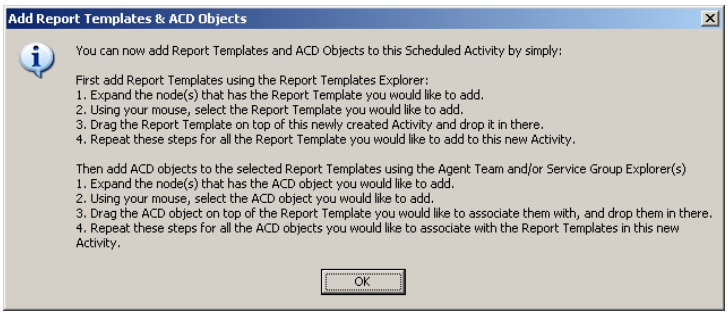



*Figure 78: Creating a new schedule activity*

3. Find the historical report template you want to schedule and then drag it and drop it on the new scheduled activity you created. (If you do not have the Report Templates pane open, go to Tools and select the Report Templates option.) You will see the report template displayed underneath the scheduled activity.

4. Find the Service Group or Agent Team you want to be included in the report in the Service Group Explorer or Agent Team Explorer, and drag and drop it on the report template beneath the scheduled activity. The object you dropped will display beneath the report template. Note that only Agents or Agent Teams can be dropped onto an Agent report, and that only Service Groups or Service Group Pools can be dropped onto a Service Group report. Remember that you can also drag and drop more than one object onto a report. An example of two scheduled reports is displayed below:

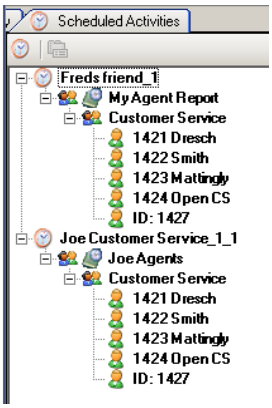



*Figure 79: Detail from the Scheduled Activities pane*

5. Right-click on the new scheduled activity and select Properties. The Schedule Activity window displays. Note that a newly created scheduled

activity will by default always be Active. Check the Inactive box if you wish the scheduled activity to become inactive.

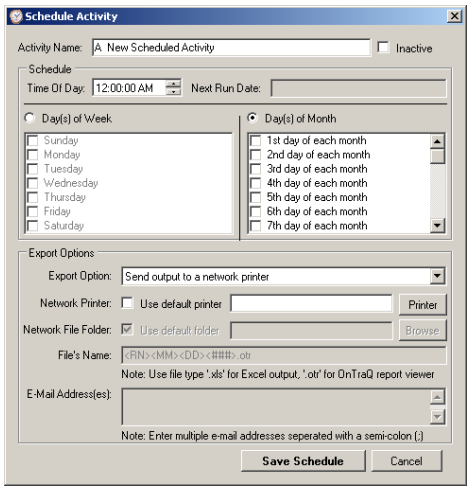



*Figure 80: The Schedule Activity window*

6. Schedule the report. You select the time of day and day of week, or day of month. Note that you can select more than one day of the week or day of month.

7. Select the report output. Your options are:

   - Send output to a network printer (you can select the printer as well)
   - Save output to a network file (use the default or enter the filename and file location)
   - Save output as an attachment via e-mail (you enter the filename and the e-mail addresses the file will be sent to)
   - Send a link to the file via e-mail (you enter the filename and the file location, and the e-mail addresses the link will be sent to)

     Note that even if you are attaching the output to an e-mail, you still have to select a location for the report file to be saved to. Both OnTraQ and Traffic Analyst save the source file when generating a report.

8. Save the schedule by clicking on Save Schedule.

Once the report is scheduled, it becomes a recurring event. If you do not want the report schedule to repeat, either delete the scheduled activity once you are finished with it or click on the Inactive checkbox to make it inactive. An inactive report retains its scheduling information and can be turned back on by clearing the inactive checkbox.

## 2.11. Custom States in Reports

If you choose to leverage custom work and unavailable states, your Current and Historical reports can provide you with the actionable detail that you are looking

for. As you create new custom states, these states automatically appear in the Total Time in ACD State report data group.

When you create a new Work state, two new data items are added to the data group—one for an after-call Work state and one for a non-call Work state. For example, if you create a new Work state called “Special Project,” then “Work – Special Project” and “Non-Call Work – Special Project” will both appear in the data group.

Note that all custom states will figure into the total service group or agent Time in State for the selected state-type. In the following example, the four columns on the right show the agent was on Break for 45 seconds, in a Meeting for about 31 minutes, on Lunch for about 45 minutes and unavailable for another reason (Miscellaneous) for almost 13 minutes. The time spent in these four custom Unavailable states adds up to a total of 1 hour, 30 minutes and 44 seconds, as shown in the Unavailable column.

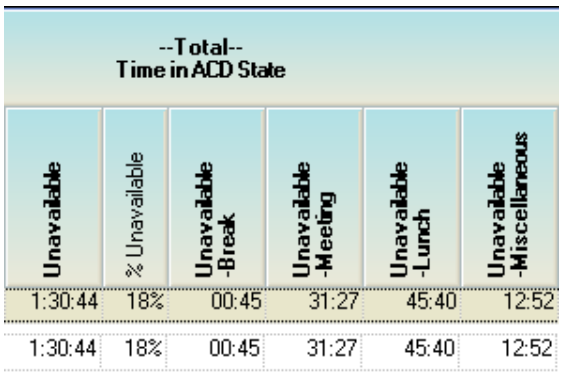



*Figure 81: Custom States Report*

For more information regarding Custom Agent States, please see the relating section, 1.5, which discusses how to create and utilize custom states

# Section 3: Appendix: Menu options

There are six menus in OnTraQ: File, Edit, View, Tools, Window, and Help. These are discussed below.

## 3.1. File Menu

The following options are available on the File menu:

- Open Report File – open a saved report file.
- Server names – select the OnTraQ server from the list of server names displayed here. You may log into multiple servers at the same time. The list of servers available depends on your access rights. If your system includes redundant servers to optimize availability, only log into one server at a time. If the primary server fails, log out and log into redundant server.
- Configure OnTraQ Servers – this displays the OnTraQ Servers window. You can select a server from this window and edit the information that OnTraQ uses to connect to that server. Note that this is restricted to administrative users.
- Logout – logs you out of OnTraQ but does not close OnTraQ.
- Exit – logs you out of OnTraQ and also closes OnTraQ.

## 3.2. Edit Menu

The following options are available on the Edit menu:

- Copy – allows you to copy an object in OnTraQ (if that object can be copied).
- Paste – allows you to paste copied information or an object (if that action is allowed).
- Rename – allows you rename an object (if renaming is allowed).

## 3.3. View Menu

The following options are available on the View menu:

- Change Alarm Colors/Sounds – allows you to change the color-coding and sounds used for alarms.
- Small, Medium, and Large Fonts – allows you to select the size of the font OnTraQ uses.

## 3.4. Tools Menu

The following options are available on the Tools menu:

- Report Templates – displays the Report Template pane and allows you to create new report folders and delete report templates. Note that only Administrative users may create folders for Shared Templates. All users may create folders for their Personal report templates.
- Scheduled Activities – displays the Scheduled Activities pane and lets you create new scheduled activities and delete or make inactive currently scheduled activities.
- ACD Object Access – lets you select OnTraQ users and limit their ability to view objects in OnTraQ. For example, you can limit a shift leader's view to his or her agents only. This option is for administrative users only. Other users will not see it as a menu option.
- Alarm Thresholds – lets you define the alarm thresholds for Service Groups and Agents, including all Service Groups or individual ones. You can also use the Clear All Entries option to erase the current thresholds for an Agent or Service Group.
- ANI/DNIS Group – lets you define rules that associate calls with appropriate ANI/DNIS groups. This option is for administrative users only. Other users will not see it as a menu option.
- Transaction Codes – lets you define within OnTraQ the transaction codes defined on your switch. OnTraQ needs to have these codes defined before you can create any Transaction Code reports. This option is for administrative users only. Other users will not see it as a menu option.
- OnTraQ Servers – lets you define the server properties that OnTraQ uses to retrieve information from the Traffic Analyst database.
- System Preferences – lets you define your Session Boundaries (these typically correspond to your workshifts), the Time-In-Queue-Bands (the boundaries that define a queue, the Data Storage Timeframes for the Life of Call and Event Logs, and the URL location of the Traffic Analyst database, which OnTraQ needs to have to collect switch data.
- Custom Agent States – lets you define up to 20 custom Work and Unavailable states for your agents. This option is for administrative users only. (see 1.5 for more details)
- Audit Log – view when your users have logged in and out of the system. You can filter by date and user.

## 3.5. Window Menu

The following options are available on the Window menu

- Agent Team Explorer – displays the Agent Team Explorer
- Service Group Explorer - displays the Service Group Explorer
- Service Group Status – displays the Service Group Status pane, which displays real-time statistics for your Service Groups
- Close Window Layout – this closes all the OnTraQ panes.
- Default Window Layout – this reverts to the default OnTraQ layout.
- Save Window Layout – this saves your current layout. Whenever you login to OnTraQ the saved layout is automatically displayed.

  Note: Multiple historical reports cannot be saved to the window layout.
- [any open panes] – if you have any other panes open those panes will be listed here. Click on one to bring it to the front of the OnTraQ dasboard.

## 3.6. Help Menu

The following options are available on the Help menu

- OnTraQ Help… – displays a web link to OnTraQ documentation.
- About OnTraQ… – displays software version information about OnTraQ.