

MULTIMEDIA CONTACT CENTER

RELEASE 8.1

INSTALLATION AND DEPLOYMENT GUIDE



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Multimedia Contact Center Installation and Deployment Guide

Release 8.1

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MULTIMEDIA CONTACT CENTER

Mitel Multimedia Contact Center enables contact centers to handle email, chat, and SMS contacts from customers. Agents handle voice, email, chat, and SMS contacts using Ignite.

Within Ignite, agents and supervisors can monitor contact center activity and interactively manage contacts. Supervisors can monitor and interact with contacts and employees using Contact Center Client, Interactive Contact Center, and Interactive Visual Queue.

Multimedia contacts are routed using workflows, created using a visual, intuitive interface. Also included in Multimedia Contact Center is a Contact Us page that can be used by contact center website administrators to add live wait time statistics to their corporate website page, enabling customers to select their preferred communication method based on media type availability. Multimedia reports and charts provide valuable information by summarizing agent, employee, queue, and contact center performance.

WHAT'S NEW IN VERSION 8.1?

The following section briefly describes the features and product enhancements that were introduced in MiContact Center Version 8.1.

Ignite - Web-client version

Ignite is now available as either a desktop or Web version. They share much of the same functionality but each implementation also offers unique agent and supervisor capabilities, enabling you to choose the application that suits your individual needs.

Ignite (WEB), new to MiContact Center Version 8.1, gives access to Ignite from any supported, Web-enabled device, including full support for tablets (Apple, Android, and Microsoft) and partial support for mobile phones (Apple, Android, and Microsoft).

Ignite (WEB) enables you to:

- View multiple windows simultaneously to gain greater, immediate access to different types of information
- Switch between desktop, tablet, and mobile device, while maintaining consistent access to all relevant information
- Log into Ignite, without necessarily logging into a queue, enabling you to access Ignite without being presented with ACD calls
- Monitor the activity of employees, agents, queues, and the status of callback requests with customizable real-time monitors
- Access a light version of Contact Center Client's Interactive Contact Center capabilities, including interacting with agent states and agent group presence and moving contacts from queues to agents (based on agent availability and queue activity levels)

Within our documentation, we refer to desktop Ignite and its features as Ignite (DESKTOP) and Web Ignite and its features as Ignite (WEB) or, where appropriate, as DESKTOP or WEB only.

CCMWeb - Support for additional browsers

CCMWeb, previously supported for Internet Explorer only, is now supported with the following browsers:

- Internet Explorer
- Google Chrome
- Safari
- Mozilla Firefox
- Microsoft Edge

Screen reader support

Multimedia Contact Center's customer-facing chat request pages and chat sessions now support screen reading applications. All controls, graphics, buttons, and input fields in customer-facing chat request pages and chat sessions are labeled with alternative tags for screen readers and buttons have proper hyperlink references and contain readable content needed for keyboard focus.

For more information, see the *Mitel MiContact Center and Business Reporter System Engineering Guide*.

SSL support for Chat

In Version 8.1, Multimedia Contact Center Chat and Contact Us support SSL on both IIS and Apache web servers in an End-to-End SSL deployment.

For more information on the supported SSL deployment, see the *Mitel MiContact Center and Business Reporter System Engineering Guide*.

Technology changes

Support for the following technologies was introduced in Version 8.1:

- Office 2016
- Exchange Server 2016
- CRM 2016

Support for the following technologies was discontinued in Version 8.1:

- CRM 2011
- Exchange Server 2007
- Hyper-V 2008 R2

ABOUT THIS GUIDE

This guide describes the Multimedia Contact Center application and its use from the perspectives of the Administrator, the Supervisor, and the Agent. Installation and upgrade procedures are included, as are procedures for configuration and daily use.

Voice-enabled contact centers will benefit from referring also to the *MiContact Center User Guide* and the *MiContact Center Installation and Administration Guide*.

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LOCATING THE LATEST VERSION OF OUR GUIDES

The MiContact Center documentation library includes the following guides. The latest version of each guide is available from <http://edocs.mitel.com>.

- *MiContact Center User Guide*: provides information on the basics of contact center management, and descriptions for use of all agent and supervisor desktop applications within the MiContact Center suite. This guide focuses on voice media.
- *MiContact Center Installation and Administration Guide*: provides instructions for:
 - Downloading, installing, registering, and configuring MiContact Center on the Enterprise Server and client computers
 - Upgrading from previous versions of MiContact Center
 - Installing and configuring MiContact Center at remote sites
 - Installing and deploying MiContact Center .ova files
 - All IVR Routing configuration
- *MiContact Center - Contact Center Reports Guide*: describes all of the report types available and explains how to generate, view, and share reports for the Contact Center licensing package.
- *MiContact Center - Workgroup Reports Guide*: describes all of the report types available and explains how to generate, view, and share reports for the Workgroup licensing package.
- *Multimedia Contact Center Installation and Deployment Guide*: is the primary source of information for contact centers using email, chat, or SMS to communicate with customers. This guide describes how to:
 - Install, configure, and maintain a multimedia contact center
 - Use the desktop tools required to manage a multimedia contact center
 - Handle customer contacts via voice, email, chat, and SMS using Ignite
- *MiContact Center and Business Reporter System Engineering Guide*: discusses the following topics:
 - Deployment models based on licensing, network requirements, and availability
 - Recommendations for collocating server applications
 - System requirements, including server and client hardware and software requirements, virtual application requirements, and multi-tenanting requirements
 - Server and client virtualization details and best practices

- Performance and scalability details, including verified capacity results for all media types (alone and blended) and IVR Routing scalability and port sizing recommendations
- Bandwidth and storage requirements
- Licensing information
- Support details for third-party integrations and internal products, such as Multimedia Contact Center and IVR Routing
- Licensing
- *MiContact Center Deployment Guide*: discusses the following topics:
 - Contact center basics, with a focus on ACD routing functionality
 - Topologies for scaling
 - ACD resiliency
 - IVR Routing resiliency and redundancy
 - Virtual contact centers
- *Contact Center Blueprint*: discusses the following topics:
 - MiContact Center topologies
 - MiContact Center deployment details
 - Cloud and hosted considerations
- *MiContact Center Site-Based Security (Multi-tenant) Administration Guide*: describes how to install and configure MiContact Center in a multi-tenant deployment.

Chapter 1 System

Administrators

INSTALLING, CONFIGURING, AND
MAINTAINING A MULTIMEDIA
CONTACT CENTER

SYSTEM ADMINISTRATORS - INSTALLING, CONFIGURING, AND MAINTAINING A MULTIMEDIA CONTACT CENTER

System Administrators are responsible for upgrading their contact center to the latest release and for configuring all devices to ensure the business can run smoothly and efficiently.

MiContact Center Version 7.0 introduced a new multimedia contact center product that eases configuration. Routing of contacts is optimized through the use of visual workflows. Visual workflow configuration presents contact routing elements in an intuitive user interface. Using a drag and drop process, workflows can be customized to suit the individual needs of your contact center.

NOTE: As a best practice, system administrators should always apply the latest Windows component updates to all servers and client machines. For more information on updating Windows products, consult Microsoft documentation.

FAX AND HISTORICAL SMS LIMITATIONS

In Version 8.1, fax is supported as an email media type. However, when you upgrade to Version 8.1, if you need access to historical fax reports, you must generate such reports prior to upgrading as you will not be able to do so afterward.

Incoming fax capability can be implemented in Version 8.1 by using email attachments for fax delivery. For more information, see the Mitel Knowledge Base article located here: <http://micc.mitel.com/kb/KnowledgebaseArticle51941.aspx>

SMS is supported in 8.0+. Historical SMS data from a pre-8.0 instance of Multimedia Contact Center will be available after an upgrade because in previous versions SMS was treated as email.

UPGRADING YOUR MULTIMEDIA CONTACT CENTER TO MiCONTACT CENTER VERSION 8.1

The following versions are supported for upgrade to Version 8.1.

- Version 6.0.3.0*
- Version 7.0.x
- Version 7.1.x
- Version 8.0.x

* Due to the significant architectural changes introduced in Version 7.0, we strongly recommend a side by side migration from Version 6.0.3.0 to Version 7.1, followed by an upgrade to Version 8.1. The upgrade section of this guide primarily describes this scenario.

While there are no versions available from which to upgrade to 8.1, these instructions can be followed when upgrading to subsequent patch releases or service packs.

UPGRADING - A SIMPLIFIED PROCESS

Version 7.0 introduced Simplified Configuration, a tool designed to ease the upgrade process and limit manual intervention while ensuring your existing configuration of agents, employees, and queues remains intact.

Simplified Configuration reduces Multimedia Contact Center setup time significantly but requires that the voice only portion of the system be configured first. The voice organization is used by Simplified Configuration as a template for enabling multimedia functionality.

The Simplified Configuration process creates Unified Queue Groups, which are used to organize queue and agent groups by the service for which they answer contacts. For example, a Unified Queue Group for the Sales department would contain only those queue and agent groups that handle Sales related contacts, either by email, chat, or SMS. Unified Queue Groups are based on a service group, not on the media type handled. Unified Queue Groups can contain queues of any supported media type. Agent groups can contain agents of any supported media type.

NOTE: The Simplified Configuration feature is not available in the Version 8.0+ installer. Using this feature decreases the time spent upgrading and simplifies multimedia device configuration by auto-creating devices based on the current setup for voice. Upgrading from Version 6.0.3.0 to Version 7.1 before upgrading to Version 8.0+ enables you to take advantage of the Simplified Configuration option in the Version 7.1 installer.

UPGRADE SCENARIOS

This section of the guide describes upgrading from either a voice-only contact center or a contact center that is enabled for both voice and multimedia.

UPGRADE METHODS

You can choose to either upgrade directly onto your current system or provision a new server and upgrade in a side by side fashion.

DIRECT UPGRADES

Direct upgrades are supported when upgrading from Version 7.0.x, or 7.1.x, or 8.0.x to Version 8.1.

Due to the significant architectural changes introduced in Version 7.0, we strongly recommend using a side by side migration method when upgrading from Version 6.0.3.0 to Version 7.1. This will help ensure a smooth transition as well as reducing setup time and minimizing downtime during and following the upgrade.

If you choose to upgrade on top of an existing Version 6.0.3.0 server, please note the following:

In a direct upgrade, Version 7.1 is installed onto your existing Version 6.0.3.0 server. This method, unlike the side by side migration method, does not facilitate thorough testing prior to committing to Version 7.1 functionality. Also, unlike the side by side method, rollback is not supported. If you want to return to your previous system a reinstall is required.

In a direct upgrade, there are post-upgrade steps that must be completed before you will regain full Multimedia Contact Center functionality. Multimedia Contact Center functionality is lost while you configure your new email settings. See "Creating mail servers" on page 15 and "Configuring the email media server" on page 27 for more information. If your contact center hosted chat configuration files on your corporate web server, you must enable chat to use them. See "Hosting chat files on your corporate web server" on page 121 for more information.

If you currently use Multimedia Contact Center and choose to upgrade using your existing Version 6.0.3.0 server, you will be given the choice during the upgrade to either migrate your existing multimedia configuration or program the new multimedia portion of the software manually. Programming the multimedia software manually enables you to take advantage of the configuration options included with Version 7.1. See "Installation options" on page 20 for more information.

SIDE BY SIDE MIGRATION

In a side by side migration, a new Enterprise Server is created, separate from the current production Enterprise Server. This recommended practice facilitates thorough testing and staged client updates and supports rollback, if required, by retaining the old platform.

A side by side migration carries the lowest level of risk in upgrading but may require purchasing additional hardware depending on your current configuration.

Additional licensing is not required when running a second Enterprise Server for the purposes of migration or to create a sandbox environment. To mitigate risk, consult a certified technician before configuring a second server. Once a license has been migrated, support will be provided for the latest release only. Support will not be provided for the older server with the previous release or the sandbox server.

A side by side migration is strongly recommended when upgrading an environment that currently uses voice and other media types. With a direct upgrade, Multimedia Contact Center functionality is lost while you configure your new email settings. In a side by side migration, where you install the new version on a new server, this situation is mitigated. There is only a temporary loss of functionality when you move your live data from the old system to the new system.

In a side by side upgrade, contact centers must implement a new Version 8.1 Chat or Contact Us configuration using the new files in Version 8.1 and add their previous chat and Contact Us settings

to the 8.1 files. For information on Chat and Contact Us configuration, see "Enabling chat" on page 101 and "Enabling Contact Us" on page 133.

After restoring the configuration backup to the new server, data collection, synchronization, and voice contact control on the production PBXs begins. This ensures a minimal gap in reporting data. If the data directory is copied and the database restored outside of business hours, there is no reporting data gap.

Synchronization is enabled and changes to the telephone system will be reflected in both the new and production servers after the maintenance cycle or upon completion of a manual summarization. If write back is enabled, settings take effect on the other server only after synchronization is complete.

We recommend testing your new configuration by creating a test email queue, a test chat queue, a test SMS queue, and a test agent on the new server and validating that email, chat, and SMS are being correctly routed to queues and agents. Run reports to verify accuracy. Confirm that email aliases or distribution groups and URL redirects for chat have been correctly implemented.

In a side by side migration, once the new server is installed and all of the devices configured we recommend you then proceed to upgrade one client and ensure the system is functioning correctly before upgrading all other clients. If you choose to upgrade on top of your current system, the clients are automatically updated during the upgrade process.

Consider the following notes regarding a side by side migration:

- By default, MiVoice Business supports three ACD and three SMDR connections to the same PBX. The existing system and the new system use one ACD and one SMDR connection each. When migrating servers, data collection will resume on the new server upon restoration of the configuration backup. As a result, two connections to the SMDR and ACD ports will be used until one of the servers has been decommissioned. Ensure the number of connected devices to these ports does not exceed three per IP port.
NOTE: MiVoice Business supports 3 ICP connections by default, but the number of supported ICP connections can be increased. Exceeding the number of supported connections will impact the collection of data on the server.
- When using voice contact control through MiContact Center for business hours queues may be closed by the new server if business hours are reconfigured. To ensure no voice contact control is performed until testing or migration, stop the MiContact Center MiTAI Proxy Server service on the Enterprise Server.
- You must ensure queue schedules are identical on both systems.
- Reporting discrepancies can occur due to differences between software versions or if data collection is interrupted.
- IVR Routing services must be shut off on the new server until you are ready to switch over or assign new ports.

MULTIMEDIA CONTACT CENTER BACKUP AND RESTORE RECOMMENDATIONS

We recommend backing up Enterprise Server data on a regular basis as a preventive measure in case of events that could cause loss of data and necessitate system restoration. The frequency of backups depends on how important the data is to your business. If losing one week of data is acceptable, then backing up once a week is sufficient. If losing more than one day of data is unacceptable, then a daily backup strategy should be implemented.

NOTE: We strongly recommend storing backup files in a location outside of the Enterprise Server in order to maintain essential data in the case of a hardware failure or catastrophic event.

The following data files must be considered:

- **YourSite Database configuration data files** – These files contain all device configuration for your contact center (including IVR Routing and Multimedia Contact Center workflows and prompts) and are backed up automatically during nightly maintenance. They are located in the SQL Server database as part of the CCMDData files. During nightly maintenance, the data is backed up as an .xml file and retained for the last 30 days, enabling you to restore a previous configuration if necessary. You can also backup configuration data manually using the Backup and Restore Wizard in Contact Center Client.
- **Raw data files** – These files contain all raw data from the media servers, including ACD and SMDR historical data and a flat file multimedia repository for all media, excluding voice. The multimedia repository stores multimedia messages and SMS and chat transcripts. These files are not backed up during nightly maintenance and must be backed up manually using your corporate backup solution.
- **Reply template data files** – These files include the packaged responses for email, chat, and SMS. The reply template data files from the default folder and all user-specified folders are backed up automatically during nightly maintenance. Reply template data files are also included in manual backups using the Backup and Restore Wizard in Contact Center Client.
- **SQL Server data files (CCMDData and CCMStatisticalData)** – The data that is stored in the SQL Server database is not automatically backed up during nightly maintenance. Consult Microsoft documentation for more information regarding backup and restore processes.

Following is a list of folders and locations for data that should be backed up using your corporate backup solution. Suggested backup tools include Symantec Backup Exec and Microsoft System Center Data Protection Manager:

- **Configuration backups:** <drive>:\Program Files (x86)\Mitel\MiContact Center\BackupFiles
This folder contains the nightly .xml backups of configuration data and IVR Routing and Multimedia Contact Center workflows and prompts that are created during nightly maintenance.
- **Raw data:** <drive>:\Program Files (x86)\Mitel\MiContact Center\DataDirectory
This folder stores all raw data from the media servers. Using this data you can re-summarize your raw data to enable reporting. This folder also contains the multimedia repository for all media, excluding voice.

To restore your system with the backed up data, you must stop the MiContact Center services and use the backup tools to restore the folders that you previously backed up. After these folders have been restored, restart the MiContact Center services. For more information, see "Restoring telephone system and configuration data" on page 25.

PRE-UPGRADE NOTES AND PLANNING

Version 8.1 is supported for use with 64-bit server-side and client-side Operating Systems.

Multimedia Contact Center must be collocated on the Enterprise Server. It is not supported as a remote installation.

Some manual device configuration is required for those devices that were introduced in Version 7.0 and Version 8.1. We recommend you gather the following information before beginning the upgrade process:

- Mail server name
- IMAP port information for the mail server
- Email username and password for each mail server
- SMTP Server for email replies
- Chat URL (the public URL used to request a chat)
- Twilio SMS phone numbers, Account SID, and Account Authentication for SMS media servers
- Interflow configuration if required
- Customized in business or out of business auto-acknowledgment messages

When upgrading from Version 6.0.3.0 to Version 7.1 in a system that has remote servers, all remote nodes must have .NET Framework 4.5 installed as a pre-requisite.

CRM 2007 is not supported with Version 8.1+. If workflows contain Execute activities that point to CRM 2007, the preinstall checker will stop the upgrade. Microsoft CRM 2011 and 2013 are supported for use with MiContact Center Version 8.1.

If you are upgrading from a pre-existing voice and multimedia environment and you currently use Smart Algorithms to determine contact priority in multimedia queues, make note of the priorities for each media. Smart Algorithms are not supported in Version 7.0+ and have been replaced with Workload descriptors that apply to each employee and their capabilities.

Prior to upgrading, we recommend you consider the following regarding chat:

- Choose the corporate web pages on which you want the Contact Us page to display
 - Determine what service(s), contact information, and business hours to display
 - Determine whether a chat request from this page needs to route to a specific queue
 - Customize the page to suit the look and feel of your current website
- Before upgrading, integrate the chat request(s) and/or the Contact Us page onto your corporate website. We recommend setting up a temporary chat unavailable page, as chat will be unavailable during the upgrade.

HARDWARE AND SOFTWARE SERVER AND CLIENT SPECIFICATIONS

For information regarding hardware and software server and client specifications, and for information regarding virtualization support, see the *MiContact Center and Business Reporter System Engineering Guide*.

UPGRADING A VOICE-ONLY SYSTEM

When upgrading a voice-only system, your current voice organization forms the basis for adding multimedia. The employees, queues, and agent groups within your voice organization are extended to handle multimedia – in Version 7.0 and 7.1 this includes email and chat. Support for SMS was added in Version 8.1.

Employees handling inbound contacts for each service organization can be enabled to handle email, chat, and SMS. Agent groups handling contacts for a service organization can be expanded to handle email, chat, and SMS for the same service. Each voice queue representing a service organization will be contained within a Unified Queue Group to which email, chat, and SMS queues are added. The Unified Queue Groups represent each service organization and route any media inbound contact intended for that particular service.

NOTE: Unified Queue Groups are optional. You can alternatively use standard queue groups, depending on your business organization and needs.

The following steps must be followed to successfully upgrade a voice-only system:

1. Adhere to all pre-upgrade planning notes.
See "Pre-upgrade notes and planning" on page 11.
2. Ensure all hardware and software specifications are met for the server and clients.
See the *MiContact Center and Business Reporter System Engineering Guide* for specification details.
3. Migrate SQL databases. (Side by side migration method only.)
See "Migrating SQL databases" on page 13.
4. Back up telephone system and configuration data.
See "Backing up telephone system and configuration data" on page 13.
5. Install MiContact Center Version 8.1 on the Enterprise Server.
NOTE: If you are upgrading from Version 6.0.3.0, install Version 7.1 and, after completing post-installation multimedia configuration, install Version 8.1.
See "Enterprise Server installation" on page 25.
6. Restore telephone system and configuration data.
See "Restoring telephone system and configuration data" on page 25.

7. Configure the multimedia system: Create mail servers, add email media servers, add chat media servers, add SMS media servers, enable employees for multimedia, define employee Workload, add agent groups and set default login agent group presence, add multimedia queues, create queue groups, modify default inbound, response, and Inqueue workflows, and convert to visual workflow routing.
See "Configuring a multimedia system" on page 15.
8. Install client applications on employee desktops.
See "Installing client applications" on page 19.

MIGRATING SQL DATABASES

Please note that this section relates only to a side by side migration upgrade method.

Before upgrading, we recommend migrating the SQL databases, CCMdata and CCMStatisticalData, to the new server. By doing so, the installation configuration wizard will update the database schema when the new software version is installed.

Migrating the SQL databases enables you to preserve your previous reporting data. If you do not migrate the SQL databases, a new database will be created to which you can copy over the raw data, restore the database from the backup files, and, then, re-summarize the data. However, the data you will be re-summarizing will be for the current configuration so the reporting data may not match that of your previous system.

The two most common methods for migrating SQL databases are:

- Dropping the database files from the SQL instance and making a physical copy of the .mdf and .ldf files
- Using SQL Server Management tools to generate backup files or scripts

See the applicable Microsoft documentation for more information on migrating SQL databases.

To migrate SQL databases

1. Copy the SQL database .mdf and .ldf files or use MS SQL Server Management tools to make backup files or scripts.
2. Provision a new SQL server or new instance of SQL server.
3. Restore the SQL databases to the new SQL server or instance of SQL server.

BACKING UP TELEPHONE SYSTEM AND CONFIGURATION DATA

Before installing the new version of software on the designated new server, you must back up telephone system and configuration data on the old Enterprise Server. If you are installing on top of an existing Enterprise Server, store the backup files in a location outside of the Enterprise Server in order to maintain essential data in the case of a hardware failure or catastrophic event.

The Enterprise Server configuration backup includes configuration items such as employees, agents, agent groups, queues, and security roles.

NOTE: You must be licensed as a System Administrator to back up telephone system and configuration data.

To back up telephone system and configuration data

1. In **Contact Center Client**, click **Tools=>Management**.
2. In **Management Console**, click **Configuration=>Back up/Restore configuration data**.
3. Select **Back up** and click **Next**.
4. Next to **Save**, click the drop-down button and select **Save as**.
5. Select a location to save the file and click **Save**.
6. Close the **View Downloads** window and, in the **Backup and Restore Wizard**, click **Finish**.
A .zip file is created that contains an XML file with the entire configuration. The file size will vary depending on the amount of data that needs to be backed up, but will typically be between 1 and 20 MB. This .zip file name contains the date on which the file was created. For example, a backup file created on June 24, 2015 will contain '20150624'.

ENTERPRISE SERVER INSTALLATION

Install Version 8.1 on the existing Enterprise Server (direct upgrade) or on the designated Enterprise Server (side by side upgrade). See the 'Enterprise Server installation' section in the *MiContact Center Installation and Administration Guide*.

NOTE: If you are upgrading from Version 6.0.3.0, install Version 7.1 and, after completing post-installation multimedia configuration, install Version 8.1.

RESTORING TELEPHONE SYSTEM AND CONFIGURATION DATA

After installing the new version of software on the existing Enterprise Server (direct upgrade) or on the designated Enterprise Server (side by side upgrade), restore the previously backed-up data from the location where it was stored (direct upgrade) or from the old server to the new server (side by side upgrade).

NOTE: Remote restores are not supported.

To restore telephone system and configuration data

1. In **Contact Center Client**, click **Tools=>Management**.
2. In **Management Console**, click **Configuration=> Back up/Restore configuration data**.
3. Select **Restore**.
4. To restore a file from the server backup directory, select **from the server backup directory**, select a file, and click **Next**.
5. To restore a file saved to another location, select **from this file=>Browse**, open the backup file, and click **Next**.
6. When prompted to restart Contact Center Client, click **Yes**.
7. Optionally, you can synchronize the Enterprise Server's IP address and computer name after restoring data. Do so by selecting the appropriate check box and entering the Enterprise Server's IP address in the field provided.

After restoring a backup, check the IP addresses configured in YourSite Explorer and the computer names associated to all media servers to ensure the local media servers are set to the local server name and remote collectors are also set correctly.

CONFIGURING A MULTIMEDIA SYSTEM

To enable your voice-only contact center to handle other media types, you must configure devices and components within YourSite Explorer in the following order:

1. Create mail servers.
2. Add email media servers.
3. Add chat media servers.
4. Add SMS media servers.
NOTE: If you are upgrading from Version 6.0.3.0 to Version 7.1, you will not have the option to add SMS media servers until you upgrade to Version 8.0+.
5. Enable employees for multimedia.
6. Define employee Workload.
7. Add agent groups and set default login agent group presence.
8. Add multimedia queues.
9. Create queue groups.
10. Modify default inbound, response, and Inqueue workflows.
11. Convert to visual workflow routing.

Creating mail servers

Email media servers require one or more mail servers to be configured. A mail server is used to receive and send mails to the corporate mail server and defines the IMAP connection to a single email account. Email aliases or distribution groups, depending on the mail server type, are used to associate multiple email addresses for the contact center to a single email account. This minimizes the number of mail servers required.

After creating a mail server, we recommend using the test button to verify both the SMTP and mail server are connected.

For more information and configuration details, see "Integrating Multimedia Contact Center with mail servers" on page 42.

Adding email media servers

Media servers must be created for each media type supported by your contact center. Optionally, each media server is assigned a default Inbound workflow that you configure to route inbound contacts to designated endpoints. See "Converting to visual workflow routing" on page 18 for more information.

For media server configuration details, see "Adding email to Multimedia Contact Center" on page 56.

Adding chat media servers

Media servers must be created for each media type supported by your contact center. Each media server is assigned a default Inbound workflow that you configure to route inbound contacts to designated endpoints.

Chat media servers require the chat server URL and auto-response username to be specified. The chat server URL is the public URL invoked when a customer requests a chat. When a chat server URL is configured, the system performs an auto test to determine if the URL redirect is properly configured.

For more information and configuration details, see "Adding chat to Multimedia Contact Center" on page 58.

Adding SMS media servers

Media servers must be created for each media type supported by your contact center. Each media server is assigned a default Inbound workflow that you configure to route inbound contacts to designated endpoints.

To send and receive SMS contacts, SMS media servers require an SMS Gateway Provider. In Version 8.1, Multimedia Contact Center supports Twilio as an SMS Gateway Provider. You must have a Twilio account to add SMS handling capabilities to Multimedia Contact Center.

For more information on integrating with an SMS Gateway Provider, see "Integrating Multimedia Contact Center with an SMS Gateway Provider" on page 49. For information on configuring an SMS media server, see "Adding SMS to Multimedia Contact Center" on page 61.

NOTE: If you are upgrading from Version 6.0.3.0 to Version 7.1, you will not have the option to add SMS media servers until you upgrade to Version 8.0+.

Enabling employees for multimedia

You enable employees for multimedia by assigning the appropriate licensing and adding multimedia capabilities to existing voice-only employees.

For additional information and configuration details, see "Adding multimedia capabilities to employees" on page 66.

To enable employees for multimedia

1. Use the multi-select method to select the employees who will be upgraded to Multimedia Contact Center licensing.
2. Click the **General** tab and enable employees for the media their agents will support. Additional agents are created for the media specified. The agent uses the same name and reporting number as the employee.

Agents that are newly created in the Employee device page will only be added to the employee's agent group if the employee's agent groups are enabled for the relevant media type and the Unified Queue Group Wizard is used.
3. Click **Save**.

Defining employee Workload

A Workload descriptor, which determines the number and type of media contacts that can be pushed to an agent at any one time, must be assigned to each employee. If needed, refer to the notes regarding contact priority and Smart Algorithms that you were advised to make in the pre-upgrade notes and planning section of this document as a guide when defining Workloads.

During the upgrade, default Workloads are created and assigned to existing employees who are licensed for Multimedia Contact Center. Newly created employees must have Workloads manually assigned to them. You can also choose to create customized Workloads and assign them to employees, rather than using the included, default Workloads.

For information on defining employee Workload, see "Managing Employee Workload" on page 69.
For information on configuring Workloads, see "Configuring Workload" on page 63

Adding agent groups

No additional agent groups are required to enable voice-only employees for multimedia. As part of Simplified Configuration, existing voice agent groups are automatically enabled for multimedia during the upgrade, if the Unified Queue Group Wizard is used.

If you have agents who handle non-voice media contacts only, you will need to add agent groups accordingly.

You add agent groups and then associate employees to these groups.

Agent group presence, previously only available to voice agents, is now also available for multimedia agents. Agents and supervisors can adjust a member's presence in an agent group. By default, on login, agents are present in all of their agent groups. You can adjust this setting in the Agent group device page of YourSite Explorer. See "Managing agent group membership, presence, and skill level" on page 75.

For more information and configuration details, see "Adding agent groups" on page 73 in the 'Configuring your multimedia contact center' section of this guide.

Adding multimedia queues

When you create a multimedia queue, it is automatically associated to the existing media server for that media type.

If you use the Unified Queue Group Wizard, you do not need to add multimedia queues. Voice queues will be used by the Unified Queue Group Wizard as the basis for creating Unified queue groups that will handle all inbound contacts for a service group.

For more information and configuration details, see "Adding multimedia queues" on page 77 in the 'Configuring your multimedia contact center' section of this guide.

Creating queue groups

Administrators can group queues for common purposes. There are three kinds of queue groups available: Reporting, Mitel Virtual, and Unified Queue Groups.

Unified Queue Groups are used to enable the media queues for a service organization to be grouped together. They are called 'Unified' Queue Groups because they unify a group of media queues, for example, email, chat, and SMS, that handle conversations for a service group (i.e., Sales or Customer Support) within a business.

The Unified Queue Group wizard uses current voice queues to represent the service groups that will be expanded to handle multimedia. The System Administrator is asked to select voice queues and the media types that are to be enabled in the organization. The wizard then uses the voice queue name and reporting ID to create media queues, with the same name and reporting ID, and groups them into a Unified Queue Group. Each media queue is assigned a default Inqueue workflow.

NOTE:

- Unified Queue Groups are restricted to one media queue for each type of media.
- Individual queue priorities are used to specify the priority for media and queue routing. The default priority assigned is 64.
- Default Inqueue workflows have four levels of offer to agent group activities (to support multiple overflow conditions). The wizard populates the default Inqueue workflows with the same agent group order used by the voice queue member of the Unified Queue Group.
- Unified Queue Groups are optional. If you choose not to use them, then you must create individual email, chat, and SMS queues and enable agent groups for multimedia.

For more information and configuration details, see "Adding queue groups" on page 87.

Modifying default Inbound, Response, and Inqueue workflows

NOTE: There is no default email response workflow.

During the upgrade, a default response workflow is assigned to relevant media servers. Default Inqueue workflows are assigned to each media queue. You can choose whether to enable default Inbound workflows on the Media Server configuration page in YourSite Explorer. See "Converting to visual workflow routing" on page 18.

The default workflows must be modified after the upgrade, as follows:

- Typical Inbound workflow modifications include:
 - Emails: modifying the email address and destination queues
 - Chat: modifying the queue ID and destination queues
 - SMS: No modifications are required, but queue ID and destination queues can be modified
- Typical Response workflow modifications include:
 - Sending chat transcripts to clients
- Typical Inqueue workflow modifications include:
 - Associating the handling agent groups to the queue
 - Customizing the auto-acknowledgment messages

For more information, see "Multimedia Contact Center default workflows" on page 212.

Converting to visual workflow routing

When upgrading from Version 6.0.3.0 to Version 7.1, you have the option of converting to visual workflow routing. Visual workflow routing directs incoming contacts to queues and agent groups via routing rules, which are determined by Inbound and Inqueue workflows.

The first step in converting to visual workflow routing is enabling inbound routing for your media servers. Enabling inbound routing associates the appropriate default Inbound workflow to the server. Administrators can modify these default workflows to suit the contact center's needs.

The following explains how to convert to visual workflow routing by enabling the Inbound Routing tab on YourSite Explorer's Media Servers page. For more information on working with visual workflows and applying routing rules to contacts, see:

- "Multimedia routing using visual workflows" on page 156.
- "Multimedia Contact Center default workflows" on page 212.

NOTE: If Version 6.0.3.0 customers upgrading to a Version 7.1 system do not convert to visual workflow routing via the following procedure, multimedia contacts will continue to route directly to queues without routing rules applied through Inbound workflows. In cases where inbound contacts have multiple addresses in the To and/or CC fields, the contact will only be routed by the first address in the To field.

To apply inbound routing rules to contacts

1. Select **Multimedia=>Media servers** and select the media server.
2. Click the **Inbound** tab.
The default Inbound workflow will be applied to your media server.

NOTE: If you do not want to convert to visual workflow routing, do not save the media server.

INSTALLING CLIENT APPLICATIONS

Before performing client installations, ensure the hardware and software requirements are met. See the *MiContact Center and Business Reporter System Engineering Guide* for specification details.

In a side by side migration scenario with the Version 6.0.3.0 client applications installed, on each client machine you must manually change the Enterprise IP address in the registry to point to the new server. The client computers will then automatically update to the new software version. The registry key is `hkey_local_machine\software\wow6432node\prairieFyre software inc\common`.

After the IP address change, client computers must have their Updater Service restarted for the Enterprise IP address change to be effective and to download the client software updates.

NOTE: If, after upgrading a client computer, you want to roll back, you must uninstall the new software version and reinstall the previous version. Administrators should revert any updated requisite software components and then revert the Enterprise IP address back to the previous production server IP.

Running the Client Role Selector and installing Ignite (DESKTOP)

The MiContact Center client installation includes the Client Role Selector. Within the Client Role Selector, you choose the applications and components of MiContact Center that you want to install on the desktop. In order to install Ignite (DESKTOP), an application that enables employees to handle multimedia contacts, you must select it from the list of available options in the Client Role Selector window.

UPGRADING A SYSTEM THAT CURRENTLY INCLUDES VOICE AND MULTIMEDIA

This section describes upgrading an existing voice and multimedia contact center to Version 8.1.

INSTALLATION OPTIONS

In Version 6.0.3.0, service groups are organized using unique agent groups per media type. As of Version 7.0, Unified Queue Groups can be created for each service organization. Unified Queue Groups can contain queues for each media type and a single agent group assigned to all of the queues. During the upgrade this reorganization does not happen automatically.

At the beginning of the upgrade from Version 6.0.3.0 to Version 7.1, the install wizard offers the option of the recommended normal upgrade or manually creating your Multimedia Contact Center Version 7.1 configuration from scratch. Read further to learn about the advantages of each choice.

If you select the recommended normal upgrade option, the installation wizard will not attempt to create new agent IDs, agent groups, and queues. Such configuration must be done following the upgrade. The advantage of choosing manual configuration is that it enables you to use the Simplified Configuration tool. Simplified Configuration eases the configuration process by creating blended queues and agent groups around each service group. It uses the already existing voice system as a base from which to enable multimedia. After the Simplified Configuration process is complete, each service group in the organization will have a Unified Queue Group that contains the media queues supporting the service group and a blended agent group(s) containing all of the employees who provide support for the service group. If another media type is required for a service group, another media queue can be added to the Unified Queue Group and the employees who are members of the agent group can be enabled for the additional media type.

CAUTION: We do not recommend manually upgrading as doing so requires devices to be reconfigured. If you choose to upgrade manually instead of auto-upgrading, your existing devices will be designated as historical and you will need to create new ones.

If you select to manually configure your Multimedia Contact Center, all of your existing devices will be designated as historical. New agent devices, agent groups, and queues will be auto-created to align as well as possible with your pre-existing configuration settings and routing behavior. After the upgrade it may be necessary to adjust device configuration, for example, you may want to consolidate agent groups or create Unified Queue Groups, to better align with the new model of Multimedia Contact Center. The advantage of choosing auto-upgrade is that it is faster than the manual upgrade. If you want to re-enable your system quickly to minimize downtime and do more refined configuration later, then this may be the best choice for you.

NOTE: The Simplified Configuration feature is only applicable to upgrades from Version 6.0.3.0.

ADDITION OF DEFAULT WORKFLOWS

During the upgrade, Response and Inqueue workflows are added. Optionally, Inbound workflows can be enabled on the email media server device configuration page in YourSite Explorer. (See "Converting to visual workflow routing" on page 30 for more information.) Inqueue workflows control the routing of queued contacts to agents. The database conversion installs default Inqueue workflows for each queue. By default, each Inqueue workflow supports one primary, three overflow, and one interflow group (to be used if the overflow groups fail to route). Whenever possible, workflow data is auto-filled to reduce the upgrade effort. To avoid the need to reconfigure Inbound workflows, the existing routing configuration that media servers use to route to queues is applied.

MAINTAINING HISTORICAL DATA

During the upgrade from Version 6.0.3.0 to Version 7.1, all pre-existing multimedia media servers are designated as historical. All queues, agent groups, and agents associated to the multimedia media servers are, consequently, also designated as historical.

The Summarize process has been modified to regenerate data for historical agents if the employee associated to the agents remains licensed for Multimedia Contact Center. This ensures all pertinent historical agent records continue to be accessible.

NOTE:

- During the upgrade, device reporting numbers may change. For example, if you choose the auto-upgrade option, similar groups will be automatically aligned, potentially altering their reporting numbers. This will affect your report data interpretation.
- After upgrading to Version 7.1, all multimedia reports will be generated from the new devices on the active media servers. If you want to run pre-upgrade multimedia reports, their data must be generated from the historical media servers. You cannot consolidate historical and new data into a single report.

MIGRATING THE EMAIL REPOSITORY

To enable archived email searches following the upgrade, you must migrate your old emails by copying the Multimedia Contact Center Exchange Repository from the old system to the flat file repository on your new system.

NOTE: This section is only applicable if you are upgrading from Version 6.0.3.0.

To migrate the email repository

1. Navigate to C:\Program Files (x86)\Mitel\MiContact Center\DataDirectory, create two folders, and name them 'Originals' and 'Replies'.
2. Within Outlook, access the MCC Exchange repository and drag and drop (copy) the mail contents from **Folders=>Public Folders=>CyberAED=>Repository=>Originals** and **Folders=>Public Folders=>CyberAED=>Repository=>Replies** into the matching folders you created in step 1.
3. After the contents have been copied over, stop and start the **MiContact Center Storage** service.
Stopping and starting the Storage Service initiates the Repository Conversion tool. The Repository Conversion tool enables email compatibility with the updated Multimedia Contact Center search tool. The Conversion Tool converts and moves all mail items to two new folders: 'ProcessedOriginal' and 'ProcessedReply', for original and reply items respectively. After the conversion is complete, the items are moved to the 'SearchStorage' folder. You can delete the 'ProcessedOriginal' and 'ProcessedReply' folders after confirming all Exchange repository items have been successfully moved to the search repository.

Migrating the email repository can be quite time consuming. Depending on the number of items being moved, this process may take several hours. Migration must take place after the upgrade is finished as the C:\Program Files (x86)\Mitel and SearchStorage folders must be created before the migration can occur. You will be able to run Multimedia Contact Center while migrating the email repository. Any historical data that resides in Exchange will not be accessible from Ignite for searching purposes until the migration is complete.

Migrating the email repository breaks the link with real-time data. If you use preferred agent settings to route email, any contacts from before the upgrade will not retain their preferred agent history. To associate an agent with a reply, a manual search of SMDR records will be required.

UPGRADE PROCESS RECOMMENDATIONS

The following steps must be followed to successfully upgrade an existing voice and multimedia system:

1. Adhere to all pre-upgrade planning notes.
See "Pre-upgrade notes and planning" on page 11.
2. Ensure all hardware and software specifications are met for the server and clients.
See the *MiContact Center and Business Reporter System Engineering Guide* for specification details.
3. Migrate SQL databases. (Side by side migration method only.)
See "Migrating SQL databases" on page 24.
4. Back up telephone system and configuration data.
See "Backing up telephone system and configuration data" on page 24.
5. Install MiContact Center Version 8.1 on the Enterprise Server.
NOTE: If you are upgrading from Version 6.0.3.0, install Version 7.1 and, after completing post-installation multimedia configuration, install Version 8.1.
See "Enterprise Server installation" on page 25.
6. Restore telephone system and configuration data.
See "Restoring telephone system and configuration data" on page 25.
7. Migrate existing emails from SearchStorage to Elasticsearch.

See "Migrating existing emails from SearchStorage to Elasticsearch" on page 26.

NOTE: If you are upgrading from Version 6.0.3.0 to Version 7.1, you will not be able to migrate from SearchStorage to ElasticSearch until you upgrade to Version 8.0+.

8. Configure devices.

The devices that require configuration depend on whether you select manual or auto-upgrade during the installation process. If you select the manual upgrade, you will need to configure all multimedia devices. If you select auto-upgrade, some device configuration is done automatically. Potentially, configuration would be required for the following devices: Mail servers, email media servers, chat media servers, SMS media servers, employees, employee Workload, queues, queue groups, default login agent group presence, default inbound, response, and Inqueue workflows, and visual workflow routing.

See "Configuring devices" on page 26.

9. Install client applications on employee desktops.

See "Installing client applications" on page 31.

10. Remove Multimedia Contact Center Web Chat Server software.

See "Removing Multimedia Contact Center WebChat Server software" on page 31.

11. Bring the system online.

See "Bringing the system online" on page 31.

12. Follow Exchange Server migration recommendations.

See "Exchange Server migration recommendations" on page 32.

CPU UTILIZATION WHEN MIGRATING MULTIMEDIA MESSAGES TO ELASTICSEARCH

During upgrades, the installer migrates in-queue and in-progress multimedia messages to Elasticsearch. This migration uses a large share of the processor resources and, as such, may adversely affect system stability for Remote Desktop Sessions. After the migration process is complete, the installation continues and processor resources return to normal consumption levels.

NOTE: If system monitoring or management systems are configured to alarm on high resource utilization, a false flag may present during upgrades.

After installation is complete, multimedia interactions continue to be processed in the background and placed into the Elasticsearch archive. Multimedia messages are not searchable via Ignite until the message has been archived. Messages are archived, beginning with the most recent interactions, at a rate of approximately 8000 items per hour. The processing rate depends on your processor, available system resources, and number of historical multimedia interactions to be migrated.

Migration speed can be decreased if the server is under high load and you want to prioritize production operations. Migration speed should only be decreased if the system is in a high performance production environment and there is no immediate need to search older archived items. Default settings should provide appropriate performance for the majority of multimedia implementations. For information regarding modifying migration speed, see the following Mitel Knowledge Base article: <http://micc.mitel.com/kb/KnowledgebaseArticle52429.aspx>.

For information regarding modifying migration speed, see the following Mitel Knowledge Base article: <http://micc.mitel.com/kb/KnowledgebaseArticle52429.aspx>.

MIGRATING SQL DATABASES

Please note that this section relates only to a side by side migration upgrade method.

Before upgrading, we recommend migrating the SQL database to the new server. By doing so, the installation configuration wizard will update the database schema when the new version of software is installed.

Migrating the SQL databases enables you to preserve your previous reporting data. If you do not migrate the SQL databases, a new database will be created to which you can copy over the raw data, restore the database from the backup files, and, then, re-summarize the data. However, the data you will be re-summarizing will be for the current configuration so the reporting data may not match that of your previous system.

The two most common methods for migrating SQL databases are:

- Dropping the database files from the SQL instance and making a physical copy of the .mdf and .ldf files
- Using SQL Server Management tools to generate backup files or scripts

See the applicable Microsoft documentation for more information on migrating SQL databases.

To migrate SQL databases

1. Copy the SQL database .mdf and .ldf files or use MS SQL Server Management tools to make backup files or scripts.
The SQL databases are CCMDData and CCMStatisticalData.
2. Provision a new SQL server or new instance of SQL server.
3. Restore the SQL databases to the new SQL server or instance of SQL server.

BACKING UP TELEPHONE SYSTEM AND CONFIGURATION DATA

Before installing the new version of software on the designated new server, you must back up telephone system and configuration data on the old Enterprise Server. If you are installing on top of an existing Enterprise Server, store the backup files in a location outside of the Enterprise Server in order to maintain essential data in the case of a hardware failure or catastrophic event.

The Enterprise Server configuration backup includes configuration items such as employees, agents, agent groups, queues, and security roles.

NOTE: You must be licensed as a System Administrator to back up telephone system and configuration data.

To back up telephone system and configuration data

1. In **Contact Center Client**, click **Tools=>Management**.
2. In **Management Console**, click **Configuration=>Back up/Restore configuration data**.
3. Select **Back up** and click **Next**.

4. Next to **Save**, click the drop-down button and select **Save as**.
5. Select a location to save the file and click **Save**.
6. Close the **View Downloads** window and, in the **Backup and Restore Wizard**, click **Finish**. A .zip file is created within which is an XML file that contains the entire configuration. The file size will vary depending on the amount of data that needs to be backed up, but will typically be between 1 and 20 MB. This .zip file name contains the date on which the file was created. For example, a backup file created on June 24, 2015 will contain '20150624'.

ENTERPRISE SERVER INSTALLATION

Install Version 8.1 on the existing Enterprise Server (direct upgrade) or on the designated Enterprise Server (side by side upgrade). See the 'Enterprise Server installation' section in the *MiContact Center Installation and Administration Guide*.

NOTE: If you are upgrading from Version 6.0.3.0, install Version 7.1 and, after completing post-installation multimedia configuration, install Version 8.1.

RESTORING TELEPHONE SYSTEM AND CONFIGURATION DATA

After installing the new version of software on the existing Enterprise Server (direct upgrade) or on the designated Enterprise Server (side by side upgrade), restore the previously backed-up data from the location where it was stored (direct upgrade) or from the old server to the new server (side by side upgrade).

NOTE: Remote restores are not supported.

To restore telephone system and configuration data

1. In **Contact Center Client**, click **Tools=>Management**.
2. In **Management Console**, click **Configuration=> Back up/Restore configuration data**.
3. Select **Restore**.
4. To restore a file from the server backup directory, select **from the server backup directory**, select a file, and click **Next**.
5. To restore a file saved to another location, select **from this file=>Browse**, open the backup file, and click **Next**.
6. When prompted to restart Contact Center Client, click **Yes**.
7. Optionally, you can synchronize the Enterprise Server's IP address and computer name after restoring data. Do so by selecting the appropriate check box and entering the Enterprise Server's IP address in the field provided.

After restoring a backup, check the IP addresses configured in YourSite Explorer and the computer names associated to all media servers to ensure the local media servers are set to the local server name and remote collectors are also set correctly.

MIGRATING EXISTING EMAILS FROM SEARCHSTORAGE TO ELASTICSEARCH

In a side by side migration upgrade from 7.x, after restoring the backup on the new server, you must run a migration tool to migrate existing emails from the old SearchStorage directory to Elasticsearch on the newly installed Version 8.0+ Enterprise Server.

To migrate existing conversations in a side by side upgrade scenario

1. On the 8.0+ Enterprise Server, in Windows, navigate to **Services**.
2. Right-click **MiContact Center Storage** and click **Stop**.
3. On the 7.x Enterprise Server, copy all .msg files from the **SearchStorage** location in **CCM\DataDirectory**.
4. On the 8.0+ Enterprise Server, paste them in the new **SearchStorage** location (set during installation).
5. Launch the command prompt.
6. Run the following command: **cd "<drive>:\Program Files (x86)\Mitel\MiContact Center\Services\StorageServices\ElasticsearchMigration"**, replacing <drive> with the appropriate drive chosen during installation.
7. Run the command **StorageService.ElasticsearchMigration.exe /r**.
8. When the message **Migration finished for storage directory** appears, close the command prompt.
9. Navigate to **Services**.
10. Right-click **MiContact Center Storage** and click **Start**.

CONFIGURING DEVICES

After upgrading the Enterprise Server, some manual device configuration is required to make your Version 8.1 multimedia contact center fully functional.

NOTE: Whether you need to perform each of the following procedures depends on the version of MiContact Center software you are upgrading from and your multimedia settings prior to upgrade. All procedures are included here but may not all apply to your specific upgrade.

1. Create mail servers.
2. Configure email media servers.
3. Configure chat media servers.
4. Configure SMS media servers.
NOTE: If you are upgrading from Version 6.0.3.0 to Version 7.1, you will not have the option to add SMS media servers until you upgrade to Version 8.0+.
5. Configure employees.
6. Define employee Workload.
7. Configure queues.
8. Configure queue groups.
9. Set default login agent group presence.
10. Modify default inbound, response, and Inqueue workflows.
11. Convert to visual workflow routing.

Creating mail servers

Email media servers require one or more mail servers to be configured. A mail server is used to receive and send mails to the corporate mail server and defines the IMAP connection to a single email account. Email aliases or distribution groups, depending on the mail server type, are used to associate multiple email addresses for the contact center to a single email account. This minimizes the number of mail servers required.

After creating a mail server, we recommend using the test button to verify both the incoming and outgoing connections are functioning as expected.

When email servers are copied over during the upgrade, they retain the SMTP information for outbound mails, if it was configured in the previous system. If you are upgrading from a Version 6.0.3.0 system, inbound mail settings will need to be configured as they did not exist before Version 7.0.

For more information and configuration details, see "Integrating Multimedia Contact Center with mail servers" on page 42.

Configuring the email media server

When upgrading from Version 6.0.3.0 to Version 7.1, email media servers will be copied over when you restore the backup data from your old server to your new server and will have an Exchange mail server already assigned to them.

For more information and configuration details, see "Adding email to Multimedia Contact Center" on page 56.

Configuring the chat media server

When upgrading from Version 6.0.3.0 to Version 7.1, chat media servers will be copied over when you restore the backup data from your old server to your new server. You need to configure the Chat Server URL and auto-response username.

For more information and configuration details, see "Adding chat to Multimedia Contact Center" on page 58.

Configuring the SMS media server

SMS media servers will be made historical during an upgrade from Version 7.0 or Version 7.1. MultiTech SMS modems are not supported in Version 8.0+. Historical SMS media servers and their data will be available for reporting, post upgrade. Pre-8.0 SMS messages will be migrated and treated as emails.

If you are upgrading from pre-Version 8.0, you must add a new SMS media server, add SMS handling capabilities to employee and agent groups, and add new SMS queues. In Version 8.0+, SMS media servers require an SMS Gateway Provider. As of Version 8.0, Multimedia Contact Center supports Twilio as an SMS Gateway Provider. You must have a Twilio account to add SMS handling capabilities to Multimedia Contact Center.

For more information on integrating with an SMS Gateway Provider, see "Integrating Multimedia Contact Center with an SMS Gateway Provider" on page 49. For information on configuring an SMS media server, see "Adding SMS to Multimedia Contact Center" on page 61.

NOTE: If you are upgrading from Version 6.0.3.0 to Version 7.1, you will not have the option to add SMS media servers until you upgrade to Version 8.0+.

Configuring employees

As of Multimedia Contact Center Version 7.0, employees can only have one agent for each of the types of multimedia supported by the contact center. In addition, employees handling multimedia contacts must have the appropriate licensing.

When upgrading from Version 6.0.3.0 to Version 7.1, all multimedia agents associated to the Version 6.0.3.0 media servers are made historical. A new agent will be created with the same reporting number as the employee. New SMS agents must be created manually.

NOTE: Historical multimedia agents associated with employees can only be seen and deleted from YourSite=>Agents.

For information and configuration details, see "Adding multimedia capabilities to employees" on page 66.

Defining employee Workload

During the upgrade from Version 6.0.3.0 to Version 7.1, a default Workload descriptor, which determines the number and type of each media that can be handled at any one time, is assigned to each employee. After upgrading, you can create and assign new Workloads to employees based on employee experience or expertise or according to your contact center needs. If needed, refer to the notes regarding contact priority and Smart Algorithms that you were advised to make in the pre-upgrade notes and planning section of this document as a guide when defining Workloads.

For information on defining employee Workload, see "Managing Employee Workload" on page 69. For information on configuring Workloads, see "Configuring Workload" on page 63

Configuring queues

When you create a multimedia queue, it is automatically associated to the existing media server for that media type.

After an upgrade from Version 6.0.3.0 to Version 7.1, the agent groups associated to the previous multimedia queues are assigned to the new corresponding multimedia queues' Offer to Agent Group activities. Interflow options must be configured manually after upgrade, however.

To set interflow for a queue, add an Interflow activity to the Inqueue workflow after the last Offer to Agent group activity in the workflow. Set the Interflow activity's destination to the destination previously set in the queue's 'Internally transfer interflow contacts to this email/chat queue' field or 'Externally interflow contacts to this email address field'. For information on configuring the Interflow activity, see "Routing contacts with the Interflow activity" on page 188.

Ensure the Offer to Agent Group before the Interflow activity is set to overflow. For the duration set previously in the 'Interflow time' field, take the value and divide it amongst the Offer to Agent Group activities' Overflow Time fields. For example, if the 'Interflow time' value is 3 minutes and the new Inqueue workflow has two Offer to Agent Group activities, then the value set in each Overflow Time field would be 1.5 minutes.

The following chat queue fields are not supported in 7.0+:

- Queue public folder name
- Internal email address

After the upgrade from Version 6.0.3.0, you must configure the chat queue auto-response username and set the queue priority as best suits your contact center.

For more information and configuration details, see "Adding multimedia queues" on page 77.

Configuring queue groups

Administrators can group queues for common purposes. There are three kinds of queue groups available: Reporting, Mitel Virtual, and Unified Queue Groups.

During the upgrade from Version 6.0.3.0 to Version 7.1, a best effort is made to auto-create Unified Queue Groups, however, depending on your previous configuration, they may have to be manually created or customized. Unified Queue Groups are optional but are beneficial in organizing media types for each service organization within your business and are a preferred method of multimedia queue configuration.

For more information and configuration details, see "Adding queue groups" on page 87.

Setting default login agent group presence

Agents and supervisors can adjust a member's presence in an agent group. By default, on login, agents are present in all of their agent groups. You can adjust this setting in the Agent group device page of YourSite Explorer. See "Managing agent group membership, presence, and skill level" on page 75.

Modifying default Inbound, Response, and Inqueue workflows

NOTE: There is no default email response workflow.

During the upgrade, a default response workflow is assigned to relevant media servers. Default Inqueue workflows are assigned to each media queue. You can choose whether to enable default Inbound workflows on the email media server device configuration page in YourSite Explorer. See "Converting to visual workflow routing" on page 18.

The default workflows must be modified after the upgrade, as follows:

- Typical Inbound workflow modifications include:
 - Emails: modifying the email address and destination queues
 - Chat: modifying the queue ID and destination queues
 - SMS: No modifications required, but queue ID and destination queues can be modified
- Typical Response workflow modifications include:
 - Sending chat transcripts to clients
- Typical Inqueue workflow modifications include:
 - Associating the handling agent groups to the queue
 - Customizing the auto-acknowledgement messages

Default upgrade settings use an Offer to Agent activity to select the next available agent. If you require preferred agent support, then you must replace the Offer to Agent activity with an Offer to Preferred Agent activity in the Inqueue workflow.

For more information, see "Multimedia Contact Center default workflows" on page 212.

Converting to visual workflow routing

When upgrading from Version 6.0.3.0 to Version 7.1, you have the option of converting to visual workflow routing. Visual workflow routing directs incoming contacts to queues and agent groups via routing rules, which are determined by Inbound and Inqueue workflows.

The first step in converting to visual workflow routing is enabling inbound routing for your media servers. Enabling inbound routing associates the appropriate default Inbound workflow to the server. Administrators can modify these default workflows to suit the contact center's needs.

The following explains how to convert to visual workflow routing by enabling the Inbound Routing tab on YourSite Explorer's Media Servers page. For more information on working with visual workflows and applying routing rules to contacts, see:

- "Multimedia routing using visual workflows" on page 156.
- "Multimedia Contact Center default workflows" on page 212.

NOTE: If Version 6.0.3.0 customers upgrading to a Version 7.1 system do not convert to visual workflow routing via the following procedure, multimedia contacts will continue to route directly to queues without routing rules applied through Inbound workflows. In cases where inbound contacts have multiple addresses in the To and/or CC fields, the contact will only be routed by the first address in the To field.

To apply inbound routing rules to contacts

1. Select **Multimedia=>Media servers** and select the media server.
2. Click the **Inbound** tab.

The default Inbound workflow will be applied to your media server.

NOTE: If you do not want to convert to visual workflow routing, do not save the media server.

INSTALLING CLIENT APPLICATIONS

Before performing client installations, ensure the hardware and software requirements are met. See the *MiContact Center and Business Reporter System Engineering Guide*.

In a side by side migration scenario with the Version 6.0.3.0 client applications installed, on each client machine you must manually change the Enterprise IP address in the registry to point to the new server. The client computers will then automatically update to the new software version. The registry key is `hkey_local_machine\software\wow6432node\prairieFyre software inc\common`.

After the IP address change, client computers must have their Updater Service restarted for the Enterprise IP address change to be effective and to download the client software updates.

NOTE: If, after upgrading a client computer, you want to roll back, you must uninstall the new software version and reinstall the previous version. Administrators should revert any updated requisite software components and then revert the Enterprise IP address back to the previous production server IP.

When you upgrade client desktops, the Updater Service will remove the Version 6.0.3.0 Outlook multimedia agent plug-in application.

Running the Client Role Selector and installing Ignite (DESKTOP)

The MiContact Center client installation includes the Client Role Selector. Within the Client Role Selector, you choose the applications and components of MiContact Center that you want to install on the desktop. Ignite enables employees to handle multimedia contacts. If you want to install Ignite (DESKTOP) on the client desktop, select it from the list of available options in the Client Role Selector window.

Removing Multimedia Contact Center WebChat Server software

If chat was supported in your Version 6.0.3.0 Multimedia Contact Center environment, remove the WebChat Server software that was previously installed on the corporate Web server.

BRINGING THE SYSTEM ONLINE

NOTE: This section is only applicable if you are upgrading from Version 6.0.3.0.

Create a test email queue, a test chat queue, a test SMS queue, and a test agent on the new server and validate that email, chat, and SMS are being correctly routed to queues and agents. Run reports to verify accuracy. Confirm that email aliases or distribution groups and URL redirects for chat have been correctly implemented.

Before moving to the new system, advise agents to complete all outstanding items on the old system. Advise agents to empty their public folders.

When moving email addresses from your old server to the new server, we recommend you enable email addresses one at a time, beginning with those that experience the lowest traffic.

Mail-disable the email address from the existing public folder. Add the address as an alias or distribution group to the generic email address inbox that your mail server is pulling from in the Version 8.1 environment. Continue with this process until all email addresses have been enabled in the new system.

NOTE: When you mail-disable the email address in the public folder, mails will not be delivered and mail senders will receive an undeliverable message until the email address has been created in the new system as an alias or distribution group.

For more information, see "Exchange Server migration recommendations" on page 32.

Optionally, you can similarly migrate the chat items. We recommend you do so in a staggered fashion by only exposing the request to chat from the corporate Web page for a specific service group. We also recommend that, during migration, you add a maintenance message that explains chat is temporarily unavailable.

Deploy the updated corporate Web pages with the Contact Us page on the corporate website. Remove the chat temporary unavailable page.

Disable the old system and instruct agents to log onto the new system.

EXCHANGE SERVER MIGRATION RECOMMENDATIONS

NOTE: This section is only applicable if you are upgrading from Version 6.0.3.0.

Support is provided for migrating the Exchange repository to the new flat file repository. This migration is expected to take a significant amount of time and is dependent on the amount of data to be migrated. This migration can occur after the new system is operational. After migrating to the flat file repository, stopping and restarting the Storage Service is required and will tag new entries for the search tool.

NOTE: Due to Windows' limitations, you will be unable to migrate emails whose file names exceed 260 characters.

Migrating data will break the link with real-time data and preferred agent status for any contacts from before the upgrade will be lost. The migrated data will be fully indexed and searchable. To associate an agent to a reply will require a manual search of SMDR records.

There are several possible, existing Exchange Server deployment scenarios to consider when upgrading. The high level upgrade steps are similar regardless of the version of Exchange currently being used. See the following table for a description of four possible migration scenarios.

NOTE: For minimum downtime, we recommend migrating email addresses after all installation and configuration is complete. In that way, when you mail-disable the public folders and add email addresses, as aliases or distribution groups, agents will be already be configured and prepared to answer emails in the new system.

Table 1: Exchange Server migration recommendations

EXCHANGE SERVER DEPLOYMENT SCENARIO	DURING MIGRATION	POST-UPGRADE
Exchange is installed on its own server and is not colocated with MiContact Center. This Exchange Server is only used to host public folders for the Multimedia Contact Center.	Leave the Exchange Server intact.	Decommission the Exchange Server. It is no longer required. The public folder structure can be migrated to any other public folder store using public folder replication.
Exchange is installed on its own server and is not colocated with MiContact Center. This Exchange Server is used for corporate and Multimedia Contact Center data.	Leave the Exchange Server intact.	Leave the Exchange Server intact for corporate use.
Exchange is colocated with MiContact Center and is only used to host Multimedia Contact Center data.	A new server should be built for MiContact Center Version 7.1. The Exchange Server should be left intact with MiContact Center installed as a part of the rollback plan.	Decommission the Exchange Server. It is no longer required. The public folder structure can be migrated to any other public folder store using public folder replication. Uninstall the MiContact Center software.
Exchange is colocated with MiContact Center and is used for corporate and Multimedia Contact Center data.	A new server should be built for MiContact Center Version 7.1. The Exchange Server should be left intact with MiContact Center installed as a part of the rollback plan.	Leave the Exchange Server intact for corporate use. Uninstall the MiContact Center software.

High-level migration steps for the Exchange Server are as follows:

1. Stop and disable the MiContact Center Services on the Exchange Server (Setup and Objects service).
2. Create a new mailbox on the mail server that is going to host the new Multimedia Contact Center mailboxes.
Use a primary SMTP address that does not match any of the queue's SMTP addresses.
3. Using the Exchange Public Folder Management Tool, mail-disable all of the Queue Public Folders.
NOTE: When you mail-disable email addresses in the public folder, mails will not be delivered and mail senders will receive an undeliverable message until the email addresses have been created in the new system as an alias or distribution group. We recommend you disable email addresses one at a time to minimize disruption.
4. Create a distribution group containing email addresses used to route to queues.
Distribution Groups are recommended in order to associate multiple email addresses to a single mailbox. It may take up to 15 minutes before the email addresses are available.
5. Enable the IMAP service and set it to automatic startup on the CAS server that is servicing the new mailbox.

CONFIGURING YOUR MULTIMEDIA CONTACT CENTER

Multimedia Contact Center is configured in the YourSite Explorer application in the Multimedia tab, which contains the relevant MiContact Center devices for Multimedia Contact Center.

YOURSITE EXPLORER CONFIGURATION NOTES AND TIPS

For ease of use and efficiency, YourSite Explorer uses standard Windows CTRL and Shift button conventions for selecting multiple objects.

NOTE:

- Only one set of pending configuration changes can be saved at any time. If another user saves changes to the same element of YourSite Explorer that you are updating, you receive an error message when attempting to save your changes. In these instances you must refresh YourSite Explorer after the other user's changes have been saved. You may then re-enter and save your changes. We recommend you save your configuration changes frequently, in order to avoid losing work.
- YourSite Explorer enables you to have multiple device tabs open simultaneously. As a best practice, we recommend you only have the device tabs open that you are currently using.
- When you configure numbers for groups in YourSite Explorer, use numerical characters only, such as 1 (for Queue Group 1). Do not insert symbols, such as a star [*] or pound sign [#], in the number.
- If you attempt to add a device or device group to YourSite Explorer that is already in the database, the system notifies you that the device or device group is already present. When you add a series of devices or device groups to YourSite, such as Queues 5001 to 5005, if the system detects you have already added Queue 5002, then it will not add Queue 5002 or any subsequent queues in the series (that is, Queues 5003 to 5005) to the database.

For detailed information regarding YourSite Explorer, consult the *MiContact Center Installation and Administration Guide*.

APPLYING CHANGES TO MULTIPLE DEVICES AT A TIME

Administrators can apply a change to multiple devices at a time using the multi-select feature. This feature saves administrators from having to apply the same change to multiple devices of the same type.

To apply changes to multiple devices at a time

1. Click **Multimedia** and select the device.
2. Select multiple devices by holding **CTRL** or **Shift** and clicking the devices.
3. Select the configuration changes.
NOTE: Only information common across devices of the same type can be changed in one action.
4. Click **Save**.

VIEWING DEVICES BY CATEGORY OR TYPE

Administrators can selectively view devices by category or type by applying filters to the device page. For example, administrators can view only the contact center's Email Inbound workflows by applying the Email Inbound filter to the Workflows page.

Multiple filters can be applied at a time, enabling administrators to selectively view devices by multiple categories or types. For example, administrators can view only Email, Chat, or SMS variables by applying these filters to the Variables page.

The following devices may be viewed by category or type

- Queues
- Subroutines
- Variables
- Workflows

To view variables by category or type

1. Click **Multimedia** and select the device.
2. After **Filter**, select a device category or type from the drop-down list.
NOTE: Filters remain in place until a category is deselected. Selecting 'None' removes all filters.

ORGANIZING DEVICES BY SHARED CRITERIA

Organizing devices by shared criteria will group devices for ease of identification and configuration. For example, grouping media servers by Site will, in the device pane, group all media servers associated to a site. After selecting grouped devices, administrators can change information common to those devices in one action. See "Applying changes to multiple devices at a time" on page 35.

In Multimedia Contact Center, administrators can organize the following devices by criteria

- Agents
- Employees
- Media servers

To organize a device type by criteria

1. Click **Multimedia** and select the device to group.
2. Click **Group by** and select an organizing criterion or criteria.
NOTE: Additional grouping criteria are nested under the original criterion selected.

To remove organizing criteria

1. Click **Multimedia** and select the device.
2. Click **Group by** and deselect the criteria to remove.
NOTE: To remove all grouping criteria, ensure no criteria remain selected under **Group by**.

REQUIRED INFORMATION

To configure Multimedia Contact Center, you require the following information:

- Mail server name
- IMAP port information for mail server
- Email username and password
- SMTP Server for email replies
- Chat server URL (the public URL used to request chat)
- SMS gateway provider account
- Interflow configuration
For multimedia queues, interflow is conducted by the Interflow activity in Inqueue workflows. See "Routing contacts with the Interflow activity" on page 188.
- Customized auto-acknowledgment messages
Multimedia Contact Center default workflows contain a number of default auto-acknowledgment messages. For an overview of the default workflows and their messages that may need to be modified to suit your contact center's needs, see "Multimedia Contact Center default workflows" on page 212.

CONFIGURING MULTIMEDIA ENTERPRISE SETTINGS

The Enterprise Server is the computer on which MiContact Center is installed. When programming the enterprise, you configure Enterprise Server general settings, some maintenance services, and email alarms, as well as settings for Contact Center Screen Pop and Multimedia Contact Center.

Configuration steps specific to Multimedia Contact Center include:

- Configuring email settings
- Configuring the Multimedia storage path

For more information concerning non-multimedia enterprise settings, see the *MiContact Center Installation and Administration Guide*.

CONFIGURING EMAIL SETTINGS

You configure email alarms so you are notified by email about Enterprise Server and real-time performance issues. You must have configured a mail server before configuring your email settings. See "Adding mail servers" on page 43.

To configure email alarms

1. In YourSite Explorer, click **YourSite=>Enterprise**.
2. Click the **Email settings** tab.
3. After **Mail Server**, click the **Browse** button.
4. Select a mail server and click **OK**.

5. After **Email notification interval minutes**, select the interval (in minutes) that the Enterprise will check for alarms and send out email notifications.
6. After **Send Enterprise Server alarms to the following address(es)**, type the email address of the employee(s) who will receive the email notification.
7. Click **Save**.

ADDING SITES

A site is an office location with one or more media servers. It can be the office where the Enterprise Server is installed or a branch office.

Your site structure determines how you view statistics and reports. When you set up your site structure, you specify site and media server information. When you add a site, you add the name of the site and the time zone. By making each site distinct, you can restrict user access to sites. For more information on restricting user access, see "Configuring security roles" on page 97. The site's language determines the default language setting for employees associated to it. Changing the site's language will change the language setting for employee's associated to it.

Administrators can limit whether or not the Make Busy and Do Not Disturb reason codes used by employees are visible in communication tools such as MiCollab and Microsoft Skype for Business.

Administrators can also enable agent greeting and whisper announcement functionality for all agents in the site. Agents record messages from Ignite (DESKTOP) and assign them to specific queues, so that they are played on each incoming ACD call. For more information, see the "Agent Greeting settings (DESKTOP)" on page 321. For information on configuring agent greeting workflows, see *MiContact Center Installation and Administration Guide* and the *MiContact Center User Guide*.

Administrators can also restrict the site's use of Contact Center Client's Chat Integration, which enables employees to chat with each other in Contact Center Client. Prior to Version 7.0, there was an option to use Microsoft Skype for Business as the default chat client instead of Contact Center Chat. In Version 7.0 and greater, YourSite Explorer automatically detects if you have Microsoft Skype for Business Server and enables it as the default chat client. If your contact center is a mixed environment where some users have Skype for Business and others do not, you may want to use Contact Center Chat to ensure all employees can communicate. For information on using Contact Center Chat in an environment with Skype for Business on some systems, see the following Mitel Knowledge Base article: <http://micc.mitel.com/kb/KnowledgebaseArticle52084.aspx>

To add a site

1. Click **Multimedia=>Site**.
2. Click **Add**.
3. After **Site Name**, type the name of the site.
4. After **Time Zone**, select the time zone and closest location from the drop-down list.
5. After **Site Language**, select the site language from the drop-down list.
6. After **Default Server**, click the **Browse** button.
7. Select a server and click **OK**.
8. If you want Make Busy and Do Not Disturb reason codes to display in communication tools, select **Display Make Busy and DND Reason Codes in Communication Tools**.

9. To enable agent greeting and whisper announcement functionality for the site, check **Enable Agent Greetings**.
The system displays an information message advising you to ensure that the appropriate Class of Service options are configured for agents on the MiVoice Business PBX.
10. To disable Contact Center Client Chat Integration, clear **Chat Enabled**.
11. Click **Save**.

CONFIGURING THE MULTIMEDIA STORAGE PATH

During installation you select the multimedia storage path, which sets the email storage location. The storage path can be either local drive or a network drive (UNC path). The Local administrator account set during installation must have read/write permission to that path. Once specified, the following folder structure will be created within the storage path:

\<SiteKey>\<Year>\<Month>\

Year and Month folders are named numerically to correspond to the year and month of the stored messages and transcripts. If you used the default storage path, the folder structure is
<drive>:\Program Files (x86)\Mitel\MiContact Center\DataDirectory\SearchStorage\<SiteKey>\<Year>\<Month>\.

NOTE:

- Chat and SMS transcripts are stored in the Elasticsearch index, at <drive>:\Program Files (x86)\Mitel\MiContact Center\Database\Elasticsearch\. For more information on Elasticsearch, see the *MiContact Center and Business Reporter System Engineering Guide*.
- The \<SiteKey>\<Year>\<Month> folders are only added the first time an email is indexed during the corresponding year and month.

The multimedia storage path can be changed to store new messages in a different location. Old files must be copied to the new location manually. For instructions on changing the multimedia storage path, see the Mitel Knowledge Base.

Certain email .msg files can be deleted from the email storage location to free up disk space. While Ignite will return deleted .msg files in search results, attachment viewing will be limited and embedded images will not display. For information, see the Mitel Knowledge Base.

ENABLING A NEW MULTIMEDIA CONTACT CENTER

You must configure the following enterprise-level items before you can configure your devices.

1. Create mail servers.

Mail servers will need to be created for your email media server. They are used to receive and send mails to the corporate mail server. It is recommended that email aliases or distribution groups, depending on your mail server type, be used to map multiple email accounts to a single email account as this will reduce the number of mail servers that need to be configured.

See "Adding mail servers" on page 43.

2. Create media servers.

Media servers will need to be created for each media supported by the contact center. Email media servers require one or more mail servers to be specified. Chat media servers require the chat server URL. SMS media servers require an integration with Twilio, a third-party SMS gateway service provider.

See "Adding email to Multimedia Contact Center" on page 56 and "Adding chat to Multimedia Contact Center" on page 58 "Adding SMS to Multimedia Contact Center" on page 61.

The order for configuring your multimedia devices depends on whether or not the administrator is creating multimedia queues using the Unified Queue Group wizard. The Unified Queue Group wizard enables rapid configuration of new multimedia queues linked with existing voice queues. If a contact center does not intend to have their multimedia queues mirror voice queues, they can be added manually. For detailed information on configuring individual Multimedia Contact Center devices, see "Multimedia Contact Center device configuration" on page 41.

If you are creating your multimedia queues using the Unified Queue Group wizard, configure your devices in the following order:

1. Create Workloads.

Workloads determine the number and type of media contacts that can be pushed to an agent at any one time.

See "Configuring Workload" on page 63.

2. Upgrade employees.

Employees must be assigned the appropriate Multimedia Contact Center licensing, Workloads, and the media types they can handle.

See "Adding multimedia capabilities to employees" on page 66.

3. Create Unified Queue Groups from the voice queues with the Unified Queue Group wizard to represent the service groups in the organization.

See "Adding queue groups" on page 87.

4. Modify default Inbound, Response, and Inqueue workflows.

The default workflows included with Multimedia Contact Center require additional configuration to customize them for your contact center.

See "Multimedia Contact Center default workflows" on page 212.

5. Configure agent groups for default Agent Group Presence.

See "Adding agent groups" on page 73.

If you are not using the Unified Queue Group wizard to create your multimedia queues, configure your devices in the following order:

1. Create Workloads.
See "Configuring Workload" on page 63.
2. Upgrade employees.
Employees must be assigned the appropriate Multimedia Contact Center licensing, Workloads, and the media types they can handle.
See "Adding multimedia capabilities to employees" on page 66.
3. Configure agent groups and set default presence.
See "Adding agent groups" on page 73.
4. Create multimedia queues.
Multimedia queues can be created individually on a queue-by-queue basis or created as parts of a Unified Queue Group.
See "Adding multimedia queues" on page 77.
See "Adding queue groups" on page 87.
5. Create Unified Queue Groups or queue groups to tie queues representing the same service groups in the organization together.
See "Adding queue groups" on page 87.
6. Modify Inbound, Response, and Inqueue workflows.
The default workflows included with Multimedia Contact Center require additional configuration to customize them for your contact center.
See "Multimedia Contact Center default workflows" on page 212.

MULTIMEDIA CONTACT CENTER DEVICE CONFIGURATION

Devices in Multimedia Contact Center can be configured using three different methods:

- **Quick Setup**—Quick Setup enables administrators to add ranges of employees with identical settings. See the *MiContact Center Installation and Administration Guide* for the relevant procedures.
- **.csv files**—YourSite Explorer can add new devices by importing device setting information using comma-separated value (.csv) files. See the *MiContact Center Installation and Administration Guide* for the relevant procedures.
- **Manually**—Devices can be added one-by-one without automated assistance or importing.

INTEGRATING MULTIMEDIA CONTACT CENTER WITH MAIL SERVERS

NOTE: Email routing to blind-copied queues is not supported.

Multimedia Contact Center integrates with mail servers using SMTP and IMAP connections.

The following servers are considered to be supported infrastructures for Multimedia Contact Center routing:

- Exchange Server
- Exchange Online (Office 365)
- Google Apps for Business
- IBM Domino
- BlueHost

Verified versions for mail servers are described in the *MiContact Center and Business Reporter System Engineering Guide*:

Multimedia Contact Center supports IMAP providers that use non-empty Namespace as mail servers. For information on the general requirements for mail servers, see "Mail server requirements" on page 48.

We recommend configuring a single mail server connection with outgoing and incoming connections.

On the mail server, administrators must first configure a master email account to receive the email messages that Multimedia Contact Center copies. For these configuration procedures, please consult the appropriate third-party documentation. See also the Knowledge Base article appropriate to the server, listed below.

We recommend that, in addition to configuring a single, master email account to receive incoming messages for Multimedia Contact Center to copy, administrators configure aliases or, in the case of Exchange, distribution groups for the different multimedia service groups receiving ACD emails. For Exchange Server users, we recommend that the master email account from which Multimedia Contact Center copies emails is not the Domain Administrator account, due to Windows Security restrictions. An inbound workflow should route emails from this master account to service groups in the contact center, based on the 'To' addresses to which emails were sent. For example, administrators can create a master email account called 'MyCompany@domain.com', and create aliases or distribution groups for the contact center's service groups.

NOTE: Using aliases or distribution groups ensures that emails sent to multiple addresses in the contact center generate a single case number. If, instead of using aliases or distribution groups, email addresses are associated to different mail servers, a single email sent to these addresses will have different case numbers.

We recommend that the master account's address is discrete from email aliases and distribution groups, and is not associated to any queues. For information on configuring your mail server with an email account and aliases or distribution groups, consult the following Mitel Knowledge Base article appropriate to the server.

- **Exchange Server 2007** – <http://micc.mitel.com/kb/KnowledgebaseArticle51973.aspx>
- **Exchange Server 2010** – <http://micc.mitel.com/kb/KnowledgebaseArticle51974.aspx>
- **Exchange Server 2013** – <http://micc.mitel.com/kb/KnowledgebaseArticle51975.aspx>
- **Exchange Online** – <http://micc.mitel.com/kb/KnowledgebaseArticle51962.aspx>
- **Google Apps for Business** – <http://micc.mitel.com/kb/KnowledgebaseArticle51960.aspx>
- **IBM Domino** – <http://micc.mitel.com/kb/KnowledgebaseArticle52166.aspx>

NOTE: For Exchange Server users, Multimedia Contact Center requires that the master account has Send As permissions to the distribution groups. See "Specifying Send As permissions in Active Directory" on page 47.

For information on configuring email workflows to route based on specific addresses, see "Default Email Inbound workflow" on page 213 and "Routing contacts with the To activity" on page 205.

Once the contact center's email client is connected to a supported server and an email account for the contact center is created, administrators can configure the mail server's outgoing and incoming settings in YourSite Explorer.

NOTE: Mitel is not responsible for any folder size restrictions on mail servers. If there are file size restrictions on your mail server, it is strongly recommended that the Processed folder created during Multimedia Contact Center mail server configuration be exempted from those restrictions or else routing functionality may be affected.

Note that, occasionally, mail servers incorrectly mark valid emails as spam. We recommend that administrators periodically check their mail servers' spam folder to avoid losing important contacts.

For information on migrating from one mail server to a new mail server, see the following Mitel Knowledge Base article: <http://micc.mitel.com/kb/KnowledgebaseArticle52085.aspx>.

The following procedures tell administrators how to

- Add a mail server to Multimedia Contact Center
- Configure SMTP connections to Multimedia Contact Center
- Configure IMAP connections to Multimedia Contact Center
- Delete a mail server from Multimedia Contact Center

NOTE: Integrating Multimedia Contact Center with mail servers requires SMTP and IMAP server names and port information. Administrators must retrieve and enable this information before configuring SMTP and IMAP connections to Multimedia Contact Center. See the Knowledge Base article, listed above, appropriate to the server.

ADDING MAIL SERVERS

To add a mail server, in YourSite Explorer, click **YourSite=>Mail servers=>Add**.

After adding the mail server, you must configure SMTP and IMAP connections.

CONFIGURING SMTP CONNECTIONS TO MULTIMEDIA CONTACT CENTER

The following configurations take place in **Multimedia=>Mail servers=>Outgoing**.

Configuring an SMTP connection enables Multimedia Contact Center to send outgoing mail through a contact center's email server. The following explains how to configure an SMTP connection between Multimedia Contact Center and email servers. The outgoing settings you configure are applied to any email your system sends, such as server alarms, reports, and outgoing email contacts to customers.

For information on locating the required information from the contact center's email server, consult the following Mitel Knowledge Base article appropriate to the server.

- **Exchange Server 2007** – <http://micc.mitel.com/kb/KnowledgebaseArticle51973.aspx>
- **Exchange Server 2010** – <http://micc.mitel.com/kb/KnowledgebaseArticle51974.aspx>
- **Exchange Server 2013** – <http://micc.mitel.com/kb/KnowledgebaseArticle51975.aspx>
- **Exchange Online** – <http://micc.mitel.com/kb/KnowledgebaseArticle51962.aspx>
- **Google Apps for Business** – <http://micc.mitel.com/kb/KnowledgebaseArticle51960.aspx>
- **IBM Domino** – <http://micc.mitel.com/kb/KnowledgebaseArticle52166.aspx>

Configuring an SMTP connection requires you to

- Add the mail server to YourSite Explorer
If the mail server has not already been added, see "Adding mail servers" on page 43.
- Specify the server information for outgoing emails
See the KB article appropriate to the media server, listed above
- Specify the email account's 'From' name and address
- Specify the email account's aliases.
- If required by the SMTP server, request logon credentials to send outgoing mail
- Test the server's SMTP socket connection to Multimedia Contact Center
NOTE: To test the connection, administrators must have an email address configured for them in the Employees page. This email address receives notification of whether the test was successful.

To specify the server information for outgoing emails

1. After **SMTP Server**, type the server's IP address or name.
2. Select the **Use SSL** check box if the server uses Secure Sockets Layer.
3. After **SMTP Port**, type the server's SMTP port number.
NOTE: Google Apps for Business' port 465 is not supported.
4. After **Connection Timeout**, type how many seconds the system has to connect to the server before timing out.

To specify the email account's 'From' name and address

1. After **From Name**, type the name that appears on outgoing mail.
For example, 'XYZ Company Sales'.
2. After **From Email Address**, type the email address that appears on outgoing mail.
For example, 'xyzsales@email.com'.

NOTE: This must be a valid email address. Add a queue email address that agents will select as the 'From' address in email responses and outbound emails, if this queue is not configured as an 'Alias' for the mail server.

To specify the email account's aliases.

1. After **Aliases**, click the **Browse** button.

NOTE:

- Include all queue email addresses that agents will select as the 'From' address in email responses and outbound emails, if these queues are not configured as the 'From Email Address' for the mail server.
- Failure to include all aliases will impact the ability of the Transfer activity to route inbound emails to all queues when using the <<DestinationQueues>> variable. For more information, see "Routing contacts with the Transfer activity" on page 207.

2. Type the mail server's alias and click **Add**.

NOTE: An alias can only be associated to a single mail server.

3. If you want to associate additional aliases for the mail server, for each additional alias, type the alias and click **Add**.
4. Click **Ok**

To request logon credentials to send outgoing mail

1. Select the **SMTP Authentication Required** check box.
2. Enter the **Username**, **Password**, and, in the case of Exchange, **Domain** information for the server's email account.
NOTE: If you use Google's 2-step verification, enter the password specific to Multimedia Contact Center.
3. Click **Save**.

To test the server's SMTP socket connection to Multimedia Contact Center

- Click **Test Outgoing Mail**. If an error message is received, verify that the Outgoing Server, User, and Logon information is entered accurately. To troubleshoot, the default installation location for verbose logs is C:\Users\<current user>\Documents\CCMLogs\YourSiteExplorer.txt.

CONFIGURING IMAP CONNECTIONS TO MULTIMEDIA CONTACT CENTER

The following configurations take place in **Multimedia=>Mail servers=>Incoming**.

IMAP connections enable Multimedia Contact Center to retrieve messages from a specified account on a mail server and define the folder from which Multimedia Contact Center retrieves messages. The following explains how to configure an IMAP connection between Multimedia Contact Center and a mail server.

For information on locating the required information from the contact center's email server, consult the following Mitel Knowledge Base article appropriate to the server.

- **Exchange Server 2007** – <http://micc.mitel.com/kb/KnowledgebaseArticle51973.aspx>
- **Exchange Server 2010** – <http://micc.mitel.com/kb/KnowledgebaseArticle51974.aspx>
- **Exchange Server 2013** – <http://micc.mitel.com/kb/KnowledgebaseArticle51975.aspx>
- **Exchange Online** – <http://micc.mitel.com/kb/KnowledgebaseArticle51962.aspx>
- **Google Apps for Business** – <http://micc.mitel.com/kb/KnowledgebaseArticle51960.aspx>
- **IBM Domino** – <http://micc.mitel.com/kb/KnowledgebaseArticle52166.aspx>

Configuring IMAP connections requires administrators to

- Enable incoming server settings in YourSite Explorer
- Specify the server information for incoming emails
- Specify the email account's username and password
- Test the server's IMAP connection to Multimedia Contact Center

NOTE:

- If you have not added a mail server in YourSite Explorer or configured its SMTP settings, see "Adding mail servers" on page 43, and "Configuring SMTP connections to Multimedia Contact Center" on page 44.
- If you are editing information for an existing server, select the media server and click the 'Incoming' tab.

To enable incoming server settings in YourSite Explorer

1. Select the mail server and click the **Incoming** tab.
2. Select the **Enable Incoming Server Settings** check box.

To specify the server information for incoming emails

1. Select the **Use TLS** check box if the server uses Transport Layer Security.
2. After **Incoming Server**, type the server's IP address or name.
3. After **Incoming Port**, type the server's IMAP port number.
4. After **Connection Timeout**, type how many seconds the system has to connect to the server before timing out.
5. After **Incoming Folder**, specify the email account folder from which Multimedia Contact Center retrieves email.

NOTE: If the system should retrieve email from the Inbox, leave this setting as the default. If the system should retrieve email from a subfolder of the Inbox, specify the folder name. Multimedia Contact Center can retrieve email from a single folder only. Ensure emails to aliases and distribution groups are also routed to this folder.

To specify the email account's username and password

NOTE: Specifying the email account's username and password authenticates Multimedia Contact Center to the mail server

1. Select the **Same as Outgoing Server** check box if the email account logon information is shared between the SMTP and incoming server.
2. If the logon information for the email account is discrete, enter the **Username**, **Password**, and **Domain** information required to receive mail.
3. Click **Save**.

To test the server's IMAP connection to Multimedia Contact Center

- Click **Test Incoming Connection**. If an error message is received, verify that the Incoming Server and Logon information is entered accurately. To troubleshoot, the default installation location for verbose logs is C:\Users\<current user>\Documents\CCMLogs\YourSite Explorer.txt.

DELETING MAIL SERVERS

CAUTION: Deleting a mail server prevents emails dependent on the server from routing, including

- Multimedia Contact Center email routing
- Report distribution
- Error reporting

Before deleting the mail server, we recommend first disassociating it from the email media server several days in advance. This allows pending emails to clear the system before the mail server is deleted. See "Disassociating mail servers from email media servers" on page 57 for more information.

To delete a mail server

1. Click **YourSite=>Mail servers**.
2. Select the mail server and click **Delete**.
3. When prompted, click **OK**.
4. Click **Save**.

SPECIFYING SEND AS PERMISSIONS IN ACTIVE DIRECTORY

For Exchange Server users, the master account from which Multimedia Contact Center retrieves emails requires Send As permissions for the applicable distribution groups.

Before specifying Send As permissions, ensure that

- A master account has been created in Exchange. This is the account from which Multimedia Contact Center will retrieve emails
- SMTP and IMAP connections to Multimedia Contact Center are configured
- Distribution groups are created for the contact center's service groups

To specify Send As permissions in Exchange

1. In Windows, open Active Directory and select **Users and Computers**.
2. Right-click the distribution group and select **Properties**.
3. Select the **Security** tab and click **Add**.
NOTE: If the Security tab does not display, go to **View** and select **Advanced features**.
4. Add the master account created in Exchange.
5. Under **Permissions**, after **Send As**, select the **Allow** check box.
6. Click **Apply** and then **OK**.
7. Repeat these steps for all applicable distribution groups.

SPECIFYING SEND AS PERMISSION USING POWERSHELL

For Exchange Online users, the master account from which Multimedia Contact Center retrieves emails requires Send As permission for the applicable distribution groups.

Before specifying Send As permissions, ensure that

- A master account has been created in Exchange Online. This is the account from which Multimedia Contact Center will retrieve emails.
- SMTP and IMAP connections to Multimedia Contact Center are configured.
- Distribution groups are created for the contact center's service groups.

To specify Send As permission for a distribution group using PowerShell

1. In Windows, open **PowerShell**.
2. To create the PowerShell connection to the remote Exchange Online, run the following credentials:
`$LiveCred = Get-Credential`
`$Session = New-PSSession -ConfigurationName Microsoft.Exchange -ConnectionUri https://ps.outlook.com/powershell/ -Credential $LiveCred -AuthenticationBasic -AllowRedirection`
`Import-PSSession $Session`
3. Enter the credentials for the Exchange Online administrator.
4. To add the Send As permission to the list
`Add-RecipientPermission -Identity distributiongroup@example.com -Trustee mailbox@example.com -AccessRights SendAs`
NOTE: Identify corresponds to the distribution group. Trustee corresponds to the mailbox.
5. Repeat Step 3 for each distribution group.

MAIL SERVER REQUIREMENTS

Contact centers using mail servers other than Exchange Server, Exchange Online, or Google Apps for Business must confirm that

- The mail server supports IMAP version 4
- The mail server can maintain a reliable connection to the Enterprise Server

In addition, we recommend that

- The mail account from which Multimedia Contact Center retrieves emails supports aliases.
NOTE: To simplify deployment, we recommend administrators configure a single email account from which Multimedia Contact Center retrieves contacts, and configure additional email addresses as aliases to this account. For more information, see "Integrating Multimedia Contact Center with mail servers" on page 42.

Multimedia Contact Center supports non-empty Namespace IMAP providers. For information on configuring a mail server, other than Exchange Online, Google Apps for Business, or Exchange Server, consult the following Mitel Knowledge Base article:
<http://micc.mitel.com/kb/KnowledgebaseArticle51977.aspx>.

For a list of supported Exchange versions, see the *MiContact Center and Business Reporter System Engineering Guide*.

INTEGRATING MULTIMEDIA CONTACT CENTER WITH AN SMS GATEWAY PROVIDER

Multimedia Contact Center integrates with the third party SMS gateway provider Twilio to support SMS routing. With Twilio, Multimedia Contact Center supports long codes (60 SMS messages per minute per mobile number). Short codes are unsupported. MiContact Center does not support Multimedia Messaging Service (MMS). You must have an account with Twilio to handle SMS messages with Multimedia Contact Center.

To ensure SMS contacts route to the Enterprise Server, for each SMS number associated to your Twilio account, you must set the Request URL to the following:
<http://twimlets.com/echo?Twiml=%3CResponse%3E%3C%2FResponse%3E&>. Consult your SMS gateway service provider documentation for information on configuring your account.

SMS gateway provider SMS phone numbers are added to Multimedia Contact Center as a part of configuring SMS media servers. Multiple SMS numbers from an SMS gateway service provider can be added to your SMS media server. When adding Twilio SMS phone numbers to your SMS media server, you require, in addition to the SMS phone number, the Twilio Account SID and the Account Authentication Token. For more information, see "Adding SMS to Multimedia Contact Center" on page 61.

A single SMS number can be used with multiple queues, provided the SMS Inbound workflow is modified to route SMS messages through a method other than by the `<<DestinationQueues>>` variable, such as with an Ask activity. For more information on the default SMS workflow, see "Default SMS Inbound workflow" on page 220.

ADDING MEDIA TYPES TO MULTIMEDIA CONTACT CENTER

Adding media types to Multimedia Contact Center applies Inbound, Inqueue, and Response routing rules to email, chat, and SMS contacts, directing them to the agents best suited to respond.

Administrators add media types to Multimedia Contact Center by adding and configuring media servers in YourSite Explorer. Media servers are accessed via the Multimedia tab. Multimedia Contact Center supports one media server for each type of multimedia. When a multimedia media server is added to YourSite Explorer, that media type becomes unavailable in the Add drop-down list in the Media Server tab. If you want to add a new media server of that type, you must either delete the current media server of that type or make it historical.

NOTE: When adding media servers, administrators must indicate if the contact center operates over midnight. If not, reporting over midnight may not be accurate, and agent shifts are closed after the last agent events before midnight. For more information, see "Extending reporting and agent shifts over midnight" on page 52.

For information on configuring specific media types see

- "Adding email to Multimedia Contact Center" on page 56.
- "Adding chat to Multimedia Contact Center" on page 58.
- "Adding SMS to Multimedia Contact Center" on page 61.

For information on configuration options shared among media types, see

- "Deleting multimedia media servers" on page 50
- "Applying inbound routing rules to contacts" on page 50.
- "Configuring Advanced options for media servers" on page 52.
- "Extending reporting and agent shifts over midnight" on page 52.
- "Specifying when Make Busy and Do Not Disturb timers begin" on page 53.
- "Configuring Reply templates for email, chat, and SMS" on page 53.
- "Enabling Conversation Detail reporting" on page 55.
- "Configuring Reply templates for email, chat, and SMS" on page 53

DELETING MULTIMEDIA MEDIA SERVERS

When an administrator deletes a multimedia media server, all data associated with the media server and all devices configured and associated to that media server are deleted. Employee agent IDs for that media type are deleted and removed from their agent groups. Queues are deleted and removed from their associated queue groups. Multimedia workflows are not deleted but Inbound and Response workflows are disassociated from the deleted media server and Inqueue workflows are disassociated from the deleted queues.

To delete a multimedia media server

1. Click **Multimedia=>Media servers**.
2. Select the media server you want to delete and click **Delete**.
3. Click **OK**.

APPLYING INBOUND ROUTING RULES TO CONTACTS

Adding media requires administrators to apply routing rules to inbound contacts retrieved from media servers. The Inbound Routing tab enables administrators to view and modify the workflows and activities defining inbound routing rules.

New media servers are associated to the appropriate default workflows. For example, when an administrator adds an email media server, the system automatically associates the Default Email Inbound workflow to it. Administrators can customize these default workflows to suit the contact center's needs. The workflow displaying on a media server's Inbound Routing tab is associated to that media server.

For more information on working with visual workflows and applying routing rules to contacts, see

- "Multimedia routing using visual workflows" on page 156.
- "Multimedia Contact Center default workflows" on page 212.

APPLYING RESPONSE ROUTING RULES TO CONTACTS

Response routing determines how the system handles completed contacts. For example, chat response workflows can mail conversation transcripts to customers, post-chat. Email response workflows can send customers surveys after email exchanges or supervisors copies of agent email responses. SMS response workflows can store the transcript of an SMS conversation and the handling agent in a CRM database.

Response routing is configured via Response workflows, located on the Response Routing tab of the media server.

New chat media servers are associated to a default Response workflow. Administrators can customize this workflow to suit the contact center's needs. For more information on the Default Chat Response workflow, see "Default Chat Response workflow" on page 219.

Default Response workflows are not provided for email or SMS media servers. Administrators must create these workflows.

NOTE:

- Variables in Response workflows/subroutines are based on the agent's reply, not the customer's original contact. For example, in Inbound and Inqueue workflows/subroutines the <<From>> variable populates with the customer's sending address. The <<To>> variable populates with the queue's address. In Response workflows/subroutines, the <<From>> variable populates with the queue's address and the <<To>> variable populates with the customer's address.
- Email response workflows execute every time an email response is sent in Ignite.
- Email content inserted via the <<Body>> variable in the Email activity is limited to 2MB. After 2 MB, content inserted via the <<Body>> variable is truncated.

For more information on working with visual workflows and applying routing rules to contacts, see

- "Multimedia routing using visual workflows" on page 156.
- "Multimedia Contact Center default workflows" on page 212.

CONFIGURING ADVANCED OPTIONS FOR MEDIA SERVERS

NOTE: For information on configuring advanced options specific to email, chat, or SMS media servers, see "Configuring Advanced options for email media servers" on page 57, "Configuring Advanced options for chat media servers" on page 60, and "Configuring Advanced options for SMS media servers" on page 63

Configuring Advanced media server options enables administrators to

- Disable alarm reporting for the media server
- Configure intervals for generating queue statistics (for real-time purposes)
- Enable or disable previews of contacts

The following configurations take place in **Multimedia=>Media servers**.

To disable alarm reporting for the media server

1. Select the media server and click the **Advanced** tab.
2. Deselect **Enabled for alarms**.
3. Click **Save**.

To configure intervals for generating queue statistics

NOTE: This option determines, for real-time purposes, how frequently the system generates a queue statistics record.

1. Select the media server and click the **Advanced** tab.
2. To generate a new queue statistics record as statistics change, select **Report on Change**.
3. To generate a new queue statistics record every minute, select **Report Every 60 Seconds**.
4. Click **Save**.

To enable or disable previews of contacts

NOTE: The option enables administrators to control whether agents can preview contacts that are in queue or ringing in the Inbox.

1. Select the media server and click the **Advanced** tab.
2. To enable agents to preview messages, select **Allow agent preview**.
3. Click **Save**.

EXTENDING REPORTING AND AGENT SHIFTS OVER MIDNIGHT

Administrators at contact centers operating over midnight should select 'This enterprise operates 24 hours a day' for the media server. This option provides more accurate reporting over midnight and determines when and how agent shifts are opened and closed after midnight.

If this option is selected, the system automatically closes and re-opens agent shifts at midnight. All agents remain logged into the system. Agent shift reporting is uninterrupted over this period.

If this option is not selected, the system closes agent shifts after the last agent event before midnight. The system re-opens agent shifts after the first agent event after midnight. All agents remain logged into the system. Agent shift reporting is not extended between the time agent shifts close and the time they re-open.

NOTE: Contact centers operating over midnight and rebooting their servers overnight should consult the following Mitel Knowledge Base article, to enable agents to retain their states post-reboot: <http://micc.mitel.com/kb/KnowledgebaseArticle52046.aspx>

To extend reporting and agent shifts over midnight

1. Select **Multimedia=>Media servers**.
2. Select the media server and click the **Data Summary Options** tab.
3. Select **This enterprise operates 24 hours a day**.
4. Click **Save**.

SPECIFYING WHEN MAKE BUSY AND DO NOT DISTURB TIMERS BEGIN

Agents can enter Make Busy (MKB) or Do Not Disturb (DND) while handling contacts to ensure that, once they are finished, they are not offered another message. By default, the real-time MKB and DND timers begin after the message is handled and agents do not appear in MKB or DND until this time. This enables agents to take scheduled breaks while remaining in adherence.

Administrators can set the MKB and DND timers to begin as soon as the agent enters MKB or DND.

To specify when the MKB and DND timer begins

1. Select **Multimedia=>Media servers**.
2. Select the media server and click the **Data Summary Options** tab.
3. To start MKB and DND when the agent ends the contact, select **Reset Make Busy and Do Not Disturb time after conversation ends**.
4. To start MKB and DND duration when the agent enters either state, deselect **Reset Make Busy and Do Not Disturb time after conversation ends**.

CONFIGURING REPLY TEMPLATES FOR EMAIL, CHAT, AND SMS

Administrators can configure templates to be applied to email, chat, and SMS responses. Reply templates enable efficient and uniform responses to common questions and requests.

Email templates must be in .msg or .txt format, and .msg email templates may contain images. Do not copy content containing images in .msg files directly from Outlook. Save this content as .msg files in the Reply Templates folder and leverage from there. Chat and SMS templates must be in .txt format. Chat and SMS share templates.

Administrators store templates in either the default template folder created during installation, or in a folder on a network share. A network share is required if agents are permitted to create and modify templates and therefore must access them.

The default Reply Templates folder is located at <installation drive>:\<installation folder>\CCM\Templates\ReplyTemplates. The folder contains samples illustrating reply template formatting. If administrators house the templates on a network share, we recommend creating a folder structure to organize templates by media type and area of business.

Administrators must ensure media servers are pointed to the Reply Templates folder so that agents can apply templates in Ignite. By default, the server points to the default Reply Templates folder. To point the media server to a folder on a network share, complete the following procedure.

NOTE: Template files on UNC shares must have 'Everyone' and/or 'Users' permission(s) enabled for administrators to set the appropriate file path in YourSite Explorer.

If templates are housed on a network share, you must perform the following:

- Configure identity settings for the CCMWa and MCCWa web applications
- Configure security permissions for CCMWa and MCCWa
- Point the media server to a network share folder

To configure identity settings for the CCMWa and MCCWa web applications

1. On the **Enterprise Server**, navigate to **Internet Information Services (IIS) Manager**.
2. Under **Connections**, select **Application Pools**.
3. Right-click **CCMWa** and select **Advanced Settings...**
4. Under **Process Model**, for **Identity** click the ... button.
5. Select **Custom account:** and click **Set...**
6. On the **Set Credentials** window, enter the Windows credentials for the identity under which the MiContact Center Configuration Manager service runs and click **OK**.

NOTE:

- You can retrieve this identity by navigating to Windows' Services list.
- Domain names must be included in the username. E.g. Domain\Username

7. Click **OK**.
8. In the **Advanced Settings** window, under **Process Model**, set the value for **Load User Profile** to **True**.
9. Click **OK**.
10. Repeat the above steps for **MCCWa**.

To configure security permissions for CCMWa and MCCWa

1. On the **Enterprise Server**, navigate to **Internet Information Services (IIS) Manager**.
2. Under **Connections**, expand **Sites=>Default Web Site**.
3. Right-click **CCMWa** and select **Edit Permissions...**
4. Click the **Security** tab and, for **Users**, set 'Allow' for the following permissions only:
 - Read & execute
 - List folder contents
 - Read
5. Repeat the above steps for **MCCWa**.

To point the media server to a network share folder

1. Click **YourSite=>Media servers**, and select the **Advanced** tab.
2. Under **Reply template**, click the **Browse** button.
Alternatively, enter the path in the **Location** field and click the **Browse** button. This redirects the Browse dialog to the specified path.
3. Navigate to the network folder housing the templates and click **OK**. Alternatively, type the network share folder path in the **Location** field.

NOTE:

- Only network share folder paths are supported. For example, the folder path should look like \\ServerName\SharedFolderName. Standard paths are not supported.
- To point the server back towards the default folder, delete the network share path.

4. Click **Save**.

ENABLING CONVERSATION DETAIL REPORTING

NOTE:

- Conversation Detail reporting is available for email, chat, and SMS only. Multimedia Trace reports provide commensurate data on voice, email, chat, and SMS.
- After enabling Conversation Detail reporting, data must be summarized for the applicable date ranges.

Conversation Detail reports illustrate, by device, how contacts transition through your system and provide a high-level view of how customer contacts were handled. For more information on Conversation Detail reporting, see the reports guide appropriate to your MiContact Center licensing level.

To populate Conversation Detail reports with data, you must enable Conversation Detail reporting for the media server.

To enable Conversation Detail reporting

1. Select **Multimedia=>Media servers**.
2. Select the media server and click the **Data Summary Options** tab.
3. Select **Conversation detail reporting**.
4. Click **Save**.

ADDING EMAIL TO MULTIMEDIA CONTACT CENTER

Adding email enables Multimedia Contact Center to retrieve a contact center's email from an email server and route contacts to the appropriate queues and agents. To see supported mail servers and mail server requirements, see "Integrating Multimedia Contact Center with mail servers" on page 42 and "Mail server requirements" on page 48.

Administrators can add only a single email media server to YourSite Explorer. Before deleting an existing media server, see "Deleting multimedia media servers" on page 50 for important information.

NOTE: Administrators must configure SMTP and IMAP connections to Multimedia Contact Center before adding email. See the appropriate sections of this guide for relevant information and procedures.

To add email to Multimedia Contact Center, administrators must

- Add an email media server to YourSite Explorer
- Specify the media server's name and site
- Apply inbound routing rules to contacts retrieved from the email server
- Associate mail servers to the email media server, to begin routing

See below for the corresponding procedures. To disassociate mail servers from the email media server, see "Disassociating mail servers from email media servers" on page 57.

Optionally, administrators can

- Create Response workflows
See "Applying response routing rules to contacts" on page 51.
- Specify Data Summary Options, such as indicating that the contact center operates 24 hours a day
See "Extending reporting and agent shifts over midnight" on page 52.
- Specify advanced configuration options for handling email, such as customizing case and ticket number information in email subject lines
See "Configuring Advanced options for email media servers" on page 57.

To add an email media server to YourSite Explorer

- Click the **Multimedia** tab and select **Media servers=>Add=>Email**.

To specify the media server's name and site

1. Select the email media server and click the **General** tab.
2. Type a **Name** to identify the server for management and reporting purposes.
NOTE: The Media Server ID field is populated with a unique number after the media server is saved.
3. After **Site**, click the **Browse** button and select the media server's location.
To add a new site, see "Adding sites" on page 38.
4. Click **Save**.

To apply inbound routing rules to contacts retrieved from the email server

- See "Applying inbound routing rules to contacts" on page 50.

To associate mail servers to the email media server

1. On the **General** tab, after **Mail Server(s)**, click the **Browse** button.
2. Select any email accounts to associate to Multimedia Contact Center and click **OK**.
NOTE: All outgoing email is sent through these accounts, and the system retrieves emails from the accounts' associated Inboxes.
3. Click **Save**.

CONFIGURING ADVANCED OPTIONS FOR EMAIL MEDIA SERVERS

Configuring Advanced chat options enables administrators to

- Customize case and ticket number information in email subject lines
NOTE: Using aliases or distribution groups ensures that an email sent to two contact center addresses will share the same case number. A single email sent to addresses on different mail servers will generate different case numbers. For more information, see "Integrating Multimedia Contact Center with mail servers" on page 42.
- Remove case and ticket numbers from email subject lines

The following configurations take place in **Multimedia=>Media servers**.

To customize case and ticket number information in email subject lines

NOTE:

- This option must be enabled for preferred agent routing to function. See "Routing contacts with the Offer to Preferred Agent activity" on page 192.
 - This option must be enabled to search contact history by case in Ignite.
1. Select the media server and click the **Advanced** tab.
 2. Deselect **Disable auto case and ticket number generation**.
 3. After **Case Prefix:**, specify the prefix identifying case numbers.
 4. After **Ticket Prefix:**, specify the prefix identifying ticket numbers.
 5. Click **Save**.

To remove case and ticket numbers from email subject lines

1. Select the media server and click the **Advanced** tab.
2. Select **Disable auto case and ticket number generation**.
3. Click **Save**.

DISASSOCIATING MAIL SERVERS FROM EMAIL MEDIA SERVERS

If administrators intend to delete a mail server, we recommend first disassociating it from the email media server several days in advance. This allows pending emails to clear the system, before the mail server is deleted.

To disassociate a mail server from an email media server

1. Click **YourSite=>Media servers** and select the email media server.
2. On the **General** tab, after **Mail Server(s)**, click the **Browse** button.
3. Select the check boxes beside the mail servers to be disassociated from the email media server.
4. Click **OK**.
5. Click **Save**.

ADDING CHAT TO MULTIMEDIA CONTACT CENTER

Adding chat enables Multimedia Contact Center to route chat sessions to the appropriate queues and agents. The chat media server resides as a service within the CCMWa web application, which is used to manage chat sessions and is automatically installed on the Enterprise Server at `http://<Enterprise Server>/CCMWa` (visible in a chat server's 'Internal URL for chat root' field).

To offer chat, the chat media server requires that a reverse proxy be set up to offer CCMWa from the Enterprise Server to the contact center's web server. A chat media server can be added and configured and be tested internally without a reverse proxy by using the Internal URL for chat root as the External URL for chat root, but it will not be available for a contact center's customers. For information on offering chat, setting up reverse proxies, and configuring chat request and chat session settings, see "Enabling chat" on page 101. For information on setting up CCMWa with a reverse proxy, see "Publishing Chat and Contact Us to the Internet using reverse proxies" on page 100.

CCMWa is made available from the Enterprise Server to the contact center's web server through a reverse proxy. Before adding the chat media server to Multimedia Contact Center, you must have first set up the reverse proxy for `http://<enterprise server>/CCMWa`. This external-facing URL must be entered in the 'External URL for chat root' field, which validates the URL and confirms that the reverse proxy has been applied correctly. Valid URLs are confirmed with a green checkmark icon. Invalid URLs are indicated with a red X icon. URLs that the system cannot confirm are marked with a question mark icon.

To add chat to Multimedia Contact Center, administrators must

- Add a chat media server
- Specify information for the chat media server, including name, site, URL, and auto response username
- Modify the Default Inbound Chat workflows
See "Applying inbound routing rules to contacts" on page 50.
- Modify the Default Response routing rules to Chat
See "Applying response routing rules to contacts" on page 51.

Optionally, administrators can

- Make the chat media server historical
- Specify Data Summary options
See "Extending reporting and agent shifts over midnight" on page 52 and "Specifying when Make Busy and Do Not Disturb timers begin" on page 53.
- Specify advanced configuration options for chat servers, such as enabling alarms and configuring reporting intervals for queues
See "Configuring Advanced options for chat media servers" on page 60.

To add a chat media server

- Click the **Multimedia** tab and select **Media servers=>Add=>Chat**.
NOTE: Default Inbound and Response Chat workflows are assigned to the server. Modify these workflows to specify routing rules for the contact center. See "Default Chat Inbound workflow" on page 217 and "Default Chat Response workflow" on page 219.

To specify the chat media server's name, site, external URL for chat root, Auto Response Username, and configure default workflow email activities

1. After **Name**, type the name of the media server.
NOTE: To distinguish between the various types of media for management and reporting purposes, you must give each media server a unique name when setting up your site.
2. After **Site**, click the **Browse** button to select the site where the chat server resides.
To add a site, see "Adding sites" on page 38.
3. Enter the **External URL for chat root**.
The External URL for chat root is the URL used with the reverse proxy to make chat externally available. Valid URLs are confirmed with a green checkmark icon. Invalid URLs are indicated with a red X icon. URLs that the system cannot confirm are marked with a question mark icon.
NOTE: The Invalid URL icon may display until a complete and valid URL is entered.
4. After **Auto Response Username**, enter the name to be used for sending automated messages to contacts.
5. Click the Inbound Routing tab and add an SMTP and To: email address destination for all email activities in the workflow.
See "Sending emails with the Email activity" on page 179.
6. Click the **Response Routing** tab.
7. Right-click the **Email** activity and select **Edit SMTP server**.
8. Select a mail server and click **OK**.
9. Click **Save**.

To make a chat server historical

1. Select a Chat media server and click the **General** tab.
2. Click **Make historical**.
3. Click **Save**.

CONFIGURING ADVANCED OPTIONS FOR CHAT MEDIA SERVERS

Configuring Advanced chat options enables administrators to

- Choose to use employees' nicknames in chat conversations
NOTE: By default, employees are identified by their first name (as configured in the Employee device page in YourSite Explorer) in chat sessions. If employees have nicknames associated with them in their Employees entry, these can be used instead.
- Set the amount of time a closed chat session can remain idle before being terminated
NOTE: If customers accidentally exit the browser or close the chat window, this configuration determines how long they have to return to the live chat session. Customers can re-access the session by returning to the business site and re-entering the chat request.
- Change the reply template location from the default
For more information on reply templates, see "Configuring Reply templates for email, chat, and SMS" on page 53.

The following configuration takes place in **Multimedia=>Media servers**.

To use employee nicknames in chat conversation public interactions

1. Select the chat media server and click the **Advanced** tab.
2. Select the **Use agent nickname for public interaction** check box.
Employee nicknames are configured in Multimedia=>Employees in the Profile tab.
3. Click **Save**.

To configure how long closed chat sessions remain idle before being terminated

NOTE: If customers accidentally exit the browser or close the chat window, this configuration determines how long they have to return to the live chat session. Customers can re-access the session by returning to the business site and re-entering the chat request

1. Select the chat media server and click the **Advanced** tab.
2. After **Terminate closed chat sessions that are idle for longer than the specified minutes**, set the number of minutes.
3. Click **Save**.

To change the location of the reply templates

1. Select the chat media server and click the **Advanced** tab.
2. After **Location**, click the **Browse** button.
3. Select the folder and click **OK**.
NOTE: The reply template folder must be located on a UNC (Universal Naming Convention) path, also known as a shared network path.

ADDING SMS TO MULTIMEDIA CONTACT CENTER

Adding SMS enables Multimedia Contact Center to route SMS contacts to a contact center's SMS numbers to the appropriate queues and agents. The SMS media server integrates with a third-party SMS gateway service provider to enable SMS conversations

Administrators may add only a single SMS media server to YourSite Explorer. Before deleting an existing media server, see "Deleting multimedia media servers" on page 50 for important information.

Optionally, SMS handling for agents in Ignite can be modified through editing JavaScript files. See "Configuring the agent and supervisor configuration JavaScript files" on page 122.

NOTE: SMS media servers require a Twilio account. For more information, see "Integrating Multimedia Contact Center with an SMS Gateway Provider" on page 49.

To add SMS to Multimedia Contact Center, administrators must

- Add an SMS media server to YourSite Explorer
See the procedures below.
- Specify the media server's connection to an SMS gateway services provider
See the procedures below.
- Apply inbound routing rules to contacts retrieved from the email server.
See "Applying inbound routing rules to contacts" on page 50.

Optionally, administrators can

- Create Response workflows
See "Applying response routing rules to contacts" on page 51.
- Specify advanced configuration options for handling SMS, such as enabling alarms and configuring reporting intervals for queues.
See "Configuring Advanced options for media servers" on page 52 and see "Configuring Advanced options for SMS media servers" on page 63.
- Specify Data Summary options, such as indicating that the contact center operates 24 hours a day.
See "Extending reporting and agent shifts over midnight" on page 52, "Specifying when Make Busy and Do Not Disturb timers begin" on page 53, and "Enabling Conversation Detail reporting" on page 55.

The following procedures explain how to

- Add an SMS media server
- Specify information for an SMS media server
- Add an SMS Provider
- Modify an SMS Provider
- Remove an SMS Provider
- Make an SMS media server historical

The following configuration takes place in Multimedia=>Media servers.

To add an SMS media server

- Click **Add=>SMS**.

NOTE: Default Inbound are assigned to the server. Modify these workflows to specify routing rules for the contact center. See "Default SMS Inbound workflow" on page 220.

To specify information for an SMS media server

1. Type the **Name** of the media server.
NOTE: The media server ID field is populated with a unique number after the media server is saved.
2. After **Site**, click the **Browse** button to select the site where the SMS server resides.
3. Click **Save**.

To add an SMS Provider

1. In the **General** tab, after **SMS Provider**, click the **Browse** icon.
2. Click **Add**.
3. Enter a **Name** for the **SMS Provider**.
4. Enter the **PhoneNumber** (including country code) for the Twilio SMS phone number.
NOTE: You must include country and area code
5. If this SMS number handles inbound SMS contacts, set **Retrieve incoming SMS messages** to **True**.
6. If this SMS number only sends outbound SMS messages, set **Retrieve incoming SMS messages** to **False**.
7. Enter your Twilio **AccountSid**.
8. Enter your Twilio **Authentication Token**,
9. After **Days to Search**, set how many days back Twilio will check for new SMS contacts. The recommended default is 3.
10. After **Messages/page**, set how many pages of messages MiContact Center downloads when checking for new messages. The recommended default is 25.
11. Click **Save**.
12. Repeat steps 2-11 for each additional SMS Provider you want to add to your SMS media server.
13. For each SMS Provider that you are adding, confirm that its checkbox is selected.
14. Click **OK**.
15. Click **Save**.

To modify an SMS Provider

1. In the **General** tab, after **SMS Provider**, click the **Browse** icon.
2. Select the **SMS Provider** and click **Edit**.
3. Modify the settings.
4. Click **Save**.
5. Click **OK**.
6. Click **Save**.

To remove an SMS Provider

1. In the **General** tab, after **SMS Provider**, click the **Browse** button.
2. Clear the checkbox beside the **SMS Provider**.
3. Click **OK**.
4. Click **Save**.

To make an SMS media server historical

1. Select an SMS media server and click the **General** tab.
2. Click **Make historical**.
3. Click **Save**.

CONFIGURING ADVANCED OPTIONS FOR SMS MEDIA SERVERS

Configuring Advanced SMS options enables administrators to

- Set the amount of time an SMS session can remain idle before being terminated.
NOTE: This configuration determines how long a customer or agent cannot participate in an SMS session before the system ends the SMS session. Customers can continue their SMS contacts with an agent by sending a new SMS contact to the contact center.
- Change the reply template location from the default
For more information on reply templates, see "Configuring Reply templates for email, chat, and SMS" on page 53.

The following configuration takes place in Multimedia=>Media servers.

To set the amount of time an SMS session can remain idle before being terminated

1. Select the **SMS media server** and click the **Advanced** tab.
2. After **Terminate SMS sessions idle for longer than the specified minutes**, set the amount of time an SMS session can remain idle.
3. Click **Save**.

To change the location of the reply templates

1. Select the SMS media server and click the **Advanced** tab.
2. After **Location**, click the **Browse** button.
3. Select the folder and click **OK**.
NOTE: The reply template folder must be located on a UNC (Universal Naming Convention) path, also known as a shared network path
4. Click **Save**.

CONFIGURING WORKLOAD

Employees handling multimedia contacts must be associated with a Workload. Workloads determine the number and type of media contacts that can be pushed to an agent at any one time. When employees become licensed for Multimedia Contact Center, they are automatically assigned the default Workload, which allows concurrent handling of 1 contact from each media type.

When an employee reaches their maximum Workload for a media type, their agent is put into Make Busy with the Overloaded reason code. When an employee is Overloaded, the employee will not be offered inbound contacts for that media type. This state is automatically removed when they are no longer at their maximum Workload. Employees in Ignite who have reached their maximum concurrent contacts in one type of media are still able to pick contacts from the corresponding media's queues and receive transfers from other agents.

A default Workload is provided with Multimedia Contact Center. The default Workload can be modified, but not deleted. Figure 1 shows the default Workload.

The screenshot shows a window titled "Select a Workload" with a blue header bar containing the text "Default Workload (System Created)". Below the header, there is a "Name" field with the value "Default Workload (System Created)". A checkbox labeled "Apply rule to outgoing voice calls" is unchecked. Below this, there is a table with four rows representing media types: Voice, Chat, Email, and SMS. Each row has a "Concurrent contacts" column with a numeric input field set to "1", and a "Avoid routing to this media type when current media type is active" column with four icons: a headset, a speech bubble, an envelope, and a smartphone. The icons for Voice, Chat, and SMS are active (blue), while the icon for Email is disabled (gray). At the bottom right, there are "Save" and "Cancel" buttons.

	Name	Concurrent contacts	Avoid routing to this media type when current media type is active			
Voice		1				
Chat		1				
Email		1				
SMS		1				

Figure 1: Default Workload

Administrators can create Workloads and assign them to employees as necessary. There are two areas of configuration required for Workloads for each media type:

- **Concurrent contacts:** This column of drop-down menus allows an administrator to set how many contacts of each type of media an employee can handle concurrently.
- **Avoid routing to this media type when current media type is active:** This matrix enables administrators to prevent certain media types from being offered to employees when they are handling a higher priority of media. When an employee is handling a media that filters another kind of media, the employee's agents for the blocked media are set into Make Busy. The disallowing of media is reciprocal, so that if Chat is disabled when handling Voice, then Voice would be disabled when handling Chat.

NOTE:

- Agents can still pick and receive transferred contacts of the disallowed media type.
- If you do not want agents to receive multiple ringing contacts of different media types, configure this option

The following configuration takes place in Multimedia=>WorkLoad.

The following procedures explain how to:

- Create a new Workload
- Modify an existing Workload
- Delete a Workload

NOTE: We recommend disassociating a Workload from all employees before deleting it.

To create a new Workload

1. Click **Add**.
2. Type a **Name** for the Workload.
3. To apply the Workload to outgoing voice calls, select **Apply rule to outgoing voice calls**.
4. For each media type, under **Concurrent contacts**, select the maximum number of connections of that media type that can be handled concurrently.
5. For each media type, click the icons of the media you do not want employees to concurrently handle when handling that type of media.
6. Click **Save**.

To modify an existing Workload

1. Select a **Workload**
2. When you are done modifying the Workload, click **Save**.

To delete a Workload

1. Select a Workload and click **Delete**.
2. Click **OK**.

ADDING MULTIMEDIA CAPABILITIES TO EMPLOYEES

Contact center employees handling multimedia must be licensed for Multimedia Contact Center.

Administrators can add multimedia capabilities to employees on an employee-by-employee basis, or they can select a number of existing employees and add multimedia capabilities to multiple employees at the same time.

For more information on employee licensing or for instructions on creating new employees in YourSite Explorer, consult the *MiContact Center Installation and Administration Guide*.

The following sections explain

- Licensing requirements for employee multimedia capabilities
- How to configure Multimedia Contact Center employee licensing
- How to assign employee Workload
- How to manage the media types an employee can handle

LICENSING REQUIREMENTS FOR EMPLOYEE MULTIMEDIA CAPABILITIES





Employees consume a Multimedia Agent license when they are enabled to handle email, chat, or SMS. Employees handling multiple multimedia types do not consume additional Multimedia Agent licenses. Removing an employee's ability to handle multimedia unlicenses the employee. For information on enabling employees to handle multimedia types, see "Managing the media types an employee can handle" on page 66.

Employees licensed as Advanced supervisors or System Administrators may search Ignite's entire repository. This includes Ignite's In Progress folder (DESKTOP), which enables supervisors to see contacts currently in agent Inboxes. This search capability does not require Multimedia Contact Center licensing. However, to view and search contacts in queue using Ignite, employees must have a Multimedia Contact Center license and multimedia agents assigned to the queue.

MANAGING THE MEDIA TYPES AN EMPLOYEE CAN HANDLE

Employees handle media through their associated agents. The General tab of an employee contains buttons representing each media type that has a configured media server. When a button is selected, an agent of that media type is automatically created and associated to the employee. Table 2 contains an explanation of which buttons correspond to which media type.

Table 2: Media buttons

MEDIA TYPE	MEDIA BUTTON
Voice	
Chat	
Email	
SMS	

NOTE: Employees must be licensed to handle non-voice media. See "Licensing requirements for employee multimedia capabilities" on page 66.

When you remove the employee's ability to handle non-voice media, the employee's agents are made historical. Historical agents are disabled for real-time monitoring and data collection. If the employee is re-enabled to handle that non-voice media, then their agent will be made active again. Multimedia agents can be deleted to be removed entirely from the system.

NOTE: Failover media servers for voice agents must be configured on your telephone system and synchronized into YourSite Explorer. Workgroup does not support Contact Center resiliency. You cannot program failover media servers for ACD agents and extensions.

The following procedures explain how to:

- Enable an employee to handle voice media
- Edit an employee's voice agent
- Enable an employee's voice agent for external hot desking
- Enable an employee to handle voice media using an existing agent
- Remove a voice agent from an employee
- Enable an employee to handle multimedia
- Remove an employee's ability to handle multimedia
- Delete a multimedia agent

The following configuration takes place in Multimedia=>Employees.

To enable an employee to handle voice media

1. Select an employee and click the **General** tab.
2. Under **Devices**, click the **Voice** button.
A voice agent and extension are automatically created for the employee.
By default, the extension type is voice softphone, which emulates a 5020 IP set.

By default, the extension reporting number/dialable is populated with the employee's business phone.

3. Optionally, change the agent's **First name**.
4. Optionally, change the agent's **Last name**.
5. Optionally, after **Agent login ID**, enter the reporting number for the voice agent.
6. After **Media server**, click the **Browse** button.
7. Select a media server and click **OK**.
8. If you want to disable real-time monitoring and data collection for this agent, select **Disable real-time monitoring and data collection on this device**.
9. If a 3300 media server was selected, after **COS**, select a Class of Service from the list.
10. If a 3300 media server was selected, optionally, after **COR**, select a Class of Restriction from the list.
11. Select a media server and click **OK**.
12. Click **Save**.
13. Click **Save**.

To edit an employee's voice agent

1. Select an employee and click the **General** tab.
2. Under **Devices**, click the down arrow beside the Voice button and click **<agent ID>=>Edit**.
3. Edit the agent's fields.
4. Click **Save**.
5. Click **Save**.

To enable an employee's voice agent for external hot desking

1. Select an employee and click the **General** tab.
2. Under **Devices**, click the down arrow beside the **Voice** button and click **<agent ID>=>Edit**.
3. Select **External hot desk user enabled**.
4. After **External dialing prefix**, type the dialing prefix for the device to which calls will be routed.
5. After **External dialing number**, type the dialing number for the device to which calls will be routed.
6. Click **Save**.
7. Click **Save**.

To enable an employee to handle voice media using an existing agent

1. Select an employee and click the **General** tab.
2. Under **Devices**, click the down arrow beside the **Voice** button and click **Associate existing voice agent**.
3. Select an unassigned agent and click **OK**.
4. Click **Save**.

To remove a voice agent from an employee

1. Select an employee and click the **General** tab.
2. Click the down arrow beside the **Voice** icon and click <agent ID>=>**Delete**.
3. Select the delete option:
 - **Make the device historical**—sets the agent as historical, but leaves it associated to this employee
 - **Disassociate the device**—disassociates the agent so it can be used with another employee
 - **Remove the device from the system**—deletes the agent
4. Click **OK**.
5. Click **Save**.

To enable an employee to handle multimedia

1. Select an employee.
2. Under **Devices**, click the media button to select which media this employee can handle.
3. Click **Save**.

To remove an employee's ability to handle multimedia

1. Select an employee.
2. Under **Devices**, click the enabled media button.
3. Click **Save**.

To delete a multimedia agent

1. Select an employee.
2. Click the down arrow beside the media button and click **Delete**.
3. Click **Save**.

MANAGING EMPLOYEE WORKLOAD

Employees handling multimedia contacts must be associated with a Workload. Workloads determine the number and type of media contacts that can be pushed to an agent at any one time. When employees become licensed for Multimedia Contact Center, they are automatically assigned the default Workload, which allows concurrent handling of 1 contact from each media type. For more information on Workloads, see "Configuring Workload" on page 63.

The following configuration takes place in Multimedia=>Employee.

The following procedures explain how to:

- Associate a Workload to an employee
 - Associate a new Workload to an employee
 - Edit an existing Workload
 - Delete a Workload
- NOTE:** We recommend disassociating a Workload from all employees before deleting it.

To associate a Workload to an employee

1. Select an employee and click the **Advanced** tab.
2. After **Workload Descriptor**, click the **Browse** button.
3. Select a **Workload**.
Alternatively, if you want to create a new Workload to associate to the employee, click **Add**.
4. Click **OK**.
5. Click **Save**.

To associate a new Workload to an employee

1. Select an employee and click the **Advanced** tab.
2. After **Workload Descriptor**, click the **Browse** button.
3. Click **Add**.
4. Type a **Name** for the Workload.
5. To apply the Workload to outgoing voice calls, select **Apply rule to outgoing voice calls**.
6. For each media type, under **Concurrent contacts**, select the maximum number of connections of that media type that can be handled concurrently.
7. For each media type, click the icons of the media you do not want employees to concurrently handle when handling that type of media.
NOTE: If you do not want agents to receive multiple ringing contacts of different media types, configure this option.
8. Click **Save**.

To edit an existing Workload

1. Select an employee and click the **Advanced** tab.
2. After **Workload Descriptor**, click the **Browse** button.
3. Select a Workload and click **Edit**.
4. When you are done modifying the Workload, click **Save**.

To delete a Workload

1. Select an employee and click the **Advanced** tab.
2. After **Workload Descriptor**, click the **Browse** button.
3. Click **Delete**.
4. Click **OK**.

ADDING EMPLOYEE GROUPS

After adding employees, you add employee groups and associate employees to these groups. Employee groups enable you to report on specific groups of employees.

If you intend to use security roles to restrict employees from elements of Ignite, it is recommended that you create employee groups whose membership duplicates that of your agent groups. For more information on Multimedia Contact Center and security roles, see "Multimedia Contact Center security settings" on page 97.

The following procedures explain how to:

- Add an employee group
- Associate an employee with an employee group
- Remove an employee from an employee group

To add an employee group

1. Click **Multimedia=>Employee groups**.
2. Click **Add**.
3. Type the employee group's **Name**.
4. Type the **Employee group ID**.
5. Click **Save**.

To associate an employee with an employee group

1. Click **Multimedia=>Employee groups**.
2. Select an employee group from the list.
3. On the **Membership** tab, under **Available** members, select an employee and click **>** to move the employee to the **Selected members** list.
4. Click **Save**.

To remove an employee from an employee group

1. Click **Multimedia=>Employee groups**.
2. Select an employee group from the list.
3. On the **Membership** tab, under **Selected members**, select an employee and click **<** to move the employee to the **Available members** list.
4. Click **Save**.

ADDING VOICE AGENT IDS

Agent IDs enable employees to handle different media and to be reported on and tracked in real time. When an administrator enables an employee to handle a type of media, the employee has an agent ID of that media type automatically created. A contact center employee can have multiple voice agent IDs, but requires a unique agent ID for each of the other media types (email, chat, and SMS) that they handle.

Voice and multimedia agent IDs are added in the Employee section of Multimedia Contact Center. To add different media agent IDs to an employee, see "Managing the media types an employee can handle" on page 66. Voice agents can be created in the Agent section of Multimedia Contact Center, but it is recommended to create agents within the Employee section. The Agent section also enables administrators to delete agent IDs. Deleting an active multimedia agent removes an employee's capabilities to handle the corresponding media. Historical multimedia IDs can only be deleted in the Agent section.

In Multimedia Contact Center=>Agents, administrators

- Add voice agent IDs
- Delete agent IDs
- Associate unassociated voice agent IDs to employees
- Specify 3300 ICP Class of Service, Class of Restriction, and Failover media server options for voice agent IDs
- Enable a voice agent for external hot desking

To add a voice agent ID

1. Click **Multimedia=>Agents**.
2. Click **Add**.
3. If you want to associate the new voice agent ID to an employee, click the **Browse** button after Employee.
Selecting an employee will automatically fill in the First name and Last name fields with the employee's name.
4. Type the voice agent ID's **First name**.
5. Type the voice agent ID's **Last name**.
6. After **Agent login ID**, enter the reporting number for the voice agent ID.
7. After **Media Server**, click the browse button.
8. Select a media server and click **OK**.
9. Click **Save**.
NOTE: The **Disable real-time monitoring and data collection on this device** check box is automatically selected if the employee that is associated to this agent has their licensing attribute set to 'None'.

To configure 3300 ICP options for a voice agent ID

1. Click **Multimedia=>Agents**.
2. Select an agent from the list.
3. Under **3300 ICP Options**, after **COS**, select a Class of Service from the list.
4. After **COR**, select a Class of Restriction from the list.
5. After **Failover media server**, click the **Browse** button.
6. Select a failover media server from the list and click **OK**.
Workgroup does not support Contact Center resiliency. You cannot program failover media servers for ACD agents and extensions.
7. Click **Save**.

To enable a voice agent for external hot desking

1. Click **Multimedia=>Agents**.
2. Select an agent from the list.
3. Select **External hot desk user enabled**.

4. After **External dialing prefix**, type the dialing prefix for the device to which calls will be routed.
5. After **External dialing number**, type the dialing number for the device to which calls will be routed.
6. Click **Save**.

To delete an agent ID

1. Click **Multimedia=>Agents**.
2. Select an agent.
3. Click **Delete**.
4. Click **OK**.

To associate an unassociated voice agent to an employee

1. Click **Multimedia=>Agents**.
2. Select an unassociated voice agent ID.
3. After **Employee**, the **Browse** button.
4. Select an employee and click **OK**.
5. Click **Save**.

ADDING AGENT GROUPS

Administrators must add agent groups to the YourSite database and associate employees to these agent groups. An employee and their agents can be associated to more than one agent group.

When agent groups are created, an employee's agents are assigned a default group presence, either Present or Absent. Employees whose agents' default presence is Absent will be set in the Logged In Not Present Agent state when they join their agent group. To handle that media type, the employee must change their agent state manually in Ignite or Contact Center Client. Employees whose agents' default presence is Present will be set in the Idle Agent state when they join their agent group. For details about Agent States, see "Employee and Agent state indicators" on page 227.

If you are upgrading to Multimedia Contact Center Version 8.1, agent groups can be modified automatically through the Unified Queue Group Wizard to support new types of media. The Unified Queue Group Wizard, located in the Queue device page in YourSite Explorer, if selected, updates agent groups that are associated to selected voice queues and adds the ability for these agent groups to also handle, for example, chat and email queues. For more information on the Unified Queue Group Wizard, see "Adding Unified queue groups" on page 89.

NOTE:

- If an administrator attempts to add a group to YourSite that is already in the database the system notifies the administrator that the group is already present. When an administrator adds a series of groups to YourSite, such as Queue Groups 1 to 5, if the system detects the administrator has already added Queue Group 3, then it will not add Queue Group 3 or any subsequent queues in the series (that is, Queue Group 4 or 5) to the database.
- Deleting an agent group that is currently the last member of a voice or multimedia queue will invalidate that queue. Deleting an agent group that is associated to an activity in an Inqueue workflow will create a validation error. The queue will not be able to be saved until another agent group is associated to it. It is recommended that you disassociate agent groups from queues and their associated Inqueue workflows before deleting the agent group.
- Workgroup does not support Contact Center resiliency. You cannot program failover media servers for ACD agents and extensions.

To set up an agent group, administrators must:

- Add an agent group
- Manage agent group membership, presence, and skill level
- Specify agent group options for the 3300 ICP media server

The following procedures explain how to:

- Add an agent group
- Disable monitoring and device collection for an agent group
- Specify if the agent group uses skills




The following configuration takes place in Multimedia=>Agent groups.

To add an agent group

1. In Agent groups, click **Add**.
2. Type a **Name** for the agent group.
3. Type a **Reporting number** for the agent group.

4. Select the media type(s) the agent group will handle.
See Table 3.

Table 3: Media icons

MEDIA TYPE	MEDIA ICON
Voice	
Chat	
Email	
SMS	

5. If you select voice media, select the voice media server and click **OK**.
NOTE: If this agent group is not handling voice contacts, then this option will not be available.
6. Click **Save**.

To disable monitoring and device collection for an agent group

1. Select an agent group.
2. Select **Disable real-time monitoring and data collection on this device**.
3. Click **Save**.

To specify if the agent group uses skills

1. Select an agent group
2. Select **The group uses skills**.
3. Click **Save**.

MANAGING AGENT GROUP MEMBERSHIP, PRESENCE, AND SKILL LEVEL

After configuring an agent group, administrators must associate employees to the agent groups and specify the default presence for each of the employee's agent IDs for the media types the agent is configured to handle. If the agent group uses skills, skill levels must be set for each employee. Skill levels range from 1, which is the most skilled, to 255, which is the least skilled. The skill level assigned to the employee is applied to each media the employee is capable of handling.

Some employees may have multiple voice agents associated to them. When these are added to an agent group, they are highlighted in yellow. Administrators can select which of an employee's voice agents are in the agent group. It is recommended that an employee only have one voice agent associated to an agent group.

The following procedures explain how to

- Add employees to an agent group
- Specify which of an employee's multiple voice agents are in an agent group
- Specify a member's default presence in an agent group
- Specify a member's skill level
- Edit a member employee
- Remove a member from an agent group

The following configuration takes place in Multimedia=>Agent groups.

To add employees to an agent group

1. Select an agent group and click the **Membership** tab.
2. To add employees to the agent group, click **Add**.
3. Select the employees to add to the agent group and click **OK**.
4. Click **Save**.

To specify which of an employee's multiple voice agents are in an agent group

1. Select an agent group and click the **Membership** tab.
2. Under **Selected members**, select the employee with multiple voice agents.
3. Click **Voice agent options**.
4. Select the voice agent to be present in this agent group and click **OK**.
5. Click **Save**.

To specify a member's default presence in the agent group

1. Select an agent group and click the **Membership** tab.
2. In the **Default <media type> Presence** column of the member's row, click the cell and select the default presence.
 - **Absent**—the employee's agent ID will be put into the Logged in Not Present agent state when they join the agent group.
 - **Present**—the employee's agent ID will be put into Idle when they join the agent group.
3. Repeat Step 2 for each media type the member can handle in the agent group.
4. Click **Save**.

To specify a member's skill level

1. Select an agent group and click the **Membership** tab.
2. In the **Skill level** column of the member's row, select a skill level from the drop-down list.
3. Click **Save**.

To edit a member employee

1. Select an agent group and click the **Membership** tab.
2. Select an employee and click **Edit**.
For information on configuring employees, see the *MiContact Center Installation and Administration Guide*.
3. When you are done editing the employee, click **Save**.

To remove a member

1. Select an agent group and click the **Membership** tab.
2. Select a member and click **Delete**.
3. Click **Save**.

SPECIFYING 3300 ICP OPTIONS FOR AGENT GROUPS

The following configuration takes place in Multimedia=>Agent groups

To specify 3300 ICP options for an agent group

1. Select an agent group from the list.
2. On the **3300 ICP options** tab, if you want to change your Skill Group ID, after Skill Group ID, enter a new ID.
3. Click **Browse** and select a failover media server.
Workgroup does not support Contact Center resiliency. You cannot program failover media servers for ACD agents and extensions.
4. Specify if the agent group uses skills and if calls are to be queued to the agent group when no agents are logged in.
5. Click **Save**.

ADDING MULTIMEDIA QUEUES

When you create a multimedia queue, it is automatically associated to the existing media server for that type of media. Your multimedia media servers must already be configured before you can add a multimedia queue of that media type.

When adding a queue, administrators must

- Configure general multimedia queue settings
- Configure multimedia queue membership and routing
- Configure multimedia queue performance settings
- Configure queue spectrum settings for multimedia queues

Depending on the media type, administrators must also

- Configure email options
 - Apply signatures to email queues
- Configure chat options
- Configure SMS options

To add a multimedia queue

1. Click **Multimedia=>Queues**.
2. Click **Add** and select **<media type> Queue**.

CONFIGURING GENERAL SETTINGS FOR MULTIMEDIA QUEUES

When configuring general information for multimedia queues, administrators configure the basic settings for the queue that are required to be configured before the queue can be saved.

NOTE: For email queues not automatically requeuing contacts on agent logout, emails are put on hold until the agent logs back in and removes hold. Once the hold requeue time expires, contacts are requeued whether the agent is logged in or not.

To configure general settings for a multimedia queue

1. Select a queue and click the **General** tab.
2. Type a **Name** for the queue.
3. Type a **Reporting number** for the queue.
4. For Email queues, after **Email address**, click the **Browse** button.
5. Type the queue's email address and click **Add**.
The Email queue's email address identifies the queue to which the system will route the email. The email address can correspond to an email address included in a mail server distribution list or it can be internal to the Multimedia Contact Center. For information on configuring mail servers, see "Integrating Multimedia Contact Center with mail servers" on page 42.

NOTE:

- We do not recommend assigning the same email address to multiple queues.
- Using the <<DestinationQueues>> variable for routing with the Transfer activity requires email queues to have an associated email address. For more information on the <<DestinationQueues>> variable, see "Routing contacts with the Transfer activity" on page 207.
- If you use the <<DestinationQueues>> variable for routing with the Transfer activity and have multiple queues associated to the same email address, the system routes emails to the first configured queue only. We do not recommend assigning the same email address to multiple queues.
- For agents to select queue email addresses as the 'From' address in email responses and outbound emails, the addresses must be associated to a mail server which is associated to the media server for the queue. Administrators must configure primary and secondary queue email addresses as either the mail server's 'From Email Address' or 'Alias'. See "Configuring SMTP connections to Multimedia Contact Center" on page 44.
- An Email queue can be saved without an email address added, in which case the queue uses the SMTP email address assigned to the mail server as the "from" email address. To ensure proper response functionality, however, an email address must be set for the Email queue.

- If the queue email address uses an alias, ensure that the alias has been added to the mail server. An alias can be used with only one queue. For more information about adding aliases to the mail server, see "Configuring SMTP connections to Multimedia Contact Center" on page 44.
6. If you want to associate additional email addresses to the email queue, for each additional email address, type the address and click **Add**.
Alternatively, to import all of the email addresses and aliases associated to the mail servers associated to your enterprise, click **Pull From Mail Server(s)**.
The first email address in the list is always considered the primary email address for the queue that is used as the From address when an agent responds to an email address in this queue. Each subsequent email address is considered an alternative email address.
You can adjust the order of the email addresses by selecting an address and clicking the Up and Down buttons.
 7. Click **Ok**.
 8. For Chat queues, type a **Username**.
The Chat queue's auto response username is used with workflow activities that provide automated responses to contacts in queue.
 9. For SMS queues, type a **Phone number**.
SMS numbers must not use dashes or parentheses and must include both a country and area code. SMS queues can only have one SMS phone number associated to them. An SMS number can be used for multiple queues, with some restrictions. For more information, see "Integrating Multimedia Contact Center with an SMS Gateway Provider" on page 49
 10. If you do not want the queue to be viewed in Contact Center Client and Ignite, select **Disable real-time monitoring and data collection on this device**.
 11. Click **Save**.

To edit an email queue's email addresses

1. Select an email queue and click the **General** tab.
2. After **Email address**, click **Browse**.
3. To add an email address to the queue, enter the email address and click **Add**.
4. To change the order of email addresses, select an email address and click the **Up** or **Down** buttons.
The first email address is the queue's primary email address.
5. To remove an email address, select the email address and click **Remove**.
6. Click **OK**.
7. Click **Save**.

CONFIGURING MULTIMEDIA QUEUE MEMBERSHIP AND ROUTING

When a queue is created, a copy of the Default Inqueue email, chat, or SMS workflow is created and assigned to the queue. In each of the Offer to Agent Group activities in these workflows, the handling agent groups must be specified. An agent group can only be associated with one Offer to Agent Group activity in an Inqueue workflow. For more information on configuring Offer to Agent Group activities, see "Routing contacts with the Offer to Agent Group activity" on page 189.

If your default Inqueue workflow uses Email activities as auto responses, you will need to specify the SMTP servers as well. The default email messages assigned to Email activities in the Inqueue workflow should be reviewed and customized as required. After assigning agent groups in the Inqueue workflow, administrators can review them in the General tab. Agent groups are listed, in the order from the Inqueue workflow, in the Members field. Administrators can click the name of the agent group to open that agent group's page in YourSite Explorer.

Once you have configured your Inqueue workflow, you must enable validation for the workflow. Validation prevents workflows with invalid or incomplete configuration from being used.

If you have an existing Inqueue workflow you would like to use for routing, you can assign it to the queue from Workflows. For information on assigning Inqueue workflows to queues, "Associating workflows to queues" on page 163.

For more information about the Default Inqueue workflows, see "Multimedia Contact Center default workflows" on page 212.

The following procedures explain how to:

- Set which agent group handles contacts
- Enable workflow validation
- Set the SMTP servers in an Email activity
- Prevent overflow on the final Offer to Agent Group activity

The following procedures take place in Multimedia=>Queues.

To set which agent group handles contacts

1. Select a queue and click the **Inqueue workflow** tab.
2. Right-click on the **Offer to Primary Agent Group** activity and select **Agent group**.
3. Select the agent group who will handle this queue and click **OK**.
4. For each subsequent Offer to Agent Group activity in the workflow, repeat steps 2-3 to set all of the answering agent groups.
5. Click **Save**.

To enable workflow validation

1. Select a queue and click the **Inqueue workflow** tab.
2. In the **Properties** pane, select **Validate workflow**.
3. Click **Save**

To set the SMTP servers in an Email activity

1. Select a queue and click the **Inqueue workflow** tab.
2. Right-click on the Email activity and select **Edit SMTP Server**.
3. Select a SMTP server and click **OK**.
4. Click **Save**.

To prevent overflow on the final Offer to Agent Group activity

1. Select a queue and click the **Inqueue workflow** tab.
2. Select the final **Offer to Agent Group** activity.
3. In the **Properties** pane, select **Do Not Allow Overflow**.

4. Set the **Overflow Time** to **0:00:00**.
5. Click **Save**.

CONFIGURING MULTIMEDIA QUEUE PERFORMANCE SETTINGS

When configuring a multimedia queue, administrators set the priority of the queue, the queue's business hours, the Queue Work Timer options, set the Service Level objectives, and set the queue handling times. Note that Multimedia Queue Work Timer functions independently of Class of Service Work Timer. Queue Work Timer options enable queues to change their Work Timer duration to be different than the Class of Service Work Timer.

The following procedures explain how to:

- Set queue priority
- Configure the business hours for a queue
- Apply the business hours to all queues on the same media server
- Configure the Queue Work Timer options
- Set the queue service level objectives
- Set the queue handling times

To set the priority level for the queue

1. Select a queue and click the **Performance** tab.
2. After **Priority**, select the priority level for the queue.
The highest priority level is 1. The lowest priority level is 64.
3. Click **Save**.

To configure the business hours for a queue.

1. Select a queue and click the **Performance** tab.
2. After **Business-hour schedule**, click the **Browse** button.
3. Select a schedule and click **OK**.
4. If you want to restrict the production of real-time statistics and reports to only during business hours, select **Generate statistics and reports only within business hours**.
5. Click **Save**.

To apply the business hours to all queues on the same media server

1. Select a queue and in the ribbon, click the **Queue Tools** tab.
2. Select **Apply business hours to all**.

To configure the Queue Work Timer options

1. Select a queue and click the **Performance** tab.
2. If you want to add Contact Center Work Timer to handling time in reports, select **Include Queue Work Timer as part of handling time**.
NOTE: When 'Include queue work timer as part of handling time' is enabled, the ACD handling time durations for reporting purposes span from ACD pick up to the end of the Work Timer time.
When this option is disabled, the ACD handling time duration spans from ACD pick up to hang up.
3. To enable the queue for Work Timer, select **Use Queue Work Timer** and set the duration of Queue Work Timer.
The default duration is 00:05:00.
4. Click **Save**.

To set the queue service level objectives

1. Select a queue and click the **Performance** tab.
2. Specify the **Service Level goal** and **Service Level time** for the queue.
3. Click **Save**.

To set the queue handling times

1. Select a queue and click the **Performance** tab.
2. After **Short handle less than**, type the duration that will define a call as a short handle call.
For example, type 3 to define a short handle call as one that lasts less than 3 seconds. Short talk calls are included in call statistics.
3. After **Short abandon less than**, type the duration that will define an abandoned call as 'Abandoned (Short)'.
For example, type 5 to define a short abandon call as one that is abandoned in less than 5 seconds.
NOTE: 'Short abandon less than' is not applicable for Email queues.
4. Click **Save**

CONFIGURING QUEUE SPECTRUM SETTINGS FOR QUEUES

Queue spectrum reports provide valuable information on how emails are dispersed in your contact center. You configure thresholds for answer, abandon, interflow, handle, and ringing thresholds for queues in YourSite Explorer. The answer, abandon, interflow, and talk statistics will be distributed across the queue spectrum reports in the time intervals you specify.

The following procedures explain how to:

- Configure queue spectrum settings for a queue
- Apply queue spectrum settings to all queues on the same media server

The following procedures take place in Multimedia=>Queues.

To configure queue spectrum settings for a queue

1. Select a queue and click the **Queue Spectrum** tab.
2. Select the spectrum value(s) you want to include in reports and specify thresholds for each.
3. Click **Save**.

To apply queue spectrum settings to all queues on the same media server

1. Select a queue and in the ribbon, click the **Queue Tools** tab.
2. Select **Apply queue spectrum to all**.

CONFIGURING EMAIL OPTIONS FOR MULTIMEDIA QUEUES

The Email options tab contains email queue-specific options. The Email options tab enables you to control if email contacts in the Ignite inbox are requeued when the agent logs out of Ignite, how long contacts can remain on hold for before being requeued, and whether or not agents can select the From address of the email response to contacts. The Email options tab also contains options for email signatures. For information on configuring email signatures, see "Applying signatures to email queues" on page 84.

NOTE: For email queues not automatically requeuing contacts on agent logout, emails are put on hold until the agent logs back in and removes hold. Once the hold requeue time expires, contacts are requeued whether the agent is logged in or not.

The following procedures explain how to:

- Set whether email contacts in the Inbox requeue on employee logout
- Set how long an email contact can be on hold before being requeued
- Enable agents to pick the From address on responses

To set whether email contacts in the Inbox requeue on employee logout

1. Select a queue and click the **Email options** tab.
2. To requeue email contacts on employee logout select the **Requeue on logout** checkbox.
3. To keep email contacts on employee logout, deselect the **Requeue on logout** checkbox.
4. Click **Save**.

To set how long a contact can remain on hold or in the Inbox after logout before being requeued

NOTE: When the 'Minutes a contact can be on hold before being requeued' timer expires, the contact is returned to the queue as the longest waiting contact and the employee (if logged into Ignite) is put into System Make Busy. For emails, any text the agent entered is visible to the agent who handles the requeued contact.

1. Select a queue and click the **Email options** tab.
2. Under **Requeue options**, enter the number of **Minutes a contact can be on hold before being requeued**.
NOTE: Once the 'Minutes a contact can be on hold before being requeued' timer expires, contacts are requeued whether the agent is logged in or not.
3. Click **Save**.

To enable agents to pick the From address on responses

1. Select a queue and click the **Email options** tab.
2. Select **Allow Pick From Address**.
3. Click **Save**.

Applying signatures to email queues

NOTE:

- Do not copy signatures containing images in .msg files directly from Outlook. Save these signatures as .msg files in the Reply Templates folder and leverage from there.
- The size of email signatures contributes to email file size. By default, the maximum file size for emails, including attachments, signatures, and images, is 25 MB.
- Email queue signatures are limited to 150 000 characters. To increase this number, consult the following Knowledge Base article:
<http://micc.mitel.com/kb/KnowledgebaseArticle52209.aspx>
- Email queue signatures are not inserted in workflow automatic email responses.

Administrators can apply signatures to email queues. These signatures are automatically inserted into agent email responses. Signatures are configured and applied on a queue-by-queue basis. Queue signatures enable custom signatures to be deployed uniformly across the responses of agents answering for the queue.

Email signatures must be in .msg or .txt format. .msg signatures can contain images. Unsupported file types cannot be saved to the queue. Email signature files must have 'Everyone' and/or 'Users' permission(s) enabled in order to be saved to the queue.

Administrators can either store signature files in the default Reply Template folder location created on the server during installation, or they can move the Reply Templates folder to a network share. Using the Reply Templates folder ensures that signature files are included in database backups. A network share is required for signatures to be created and modified on client computers or remote servers. If the network drive is unavailable to the server, the queue signature is not automatically inserted in agent replies. However, agents can manually insert signatures in their responses from the Reply Templates folder.

The default Reply Templates folder location is

- <installation drive>:\<installation folder>\CCM\Templates\ReplyTemplates\Email.

Administrators must ensure that media servers are pointed to the Reply Templates folder and that queues are pointed to the signature file in that folder. By default, media servers point to the Reply Templates folder. To point the media server to a Reply Templates folder housed on a network share, see "Configuring Reply templates for email, chat, and SMS" on page 53.

If agents are permitted to use personalized signatures, they must use response templates configured for that purpose. Administrators must configure the templates for agents to apply as signatures. See "Configuring Reply templates for email, chat, and SMS" on page 53.

The following procedure explains how to

- Apply signatures to email queues
- Disable or remove signatures on email queues

To apply signatures to email queues

1. Select a queue and click the **Email options** tab.
2. Select **Enable Email Signature**.
3. Click the **Browse** button and navigate to the folder housing the signatures.
NOTE: This folder must be the same folder to which the media server points.
4. Select the email signature file and click **Open**.
NOTE: Only .msg and .txt files can be inserted into the Email Signature field.
5. Click **Save**.

To disable or remove signatures on email queues

1. Select a queue and click the **Email options** tab.
2. To disable the signature, deselect **Enable Email Signature**.
3. To remove the signature, click **Clear**.
4. Click **Save**.

CONFIGURING CHAT OPTIONS FOR MULTIMEDIA QUEUES

The following procedures explain how to:

- Set the queue hold/requeue time
NOTE: Once the hold/requeue time expires, contacts are requeued whether the agent is logged in or not
- Configure chat queue transcript options

The chat options tab for chat queues enables you to email chat transcripts to contacts as a part of the Chat Response workflow and view the internal and external URL for that specific chat queue.

A queue's internal URL has the queue's GUID built into the URL, removing the potential need for customers to select the queue they want from the chat request page and, if the Inbound workflow is configured to route based on queue IDs, automatically identify the destination queue so that customers are routed directly to the appropriate queue. There are two fields for chat URLs, the external URL for Queue and the internal URL for Queue. The internal URL for Queue is the Public URL used internally by the system <Enterprise Server>/chat/GUID. The external URL for Queue is the Public URL used externally with the reverse proxy applied and is the URL to link contacts to specific queues.

The following procedures take place in Multimedia=>Queues.

To set the queue hold/requeue time

1. Select a queue and click the **Chat options** tab.
2. Under **Requeue options**, set the **Hold requeue time**.
NOTE: Once the hold/requeue time expires, contacts are requeued whether the agent is logged in or not
3. Click **Save**.

To configure chat queue transcript options

1. Select a chat queue and click the **Chat options** tab.
2. Select **Email chat transcript**.
3. Type the email address that will send the transcript.
NOTE: The email address must be your SMTP server's main address or an alias. For more information on SMTP servers, see "Configuring SMTP connections to Multimedia Contact Center" on page 44.
4. Click **Save**.

CONFIGURING SMS OPTIONS FOR MULTIMEDIA QUEUES

The SMS options tab for SMS queues enables you to set how long contacts remain on hold before being requeued.

The following procedures explain how to

- Set the hold requeue timeout time

To set the hold requeue timeout time

1. Select an SMS queue and click the **SMS options** tab.
2. Set the **Hold requeue timeout** time.
3. Click **Save**.

SETTING A MULTIMEDIA QUEUE AS HISTORICAL

Multimedia queues can be set as historical, disabling real-time monitoring and data collection for the queue. Historical multimedia queues retain their data for reporting, as well as any emails or transcripts, but cannot handle contacts and are removed from Contact Center Client and Ignite. Emails and transcripts associated to the queues will still be visible in the History folder in Ignite. Historical chat queue cannot be linked to directly and will not appear in the default chat request form.

To set a queue as historical or to reactivate a historical queue

1. Select a queue and click the **General** tab.
2. If you are setting the queue as historical, select **Disable real-time monitoring and data collection on this device**.
3. If you are reactivating the queue, clear **Disable real-time monitoring and data collection on this device**.
4. Click **Save**.

DELETING A MULTIMEDIA QUEUE

Emails and transcripts from a deleted queue will still be visible in Ignite, but will not have a queue associated to them. Emails and transcripts will not be associated to a new queue that matches the configuration of the deleted queue.

To delete a queue

1. Click **Multimedia=>Queues**.
2. Select a queue and click **Delete**.
3. Click **OK**.

ADDING QUEUE GROUPS

Administrators can group queues for common purposes. There are three kinds of queue groups available:

- **Reporting**—groups queues together for reporting and viewing their activities in real-time
- **Mitel Virtual**—groups queues across telephone switches that load balance ACD calls between multiple queues
- **Unified Queue Group**—groups queues of different media types that handle contacts for the same service group in a contact center

ADDING REPORTING QUEUE GROUPS

Reporting queue groups enable administrators to run reports on activities for the grouped queues and view queue group activities in real-time.

The following procedures explain how to:

- Add a Reporting queue group
- Associate a queue to a Reporting queue group
- Remove a queue from a Reporting queue group

To add a Reporting queue group

1. Click **Multimedia=>Queue groups**.
2. Click **Add=>Reporting**.
3. Type a **Name**.
4. Type a **Reporting number**.
5. Click **Save**.

To associate a queue to a Reporting queue group

1. Click **Multimedia=>Queue groups**.
2. Select a Reporting queue group from the list.
3. On the **Membership** tab, under **Available members**, select a queue and click > to move the queue to the **Selected members** list.
4. Click **Save**.

To remove a queue from a Reporting queue group

1. Click **Multimedia=>Queue groups**.
2. Select a Reporting queue group from the list.
3. On the **Membership** tab, under **Selected members**, select a queue and click < to move the queue to the **Available members** list.
4. Click **Save**.

ADDING VIRTUAL QUEUE GROUPS

Virtual queue groups are comprised of two or more queues across one or more telephone switches that all send ACD voice contacts to the same pool of agent groups, balancing loads across queues. Queues within a virtual queue group must have the same reporting numbers, the same agent groups, and different dialable numbers. For example, in Figure 2 below, the virtual queue group is made from two queues on two different telephone systems:

- **PBX 1:** Queue 7000: reporting number P700, dialable 7000 on PBX1, queue 700, 701, 702 assigned
- **PBX 2:** Queue 7001: reporting number P700, dialable 7001 on PBX2, queue 700, 701, 702 Assigned

Virtual Queue 7000/7001 Queue groups

Name:
 Reporting number:
 Virtual Queue ☒

Membership

Available members

Name	Reporting number	Media server
3053	P533	10.1.1...
3900-Queue	P390	10.1.1...
CH-QUEUE-3061	P301	10.1.1...
CH-TestQueue 3555	P355	10.1.1...
PC_Queue_3008	P308	10.1.1...
PC_Queue_3009	P309	10.1.1...
PC_Queue_3010	P310	10.1.1...
PC_Queue_3011	P311	10.1.1...
PC_Queue_3012	P312	10.1.1...
PC_Queue_3013	P313	10.1.1...
Q3001	P301	10.1.1...
Q3001 - 2.125	P301	10.1.2...
Q3002 - 2.125	P302	10.1.2...
Q3002 - HDA 1002	P302	10.1.1...
Q3003 - 2.125	P303	10.1.2...
Q3003 - HDA 1003	P303	10.1.1...

0 of 29 selected, Total : 29

Selected members

Name	Reporting number	Media server
Q7000	P700	10.1.16.57 - 657
Q7001	P700	10.1.16.61 - 661

0 of 2 selected, Total : 1

Figure 2: Virtual queue group

Virtual queue groups provide the ability to merge multiple queues into a single visual representation in Interactive Visual Queue and provide callers with an accurate position in queue through the Updated Position in Queue service.

NOTE: Although Virtual queue groups are added and configured under Queue Groups in YourSite Explorer, a virtual queue group is treated as a singular entity.

The following procedures explain how to:

- Add a Virtual queue group
- Associate queues to a Virtual queue group
- Remove queues from a Virtual queue group

To add a Virtual queue group

1. Click **Multimedia=>Queue groups**.
2. Click **Add=>Mitel Virtual**.
3. Type a **Name**.
4. Type a **Reporting number**.
5. Click **Save**.

To associate queues to a Virtual queue group

1. Click **Multimedia=>Queue groups**.
2. Select a Virtual queue group from the list.
3. On the **Membership** tab, under **Available members**, select a queue and click > to move the queue to the **Selected members** list.
Repeat as necessary.
4. Click **Save**.

To remove queues from a Virtual queue group

1. Click **Multimedia=>Queue groups**.
2. Select a Virtual queue group from the list.
3. On the **Membership** tab, under **Selected members**, select a queue and click < to move the queue to the **Available members** list.
Repeat as necessary.
4. Click **Save**.

ADDING UNIFIED QUEUE GROUPS

Unified queue groups are used to consolidate a group of queues of different media types that handle contacts for the same service organization within a contact center, such as sales or support. A Unified queue group can only have one queue for each of the media types it supports. Individual queue priorities are used within a Unified queue group to specify the priority of the media types and queues for handling. The queues within a Unified queue group can be viewed together in Ignite.

Unified queue groups can be created using a wizard or may be created manually. The Unified Queue Group wizard takes an existing voice queue and then uses its configuration settings to input information into new multimedia queues. The wizard also enables all agent groups associated with the voice queue to support the multimedia type selected during queue creation.

NOTE:

- The Unified Queue Group Wizard does not create new agents for employees belonging to the associated agent groups. Employees must be enabled to handle new media types manually. See "Managing the media types an employee can handle" on page 66.
- Employees already enabled to handle the new queues' media types will be set as Present in their agent groups for those media types. For information on changing the default presence, see "Managing agent group membership, presence, and skill level" on page 75.
- A default queue priority of 64 is assigned to queues created by the Unified Queue Group Wizard. These may be altered after the wizard has finished.
- Business hours are copied over from the business hours configured for the voice queue. Default automated responses for business hours are provided for multimedia.
- The wizard will populate the Offer to Agent Groups activities in the default Inqueue workflows with the same agent group order used by the voice queue member of the Unified queue group.

When manually creating a Unified queue group, administrators can create new queues to associate with the Unified queue group. When you create these new queues, they are automatically assigned the name and reporting number of the existing Unified queue group. Users manually creating a Unified queue group can also associate existing queues to a Unified queue group. Virtual queue groups may be associated to the voice media of a Unified queue group. If an administrator disables a media type for a Unified queue group, the associated queue will become historical.




The following procedures explain how to:

- Add a Unified queue group using the Unified Queue Group Wizard
- Add a Unified queue group
- Associate new queues to the Unified queue group
- Associate an existing queue to the Unified queue group
- Associating an existing virtual queue group to the Unified queue group
- Replace an associated queue with a new queue
- Replace an associated queue with an existing queue
- Remove a media type from a Unified queue group and set the associated queue as historical

To add a Unified queue group using the Unified Queue Group Wizard

1. Click **Multimedia=>Queues**.
2. Select the queue(s) for which you want to create Unified queue groups.
3. In the **Queue Tools** tab of the ribbon, click **Create unified queue group**.
4. Click the icons for the multimedia queues you want to create.
See Table 4.

Table 4: Unified Queue Group Wizard media icons

MEDIA TYPE	MEDIA ICON
Chat	
Email	
SMS	

5. If you want to create a corresponding reporting queue group, select **Create reporting queue group** and type a **Reporting number**.
6. Click **Create**.
7. Click **Save**.

To add a Unified queue group

1. Click **Multimedia=>Queue groups**.
2. Click **Add=>Unified**.
3. Type a **Name**.
4. Type a **Reporting number**.
5. Click **Save**.

To associate new queues to the Unified queue group

1. Click **Multimedia=>Queue groups** and select a Unified queue group.
2. Click on the media type icons to select which media types the queue group can handle. A queue configuration window opens.

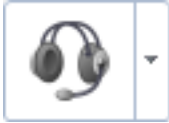


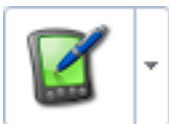
For instructions on configuring an email, chat, or SMS queue, see "Adding multimedia queues" on page 77.

See Table 5.

NOTE:

- Queue Inqueue workflows cannot be configured when adding new queues as members of Unified queue groups. Inqueue workflows for new queues must be configured in **YourSite=>Queues** after the Unified queue group is saved.
- By default, new queues added this way will use the name of the Unified queue group and the reporting number.

Table 5: Unified queue group media type icons

MEDIA TYPE	ICON
Voice	
Chat	
Email	
SMS	

3. When you are done configuring the new queue, click **Save**.
4. Repeat steps 2 and 3 for each media type you want the Unified queue group to handle.
5. Click **Save**.

To associate an existing queue to the Unified queue group

1. Click **Multimedia=>Queue groups** and select a Unified queue group.
2. Click the down arrow button beside the media type icon and click **Associate existing <media type> queue**.
3. Select a queue and click **OK**.
4. Click **Save**.

To associate an existing virtual queue group to the Unified queue group

1. Click **Multimedia=>Queue groups** and select a Unified queue group.
2. Click the down arrow button beside the voice media icon and click **Associate existing Virtual queue group**.
3. Select a virtual queue group and click **OK**.
4. Click **Save**.

To replace an associated queue with a new queue

1. Click **Multimedia=>Queue groups** and select a Unified queue group.
2. Click the down arrow button beside the media type icon and click **Replace with new <media type> queue**, click on the media type icons to select which media types the queue group can handle.

A queue configuration window opens.

For instructions on configuring an email, chat, or SMS queue, see "Adding multimedia queues" on page 77.

NOTE:

- Queue Inqueue workflows cannot be configured when adding new queues as members of Unified queue groups. Inqueue workflows for new queues must be configured in YourSite=>Queues after the Unified queue group is saved.
- By default, new queues added this way will use the name of the Unified queue group and the reporting number.

3. When you are done configuring the new queue, click **Save**.
4. Click **Save**.

To replace an associated queue with an existing queue

1. Click **Multimedia=>Queue groups** and select a Unified queue group.
2. Click the down arrow button beside the media type icon and click **Replace with existing <media type> queue**.
3. Select a queue and click **OK**.
4. Click **Save**.

To remove a media type from a Unified queue group and set the associated queue as historical

1. Click **Multimedia=>Queue groups** and select a Unified queue group.
2. Click on a selected media type icon.
3. Click **Save**.

CONFIGURING HOLIDAYS

You configure holiday options in the Holidays section of Multimedia Contact Center for the dates that affect your contact center operations. In Multimedia Contact Center, Holidays are used in the Schedule activity. For more information on the Schedule activity, see "Routing contacts with the Schedule activity" on page 201. Multimedia Contact Center includes default holidays for the USA, UK, and Canada.

To enable an existing holiday

1. In YourSite Explorer, click **Multimedia=>Holidays**.
2. From the list of holidays, select the holiday you want to enable.
3. Select **This holiday is a company holiday. Notify me if I attempt to schedule an employee on this day**.
4. Click **Save**.

To add a new holiday

1. In YourSite Explorer, click **Multimedia=>Holidays**.
2. Click **Add**.
3. After **Name**, type the name of the holiday.
4. If you wish to enable this holiday immediately, select **This is a company holiday. Notify me if I attempt to schedule an employee on this day**.
5. Specify the pattern of the holiday
 - If the holiday always falls on the same day of the month, select **Every** and specify the month and date the holiday falls on.
 - If the holiday has a pattern of falling on a certain day, week, and month, select **The** and specify the pattern, day of week, and month.
 - If the holiday is a calculated holiday, such as Good Friday or Easter Monday, select **Calculated holiday** and specify the holiday.
6. Click **Save**.

To delete a holiday

1. Select the holiday you want to delete from the holidays list.
2. Click **Delete**.
3. Click **OK**.

CONFIGURING BUSINESS HOUR SCHEDULES

Multimedia Contact Center performs certain tasks during business hours and other tasks after hours. For example, the system can send auto-response messages to contacts received after hours, informing customers that the contact center is closed and to expect a response during business hours. Applying a business hours schedule to workflows tells the system when to send this message.

Multimedia Contact Center ships with a default 24/7 business hour schedule and a default Monday to Friday 9:00 AM to 5:00 PM business hour schedule. Administrators can

- Modify the default business hours schedules
- Create new business hour schedules
- Manage business hour schedule exclusion lists to omit days from schedules, such as national holidays.
- Apply business hour schedules to workflows

MODIFYING DEFAULT BUSINESS HOUR SCHEDULES

Administrators can modify the default 24/7 and default Monday to Friday 9:00 AM to 5:00 PM business hour schedule to suit their business' needs.

To modify a default business hours schedule

1. Click **YourSite=>Schedules** and select a default schedule.
2. Type a new **Name** for the schedule. For example, 'Monday to Friday 8:00 AM to 6:00 PM'.
3. To apply a **Schedule exclusion list**, click the **Browse** button, select an exclusion list and click **OK**.
NOTE: To create a schedule exclusion list, or to edit an existing schedule exclusion list, see "Managing schedule exclusion lists" on page 95.
4. Specify the business day **Start time** and **End time** for each day of the week.
5. Select the **Disable for day** check box for each day the business is closed.
6. Click **Save**.

CREATING NEW BUSINESS HOUR SCHEDULES

Administrators can create new business hour schedules to apply to Multimedia Contact Center devices and to use in workflows.

To create a new business hour schedule

1. Click **YourSite=>Schedules=>Add**.
2. Type a **Name** for the new schedule.
3. To apply a **Schedule exclusion list**, click the **Browse** button, select an exclusion list and click **OK**.
NOTE: To create a schedule exclusion list, or to edit an existing schedule exclusion list, see "Managing schedule exclusion lists" on page 95.
4. Specify the business day **Start time** and **End time** for each day of the week.
5. Select the **Disable for day** check box for each day the business is closed.
6. Click **Save**.

MANAGING SCHEDULE EXCLUSION LISTS

The following configurations take place in YourSite=>Schedules.

Managing schedule exclusion lists enables administrators to omit days from business hour schedules. For example, administrators can use a schedule exclusion list to omit national holidays from a business' yearly schedule.

The following procedures tell you how to

- Create and apply new exclusion lists to schedules
- Apply existing exclusion lists to schedules
- Remove exclusion lists from schedules
- Edit and remove dates from schedule exclusion lists
- Delete exclusion lists from YourSite Explorer

To create and apply a new exclusion list to a schedule

1. Select the schedule and click **Manage schedule exclusion list**.
2. Type a **Name** for the exclusion list.
NOTE: To create a new list for a schedule with an exclusion list already applied to it, click **Add** and follow step 2 onward.
3. Select the dates to exclude from the schedule and click **Save**.
4. To apply the exclusion list to the selected schedule, click **Apply**. Otherwise, close the schedule exclusion list designer window.
5. On the ribbon, click **Save**.

To apply an existing exclusion list to a schedule

1. Select the schedule and, after **Schedule exclusion list**, click **Browse**.
2. Select a schedule exclusion list and click **OK**.
3. Click **Save**.

To edit and remove dates from an exclusion list

1. Select a schedule with an exclusion list applied to it and click **Manage Schedule exclusion list**.
2. Click **Edit**.
3. To add new dates, select them from the calendar.
4. To remove dates, select the dates from the list and click **Remove**.
5. To remove all dates, click **Clear**.
6. Click **Save**.
7. To apply these changes to the schedule, click **Apply**.
8. On the ribbon, click **Save**.

To delete an exclusion list from YourSite Explorer

1. Select a schedule that has the exclusion list to be deleted and click **Manage Schedule exclusion list**.
NOTE: If deleting exclusion lists as part of clean-up, select any schedule with an exclusion list applied to it and follow these steps.
2. From the drop-down list, select the exclusion list you want to delete and click **Delete**.
3. Close the schedule exclusion list designer and, on the ribbon, click **Save**.

APPLYING BUSINESS HOUR SCHEDULES TO WORKFLOWS

Administrators can apply business hour schedules to workflows via the Schedule activity.

For example, an administrator applies a Monday to Friday, 7:00 AM to 7:00 PM business hour to a Schedule activity in a Chat Inqueue workflow. Chat messages arriving after hours follow the 'After Hours' branch. This branch is configured to send an automatic response informing customers of the contact center's business hours and to expect a reply during that time.

To apply business hour schedules to workflows, see "Routing contacts with the Schedule activity" on page 201.

CONFIGURING SECURITY ROLES

You create security roles if you want to restrict employees from specific devices and MiContact Center application areas that their licensing would enable them to access.

NOTE: In order for you to assign security roles, your account must be associated with a security role that has 'May manage security' enabled.

MiContact Center has two default security settings, Local administrator and Enterprise administrator. These settings provide employees full access to all MiContact Center applications (to which the contact center and employees are licensed) and devices, and allow Write Back for synchronization.

Employee access to applications is limited by their security role and their licensing. An employee's security role defines the application areas an employee can access and licensing limits what applications an employee can access. For example, an employee with the Enterprise administrator security role but no supervisor license would not be able to access YourSite Explorer.

When you install MiContact Center, a default user is created. This ensures there is at least one account with which you can access YourSite Explorer.

The default user name and password are:

- Username: _admin
- Password: _password
- Security Role: Local Administrator

Security roles have two components:

Basic—Basic security controls user access to specific areas of MiContact Center, and Flexible Reporting, and to Workforce Scheduling and Schedule Adherence.

Advanced—Advanced security controls user access to customized lists of devices, real-time monitors, profiles, reports, sites, and users.

For detailed information regarding creating and applying security roles and creating security lists, see the *MiContact Center Installation and Administration Guide*.

MULTIMEDIA CONTACT CENTER SECURITY SETTINGS

Many of the features in Multimedia Contact Center are advanced; administrators may want to restrict their multimedia employees from having access to select devices or applications.

Employees using Ignite for Multimedia Contact Center require several specific security role settings to control their access to parts of the Ignite.

Security roles can be applied to restrict which devices agent can view in Ignite, so that they are limited to both handling and viewing only the queues associated to their agent group. Employees can be restricted from controlling their Agent Group Presence, so their presence in agent groups can be entirely controlled by the system. Employees can be restricted from picking contacts out of queue. Employees can be restricted from transferring contacts from the queue and their Inbox. Employees can be restricted from marking contacts as Junk. Employees can also be restricted from accessing Ignite.

NOTE: Users currently logged on are not affected by changes to their associated role until the next time they log on.

To restrict access to Ignite, disable the following Basic security option:

- May access Contact Center Client/Ignite

To restrict the devices an employee can view in Ignite, enable the following Advanced security options:

- May view real-time information on devices contained in this list only <device list>. The device list must contain the following members:
 - All the queue groups that contain queues the employee handles
 - All the agent groups to which the employee has agents
 - Employee groups that mirror the composition of the agent groups' employee membership

To restrict control of presence in Ignite, such as Join and Leave, disable the following Advanced security option:

- May control my real-time presence status in Interactive Contact Center

To restrict the ability to pick contacts out of queue, disable the following Basic security option

- May Pick/Pick & Reply Contacts

To restrict the ability to transfer contacts from the queue and Inbox, disable the following Basic security option

- May Transfer Contacts

To restrict the ability to mark contacts as Junk, disable the following Basic security option

- May Junk Contacts

To restrict access to Ignite, disable the following Basic security option

- May access Contact Center Client/Ignite

CONFIGURING MULTIMEDIA CONTACT CENTER WEB FEATURES

Multimedia Contact Center includes web applications and features that require configuration by qualified web administrators and IT personnel to ensure successful deployment. These features consist of:

- Chat
For information on offering chat through your corporate website, see "Enabling chat" on page 101.
- Contact Us
For information on offering Contact Us through your corporate website, see "Enabling Contact Us" on page 133.

The following is the suggested order of configuration for Multimedia Contact Center web features.

To set up Multimedia Contact Center web features

1. Configure chat media servers.
See "Adding chat to Multimedia Contact Center" on page 58.
2. Configure chat queues.
See "Adding multimedia queues" on page 77.
3. Add reverse proxy.
Reverse proxies enable /CCMWa to be published as a part of your corporate website.
See "Publishing Chat and Contact Us to the Internet using reverse proxies" on page 100.
4. Add SSL (optional)
See "Publishing Chat and Contact Us to the Internet with SSL" on page 100.
5. Update chat media server with external URL for chat root.
See "Adding chat to Multimedia Contact Center" on page 58.
6. Configure chat customizations.
See "Enabling chat" on page 101
7. Configure Contact Us.
See "Enabling Contact Us" on page 133.

For information on troubleshooting the deployment of Multimedia Contact Center web features, see "Troubleshooting Multimedia Contact Center web features" on page 155.

MULTIMEDIA CONTACT CENTER PROFICIENCY REQUIREMENTS

Contact centers are responsible for the deployment of Multimedia Contact Center web features on their corporate web servers. You must have web administrator and IT personnel with knowledge of the following to deploy and customize Chat and Contact Us:

- IT administrator proficiencies for Chat and Contact Us deployment
 - Reverse proxy configuration
 - Network and Firewall configuration and troubleshooting
 - End-to-End SSL deployment (optional)

- Basic web proficiencies for Chat customization
 - JavaScript: Manipulating JavaScript file with a list of variables
 - HTML: Adding URL link to corporate web site
NOTE: These are the minimum proficiencies required. More complicated integrations will require more enhanced skills.
- Basic web proficiencies for Contact Us customization
 - JavaScript: Manipulating JavaScript file with a list of variables
 - HTML: Add a JavaScript call to a corporate website
 - CSS: Ability to integrate complex CSS file to integrate with corporate website.

PUBLISHING CHAT AND CONTACT US TO THE INTERNET USING REVERSE PROXIES

Chat can be published to the internet using reverse proxies, either with or without SSL. Multimedia Contact Center only supports End-to-End SSL deployments. For more information, see the *MiContact Center and Business Reporter System Engineering Guide*.

Chat and Contact Us both use CCMWa, a web application installed on the Enterprise Server at `http://<Enterprise Server IP Address>/CCMWa` to route contacts to your queues. Using a reverse proxy enables requests to your corporate website to be served from CCMWa through your corporate website, proxying requests through the web server to CCMWa on the Enterprise Server.

Setting up a reverse proxy requires setting up Inbound and Outbound routing rules on your web server. The Inbound rule configures the directory on the web server that routes the requests to the Enterprise Server. The Outbound rule modifies the responses from the Enterprise Server to match the corporate website URL format.

For example, if `http://www.contactcenter.com/Chat` was configured as the directory that reverse proxies `http://<enterprise server>/CCMWa/chat`, then when a customer arrives on `http://www.contactcenter.com/Chat`, the web server makes the request to `http://<enterprise server>/CCMWa/chat` on the customer's behalf. The Enterprise Server's response is then sent back to the web server which then publishes it to the customer as if it had been generated by the corporate web server.

The method for configuring a reverse proxy depends on if your organizational web server is an Apache or an IIS web server. The Mitel MiContact Center Knowledge Base contains guidelines for reverse proxy deployment:

- IIS web servers: <http://micc.mitel.com/kb/KnowledgebaseArticle52451.aspx>
- Apache web servers: <http://micc.mitel.com/kb/KnowledgebaseArticle52450.aspx>

PUBLISHING CHAT AND CONTACT US TO THE INTERNET WITH SSL

Multimedia Contact Center Chat and Contact Us support SSL on both IIS and Apache web servers in an End-to-End SSL deployment. Due to the variance in possible deployment models for End-To-End SSL and the unique configurations of different corporate websites, it is the responsibility of contact centers to determine how to best configure their own End-to-End SSL deployments. See the *MiContact Center and Business Reporter System Engineering Guide* for more information on the supported SSL deployment.

ENABLING CHAT

The first step in enabling chat is deciding how to provide access to chat. You must determine how chat will be offered within your corporate website and published to the Internet as well as how your contacts access offered chat services.

During the installation of Multimedia Contact Center, the chat server CCMWa (Internal URL `http://<enterprise server>/ccmwa`) and the customer-facing chat request form (default URL `http://<enterprise server>/ccmwa/chat`) are installed on the Enterprise Server. Individual queues include an Internal URL for direct access to them: `http://<enterprise server>/CCMWa/chat/<queue GUID>`. The configuration and customization of your chat request forms are handled in a single JavaScript file, `chat.public.config.js`.

NOTE: As of Version 8.1, it is recommended to use the chat files on the Enterprise Server rather than hosting them on your corporate web server. For more information, see "Hosting chat files on your corporate web server" on page 121.

Enabling chat takes place in five steps:

1. **Determine how to offer chat to contacts.**

Multimedia Contact Center includes a chat request form that launches chat sessions. Chat can be offered through a chat request form that enables contacts to select a queue to which their chat will be submitted, through a queue-specific chat request form, through activities in an Inbound workflow, or through a user-made chat request page.

For more information, see "Determining how to offer chat" on page 102

2. **Publish chat to the Internet with reverse proxies.**

Reverse proxies enable /CCMWa to be published as a part of your corporate website.

For more information, see "Publishing Chat and Contact Us to the Internet using reverse proxies" on page 100.

3. **Customize your chat request forms.**

Chat request forms can be customized in `chat.public.config.js` to display corporate branding, show and hide different form properties, and display avatars in chat sessions.

For more information on customizing your chat request forms, see "Customizing public-facing chat" on page 105.

4. **(Optional) Customize Ignite chat and SMS agent options.**

Agent options for handling chat and SMS messages can be configured to change Ignite handling options and display avatars in chat sessions. For more information on customizing your agent chat and SMS session in Ignite, see "Customizing Ignite chat and SMS agent options" on page 121.

5. **Integrating chat with your website.**

You must determine how chat is offered through your website so that your contacts can access it. For suggestions on how to integrate chat with your corporate website, see "Offering chat through your corporate website" on page 131.

DETERMINING HOW TO OFFER CHAT

When setting up chat, administrators and IT administrators must decide how their contact center is going to use the customer-facing chat page to offer chat to their contacts. The customer-facing chat page can be modified to integrate with your organization's website standards. All inbound chats must route through the chat media server's Inbound workflow without exception. By default, this workflow is set to route chat requests using the queue selected by the customer in the chat request form.

There are four options for offering chats to your contact center:

- By the root chat request form
- By the queue chat queue form
- By the Inbound workflow
- By a user-created chat request form

NOTE: Multimedia Contact Center's chat request forms do not support Internet Explorer's Compatibility View.

Each of these methods requires the configuration of a reverse proxy between the Enterprise Server and your corporate website. For more information, see "Publishing Chat and Contact Us to the Internet using reverse proxies" on page 100.

All four methods for offering chat can be used when offering chat through the Contact Us sample contact page. For more information on using Contact Us, see "Enabling Contact Us" on page 133.

Offering chat by the root chat request form

The default CCMWa/chat root chat request form offers contacts the ability to choose the queue destination for their chat request from all chat queues configured by a contact center. When a contact selects a queue, by default, the root chat request form loads the queue chat request form for that queue, displaying the Estimated Wait Time for the queue. Other queue statistics can be optionally used as well. For more information, see "Configuring the public-facing chat JavaScript file" on page 106.

After filling out the chat request form, contacts are routed through the default Inbound workflow using the selected queue. Figure 3 shows the chat request form. When a contact selects a queue from the automatically populated drop-down list of your contact center's chat queues, they are routed through the default Inbound workflow using the selected queue.

The root chat request form is accessible from `http://<enterprise server>/ccmwa/chat`. If you want to offer it in another supported language, the format is `http://<enterprise server>/ccmwa/<language designator>/chat`. For more information, see "Offering chat in different languages" on page 133.

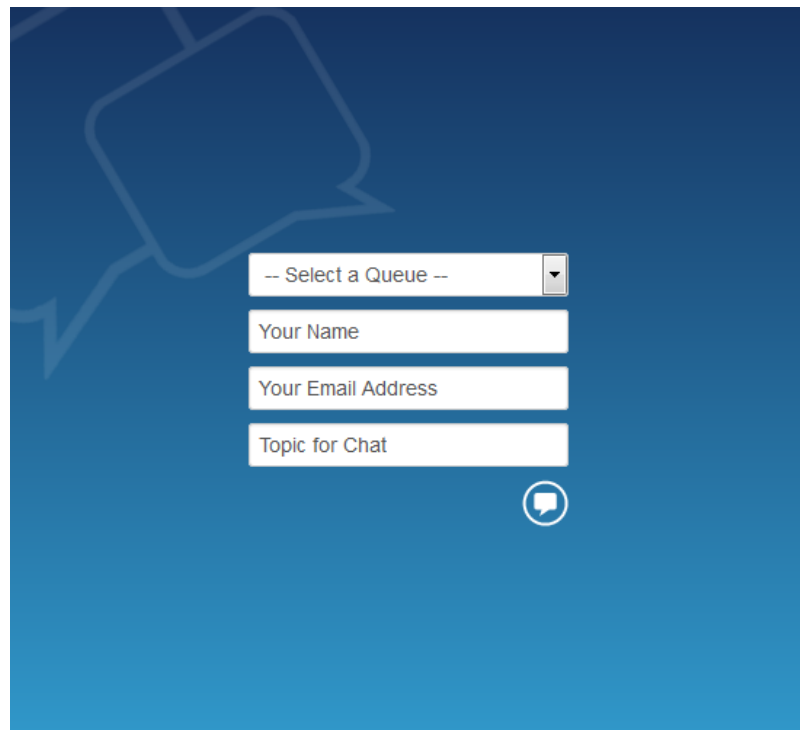
The image shows a root chat request form on a blue background. The form consists of four white input fields stacked vertically: a dropdown menu labeled "-- Select a Queue --", a text field labeled "Your Name", a text field labeled "Your Email Address", and a text field labeled "Topic for Chat". Below the text fields is a white circular button with a blue speech bubble icon. In the background, there is a faint white outline of a speech bubble.

Figure 3: Root chat request form

Offering chat by the queue chat request form

If a contact center has multiple contact webpages for specific products or services, the contact center may want to link to specific chat queues when offering chat. Chat queues have their own internal and external URL that can be used to take contacts directly to a version of the chat request form that has the queue pre-selected. Figure 4 shows the chat request form for a chat queue. The Estimated Wait Time for the queue is also displayed in the chat request form. Other queue statistics can be optionally added as well. For more information, see "Configuring the public-facing chat JavaScript file" on page 106.

After filling out the chat request form, contacts are automatically routed through the Inbound workflow by the queue ID and transferred to the appropriate queue.

A queue's chat request form is accessible from `http://<enterprise server>/ccmwa/chat/<queue GUID>`. Chat queue URLs are available from the chat queue's entry in YourSite Explorer. If you want to offer it in another supported language, the format is `http://<enterprise server>/ccmwa/<language designator>/chat/<queue GUID>`. For more information, see "Offering chat in different languages" on page 133.

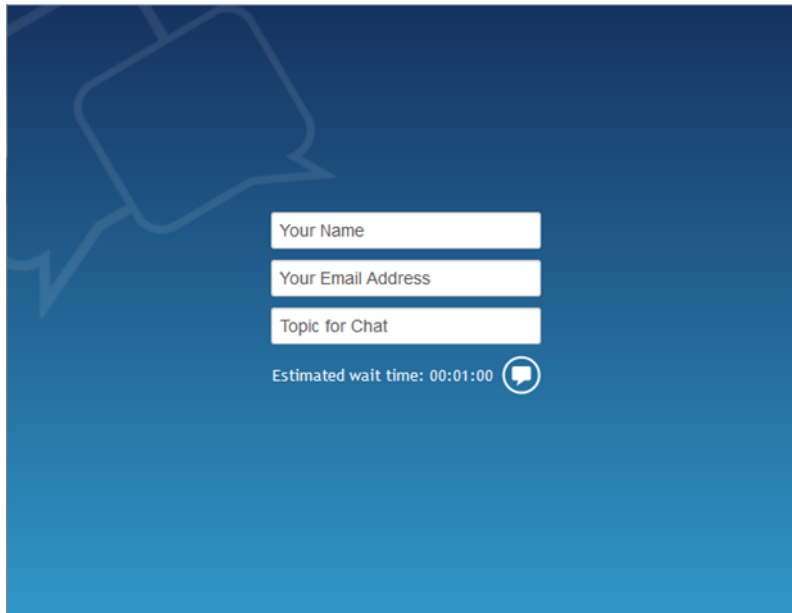
A screenshot of a queue chat request form. The form is centered on a blue gradient background with a faint speech bubble icon. It contains three white input fields stacked vertically, labeled "Your Name", "Your Email Address", and "Topic for Chat". Below these fields, it displays "Estimated wait time: 00:01:00" next to a small circular icon containing a speech bubble.

Figure 4: Queue chat request form

Offering chat by Inbound workflow

As an alternative to offering chat to contacts by a chat request form or by links to specific chat queues, contacts can be routed or route themselves to their destination queues using activities such as Ask or Compare Variables in an Inbound workflow. For example, a general chat queue could be created and the external URL could be used to present chat to contacts. Once the customer is in the Inbound workflow, Ask activities could be used to pose questions to the customer and route them based on the answers. When using the chat queue URL, the drop-down queue selection field is removed from the chat request form.

To offer a chat request form with no drop-down for queue selection, simply use any of the external URLs for one of your queues and do not route by queue ID in the Inbound workflow. For more information about Inbound workflows, see "Applying inbound routing rules to contacts" on page 50. To remove any queue statistics for your selected queue, update your chat request form to exclude those features. For more information, see "Configuring the public-facing chat JavaScript file" on page 106.

For more information on chat Inbound workflows, see "Default Chat Inbound workflow" on page 217. For information on chat request forms for queues, see "Offering chat by the queue chat request form" on page 103.

Offering chat by a user-created chat form

For contact centers with advanced web development resources, Multimedia Contact Center supports user-created request or authentication pages. These chat request pages must submit name and email to chat, and, optionally, a topic, which are populated into chat when the user-made request page submits a chat request.

User-created chat request or authentication pages require advanced web development resources. For more information on the requirements for user-made chat request forms, see the following Knowledge Base article: <http://micc.mitel.com/kb/KnowledgebaseArticle52373.aspx>.

CUSTOMIZING CHAT

Chat is customized through configuring JavaScript file settings. You can configure the public-facing chat request pages and the chat experience of your customers as well as the chat experience of agents and supervisors using Ignite.

Chat is customized through the configuration of three different JavaScript files:

- chat.public.config.js
See "Customizing public-facing chat" on page 105.
- chat.agent.config.js
See "Customizing Ignite chat and SMS agent options" on page 121.
- chat.supervisor.config.js
See "Customizing Ignite chat and SMS agent options" on page 121.

Multimedia Contact Center maintains three default version of these files:

- Chat.ui.public.config.DEFAULT.js
- Chat.ui.agent.config.DEFAULT.js
- Chat.ui.supervisor.config.DEFAULT.js

During upgrades, these default files update the chat customization files with any new fields and populates them with the default values. On every start/restart of the CCMWa application on the Enterprise Server, if the customization files are not found, they are recreated automatically from the default files.

CAUTION: Do not make any changes to the default chat configuration files.

NOTE:

- If you are hosting your chat configuration files on your corporate web server, they will not be automatically updated during an upgrade and must be manually upgraded.
- Chat configuration must be consistent for the fields shared between the different JavaScript files used to customize chat. If you want to use a default public Gravatar image for a queue, for example, you must ensure that the same image is set in both chat.public.config.js and chat.agent.config.js.

Customizing public-facing chat

Multimedia Contact Center enables contact centers to customize both the contact-facing and agent-facing chat experience.

Public customizations add options to the chat request form as well as providing avatar options for contacts chatting with contact center agents. For information on customizing contact-facing chat options, see "Customizing chat request forms and chat sessions" on page 106.

Agent-facing customizations modify chat and SMS handling options in Ignite and provide avatar options for agents handling chat and SMS options. For information on customizing agent-facing chat options, see "Customizing Ignite chat and SMS agent options" on page 121.

NOTE: Chat configuration must be consistent for the fields shared between the different JavaScript files used to customize chat. If you want to use a default public Gravatar image for a queue, for example, you must ensure that the same image is set in both chat.public.config.js and chat.agent.config.js.

Customizing chat request forms and chat sessions

Chat request forms and chat sessions can be customized to match your organizational style and provide different options to contacts. You can customize your chat offering at the contact center level and at the level of individual queues. Chat options are configured using a single JavaScript file, `chat.public.config.js`, that contains a series of JavaScript variables and properties. This file is hosted in CCMWa's folder on the Enterprise Server (<drive>\Program Files (x86)\Mitel\MiContact Center\Website\CCMWa\Scripts\).

You can make the following customizations to your chat request forms and chat sessions:

- Show or hide Estimated Wait Time, Number of Available Agents, Number of Idle Agents, Number of Chats Waiting, and Business Hours queue statistics
- Enable chats to be submitted after hours
- Enable chat requests to be submitted when the queue is closed or unavailable
- Enable chats to be submitted when there are no available agents
- Enable Gravatar avatars
- Add a corporate logo and customize its placement on the chat request form
- Provide a description for the queue that appears both on the chat request form and in the browser title bar
- Change both the background color and if it displays as a solid color or a gradient
- Show or hide the topic field, make topics mandatory, and set specific topic choices
- Set up Gravatar avatars for contacts
- Configure queue closed messages
- Configure the `LumaThreshold` for light or dark icons

To customize chat request forms

- Configure the chat JavaScript file.
See "Configuring the public-facing chat JavaScript file" on page 106.

NOTE: If you customized your chat request form in Version 7.0, your customizations will not be retained after an upgrade to Version 8.1. For more information, see "Updating chat customization from Version 7.0 to Version 8.1" on page 121.

Configuring the public-facing chat JavaScript file

Configuration settings for chat request forms are controlled through a single JavaScript file, `chat.public.config.js`, which can be found at <drive>:\Program Files (x86)\Mitel\MiContact Center\Website\CCMWa\Scripts.

`chat.public.config.js` settings can be grouped into three categories:

- **Global settings**—control chat request form settings and options. These settings are applied universally across chat request forms or are required to enable features at a queue level. Table 6 outlines the global fields.
- **Queue settings**—control chat request form settings for the queue as well as chat session settings for queues. Queue settings are configured in both `DefaultConfig` and `ChatQueues` sections of `chat.public.config.js`. `DefaultConfig` settings are applied to all queues while `ChatQueues` settings, available in the advanced version of the `Chat.Config` file, are applied to individual specific queues. Table 7 outlines `DefaultConfig` and `ChatQueues` settings.

- **Logging and connection settings**—provide troubleshooting options as well as set connection retry limits. Table 8 details the fields available for logging and connection settings.

When adding field values based on the following tables, ensure that they use correct JavaScript formatting and punctuation. If you configure your customized chat request forms using the basic `chat.public.config.js` and later decide that you want to customize the chat request form for individual queues, you can add the `ChatQueues` fields to your `chat.public.config.js` file using a text editor.

Table 6: Global settings fields

FIELD NAME	FIELD VALUE	FIELD DESCRIPTION
EnableEstimateWaitTime	True or False	<p>This field controls whether or not Estimated Wait Time is available to all chat request forms.</p> <p>If set to False, the Estimated Wait Time statistic does not display in any chat request form.</p> <p>If set to True, the value configured under <code>ShowEstimatedWaitTime</code> determines if Estimated Wait Time displays or not.</p>
EnableNumberOfAvailableAgents	True or False	<p>This field controls whether or not Number of Available Agents is available to all chat request forms.</p> <p>If set to False, the Number of Available Agents statistic does not display in any chat request form.</p> <p>If set to True, the value configured under <code>ShowNumberOfAvailableAgents</code> determines if Number of Available Agents displays or not.</p>
EnableNumberOfIdleAgents	True or False	<p>This field controls whether or not Number of Idle Agents is available to all chat request forms.</p> <p>If set to False, the Number of Idle Agents statistic does not display in any chat request form.</p> <p>If set to True, the value configured under <code>ShowNumberOfIdleAgents</code> determines if Number of Idle Agents displays or not.</p>

Table 6: Global settings fields (continued)

FIELD NAME	FIELD VALUE	FIELD DESCRIPTION
EnableNumberOfChatsWaiting	True or False	<p>This field controls whether or not Number of Chats Waiting is available to all chat request forms.</p> <p>If set to False, the Number of Chats Waiting statistic does not display in any chat request form.</p> <p>If set to True, the value configured under ShowNumberOfChatsWaiting determines if Number of Chats Waiting displays or not</p>
EnableBusinessHours	True or False	<p>This field controls whether or not queue business hours are available to all chat request forms when the queue is outside of business hours.</p> <p>If set to False, no business hours display for the queue when outside business hours.</p> <p>If set to True, the value configured under ShowBusinessHours determines if business hours display or not.</p>
EnableQueueingWhenNoAgentsLogin	True or False	<p>This field controls whether or not contacts can submit chat requests when no agents are available.</p> <p>If set to False, no chat requests can be submitted when no agents are logged in.</p> <p>If set to True, the value configured under AllowQueueingWhenNoAgentsLogin determines if chat requests can be submitted when no agents are logged in.</p>
EnableQueueingInAfterHours	True or False	<p>This field controls whether or not contacts can submit chat requests outside of business hours</p> <p>If set to False, no chat requests can be submitted outside of business hours.</p> <p>If set to True, the value configured under AllowQueueingInAfterHours determines if chat requests can be submitted when no agents are logged in.</p>

Table 6: Global settings fields (continued)

FIELD NAME	FIELD VALUE	FIELD DESCRIPTION
EnablePublicGravatar	True or False	<p>This field controls whether or not public users will use avatars provided through Gravatar.</p> <p>If set to True, Chat sessions will use any Public Gravatar user image associated to the email addresses used in the chat session.</p> <p>If set to False, no Public Gravatar user images will be used in the chat session.</p> <p>NOTE: This field must have the same value in chat.public.config.js, chat.agent.config.js, and chat.supervisor.config.js.</p>
EnableAgentGravatar	True or False	<p>This field controls whether or not Chat will use Gravatar for Agents.</p> <p>If set to True, Chat sessions will use any Gravatar user image associated to the email addresses used in the chat session or the image configured with DefaultAgentGravatarUrl.</p> <p>If set to False, no agent Gravatar user images will be used in the chat session.</p> <p>NOTE: This field must have the same value in chat.public.config.js, chat.agent.config.js, and chat.supervisor.config.js.</p>

Table 7: Queue setting fields

FIELD NAME	FIELD VALUE	FIELD DESCRIPTION
Enabled	True or False	<p>This field enables or disables this configuration record.</p> <p>If you set to False, the queue's chat form will use the values from the default file in <drive>\Program Files (x86)\Mitel\MiContact Center\WebSites\CCMWa\Scripts\Chat.ui.public.config.DEFAULT.js.</p>

Table 7: Queue setting fields (continued)

FIELD NAME	FIELD VALUE	FIELD DESCRIPTION
QueueId (ChatQueues only)	The queue's GUID, such as '26F1A5C3-DD2C-45FF-BE75-2BC7B85012D0'	The GUID for the chat queue to which you want the associated settings to apply. You can use YourSite Explorer to obtain a queue's GUID. See "Obtaining Queue GUIDs" on page 155.
LogoImgPath	The path to the logo's image file	<p>The path to the image file containing your organization's logo. Logo files should be located in the following folder: <drive>\Mitel\MiContact Center\WebSites\CCMWa\Content\images\logo</p> <p>NOTE: It is recommended that you keep a copy of your logo image file in a separate location to prevent your logo from being lost during an upgrade or installation in the future.</p>
ShowLogo	True or False	<p>If set to True, the Logo image file specified in LogoImgPath will display in the chat request form.</p> <p>If set to False, the Logo image file specified in LogoImgPath will not display in the chat request form.</p>
QueueLabel	The text you want to display as the queue's label, such as 'Sales Chat'	The queue label is text that will render both on the chat request form and in the title bar of the browser window title bar
ShowQueueLabel	True or False	<p>If set to True, the QueueLabel will display on the chat request form</p> <p>If set to False, the QueueLabel will not display on the chat request form.</p>

Table 7: Queue setting fields (continued)

FIELD NAME	FIELD VALUE	FIELD DESCRIPTION
AppendQueueLabelToPageTitle	True or False	<p>If set to True, the QueueLabel value is added to the html document title for the page the chat is hosted in.</p> <p>If set to False, the QueueLabel value is not added to the html document title.</p>
FormatPrechatLogoToForm	True or False	<p>This field controls where the logo, if a logo is used, displays.</p> <p>If set to True, the logo is formatted to be centered to the form fields on the chat request form and match the width of the fields (approximately 220 px).</p> <p>If set to False, the logo will display statically in the top left corner of the page and its size will not be modified.</p>
Gradient	True or False	<p>This field controls whether or not the background uses a gradient or solid color.</p> <p>If set to True, the values in GradientStartColor and GradientEndColor are used to render a gradient background.</p> <p>If set to False, the value in GradientStartColor is used to render a solid background.</p>
GradientStartColor	The color's value, such as '#000000'	<p>The start color for the background's gradient or the solid color used for the background</p> <p>NOTE: Depending on the background color selected, the fonts and buttons/icons will automatically render in a dark or light form based on the background color implemented for optimal legibility.</p>
GradientEndColor	The color's value, such as '#000000'	The end color for a gradient background
ShowEstimatedWaitTime	True or False	<p>Shows or hides the Estimated Wait Time statistic on the chat form.</p> <p>NOTE: EnableEstimatedWaitTime must be set to True.</p>

Table 7: Queue setting fields (continued)

FIELD NAME	FIELD VALUE	FIELD DESCRIPTION
ShowNumberOfAvailableAgents	True or False	Shows or hides the Number of Available Agents statistic on the chat request form. If set to True and there are no available agents, a message stating that 'No agents are available to answer this request' displays in place of the queue statistic. NOTE: EnableNumberOfAvailableAgents must be set to True.
ShowNumberOfIdleAgents	True or False	Shows or hides the Number of Idle Agents statistic on the chat request form. NOTE: EnableNumberOfIdleAgents must be set to True.
ShowNumberOfChatsWaiting	True or False	Shows or hides the Number of Chats Waiting statistic on the chat request form. NOTE: EnableNumberOfChatsWaiting must be set to True.
ShowBusinessHours	True or False	Shows or hides the queue business hours on the chat request form. NOTE: EnableBusinessHours must be set to True.
AllowQueuingWhenNoAgentsLoggedIn	True or False	If set to True, chat requests can be submitted when there are no agents logged in. If set to False, when there are not agents logged in, contacts cannot submit chat requests and receive the message 'No agents are available to answer this request'. NOTE: EnableQueuingWhenNoAgentsLogin must be set to True.
AllowQueuingInAfterHours	True or False	If set to True, chat requests can be submitted outside of the queue's business hours. If set to False, contacts are unable to submit chat requests to a queue outside of its business hours and receive a message which states 'The office is now closed, please contact us during our office hours.' and lists the business hours for the queue

Table 7: Queue setting fields (continued)

FIELD NAME	FIELD VALUE	FIELD DESCRIPTION
ShowTopic	True or False	Show/hide the topic form field on the chat request form
RequireTopic	True or False	<p>If set to True, a topic is required for a chat request to be made.</p> <p>If set to False, contacts may optionally enter or select a topic.</p>
Topic	Null or the text you want to display as the topic(s)	<p>If set to null, the Topic field display as a freeform field.</p> <p>If a single value is entered, the Topic field appears as a static, non-editable value.</p> <p>If a comma separated list is entered, the Topic field appears as a drop-down list of selectable topics.</p>
DefaultPublicGravatarURL	URL of image	<p>This field is used to set the Default Public Gravatar image to be used for contacts without Gravatar accounts in chat sessions.</p> <p>This image must be hosted on a public website.</p> <p>Images being used for the Default Public Gravatar image must meet the following requirements:</p> <ul style="list-style-type: none"> • It must be publicly available • It must be accessible via HTTP or HTTPS on ports 80 and 443 • It must be a .jpg, .jpeg, .gif, or .png image file • It must not include a querystring

Table 7: Queue setting fields (continued)

FIELD NAME	FIELD VALUE	FIELD DESCRIPTION
DefaultAgentGravatarURL	URL of image	<p>This field is used to set the Gravatar image to be used for all agents in all chat sessions.</p> <p>The image must be hosted on a public website.</p> <p>Images being used for the Gravatar image must meet the following requirements:</p> <ul style="list-style-type: none"> • It must be publicly available • It must be accessible via HTTP or HTTPS on ports 80 and 443 • It must be a .jpg, .jpeg, .gif, or .png image file • It must not include a querystring.
UseDefaultPublicGravatarForAllPublicUsers	True or False	<p>This field is used to determine whether or not all contacts will use the default Gravatar image.</p> <p>If set to True, all public users will use the image set in DefaultPublicGravatarURL.</p> <p>If set to False, users will only use the Default Public Gravatar if they have no Gravatar associated to their email address.</p>
UseDefaultAgentGravatarForAllAgents	True or False	<p>This field is used to determine whether or not all users will use the default Gravatar image.</p> <p>If set to True, all agents will use the image set in DefaultAgentGravatarURL (or DefaultSupervisorGravatarURL).</p> <p>If set to False, users will only use the Default Agent Gravatar (or Default Supervisor Gravatar) if they have no Gravatar associated to their email address.</p>
GravatarSize	The size, in pixels, of the Gravatar image	This field is used to set the size of the Gravatar, in pixels.

Table 7: Queue setting fields (continued)

FIELD NAME	FIELD VALUE	FIELD DESCRIPTION
DisableChatRequestIfQueueisNotOpen	True or False	<p>This field controls whether or not chat requests can be submitted when the queue is not available.</p> <p>If set to True, chat requests cannot be submitted when the queue is closed or unavailable.</p> <p>If set to False, chat requests can be submitted when the queue is closed or unavailable.</p>
OutOfBusinessHoursMsg	The text you want to display as the Out of Business Hour message	<p>The text entered in this field displays as the Out of Business Hour message.</p> <p>NOTE: ShowBusinessHours must be set to True</p>
QueueStatusDNDDMsg	The text you want to display when the queue is in Do Not Disturb	The text entered in this field displays when the queue is in Do Not Disturb.
QueueStatusOutOfServiceMsg	The text you want to display as the Status Out of Service	The text entered in this field displays when the queue is Out of Service.

Table 7: Queue setting fields (continued)

FIELD NAME	FIELD VALUE	FIELD DESCRIPTION
UsePrechatArea	True or False	<p>This field controls whether or not chat uses the default chat request form.</p> <p>If this field is set to True, the chat will use the default chat request form.</p> <p>If this field is set to False, the chat will use the user-created chat request form specified under PrechatDataFromUrl</p> <p>For more information on configuring user-made chat request pages, see the following KB article: http://micc.mitel.com/kb/KnowledgebaseArticle52373.aspx.</p>
PrechatDataFromUrl	URL or False	<p>If UsePrechatArea is set to False, this field sets the URL of the user-created Prechat form.</p> <p>For more information on configuring user-made chat request pages, see the following KB article: http://micc.mitel.com/kb/KnowledgebaseArticle52373.aspx</p>
LumaThreshold	The luma threshold value	<p>This determines the threshold to determine, based on the luma of the background color, whether or not to use dark or light icons.</p> <p>If the luma value is equal to or greater than the specified luma threshold value, then dark icons will be used. If the luma value is less than the luma threshold value, light icons will be used.</p>

Table 8: Logging and connection fields

FIELD NAME	FIELD VALUE	FIELD DESCRIPTION
ChatClientSidelogging	True or False	<p>This field controls whether or not a log for chat is available in the client's browser.</p> <p>If set to False, there is no client-side log created.</p> <p>If set to True, a client-side log is created.</p> <p>NOTE: This field must have the same value in chat.public.config.js, chat.agent.config.js, and chat.supervisor.config.js.</p>
MobileDeviceConnectionRetryLimit	The number of connections	<p>This field controls how many times a mobile device can attempt to connect to chat.</p> <p>NOTE: This field must have the same value in chat.public.config.js, chat.agent.config.js, and chat.supervisor.config.js.</p>
ConnectionRetryLimit	The number of connections	<p>This field controls how many times a desktop device can attempt to connect to chat.</p> <p>NOTE: This field must have the same value in chat.public.config.js, chat.agent.config.js, and chat.supervisor.config.js.</p>
ConnectionRetryIterationCount	The count limit	<p>This field sets the number of times a device can attempt to connect before prompting the user that it is unable to connect and that a refresh will occur.</p> <p>NOTE: This field must have the same value in chat.public.config.js, chat.agent.config.js, and chat.supervisor.config.js.</p>

The following procedures outline how to

- Set up public-facing chat settings using chat.public.config.js
- Add ChatQueues fields to the chat.public.config.js file

To set up public-facing chat settings using chat.public.config.js

1. Navigate to <drive>\Program Files (x86)\Mitel\MiContact Center\Website\CCMWA\Scripts\
2. Open **chat.public.config.js** in a text editor.
3. Customize your chat request form settings.
For a description of the settings and their fields, see Table 6, Table 7, and Table 8.
4. Save and close the editor.

To add ChatQueues to chat.public.config.js

1. In YourSite Explorer, obtain the queue IDs of the chat queues for which you want to customize settings.
For more information, see "Obtaining Queue GUIDs" on page 155.
2. Open your copy of **chat.public.config.js** file in a text editor.
3. Locate **ChatQueues: []** and copy and paste the following fields within ChatQueues's brackets:

```
{  
    Enabled: true,  
    QueueID: "",  
    LogoImagePath: "",  
    ShowLogo: false,  
    QueueLabel: "",  
    ShowQueueLabel: false,  
    AppendQueueLabelToPageTitle: true,  
    FormatPrechatLogoToForm: false,  
    Gradient: true,  
    GradientStartColor: '#000000',  
    GradientEndColor: '#444460',  
    ShowEstimatedWaitTime: true,  
    ShowNumberOfAvailableAgents: false,  
    ShowNumberOfIdleAgents: false,  
    ShowNumberOfChatsWaiting: false,  
    ShowBusinessHours: true,  
    AllowQueuingWhenNoAgentsLogin: true,  
    AllowQueuingInAfterHours: false,  
    ShowTopic: true,  
    RequireTopic: true,  
    Topic: null,  
    DefaultPublicGravatarURL:"",  
    DefaultAgentGravatarURL:"",  
    UseDefaultPublicGravatarForAllPublicUsers: false,  
    UseDefaultAgentGravatarForAllAgents: false,  
    GravatarSize: 32,  
    DisableChatRequestIfQueueisNotOpen: true,  
    OutOfBusinessHoursMsg: 'Sorry but we are currently closed. Please contact us during  
    regular business hours.',  
    QueueStatusDNDDMsg: 'Sorry but we are currently unavailable. Please try again later.'
```

```
QueueStatusOutOfServiceMsg: 'Sorry but we are currently unavailable. Please try  
again later',  
UsePrechatArea: true,  
PrechatDataFromUrl: false,  
LumaThreshold: 140  
},
```

4. Customize the chat queue settings.
5. For each chat queue's chat request form you want to customize, add the above fields. See Figure 5 for the proper formatting.

```

window.chatUIOptions = {
  EnableEstimatedWaitTime: true,
  EnableNumberOfAvailableAgents: false,
  EnableNumberOfIdleAgents: false,
  EnableNumberOfChatsWaiting: false,
  EnableBusinessHours: true,
  EnableQueueingWhenNoAgentsLogin: true,
  EnablePublicGravatar: true,
  DefaultConfig: {
    Enabled: true,
    LogoImagePath: '',
    ShowLogo: false,
    QueueLabel: '',
    ShowQueueLabel: false,
    AppendQueueLabelToPageTitle: true,
    FormatPrechatLogoToForm: false,
    Gradient: true,
    GradientStartColor: '#000000',
    GradientEndColor: '#444460',
    ShowEstimatedWaitTime: true,
    ShowNumberOfAvailableAgents: false,
    ShowNumberOfIdleAgents: false,
    ShowNumberOfChatsWaiting: false,
    ShowBusinessHours: true,
    AllowQueueingWhenNoAgentsLogin: true,
    ShowTopic: true,
    RequireTopic: true,
    Topic: null,
    DefaultPublicGravatarURL: encodeURIComponent(baseUrl + '/content/images/gravatar/defaultpublic.png'),
    UseDefaultPublicGravatarForAllPublicUsers: false,
    GravatarSize: 32,
    DisableChatRequestIfQueueisNotOpen: true,
    OutOfBusinessHoursMsg: 'Sorry but we are currently closed. Please contact us during regular bussiness hours.',
    QueueStatusDNHMsg: 'Sorry but we are currently unavailable. Please try again later.',
    QueueStatusOutOfServiceMsg: 'Sorry but we are currently unavailable. Please try again later',
    UsePrechatArea: true,
    PrechatDataFromUrl: false
  },
  ChatQueues: [
    {
      Enabled: true,
      QueueId: "26F1A5C3-DD2C-45FF-BE75-2BC7B85012D0",
      LogoImagePath: '/CCMwa/Content/images/demo/WickedTixLogo_NEW.png',
      ShowLogo: true,
      QueueLabel: 'Music Sales (Mon-Fri 8-5)',
      ShowQueueLabel: true,
      AppendQueueLabelToPageTitle: true,
      FormatPrechatLogoToForm: true,
      Gradient: true,
      GradientStartColor: '#36743C',
      GradientEndColor: '#408A47',
      ShowEstimatedWaitTime: true,
      ShowNumberOfAvailableAgents: false,
      ShowNumberOfIdleAgents: false,
      ShowNumberOfChatsWaiting: false,
      ShowBusinessHours: true,
      AllowQueueingWhenNoAgentsLogin: true,
      ShowTopic: true,
      RequireTopic: true,
      Topic: null,
      DefaultPublicGravatarURL: encodeURIComponent(baseUrl + '/content/images/gravatar/defaultpublic.png'),
      UseDefaultPublicGravatarForAllPublicUsers: false,
      GravatarSize: 32,
      DisableChatRequestIfQueueisNotOpen: true,
      OutOfBusinessHoursMsg: 'Sorry but we are currently closed. Please contact us during regular bussiness hours.',
      QueueStatusDNHMsg: 'Sorry but we are currently unavailable. Please try again later.',
      QueueStatusOutOfServiceMsg: 'Sorry but we are currently unavailable. Please try again later',
      UsePrechatArea: true,
      PrechatDataFromUrl: false
    }
  ]
}

```

Figure 5: DefaultConfig with ChatQueues fields

6. Save and close the text editor.

Hosting chat files on your corporate web server

With enhancements to chat in Version 8.1, it is no longer recommended to host chat files on your corporate web server. By default, Version 8.1 will use the configuration on the Enterprise Server. It is recommended that you change your configuration to use `chat.public.config.js` located on the Enterprise Server.

If you do continue to maintain chat files in your corporate website's file directory, you must manually update it with new fields and settings after every upgrade and you must enable `Web.config` to use an externally hosted file.

For information on hosting chat files on your Enterprise Server and referencing hosted chat with Contact Us, consult the *Version 8.0 Multimedia Contact Center Installation and Deployment Guide* available at edocs.mitel.com.

To enable externally hosted chat files

1. Navigate to `<drive>:\Program Files (x86)\Mitel\MiContact Center\WebSites\CCMWa`.
2. Open `Web.config` in an editor.
3. Locate **`UseCcmwaHostedChatPublicClientConfig`** and set it to **false**.
4. Save and close the editor.

Updating chat customization from Version 7.0 to Version 8.1

Customizations to chat done in Version 7.0 within `Index.cshtml` must be added to the `chat.public.config.js` to preserve them in Version 7.1 and greater.

If you changed the background color in Version 7.0, make note of the colors used in the `themeBackground` and `themeBackgroundColor` css classes in the `Chat.public.css` file and add them to `GradientStartColor` and `GradientEndColor` in `chat.public.config.js` as appropriate after the upgrade.

If you added a logo, copy your logo image file to the `<drive>\Program Files (x86)\Mitel\MiContact Center\WebSites\CCMWa\CCMWa\Content\images\logo\` and configure the `LogoImgPath`, `ShowLogo`, and `FormatPrechatLogoToForm` fields in `chat.public.config.js`.

For information on configuring your customization in `chat.public.config.js`, see "Configuring the public-facing chat JavaScript file" on page 106.

CUSTOMIZING IGNITE CHAT AND SMS AGENT OPTIONS

Multimedia Contact Center enables contact centers to optionally modify how Ignite enables agents to handle chat and SMS sessions in a single JavaScript file. Contact centers can also set agent avatar options for agents in this file.

You can make the following customizations to chat and SMS sessions in Ignite:

- Configure avatar settings for agents
- Configure whether or not CTRL+Enter sends a message or enters a carriage return
- Configure whether or not clicking End Your Chat ends a chat or SMS session or first prompts agents to confirm the ending of their session
- Choose to enable agents to view chats that they have not accepted or have not been offered to them
- Configure icon theme

NOTE: If you modify the default handling, it is your responsibility to inform agents of changed handling behavior.

To customize Ignite chat and SMS sessions

- Configure the agent and supervisor configuration JavaScript files.
See "Configuring the agent and supervisor configuration JavaScript files" on page 122.

Configuring the agent and supervisor configuration JavaScript files

Configuration settings for agent chat and SMS sessions in Ignite are controlled through two JavaScript files located in <drive>:\Program Files (x86)\Mitel\MiContact Center\WebSites\CCMWa\Scripts\:

- chat.agent.config.js
- chat.supervisor.config.js

Chat.agent.config.js controls agent settings in Ignite. chat.supervisor.config.js controls how chat displays in Contact Center Client when a supervisor is previewing a chat session.

chat.agent.config.js and chat.supervisor.config.js settings can be grouped into three categories:

- **Global settings**—control agent handling behavior of chat and SMS in Ignite. These settings are applied universally or are required to enable features at a queue level. Table 9 outlines the global fields.
- **Queue settings**—are controlled in DefaultConfig and ChatQueues. These two sections share the same fields. DefaultConfig fields apply the default settings for queues while ChatQueues fields are applied to individual specific queues. Table 10 outlines DefaultConfig and ChatQueues settings.
- **Logging and connection settings**—provide troubleshooting options as well as enable connection limits for devices. Table 11 outlines the logging and connection settings.

When adding field values based on the following tables, ensure that they use correct JavaScript formatting and punctuation.

Table 9: Global setting fields

FIELD NAME	FIELD VALUE	FIELD DESCRIPTION
EnableAgentGravatar	True or False	<p>This field controls whether or not Chat will use Gravatar for Agents.</p> <p>If set to True, Chat sessions will use any Gravatar user image associated to the email addresses used in the chat session or the image configured with DefaultAgentGravatarUrl.</p> <p>If set to False, no agent Gravatar user images will be used in the chat session.</p> <p>NOTE: This field must have the same value in chat.public.config.js, chat.agent.config.js, and chat.supervisor.config.js.</p>

Table 9: Global setting fields (continued)

FIELD NAME	FIELD VALUE	FIELD DESCRIPTION
EnableSupervisorGravatar	True or False	<p>This field controls whether or not Chat will use Gravatar for Agents.</p> <p>If set to True, Chat sessions will use any Gravatar user image associated to the email addresses used in the chat session or the image configured with DefaultAgentGravatarUrl.</p> <p>If set to False, no agent Gravatar user images will be used in the chat session.</p> <p>NOTE: This field must have the same value in chat.public.config.js, chat.agent.config.js, and chat.supervisor.config.js.</p>
EnablePublicGravatar	True or False	<p>This field controls whether or not Chat will use Public Gravatar for agents.</p> <p>If set to True, Chat sessions will use any Public Gravatar user image associated to the email addresses used in the chat session or the image configured with DefaultAgentGravatarUrl.</p> <p>If set to False, no Public Gravatar user images will be used in the chat session.</p> <p>NOTE: This field must have the same value in chat.public.config.js, chat.agent.config.js, and chat.supervisor.config.js.</p>
UseCtrlEnterForGlobalSend	True or False	<p>This field controls whether or not CTRL+Enter enters a carriage return or sends a message in Ignite.</p> <p>If set to True, in a Chat or SMS session in Ignite, pressing CTRL+Enter sends a message and pressing Enter adds a carriage return.</p> <p>If set to False, CTRL+Enter will add a carriage return and Enter will send a message.</p>

Table 9: Global setting fields (continued)

FIELD NAME	FIELD VALUE	FIELD DESCRIPTION
EnableAgentPromptForEndConversation	True or False	<p>This field controls whether or not agents will be prompted to confirm the closing of a chat or SMS session.</p> <p>If set to True, when the End Your Chat button is pressed, agents will be prompted to confirm that they want to close the current chat or SMS session.</p> <p>If set to False, when the End Your Chat button is pressed, the chat or SMS session closes.</p>
EnableSupervisorPromoptForEndConversation	True or False	<p>This field controls whether or not agents will be prompted to confirm the closing of a chat or SMS session.</p> <p>If set to True, when the End Your Chat button is pressed, agents will be prompted to confirm that they want to close the current chat or SMS session.</p> <p>If set to False, when the End Your Chat button is pressed, the chat or SMS session closes.</p>

Table 10: DefaultConfig and ChatQueues fields

FIELD NAME	FIELD VALUE	FIELD DESCRIPTION
Enabled	True or False	<p>This field enables or disables this configuration record.</p> <p>If you set to False, the queue's chat form will use the values from the default file in <drive>:\Program Files (x86)\Mitel\MiContact Center\WebSites\CCMWa\Scripts\Chat.ui.agent.config.DEFAULT.js or Chat.ui.supervisor.config.DEFAULT.js.</p>

Table 10: DefaultConfig and ChatQueues fields (continued)

FIELD NAME	FIELD VALUE	FIELD DESCRIPTION
QueueId (ChatQueues only)	The queue's GUID, such as '26F1A5C3-DD2C-45FFBE75-2BC7B850-12 D0'	The GUID for the chat queue to which you want the associated settings to apply. You can use YourSite Explorer to obtain a queue's GUID. See "Obtaining Queue GUIDs" on page 155.
DefaultAgentGravatar URL	URL of image	<p>This field is used to set the Gravatar image to be used for all agents in all chat sessions.</p> <p>The image must be hosted on a public website.</p> <p>Images being used for the Gravatar image must meet the following requirements:</p> <ul style="list-style-type: none"> • It must be publicly available • It must be accessible via HTTP or HTTPS on ports 80 and 443 • It must be a .jpg, .jpeg, .gif, or .png image file • It must not include a querystring.

Table 10: DefaultConfig and ChatQueues fields (continued)

FIELD NAME	FIELD VALUE	FIELD DESCRIPTION
DefaultSupervisorGravatarURL	URL of image	<p>This field is used to set the Gravatar image to be used for all agents in all chat sessions.</p> <p>The image must be hosted on a public website.</p> <p>Images being used for the Gravatar image must meet the following requirements:</p> <ul style="list-style-type: none"> • It must be publicly available • It must be accessible via HTTP or HTTPS on ports 80 and 443 • It must be a .jpg, .jpeg, .gif, or .png image file • It must not include a querystring.
UseDefaultAgentGravatarForAllAgents	True or False	<p>This field is used to set whether or not all users will use the default Gravatar image.</p> <p>If set to True, all agents will use the image set in DefaultAgentGravatarURL (or DefaultSupervisorGravatarURL).</p> <p>If set to False, users will only use the Default Agent Gravatar (or Default Supervisor Gravatar) if they have no Gravatar associated to their email address.</p>

Table 10: DefaultConfig and ChatQueues fields (continued)

FIELD NAME	FIELD VALUE	FIELD DESCRIPTION
UseDefaultSupervisorGravatarForAllSupervisors	True or False	<p>This field is used to set whether or not all users will use the default Gravatar image.</p> <p>If set to True, all agents will use the image set in DefaultAgentGravatarURL (or DefaultSupervisorGravatarURL).</p> <p>If set to False, users will only use the Default Agent Gravatar (or Default Supervisor Gravatar) if they have no Gravatar associated to their email address.</p>
UseDefaultPublicGravatarForAllPublicUsers	True or False	<p>This field is used to set whether or not all contacts will use the default Gravatar image.</p> <p>If set to True, all public users will use the image set in DefaultPublicGravatarURL.</p> <p>If set to False, users will only use the Default Public Gravatar if they have no Gravatar associated to their email address.</p>
GravatarSize	The size, in pixels, of the Gravatar image	This field is used to set the size of the Gravatar, in pixels.
PeekModeAllowed	True or False	This field controls whether or not agents can view chats that they have not accepted or have not been offered.
IconTheme	Light or Dark	IconTheme determines if the icons appear as light or dark, to better suit the selected background color. The IconTheme value can be Light or Dark.

Table 11: Logging and connection fields

FIELD NAME	FIELD VALUE	FIELD DESCRIPTION
ChatClientSidelogging	True or False	<p>This field controls whether or not a log for chat is available in the client's browser.</p> <p>If set to False, there is no client-side log created.</p> <p>If set to True, a client-side is created.</p> <p>NOTE: This field must have the same value in chat.public.config.js, chat.agent.config.js, and chat.supervisor.config.js.</p>
MobileDeviceConnectionRetryLimit	The number of connection attempts	<p>This field controls how many times a mobile device can attempt to connect to chat.</p> <p>NOTE: This field must have the same value in chat.public.config.js, chat.agent.config.js, and chat.supervisor.config.js.</p>
ConnectionRetryLimit	The number of connection attempts	<p>This field controls how many times a desktop device can attempt to connect to chat</p> <p>NOTE: This field must have the same value in chat.public.config.js, chat.agent.config.js, and chat.supervisor.config.js.</p>
ConnectionRetryIterationCount	The count limit	<p>This field sets the number of times a device can attempt to connect before prompting the user that it is unable to connect and that a refresh will occur.</p> <p>NOTE: This field must have the same value in chat.public.config.js, chat.agent.config.js, and chat.supervisor.config.js.</p>

After customizing your agent chat and SMS sessions, your changes will be applied to Ignite.

The following procedures outline how to:

- Set the agent chat and SMS settings using chat.agent.config.js
- Add ChatQueues fields to chat.agent.config.js
- Set the supervisor settings using chat.supervisor.config.js
- Add ChatQueues fields to chat.supervisor.config.js

chat.supervisor.config.js must have the same settings configured as chat.agent.config.js. For agent-specific fields such as DefaultAgentGravatarURL, add the value to the supervisor-specific equivalent, such as DefaultSupervisorGravatarURL.

To set the agent chat and SMS settings using `chat.agent.config.js`

1. On the Enterprise Server, navigate to <drive>:\Program Files (x86)\Mitel\MiContact Center\WebSites\Ccmwa\Scripts.
2. Open **chat.agent.config.js** in a text editor.
3. Customize your agent chat settings.
For a description of the settings and their fields, see Table 9, Table 10, and Table 11.
4. Save and close the editor.

To add ChatQueues fields to `chat.agent.config.js`

1. In YourSite Explorer, obtain the queue IDs of the chat queues for which you want to customize settings.
For more information, see "Obtaining Queue GUIDs" on page 155.
2. Open **chat.agent.config.js** in a text editor.
3. Locate `ChatQueues:[]` and copy and paste the following fields within `ChatQueues`'s brackets. See Figure 6 for the proper formatting.

```
{  
    Enabled: true,  
    QueueId: "",  
    DefaultAgentGravatarURL: encodeURIComponent  
    (window.ccmwa.shared.getCCMWaBaseUrl() +  
    '/content/images/gravatar/defaultagent.png'),  
    UseDefaultAgentGravatarForAllAgents: false,  
    GravatarSize: 32,  
    PeekModeAllowed: true,  
    IconTheme: 'Dark'  
},
```



```

window.chat.agentUI.Options = {
  EnablePublicGravatar: true,
  UseCtrlEnterForGlobalSend: false,
  EnableAgentPromptForEndConversation: true,
  DefaultConfig: {
    Enabled: true,
    DefaultAgentGravatarURL: encodeURIComponent(window.ccmwa.shared.getCCMwaBaseUrl() +
'/content/images/gravatar/defaultagent.png'),
    UseDefaultAgentGravatarForAllAgents: false,
    GravatarSize: 32,
    PeekModeAllowed: true,
    IconTheme: 'Dark'
  },
  ChatQueues: [
    {
      Enabled: true,
      QueueId: "de0e53e2-4df4-4f48-90e2-76de4c0f513a",
      DefaultAgentGravatarURL: encodeURIComponent(window.ccmwa.shared.getCCMwaBaseUrl() +
'/content/images/gravatar/defaultagent.png'),
      UseDefaultAgentGravatarForAllAgents: false,
      GravatarSize: 32,
      PeekModeAllowed: true,
      IconTheme: 'Dark'
    }
  ]
};

```

Figure 6: chat.agent.config.js formatting

4. Customize your ChatQueues field settings.
For a description of the settings and their fields, see Table 10.
5. For each additional queue you want to configure agent Ignite settings for, repeat steps 2-3.
6. Save and close the text editor.

To set the supervisor settings using chat.supervisor.config.js

1. On the Enterprise Server, navigate to <drive>:\Program Files (x86)\Mitel\MiContact Center\WebSites\CcmwaScripts.
2. Open **chat.supervisor.config.js** in a text editor.
3. Customize your supervisor chat settings.
For a description of the settings and their fields, see Table 9, Table 10, and Table 11.
4. Save and close the editor.

To add ChatQueues fields to chat.supervisor.config.js

1. In YourSite Explorer, obtain the queue IDs of the chat queues for which you want to customize settings.
For more information, see "Obtaining Queue GUIDs" on page 155.
2. Open **chat.supervisor.config.js** in a text editor.
3. Locate ChatQueues:[] and copy and paste the following fields within ChatQueues's brackets.
See Figure 7 for the proper formatting.

```

{
  Enabled: true,
  QueueId: "",
  DefaultSupervisorGravatarURL:"",

```

```

        DefaultPublicGravatarURL: "",
        UseDefaultSupervisorGravatarForAllSupervisors: false,
        UseDefaultPublicGravatarForAllPublicUsers: false,
        GravatarSize: 32,
        PeekModeAllowed: true,
        IconTheme: 'Dark'
    },
    window.chat.supervisorUI.Options = {
        EnableSupervisorGravatar: true,
        EnablePublicGravatar: true,
        UseCtrlEnterForGlobalSend: false,
        EnableSupervisorPromptForEndConversation: true,
        DefaultConfig: {
            Enabled: true,
            DefaultSupervisorGravatarURL: '',
            DefaultPublicGravatarURL: '',
            UseDefaultSupervisorGravatarForAllSupervisors: false,
            UseDefaultPublicGravatarForAllPublicUsers: false,
            GravatarSize: 32,
            PeekModeAllowed: true,
            IconTheme: 'Dark'
        },
        ChatQueues: [
            {
                Enabled: true,
                QueueId: '',
                DefaultSupervisorGravatarURL: '',
                DefaultPublicGravatarURL: '',
                UseDefaultSupervisorGravatarForAllSupervisors: false,
                UseDefaultPublicGravatarForAllPublicUsers: false,
                GravatarSize: 32,
                PeekModeAllowed: true,
                IconTheme: 'Dark'
            }
        ]
    };

```

Figure 7: chat.supervisor.config.js formatting

4. Customize your ChatQueues field settings.
For a description of the settings and their fields, see Table 10.
5. For each additional queue you want to configure agent Ignite settings for, repeat steps 3-4.
6. Save and close the text editor.

OFFERING CHAT THROUGH YOUR CORPORATE WEBSITE

A contact center can offer chat through a number of means on their corporate website. Some suggested methods for offering chat include:

- Offering chat via a basic hyperlink
See "Offering chat via a basic hyperlink" on page 132.
- Offering chat via a containing page
See "Offering chat in a containing page in your own site" on page 132.
- Offering chat via a pop-up window
See "Offering chat in a pop-up window" on page 132.

Multimedia Contact Center includes sample files demonstrating these suggested methods. Samples can be found in <drive>:\Program Files (x86)\Mitel\MiContact Center\Support\BasicSamples.

Offering chat via a basic hyperlink

In this method, a link is offered to the default CCMWa/chat on the Enterprise Server. Contacts clicking the link open the chat request page. With this method, you link to the default reverse proxied chat application on CCMWa.

NOTE: If a subdomain is being used to access chat, such as chat.example.com, consult the following Mitel Knowledge Base article:
<http://micc.mitel.com/kb/KnowledgebaseArticle52440.aspx>.

The following HTML is an example of offering chat to a specific queue via a basic hyperlink in a page in your own website.

```
<!DOCTYPE html>
<html xmlns="http://www.w3.org/1999/xhtml">
<head>
<title>Basic Chat</title>
</head>
<body>
<a href="http://localhost:8082/ccmwa/en-CA/chat/26F1A5C3-DD2C-45FF-BE75-
2BC7B85012D0">chat now</a>
</body>
</html>
```

Offering chat in a containing page in your own site

In this method, the CCMWa/Chat is rendered within an HTML page on your own site. This can be done by rendering CCMWa/Chat within the body of the page or within a container on the page.

For an example of chat embedded within the body of a webpage, with usable HTML and JavaScript, see chat.basic.embedAsPage.html in <drive>:\Program Files (x86)\Mitel\MiContact Center\Support\BasicSamples. Adjust as needed to match your storage of scripts and chat queue GUIDs.

For an example of chat embedded within the body of a webpage as a widget, with usable HTML and JavaScript, see chat.basic.embedAsWidget.html in the Samples folder at <drive>:\Program Files (x86)\Mitel\MiContact Center\Support\BasicSamples. Adjust as needed to match your storage of scripts and chat queue GUIDs.

NOTE: If you use these HTML, do not modify the variable names for queueId or targetContainer. Do not modify the name or value of the hdr variable. Doing so will cause issues for rendering the chat session.

Offering chat in a pop-up window

Chat can be offered through a pop-up window. For an example of how to offer chat in a pop-up window, see chat.basic.popup.html in the Samples folder at <drive>:\Program Files (x86)\Mitel\MiContact Center\Support\BasicSamples. Adjust as needed to match your storage of scripts and chat queue GUIDs.

Offering chat in different languages

Different language versions of the chat request form can be accessed by adding the language designator between /CCMWa/ and /chat. For example, the French Canadian chat request form would be accessed through <http://<enterprise server>/ccmwa/fr-CA/chat>. Table 12 below contains a list of the different supported languages and the corresponding designator.

Table 12: Language designators

LANGUAGE	DESIGNATORS
Simplified Chinese	zh-CN
Dutch	nl-NL
English (US)	en-US
English (UK)	en-GB
French (Canadian)	fr-CA
French (France)	fr-FR
German	de-DE
Italian	it-IT
Norwegian	nb-NO
Portuguese (Brazilian)	pt-BR
Russian	ru-RU
Spanish (Latin American)	es-CL
Spanish (Spain)	es-ES
Swedish	sv-SE

ENABLING CONTACT US

Contact Us is Multimedia Contact Center's contact tool for contact center corporate websites, presenting access to queues grouped by business lines. Designed to integrate into existing corporate websites, Contact Us can be customized to reflect an organization's specific service groups or business lines and their corresponding queues. Like chat, Contact Us uses CCMWa, a web application installed on the Enterprise Server at <http://<Enterprise Server IP Address>/CCMWa> to route contacts to your multimedia queues.

The WickedTix sample website included with Multimedia Contact Center showcases an integration of Contact Us within a corporate website. For more information, see "Corporate Website Example: WickedTix" on page 140. There is also a basic sample website included called BasicSamples, focusing on basic Chat and Contact Us integrations, available in the Samples folder at `<drive>:\Program Files (x86)\Mitel\MiContact Center\Support\BasicSamples`.

Figure 8 displays Contact Us. By default, all the business lines display as collapsed, showing only the business line name and hours. The footer of Contact Us contains a link that can be configured to send customers to relevant information concerning the contact center.

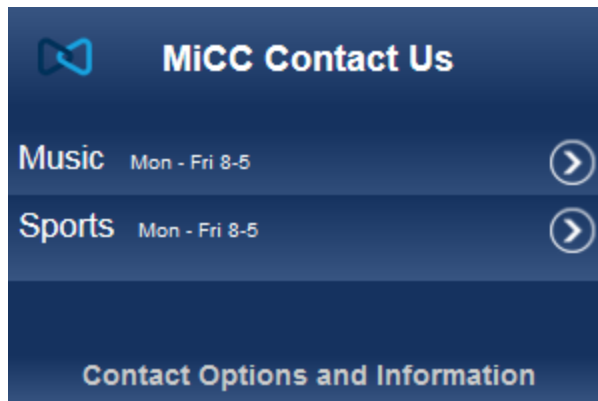


Figure 8: Contact Us

When clicked, a business line expands to display the queues configured with it. You can configure the specific contact information for each queue so that customers can contact the business line by that media type. (See Figure 9.)

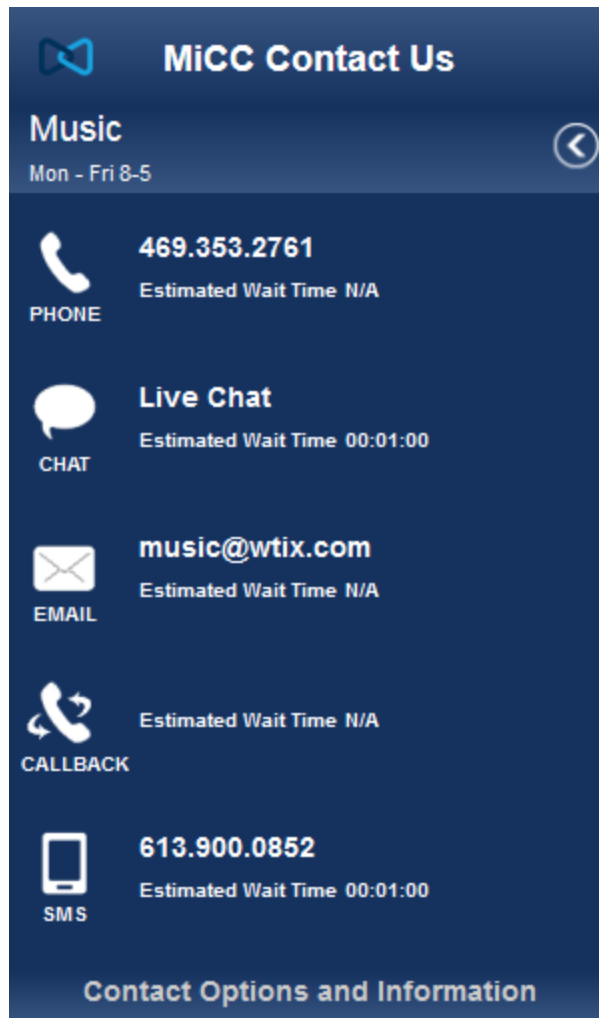


Figure 9: Contact Us (Expanded)

Contact Us can also be configured to use a horizontal display of business lines and their queues. See Figure 10.



Figure 10: Contact Us (horizontal)

In Contact Us, each queue media icon can be configured to launch a contact session. Icons can be disabled and greyed out or hidden if that media type is not applicable to a business line. Clicking the phone icon will make a call if the device is able to make calls. Clicking an email icon will either launch an email form (see Figure 11) or, if the customer is using a mobile device, it will open the phone's email application with the icon's configured email address in the To: field.

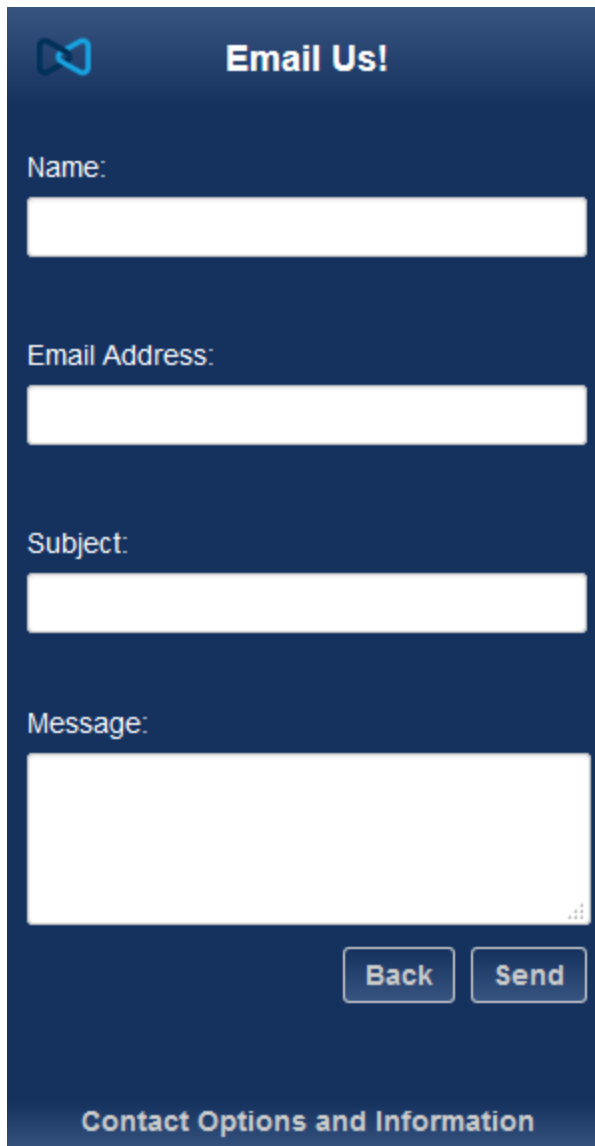
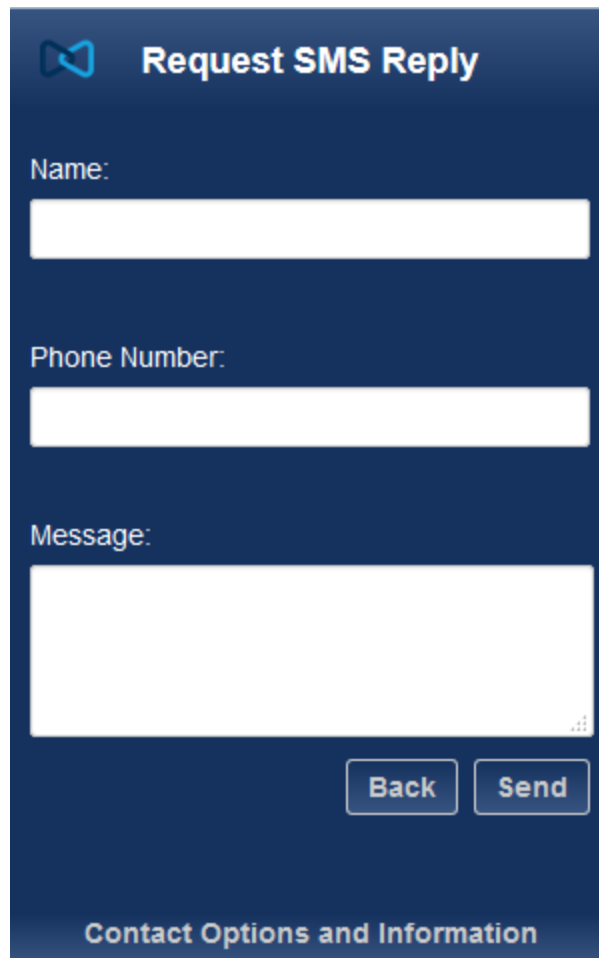
A screenshot of a mobile application interface for an "Email Us!" form. The form is set against a dark blue background. At the top left is a blue icon of two overlapping speech bubbles. To its right, the text "Email Us!" is displayed in white. Below this, there are four white input fields: "Name:", "Email Address:", "Subject:", and "Message:". The "Message:" field is a larger text area. At the bottom right of the form are two buttons: "Back" and "Send". At the very bottom of the screen, the text "Contact Options and Information" is visible in a lighter blue color.

Figure 11: Email Us form

Clicking a chat icon launches a chat session with the configured chat queue. Clicking an SMS icon launches an SMS form (see Figure 12) or, if the customer is using a mobile device, it will open the phone's SMS application with the icon's configured SMS number. When the customer clicks Send on the form, an SMS will be send to the queue by Contact Us with the customer's number.



Request SMS Reply

Name:

Phone Number:

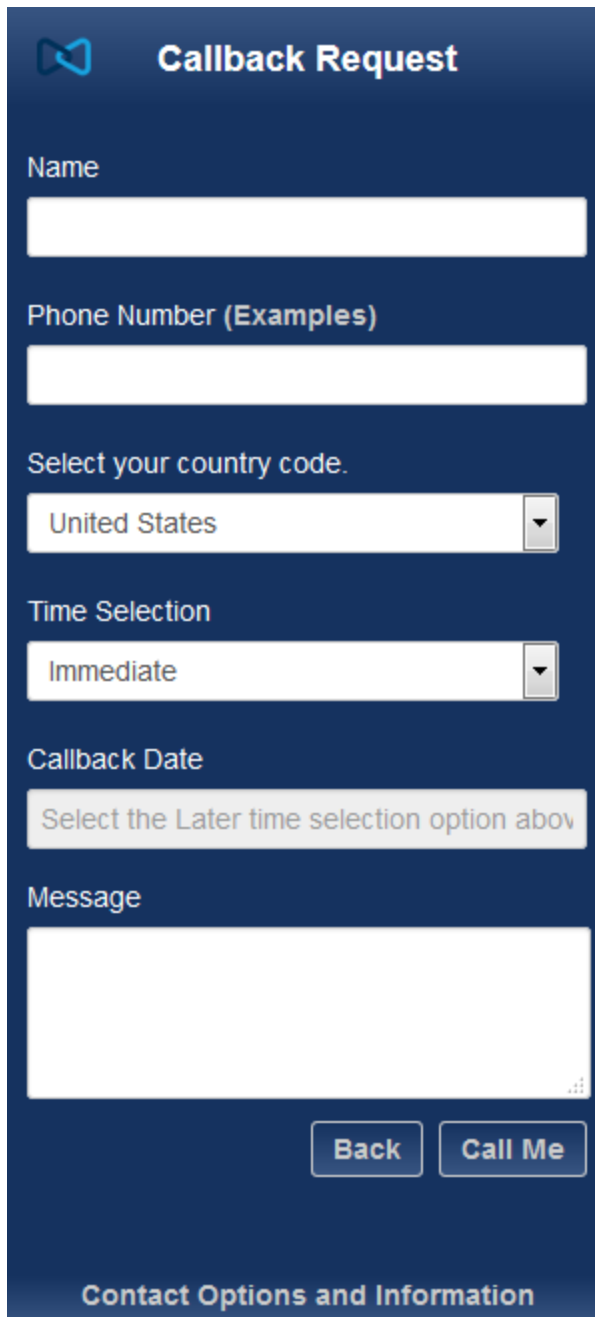
Message:

Back **Send**

Contact Options and Information

Figure 12: SMS form

If the contact center is licensed for IVR, the web callback icon can be configured to submit callback requests for customers. When clicked, a web callback request form is opened for customers to fill in callback details and submit a callback request. Figure 13 shows the options in the web callback form. For more information on web callbacks, see the *MiContact Center Installation and Administration Guide*.

A web form titled "Callback Request" with a blue header and a white body. The form contains several input fields: a text field for "Name", a text field for "Phone Number (Examples)", a dropdown menu for "Select your country code." with "United States" selected, a dropdown menu for "Time Selection" with "Immediate" selected, a text field for "Callback Date" with a placeholder "Select the Later time selection option above", and a large text area for "Message". At the bottom, there are two buttons: "Back" and "Call Me". The footer of the form says "Contact Options and Information".

Callback Request

Name

Phone Number (Examples)

Select your country code.

United States

Time Selection

Immediate

Callback Date

Select the Later time selection option above

Message

Back Call Me

Contact Options and Information

Figure 13: Web callback

DETERMINING HOW TO OFFER CONTACT US

When implementing Contact Us, you must determine how you want to offer Contact Us. Contact Us is a flexible tool that can be offered to contact center customers in multiple separate instances, as either a standalone webpage in a corporate website or as an integration within an existing webpage. Depending on the method for integrating Contact Us, you will be required to configure different Contact Us files and decide how to host them.

Contact Us has several samples available to help guide decisions on how to offer Contact Us. For basic deployments, see the files available within <drive>:\Program Files (x86)\Mitel\MiContact Center\Support\BasicSamples. These include a sample file showing Contact Us as a standalone webpage and a file showing Contact Us embedded as a slider. For an example of a more integrated deployment of Contact Us, Multimedia Contact Center includes a sample website, WickedTix, which provides an example implementation of Contact Us. WickedTix files are available in <drive>:\Program Files (x86)\Mitel\MiContact Center\Support\WickedTix. For more information on WickedTix, see "Corporate Website Example: WickedTix" on page 140.

Corporate Website Example: WickedTix

WickedTix is an example corporate webpage integrated with Multimedia Contact Center. Contact Us has been added as a slider on the right side of the page. Figure 14 shows the webpage with the Contact Us tab. When clicked, it expands and offers customers the contact options for the company. Figure 14 shows the expanded slider. WickedTix can be found at <drive>:\Program Files (x86)\Mitel\MiContact Center\Support\WickedTix.

The main WickedTix landing page shows Contact Us integrated in the horizontal mode within a targeted container within the page. Other pages in the site integrate Contact Us using the vertical layout, auto-centering it within the viewable area of the page. Figure 14 shows WickedTix with Contact Us expanded.

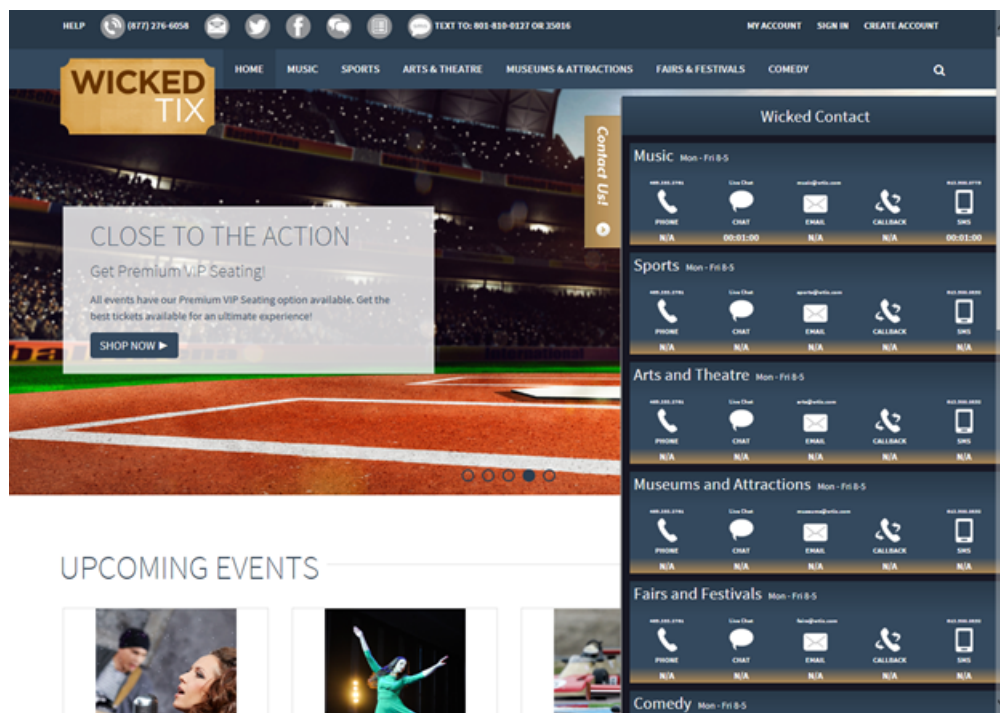


Figure 14: WickedTix with open slider

IMPLEMENTING CONTACT US

After having decided how to offer Contact Us, Contact Us can be configured and implemented. Contact Us is implemented using a single script reference to render it and another to configure the queues and media types. Additional customization can be made using a CSS stylesheet.

To implement Contact Us

1. Configure your business lines and queues for Contact Us.
Contact Us uses a JavaScript file, `contactus.config.js`, to manage business line and queue information.

Configurations can be reused if you want to show the same contact options on multiple pages (or a single configuration referenced in a header/footer, for example). A separate configuration file is required for any alternate configurations you want to render, where the contact options are different.

See "Configuring your business lines and queues for Contact Us" on page 141.
2. Configure Contact Us style.
Contact Us uses CSS to implement its styling. All of the visual components are set by `ContactUs.css` in `<drive>:\Program Files (x86)\Mitel\MiContact Center\WebSites\Ccmwa\Content`. You can copy this file and host it in your own website with any style modifications.

See "Configuring Contact Us style" on page 148.
3. Configure the email form with Exchange
This step is only required if your mail server uses Exchange.

See "Configuring the email form with Exchange" on page 149.
4. Host Contact Us files on your corporate web server (optional)
If you are using multiple configuration files for Contact Us, you must host them externally on your corporate web server and then enable Contact Us to use the external files.

See "Hosting Contact Us files on your corporate web server" on page 149.
5. Add Contact Us to your corporate website.
Add the necessary files to your corporate website's web directory on the web server and add the JavaScript references to add Contact Us as either a standalone webpage or embedded within an existing corporate webpage.

See "Adding Contact Us to your corporate website" on page 150.

Configuring your business lines and queues for Contact Us

Business line and queue information, as well as the settings for how Contact Us displays, are set in the JavaScript file `contactus.config.js`. This file can be found at `<drive>:\Program Files (x86)\Mitel\MiContact Center\WebSites\Ccmwa\Scripts`.

If you intend to offer multiple instances of Contact Us on your corporate website with different business line and queue information, you will require multiple copies of `contactus.config.js`. Copies of `contactus.config.js` can be renamed and stored in different locations, but script references to Contact Us must be updated to renamed file in the script reference's parameters. For more information, see "Adding Contact Us to your corporate website" on page 150.

Business line or service group sections can be added or removed and the available media types for each of these sections can be modified. The media type layout is fluid so that if one media type icon is removed, the others flow together.

The following procedures describe how to:

- Configure the header and footer
- Hide the header or footer
- Apply a light or dark icon theme
- Use the horizontal Contact Us layout
- Configure `contactus.config.js` with business lines and media types
- Remove media types from a service group or business line in an instance of `contactus.config.js`
- Configure logging and connection options

To configure the header and footer

1. Open the instance of **`contactus.config.js`** in a text editor.
2. Locate the field **`HeaderHTML`**.
3. Replace field's content with your header content.
4. Locate the field **`FooterHTML`**.
5. Replace the field's content with your footer content.
6. Save and close the text editor.

To hide the header or footer

1. Open the instance of `contactus.config.js` in a text editor.
2. If you want to hide the header, locate the line **`ShowHeader: true`** and set it to **`false`**.
3. If you want to hide the footer, locate the line **`ShowFooter: true`** and set it to **`false`**.
4. Save and close the text editor.

To use a light or dark icon theme

1. Open the instance of `contactus.config.js` in a text editor.
2. If you want a light icon theme, locate the line **`IconTheme`** and set it to **`Light`**.
3. If you want a dark icon theme, locate the line **`IconTheme`** and set it to **`Dark`**.
4. Save and close the text editor.

To use the horizontal Contact Us layout

1. Open your instance of `contactus.config.js` in an editor.
2. Set **`UseVerticalBusinessLinesFirst`** to **`true`**.
3. Save and close the editor.

To configure `contactus.config.js` with business lines and media types

1. Open the instance of `contactus.config.js` in a text editor.
2. Replace the existing values in the service group/business line fields.
See Table 13 for a description of each field.

See Figure 15 for a labeled diagram of what fields correspond to which elements in Contact Us.

Table 13: Business Line fields

CONTACTUS.CONFIG.JS FIELDS	DESCRIPTION
BusinessLineName	The name of the business line or service group
HoursOfOperation	The hours of operation for the contact center handling the queues for this business line or service group
UnifiedQueueIdOrNameOrReporting	The service group/business line's Unified Queue Group GUID, Name, or Reporting Number
EstimatedWaitTimeLabel	The Estimated Wait Time label text that displays when a mouse hovers over
ShowIconCaptions	If True, Contact Us will display the caption configured in Caption. If False, it hides the caption
MediaTypes	The supported media types that display in the business line or service group

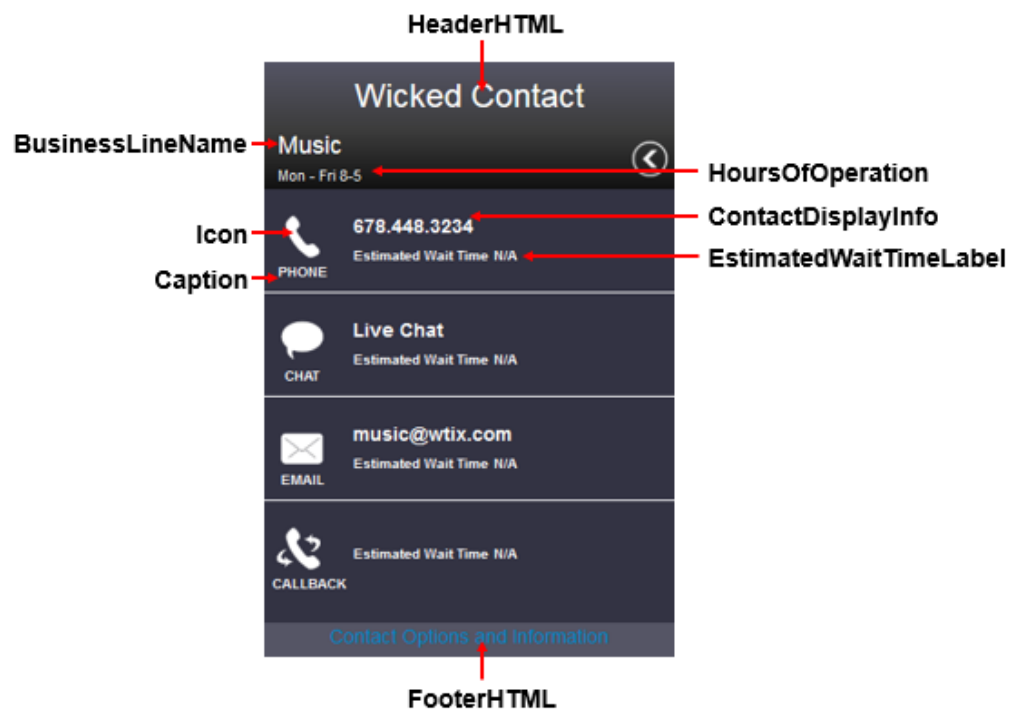


Figure 15: Contact Us contactus.config.js fields

3. Under MediaTypes, configure the MediaTypes fields to correspond to the queues for your own service groups or business lines.
See Table 14 for a description of each field.
See Figure 15 for a labeled diagram of what fields correspond to which elements in Contact Us.

Table 14: MediaTypes fields

CONTACT.CONFIG.JS FIELDS	FUNCTION
Enabled	Controls whether or not the media type can be interacted with <ul style="list-style-type: none">If set to True, the media type's icon and text are clickableIf set to False, the icon is greyed out and cannot be interacted with
OnMouseHoverMessage	The text that displays when a mouse hovers over an icon

Table 14: MediaTypes fields (continued)

CONTACT.CONFIG.JS FIELDS	FUNCTION
CssClass	<p>The CSS class used for the media type. By default these are:</p> <ul style="list-style-type: none"> • Voice: lobMediaTypePhone • Chat: lobMediaTypeChat • Email: lobMediaTypeEmail • Callback: lobMediaTypeCallback • SMS: lobMediaTypeSms
Caption	The caption text. Used in conjunction with ShowIconCaptions.
ContactDisplayInfo	The text displaying the contact information for the queue, such as email address or phone number
Icon	<p>The type of icon used for this media type. Supported icon values are:</p> <ul style="list-style-type: none"> • Phone • Chat • Email • SMS • Callback
QueueIdOrNameOrReporting	<p>The queue's GUID</p> <p>This unique identifier enables Contact Us to identify this Contact Us queue with a queue on the media server</p> <p>For instructions on how to obtain a queue's GUID, see "Obtaining Queue GUIDs" on page 155.</p>
ClickToContactInfo	<p>The queue's dialable phone number, email address, chat queue external URL, or SMS number.</p> <p>NOTE:</p> <ul style="list-style-type: none"> • Phone numbers and SMS numbers must be entered with no spaces or other characters • If you enter the external URL for CCMWa/chat instead of an external URL for a queue, then no chat Estimate Wait Time will display as no queue has been selected.

Table 14: MediaTypes fields (continued)

CONTACT.CONFIG.JS FIELDS	FUNCTION
Handler	<p>The type of media. The Handler can be:</p> <ul style="list-style-type: none"> • Call • Chat • Email • SMS • Callback <p>NOTE: It is not recommended to change or edit this field, unless you are adding or removing an entire media type.</p>
SupportedProtocols	<p>The protocols your business can support for the media type contact mechanism. Protocols can be added for voice queues. The following protocols are supported:</p> <p>Voice:</p> <ul style="list-style-type: none"> • 'tel' – calls the number configured in ClickToContactInfo using the telephone application
EwtPrefix	<p>It is not recommended to change or edit this field, unless you are adding or removing an entire media type.</p> <p>If the media type is voice, email, chat, or SMS, set EwtPrefix value to "ewt"</p> <p>If the media type is callback, set the EwtPrefix value to "ewt_wcb"</p>

4. Save and close the text editor.

To add media types to a service group or business line in an instance of `contactus.config.js`

1. Open the instance of `contactus.config.js` in a text editor.
2. If the media type is email, chat, SMS, or callback, locate the service group or business line's section in `contactus.config.js` and add the following under `MediaType`:

```
    Enabled: true,  
    OnMouseHoverMessage: "",  
    CssClass: "",  
    Caption: "",  
    ContactDisplayInfo: "",  
    Icon: "",  
    QueueIdOrNameOrReporting: "",  
    ClickToContactInfo: "",  
    Handler: ""  
    EwtPrefix: ""  
  },
```

3. If the media type is voice, locate the service group or business line's section in `contactus.config.js` and add the following under `MediaType`:

```
    Enabled: true,  
    OnMouseHoverMessage: "",  
    CssClass: "lobMediaTypePhone",  
    Caption: "",  
    ContactDisplayInfo: "",  
    Icon: "",  
    QueueIdOrNameOrReporting: "",  
    ClickToContactInfo: "",  
    SupportedProtocols: "tel",  
    Handler: "Call"  
    EwtPrefix: "ewt"  
  },
```

4. Configure the fields.
5. Save and close the editor.

To remove media types from a service group or business line in an instance of `contactus.config.js`

1. Open the instance of `contactus.config.js` in a text editor.
2. To remove a media type, delete that media type's lines from under `MediaTypes`.
To delete chat, for example, you would delete the following lines:

```
{  
  Enabled: true,  
  OnMouseHoverMessage: "Chat with Sports Support",  
  CssClass: "lobMediaTypeChat",  
  Caption: "Chat",  
  ContactDisplayInfo: "",  
  Icon: "Chat",  
  QueueIdOrNameOrReporting: "d596e70f-526d-4c94-aa86-faa0e8bdb9db",  
  ClickToContactInfo: "http://localhost/ccmwa/chat/d596e70f-526d-4c94-aa86-faa0e8bdb9db",  
  SupportedProtocols:"",  
  Handler: "Chat",  
  EwtPrefix: "ewt"  
},
```

3. Save and close the text editor.

To configure logging and connection options

1. Open the instance of `contactus.config.js` in a text editor.
2. After **ClientSideLogging**, type `True` if you want to enable a log for Contact Us to be available in the client's browser.
3. After **ConnectionRetryLimit**, set the number of times a desktop device can attempt to connect to Contact Us.
4. After **MobileDeviceConnectionRetryLimit**, set the number of times a mobile device can attempt to connect to Contact Us.
5. After **ConnectionRetryIterationCount**, set the number of times a device can attempt to connect before prompting the user that it is unable to connect and that a refresh will occur.
6. Save and close the text editor.

Configuring Contact Us style

Optionally, you can alter the style of Contact Us to match your corporate website's style. By default, Contact Us uses `ContactUs.css`, located at `<drive>:\Program Files (x86)\Mitel\MiContact Center\WebSites\Ccmwa\Content`. This default stylesheet can be customized and have multiple copies made of it for use with different instances of Contact Us. If custom instances of `ContactUs.css` are being used, JavaScript references to Contact Us require parameters specifying the `.css` file's location. For more information, see "Adding Contact Us to a webpage" on page 150 and "Adding Contact Us with the default slider" on page 152.

If Contact Us is to be integrated within an existing corporate webpage, CSS can be overridden. Contact Us's stylesheet and use the webpage's CSS stylesheet instead.

NOTE:

- It is recommended to only configure colors and fonts. Changing other stylesheet settings, such as icons, may impact Contact Us functionality.
- Copies of ContactUs.css can be stored in different folders, but must keep the name ContactUs.css.

To configure Contact Us to use the integrated webpage's CSS

1. On your Enterprise Server, navigate to **<drive>:\Program Files (x86)\Mitel\MiContact Center\WebSites\Ccmwa\Content**.
2. Create a copy of ContactUs.css and add it to a folder within your website.
3. Update ContactUs.css to match your site's style.
4. Add a reference to the copy of ContactUs.css in your JavaScript call to MiccContactUs.js or MiccSideSlider.js.
For information, see "Adding Contact Us to a webpage" on page 150 and "Adding Contact Us with the default slider" on page 152.

Configuring the email form with Exchange

The email form automatically uses the email media server's mail server configured in YourSite Explorer to submit emails to queues. To ensure Exchange uses the customer-entered email address in the form for responses and not the email mail server or queue email address, you must disable Outgoing SMTP Authentication in YourSite Explorer and configure authentication on the Exchange server.

For instructions on the specific Exchange configuration, see the following Mitel Knowledge Base article: <http://micc.mitel.com/kb/KnowledgebaseArticle52062.aspx>.

To disable Outgoing SMTP Authentication

1. Click **Multimedia=>Mail server**.
2. Select the **Exchange mail server** and click the **Outgoing** tab.
3. Under **Outgoing Logon Information**, clear **SMTP Authentication Required**.
4. Click **Save**.

Hosting Contact Us files on your corporate web server

By default, Contact Us uses files hosted on the Enterprise Server. If you are using multiple contactus.config.js files for different business lines, you will need to host them externally on your corporate web server.

You can store Contact Us JavaScript and CSS files on your corporate web server within the corporate website's directory. Files stored within your website's directory on your corporate web server can be located anywhere within the directory at your discretion. If you store Contact Us files on your corporate web server, you must manually update your files with any new fields and settings after every upgrade.

To enable externally hosted Contact Us files

1. Navigate to `<drive>:\Program Files (x86)\Mitel\MiContact Center\WebSites\CCMWa`.
2. Open **Web.config** in an editor.
3. Locate **UseCcmwaHostedContactUsClientConfig** and set it to **false**.
4. Save and close the editor.

Adding Contact Us to your corporate website

Contact Us can be offered from your corporate website through a number of different methods.

Multimedia Contact Center includes a preconfigured JavaScript file that renders Contact Us in the specified container on a webpage. This can be used to render Contact Us as a standalone webpage, embed Contact Us within a page, or render Contact Us in a pop-up or slider. For more information, see "Adding Contact Us to a webpage" on page 150.

For integrations with existing webpages, Multimedia Contact Center includes a preconfigured JavaScript slider containing Contact Us that can be added to your webpages. For more information, see "Adding Contact Us with the default slider" on page 152.

For either resource, you must decide whether you want to host Contact Us's JavaScript files and CSS files on your corporate web server within the corporate website's directory or store the files within CCMWa on the Enterprise Server. Files stored within your website's directory on your corporate web server can be located anywhere within the directory at your discretion.

NOTE: Optionally, you can store Contact Us JavaScript and CSS files on your corporate web server within the corporate website's directory. Files stored within your website's directory on your corporate web server can be located anywhere within the directory at your discretion. If you store Contact Us files on your corporate web server, you must manually add new fields to the files after every upgrade.

Ensure that you specify the locations in the script reference parameters discussed in "Adding Contact Us to a webpage" on page 150 and "Adding Contact Us with the default slider" on page 152.

Adding Contact Us to a webpage

Contact Us can be offered using a script reference. Multimedia Contact Center includes a JavaScript file, `MiccContactUs.js`, to render Contact Us within an optional target on a webpage. If you want to render Contact Us as a stand-alone webpage, create an empty HTML file and add a reference to this script. For an example of this implementation, see `contact.basic.stacked.html` or `contact.basic.horizontal.html` in `<drive>:\Program Files (x86)\Mitel\MiContact Center\Support\BasicSamples`.

By default, this script uses the default `contactus.config.js` and `ContactUs.css`. To use different business lines' `contactus.config.js` files or CSS files with `MiccContactUs.js`, different parameters can be added to the script reference. The following is an example of a `MiccContactUs` script with all parameters applied to the script reference.

```
<script  
src="ccmwa/scripts/micccontactus.js?embedded=false&target=contactus&vmode=false&c  
sspath=assets/css/&jspath=assets/js/&config=contactus.config"></script>
```

Table 15 describes the different parameters

Table 15: MicccContactUs.js parameters

PARAMETER NAME	PARAMETER VALUE	DEFAULT VALUE	PARAMETER DESCRIPTION
embedded	True or False	False	<p>Controls whether or not Contact Us will embed itself in the container specified with the target parameter.</p> <p>If set to True, Contact Us will be embedded in the target.</p> <p>If set to False, Contact Us renders within the body of the page in the upper-left corner.</p>
target	The ID attribute of the target	none	<p>Sets the target in which Contact Us renders.</p> <p>If the target is not present or empty, the Contact Us will render as the last item on the page.</p>
vmode	True or False	True	<p>Controls whether or not Contact Us renders in the standard display or the horizontal display.</p> <p>If set to True, Contact Us renders in the default display.</p> <p>If set to False, Contact Us renders in the horizontal display.</p> <p>NOTE: vmode overrides the value set in UseVerticalBusinessLinesFirst in contactus.config.js.</p>
csspath	File path	<drive>:\Program Files (x86)\Mitel\MiContact Center\WebSites\Ccmwa\Content\	Path to ContactUs.css. If left blank or excluded, the default ContactUs.css in <drive>:\Program Files (x86)\Mitel\MiContact Center\WebSites\Ccmwa\Content is used.
jspath	Folder path	<drive>:\Program Files (x86)\Mitel\MiContact Center\WebSites\Ccmwa\Scripts\	Path to folder containing contactus.config.js. If left blank or excluded, the default folder will be used.
config	File path	contactus.config.js	<p>Path to the contactus.config.js file to be used with Contact Us.</p> <p>If left blank, the default contactus.config.js file in the folder specified in jspath will be used.</p>

There are various other integration options based on a combination of the parameters used and what kind of container is targeted. For more information, see the basic samples website located in <drive>:\Program Files (x86)\Mitel\MiContact Center\Support\BasicSamples. The following procedure details how to configure Contact Us as a standalone webpage. It assumes that you have:

- Added your business lines and queues to a copy of contactus.config.js
- Optionally updated the style in ContactUs.css
- Placed your JavaScript and CSS files in the desired location on either the Enterprise Server or corporate web server.

To configure Contact Us as a stand-alone webpage

1. Open the webpage in which you want to render standalone Contact Us with an editor.
2. Add the following script reference to the Body:
<script src="ccmwa/scripts/miccccontactus.js"></script>
3. If you are using JavaScript and CSS files other than the defaults, update the script reference with parameters indicating the file locations.
For information on MicccContactUs.js parameters, see Table 15.
4. Save and close the text editor.

Adding Contact Us with the default slider

Contact Us can be added to your corporate webpages as a slider using MiCCSideSlider.js. By default, MicccSideSlider.js renders Contact Us as a slider on the right-hand side of your webpage, centered in the viewable area. The default MicccSideSlider can be added to your existing corporate webpage by adding the following script within the body of your webpage.

```
<script src="ccmwa/scripts/micccsideslider.js"></script>
```

By default, MicccSideSlider.js uses the default contactus.config.js located at <drive>:\Program Files (x86)\Mitel\MiContact Center\WebSites\Ccmwa\Scripts and the default ContactUs.css located at <drive>:\Program Files (x86)\Mitel\MiContact Center\WebSites\Ccmwa\Content.

To use different business lines' contactus.config.js files or CSS files with MicccSideSlider, different parameters can be added to the script reference. The following is an example of a MicccSideSlider with all parameters applied to the script reference as guidance for formatting:

```
<script  
src="ccmwa/scripts/micccsideslider.js?embedded=false&target=contactslider&vmode  
=false&csspath=assets/css/&imgpath=images/&imgmod=_wt&jspath=assets/js/  
&config=contactus.config&promptafter=30000"></script>
```

Table 16 describes the different parameters.

Table 16: MiCCSideSlider JavaScript options

PARAMETER NAME	PARAMETER VALUE	DEFAULT VALUE	PARAMETER DESCRIPTION
embedded	True or False	True	<p>Controls whether or not the slider will embed itself in the document in the default right-side, vertically-centered position.</p> <p>If set to True, Contact Us will be embedded in the default location.</p> <p>If set to False, Contact Us will be embedded in the location specified in the target parameter.</p>
target	The ID attribute of the target	contactslider	<p>Sets the target in which Contact Us renders. By default, this value is contactslider.</p> <p>If the target is not present or empty, the slider is created in the center of the viewable area.</p>
vmode	True or False	True	<p>Controls whether or not Contact Us renders in the standard display or the horizontal display.</p> <p>If set to True, Contact Us renders in the standard display.</p> <p>If set to False, Contact Us renders in the horizontal display.</p> <p>NOTE: vmode overrides the setting of UseVerticalBusinessLinesFirst in contactus.config.js</p>
csspath	File path	<drive>:\Program Files (x86)\Mitel\MiContact Center\WebSites\Ccmwa\Content\	<p>Path to ContactUs.css. If left blank or excluded, the default ContactUs.css in <drive>:\Program Files (x86)\Mitel\MiContact Center\WebSites\Ccmwa\Content is used.</p>

Table 16: MiCCSideSlider JavaScript options (continued)

PARAMETER NAME	PARAMETER VALUE	DEFAULT VALUE	PARAMETER DESCRIPTION
imgpath	Folder path	<drive>:\Program Files (x86)\Mitel\MiContact Center\WebSites\Ccmwa\Content\images	<p>Path to where slider button images are stored on your corporate web server.</p> <p>If left blank or excluded, the default images on the Enterprise from <drive>:\Program Files (x86)\Mitel\MiContact Center\WebSites\Ccmwa\Content\images\ will be used.</p> <p>For more information on custom images, see "Adding custom images" on page 155.</p>
imgmod	suffix	Blank	<p>Text to append to the end of the standard image name used for the slider in/out images so you can implement custom versions. Images must be .png files. For more information on custom images, see "Adding custom images" on page 155.</p>
jspath	File path	<drive>:\Program Files (x86)\Mitel\MiContact Center\WebSites\Ccmwa\Scripts\	<p>Path to folder containing contactus.config.js. If left blank or excluded, the default folder will be used.</p>
config	File path	<drive>:\Program Files (x86)\Mitel\MiContact Center\WebSites\Ccmwa\Scripts\contactus.config.js	<p>The file path to the contactus.config.js file to be used with Contact Us.</p> <p>If left blank, the default contactus.config.js file in the folder specified in jspath will be used.</p>
promptafter	Number in milliseconds	0	<p>The amount of time before the slider automatically slides out.</p> <p>If set to 0 or omitted, the slider will not automatically slide out.</p>

The following procedure assumes you have already added your business lines and queues to a copy of contactus.config.js, optionally updated the style in ContactUs.css, and placed your JavaScript and CSS files in the desired location.

To add the slider to an existing webpage

1. Open the webpage you are adding the slider to in an HTML editor.
2. Add the following script reference in the body of the webpage:
`<script src="ccmwa/scripts/miccsideslider.js"></script>`
3. If you are using JavaScript and CSS files other than the default, update the script references with parameters indicating the file locations.
For information on MiccContactUs.js parameters, see Table 16.
4. Save and close the HTML editor.

Adding custom images

MiccSideSlider can use custom images, either through replacing the default images on the Enterprise Server or by using parameters on the JavaScript call to MiccSideSlider.js to instruct us different images. The following images can be customize with MiccSideSlider.js:

- Contact_Us_Slider_Expand.png
- Contact_Us_Slider_Minimize.png

Custom images must have the same name as the original images or else have the same name with the imgmod suffix applied. Custom images must be stored in the same folder.

Obtaining Queue GUIDs

Each queue in your contact center has a unique identifier that Contact Us requires to connect the functions of queue icons with the individual queues they represent.

To obtain a queue GUID

1. In YourSite Explorer, click **Multimedia=>Queues**.
2. Select a queue.
3. In the ribbon, click **Queue Tools**.
4. Click **Copy queue ID**.
The queue GUID is copied to your clipboard.

TROUBLESHOOTING MULTIMEDIA CONTACT CENTER WEB FEATURES

When troubleshooting Multimedia Contact Center web features, the following method is recommended for verifying if issues are with the Multimedia Contact Center deployment or with the deployment of SSL, reverse proxies, or firewalls.

To troubleshoot Multimedia Contact Center web features

1. Test Chat and/or Contact Us locally on the Enterprise Server with no reverse proxy, SSL, or firewall.
2. If your deployment uses SSL, add SSL and test Chat and/or Contact Us on the Enterprise Server with no reverse proxy or firewall.
3. Add your reverse proxy and test Chat and/or Contact Us externally.
4. Add your firewall and test Chat and/or Contact Us externally.

MULTIMEDIA ROUTING USING VISUAL WORKFLOWS

Multimedia Contact Center enables routing using a visual workflow designer. Administrators can configure Inbound, Inqueue, and Response workflows by dragging and dropping activities onto a Workflow Canvas.

Workflows enable flexible routing of email, chat, and SMS contacts to the queues and agents best suited to handle them. For examples of how Inbound, Inqueue, and Response workflows create the routing rules for email, chat, and SMS contacts, see "Multimedia Contact Center default workflows" on page 212. For information on configuring the activities that comprise workflows, see "Activity list" on page 176.

WORKFLOW TYPES

The following workflow types are available in Multimedia Contact Center.

Inbound workflows – Determine the first paths contacts follow to reach destinations in an organization. Inbound workflows can search the properties of incoming contacts and determine the destinations to which these contacts should be directed, for example a sales team or a support team. Inbound workflows also support other actions such as sending response messages, running executable scripts, and performing database queries.

Inqueue workflows – Determine the conditions for routing contacts in queue to agents. Examples include when to overflow contacts to different queues, when to requeue a contact, when to interflow contacts to different agent groups, and when to transfer contacts to available agents. Inqueue workflows are executed once contacts have been delivered from the Inbound workflow to their queue destinations.

Inqueue workflows support push, pick, and mixed routing models.

- In push models, the system offers contacts waiting in queue to available agents
- In pick models, agents select their contacts from queues
- In mixed models, agents select their contacts from queues, but contacts waiting in queue past a specified time are offered to available agents

Response workflows – Enable post-contact options and activities. Performed by queues after a contact has been handled, Response workflows enable the automation of processes such as removing fields from the system or writing data to an external source, inserting information about the handled contact into the database, or emailing a transcript from a chat session.

WORKFLOW LAYOUTS IN MULTIMEDIA CONTACT CENTER

Administrators can easily view and navigate workflows and workflow layouts in Multimedia Contact Center using the following features, as described in this section:

- A customizable workspace
- The Outline pane
- The Search field

- Focusing and breadcrumbs
- The Overview window and Pan function
- The Zoom feature
- The Expand All, Collapse All, and Restore buttons

The following takes place in Multimedia=>Workflows.

CUSTOMIZING THE MULTIMEDIA WORKSPACE

New workflows open as separate tabs in Multimedia Contact Center, freeing up visual space and showcasing individual workflows on-screen. Administrators can open an existing workflow in a dedicated tab by double-clicking the workflow, by right-clicking the workflow and selecting 'Open', or by selecting the workflow and clicking 'Edit'. This maximizes the space devoted to viewing workflows.

Toolbar, Properties, and Outline panes can be minimized, expanded, or pinned to the workspace. This enables administrators to choose how much of the screen is comprised of the workflow versus configuration panes. These enhancements enable administrators to customize their workspaces and manage screen space to better facilitate their work.

VIEWING WORKFLOWS AT A GLANCE: THE OUTLINE PANE

The Outline pane displays workflows in a binary search tree format. Administrators can selectively view the workflow and the parent-child relationships of activities and conditions by expanding or minimizing individual items in the tree. By providing an overview of the workflow in a compact space, the Outline pane enables administrators to efficiently view complex workflows and the relationships between activities.

Administrators can configure activities or branches directly from the Outline pane by selecting the activity in the tree and clicking the Properties pane and by right-clicking the activity in the search tree. Right-clicking also highlights the activity in the workflow, providing a clear means of referencing a specific activity being configured. If, for example, the workflow has several similar activities, highlighting minimizes errors by helping administrators confirm they are configuring the correct activity.

LOCATING WORKFLOW ITEMS: THE SEARCH FIELD

Administrators can locate specific activities and branches in workflows using the Outline pane's Search field. The Search field returns results based on workflow items' names and system names.

Searches can be performed based on complete or partial search terms. For example, searching 'sched' will return results for all workflow items containing 'Schedule' in the name or system name.

After locating an item in the Search field, administrators can edit the item either by right-clicking it or by toggling to the Properties pane.

To locate workflow items using the Search field

1. Click **Multimedia=>Workflows**.
2. Select a workflow and click **Outline**.
3. In **Search Outline**, type the search term and click the **Search** icon.

VIEWING SPECIFIC PORTIONS OF A WORKFLOW: FOCUSING AND THE BREADCRUMB VIEW

Administrators can devote the entire Canvas to viewing specific portions of a workflow by double-clicking activities or branches on the Canvas. This feature enables focusing on precise elements of complicated workflows and minimizes the need to use subroutines solely to conserve viewing space.

When focusing on an activity or branch, the Workflow Canvas opens in a Breadcrumb view. Breadcrumbs at the top of the Canvas indicate the portion of the workflow being viewed and the parent elements of those portions. After focusing on a specific portion of the workflow, the view of the workflow can be incrementally expanded by tracing back through parent relationships using breadcrumbs. Administrators can also right-click an activity and select 'Go To Parent'. The Breadcrumb view provides an ordered way of redirecting focus in the workflow from precise elements to the bigger picture.

Note that when working in the Breadcrumb view, only the items in focus can be configured. In order to configure other items in the workflow, select the breadcrumb that brings the item into focus. (See Figure 16.)

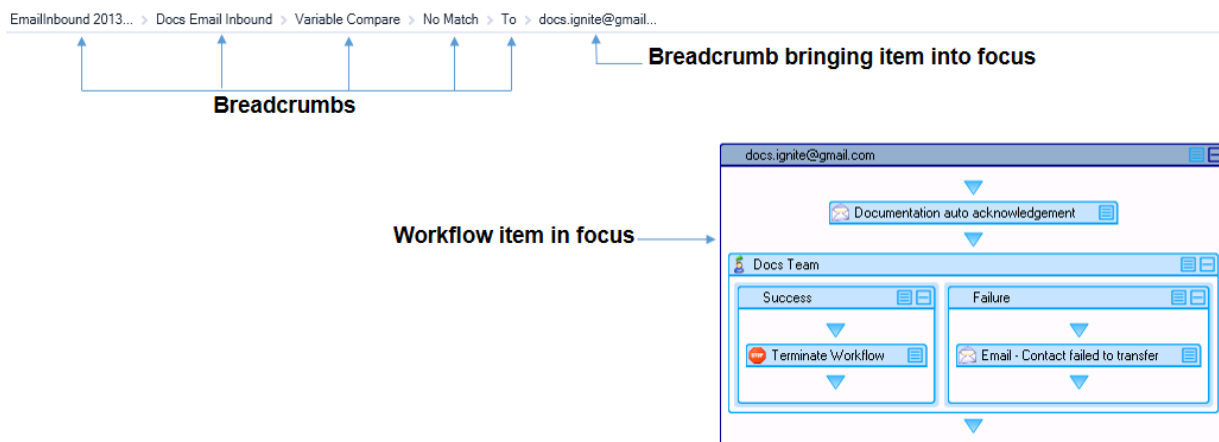


Figure 16: Focusing and the Breadcrumb view

NAVIGATING THE WORKFLOW CANVAS: THE MINIMAP WINDOW AND THE PAN MODE

The MiniMap window and the Pan mode enable administrators to navigate to sections of a workflow without manipulating the horizontal and vertical scroll bars. The MiniMap window displays the workflow in a pop-out that can be used to navigate the Workflow Canvas.

To navigate the Workflow Canvas using the MiniMap window

1. Click **Multimedia=>Workflows**, and select a workflow.
2. Click the **MiniMap** button, located to the right of the plus sign at the bottom of the window.
3. Click and drag the highlighted section over the workflow, as it appears in the MiniMap window.
4. To exit out of the MiniMap window, click the **MiniMap** button.

The Pan mode enables administrators to 'grab' the Workflow Canvas and, using the mouse, choose what portion of the workflow is centered on the Canvas without worrying about dragging activities around the workflow in the process.

To navigate the Workflow Canvas using the Pan mode

1. Click **Multimedia=>Workflows**, and select a workflow.
2. Click the **Toggle Pan Mode** button, located to the left of the '100%' at the bottom of the window.
The cursor displays as a hand icon.
3. Click anywhere on the Workflow Canvas to 'grab', and move the mouse to re-center the workflow.
4. To exit out of Pan, click the **Toggle Pan Mode** button.

RESIZING WORKFLOWS: THE ZOOM FEATURE

You can adjust how large or small a workflow appears in the Workflow Canvas by manipulating the slider bar at the bottom of the Canvas or by pressing the plus and minus signs alongside the bar. Using this feature, administrators can zoom in to focus on precise elements of the workflow or zoom out to get a bird's eye view. Expressed as a percentage, the zoom feature also determines the expanse of the highlighted section of the Overview window. For more information, see "Navigating the Workflow Canvas: The MiniMap window and the Pan mode" on page 158.

MANIPULATING ALL ACTIVITIES IN A WORKFLOW: THE EXPAND ALL, COLLAPSE ALL, AND RESTORE BUTTONS

Administrators can expand or collapse every activity and its corresponding branches in a single operation by clicking the Expand All or Collapse All buttons. Clicking the Restore button returns the workflow to the condition it was in before the activities were expanded or collapsed, enabling administrators to resume their work efficiently.

DESIGNING AND MANAGING WORKFLOWS: COMMON PROCEDURES

Several procedures for designing and managing workflows are common across workflow types. For example, common procedures include creating workflows, naming workflows, deleting workflows, and importing and exporting workflows. See the following sections for common workflow procedures in Multimedia Contact Center.

We recommend that administrators perform actions for designing workflows from the

- Inbound Routing and Response Routing tabs on the Media servers page, for Inbound and Response workflows
- Routing tab on the Queues page, for Inqueue workflows

We recommend that administrators perform actions for managing workflows from the Workflows page, located by selecting **Multimedia=>Workflows**.

CREATING WORKFLOWS IN MULTIMEDIA CONTACT CENTER

We recommend administrators modify the default workflows that ship with Multimedia Contact Center. However, in some instances, administrators may be required to create new workflows.

NOTE: When creating Inbound email workflows, ensure they contain either a Transfer, a Junk Email, or a No Reply Email activity. If they do not, email contacts will remain in system storage, using system memory and causing performance issues.

To create a workflow in Multimedia Contact Center

1. Click **Multimedia=>Workflows=>Add**.
2. Select the media and workflow type.
For example, 'Email=>Inbound'.
3. In the **Properties** pane, provide a **Name** and a **System Name** for the workflow. The Name and System Name must be unique.
4. Click **Save**.

COPYING WORKFLOWS

Administrators can reuse workflows as templates by copying and pasting them in Multimedia Contact Center. A copied workflow retains all activities and branching conditions of the original workflow, but is not assigned to a media server. Administrators can assign workflows to media servers and queues in the Workflows page. See "Associating workflows to media servers" on page 162 and "Associating workflows to queues" on page 163.

To copy a workflow

1. Click **Multimedia=>Workflows**.
2. Right-click the workflow and select **Copy**.
3. Right-click anywhere in the workflow list and select **Paste**.
4. Click **Save**.

DELETING WORKFLOWS

Deleting workflows removes the workflow and all its activity configurations from Multimedia Contact Center. Deleting live Inbound workflows stops contacts from routing to queues, and deleting live Inqueue workflows stops contacts from reaching agents.

To delete a workflow

1. Click **Multimedia=>Workflows**.
2. Select the workflow and click **Delete**.
3. When prompted, click **OK**.

IMPORTING AND EXPORTING WORKFLOWS

Administrators can import workflows to Multimedia Contact Center from a machine or network. After importing a workflow, administrators must configure its activities with information specific to the contact center and assign the workflow to a media server.

Administrators can export workflows from Multimedia Contact Center to save on a machine or network. Exported and saved workflows can be imported. Administrators should assess any validation errors, to ensure the workflow is fully configured. See "Validating workflows" on page 162 for more information.

To import a workflow

1. Click **Multimedia=>Workflows**.
2. Click the **Import** button, browse to the workflow .xaml file, and click **Open**.
3. Click **Save**.

To export a workflow

1. Click **Multimedia=>Workflows**.
2. Click the **Export** button, browse to the workflow .xaml file and select it.
3. Browse to the location to which the workflow will be saved and click **Save**.

NAMING WORKFLOWS

For administrative and reporting purposes, you must give workflows unique names and system names. A system name is used by Multimedia Contact Center to identify the workflow. A name labels the workflow for the user to see.

To name a workflow associated to a media server

1. Click **Multimedia=>Media servers**.
2. Select the Media server and select either **Inbound Routing** or **Response Routing**.
3. In the **Properties** pane, provide a **Name** and **System Name** for the workflow. The Name and System Name must be unique.
4. Click **Save**.

To name a workflow associated to a queue

1. Click **Multimedia=>Queues**.
2. Select the queue and select **Routing**.
3. In the **Properties** pane, provide a **Name** and **System Name** for the workflow. The Name and System Name must be unique.
4. Click **Save**.

To name a workflow not associated to a media server or queue

1. Click **Multimedia=>Workflows** and select the workflow.
2. Click **Properties** and type a **Name** for the workflow. The Name must be unique.
3. Type a **System Name** for the workflow. The System Name must be unique.
4. Click **Save**.

VALIDATING WORKFLOWS

Multimedia Contact Center validates workflows to ensure they do not contain programming or configuration errors before going live. To execute a workflow, workflow validation must be enabled. Workflow validation is also required to successfully offer email, chat, and SMS contacts to agents. By default, workflow validation is not enabled. This allows administrators to configure and save workflows in progress.

If validation is enabled, workflows with errors cannot be saved until the errors are corrected. If validation is not enabled, workflow with errors can be saved.

Red exclamation marks on activities indicate configuration errors to be corrected. Yellow exclamation marks on activities indicate warnings. Clicking the 'Validation' button opens a pane explaining the workflow's errors and warnings.

The pane lists the number of errors and warnings, the activity to which the error or warning is associated, and what is required to fix the problem. Double-clicking the error and warning information in the Validation pane brings the specific activity into focus, for ease of identification. For more information on focusing, see "Viewing specific portions of a workflow: Focusing and the Breadcrumb view" on page 158.

To validate a workflow

1. Select **Multimedia=>Workflows**.
2. Select the workflow and, in the **Properties** pane, select the **Validate workflow** check box.
3. Click **Save**.

SAVING AND COPYING WORKFLOWS AS IMAGES

Administrators can save workflows as images in JPG, PNG, GIF, and XPS formats. Workflow images can also be copied onto the clipboard, to be pasted into other programs. Saving or copying workflows enables administrators to easily reference, share, and print workflow designs.

To save workflows as images

1. Right-click on the active portion of the Workflows Canvas and select **Save as Image...**
2. Select the desired image type for the workflow.
3. Navigate to the location to which the image will be saved, and click **Save**.

To copy workflows as images

- Right-click on the active portion of the Workflows Canvas and select **Copy as Image**.
The workflow can be pasted into another program.

ASSOCIATING WORKFLOWS TO MEDIA SERVERS

Inbound and Response workflows must be associated to a media server of an appropriate type in order to go live in the system.

We recommend building inbound and response workflows from the Inbound Routing and Response Routing tabs on the Media servers page. This automatically associates the workflow to the server. However, workflows built from the Workflows page can be associated to the server as follows.

NOTE: Workflows execute once validation is enabled and any programming and configuration errors are corrected. For more information, see "Validating workflows" on page 162.

To associate a workflow to a media server

1. Click **Multimedia=>Workflows**, and select the Inbound or Response workflow.
2. Click **Media Server Membership**.
3. Under **Available members**, select the media server and click **>**.
4. Click **Save**.

ASSOCIATING WORKFLOWS TO QUEUES

Inqueue workflows must be associated to at least one queue in order to go live in the system. We recommend associating a single Inqueue workflow to a single queue. This avoids the potential confusion of having changes to an Inqueue workflow reflected in multiple queues. If you associate an Inqueue workflow to a queue that already has an Inqueue workflow associated to it, the newly associated Inqueue workflow replaces the existing Inqueue workflow.

We also recommend modifying an Inqueue workflow from the Routing tab of a selected queue. This automatically associates the workflow to the queue. Workflows built from the Workflows page can be associated to queues as follows.

NOTE: Workflows execute once validation is enabled and any programming and configuration errors are corrected. For more information, see "Validating workflows" on page 162.

To associate a workflow to one or more queues

1. Select **Multimedia=>Workflows**, and select the Inqueue workflow.
2. Click **Queue Membership**.
3. Under **Available members**, select the queues to which the workflow is associated and click **>**.
To associate all queues to the workflow, click **'>>'**.
4. Click **Save**.

BUILDING SUBROUTINES

Subroutines represent a sequence of routing conditions in a workflow. Using subroutines, administrators can efficiently apply a set of activities multiple times within a single workflow and across workflows of the same media and workflow type. For example, an administrator can implement an Email Inqueue subroutine in multiple Email Inqueue workflows.

To build subroutines, administrators drag and drop activities on a Canvas and configure them with routing conditions. Activity availability varies by media type. For more information on activities in multimedia routing, see "Building visual workflows in Multimedia Contact Center: Activities" on page 170.

The following procedures explain how to

- Implement subroutines in workflows
- Edit and delete subroutines
- Import and export subroutines

NOTE: Variables in Response workflows/subroutines are based on the agent's reply, not the customer's original contact. For example, in Inbound and Inqueue workflows/subroutines the <<From>> variable populates with the customer's sending address. The <<To>> variable populates with the queue's address. In Response workflows/subroutines, the <<From>> variable populates with the queue's address and the <<To>> variable populates with the customer's address.

IMPLEMENTING SUBROUTINES IN WORKFLOWS

Subroutines are implemented in workflows via Subroutine activities. Administrators can implement a single subroutine at multiple points in a workflow and across multiple workflows. However, subroutines must be of the same workflow and media type. For example, an administrator can only implement an Inbound Email subroutine in an Inbound Email workflow.

Administrators must first add a Subroutine activity to a workflow. A subroutine of the appropriate media type can then be assigned to the activity. When the workflow reaches the Subroutine activity, the subroutine executes. For more information, see "Executing subroutines with the Subroutine activity" on page 204.

EDITING AND DELETING SUBROUTINES

Administrators should note the following:

- Edits to subroutines implemented in workflows are applied to each subroutine instance in each workflow.
- Subroutines implemented in workflows cannot be deleted. To delete subroutines, administrators must first remove the subroutine from all workflows using it.

To edit a subroutine

1. Click **Multimedia=>Subroutines**.
2. Select the subroutine, and click **Edit**.
3. Make any changes to the subroutine and click **Save**.

To delete a subroutine

1. Click **Multimedia=>Subroutines**.
2. Select the subroutine, and click **Delete**.
3. When prompted, click **OK**.

IMPORTING AND EXPORTING SUBROUTINES

Administrators can import subroutines to Multimedia Contact Center from a machine or network. After importing a subroutine, administrators must configure its activities with information specific to the contact center. Imported subroutines display on the Multimedia tab's Subroutines page.

Administrators can export subroutines from Multimedia Contact Center to save on a machine or network. Exported and saved subroutines can be imported.

To import a subroutine

1. Click **Multimedia=>Subroutines**.
2. Click the **Import** button, browse to the subroutine .xaml file, and click **Open**.
3. Click **Save**.

To export a subroutine

1. Click **Multimedia=>Subroutines**.
2. Click the **Export** button, browse to the subroutine .xaml file and select it.
3. Browse to the location to which the subroutine will be saved and click **Save**.

VIEWING SUBROUTINES BY TYPE

Administrators can view subroutines selectively by type, by applying filters to the Subroutines page. For more information, see "Viewing devices by category or type" on page 36.

CONFIGURING DATA PROVIDERS

You can create a connection to a data provider located on a local or an external server to access information about incoming callers. For example, the data providers query can be configured to retrieve customer information based on variables.

Multimedia Contact Center can add the following as data providers to query for data:

- Microsoft Excel worksheets
- Microsoft SQL servers
- Lightweight Directory Access Protocol (LDAP)

Multimedia Contact Center also supports the following platforms as generic data providers to query for data:

- SAP
- Salesforce
- Microsoft Dynamics CRM

Multimedia Contact Center can also import ODBC connections configured using the Windows ODBC Data Source Administrator. Multimedia Contact Center supports the following reference platforms for ODBC connections:

- IBM DB2
- Oracle Database
- MySQL
- Microsoft Access
- PostgreSQL

ADDING A MICROSOFT EXCEL WORKSHEET AS A DATA PROVIDER

Administrators can add Microsoft Excel worksheets as data providers the system can query.

To add a Microsoft Excel worksheet as a data provider

1. In the left pane, click **Multimedia=>Data providers**.
2. Click **Add** and select **Excel** from the drop-down list.
A new data provider is added to the data provider list.
3. After **Name**, type a name for the data provider.
4. Click **Select File** and browse to the Excel worksheet you want to use as a data provider.
NOTE: The Excel worksheet must be shared as a workbook and located on a UNC (Universal Naming Convention) path, also known as a shared network path. The syntax for a UNC path is
\\ComputerName\SharedFolder\Resource. Locating the worksheet on a UNC enables Multimedia Contact Center to access the data provider remotely.
5. Click **Open**.
6. Click **Test Connection**.
7. Click **Save**.

ADDING A MICROSOFT SQL SERVER AS A DATA PROVIDER

Administrators can add Microsoft SQL Servers as data providers the system can query.

To add a Microsoft SQL Server as a data provider

1. In the left pane, click **Multimedia=>Data providers**.
2. Click **Add** and select **Microsoft SQL Server** from the drop-down list.
3. After **Name**, type a name for the data provider.
4. After **Server Name**, enter the server name.
5. Under **Log on credentials**, select **Windows Authentication** or **SQL Server Authentication**.
6. If you select SQL Server Authentication, enter a **Username** and **Password**.
7. Click **Test Connection**.
8. After **Database Name**, select a database name from the drop-down list.
9. Click **Save**.

ADDING A LDAP AS A DATA PROVIDER

Administrators can add LDAP as a data provider the system can query.

To add a LDAP as a data provider

1. In the left pane, click **Multimedia=>Data providers**.
2. Click **Add** and select **LDAP** from the drop-down list.
A new data provider is added to the data provider list.

3. After **Name**, type a name for the data provider.
4. After **Domain**, type the domain of the LDAP.
5. After **Username**, enter the username for the LDAP.
6. After **Password**, enter the password for the LDAP.
7. Click **Test Connection**.
8. On the ribbon, click **Save**.

ADDING A GENERIC DATA PROVIDER

Salesforce, Microsoft Dynamics CRM, and SAP can be added as generic data providers in YourSite Explorer. Generic data providers have certain limitations on the SQL language for queries. Consult the following KB articles for the SQL language supported for these data providers:
<http://micc.mitel.com/kb/KnowledgebaseArticle52371.aspx>.

To add a generic data provider

1. Click **Multimedia=>Data providers**.
2. Click **Add** and select **Generic** from the drop-down list.
3. Type a **Name** for the data provider.
4. After **Type**, select a data provider.
5. Type the **User Name** of the data provider.
6. Type the **Password** for the data provider
7. After **Other Settings**, enter the data provider-specific information.
 - **SAP**: Enter the client number, the system number, and the connection type, separating the values by semi-colons. For example: 250;25;SOAP
 - **Salesforce**: Enter your security token.
 - **Dynamics CRM**, enter the CRM version. For example, CRM Online Office 365.
8. Enter the connection's **Url**.
9. To test the connection, click **Test Connection**.
10. Click **Save**

ADDING AN ODBC AS A DATA PROVIDER

ODBC connections can be added as a data provider through the Windows ODBC Data Source Administrator. After adding an ODBC using ODBC Data Source Administrator, the ODBC will automatically appear in data source providers and will be made available for the Query activity.

You cannot edit an ODBC data provider in Multimedia Contact Center.

NOTE: When adding an ODBC connection for Multimedia Contact Center, you must use the 32-bit Windows Server tool. For more information, see the following Mitel Knowledge Base article:
<http://micc.mitel.com/kb/KnowledgebaseArticle52125.aspx>

DELETING DATA PROVIDERS

NOTE: Multimedia Contact Center is unable to delete ODBC data providers from the data providers list.

To delete a data provider

1. Select the data providers you want to delete from the data providers list.
2. Click **Delete**.
3. When prompted, click **OK**.

WORKING WITH VARIABLES IN MULTIMEDIA CONTACT CENTER

Variables populate subroutines and incoming workflows with data related to inbound contacts. Administrators can use variables to flag incoming contacts, store information for later use, collect customer data, perform database queries, and build simple or complex conditions to route contacts.

Multimedia Contact Center ships with System variables relevant to all media types and variables specific to media types. To view these variables and see a description of each, open YourSite Explorer and go to Multimedia=>Variables.

Administrators can

- Create custom variables
- Edit and delete variables
- View variables by category

NOTE: Variables in Response workflows/subroutines are based on the agent's reply, not the customer's original contact. For example, in Inbound and Inqueue workflows/subroutines the <<From>> variable populates with the customer's sending address. The <<To>> variable populates with the queue's address. In Response workflows/subroutines, the <<From>> variable populates with the queue's address and the <<To>> variable populates with the customer's address.

CREATING CUSTOM VARIABLES

Administrators can create new, customized variables for use in workflows and subroutines.

To create a custom variable

1. Click **Multimedia=>Variables=>Add**.
2. Type a **Name** for the variable.
NOTE:
 - Variable names must be unique and cannot contain spaces.
 - A variable's name cannot be changed after you save.
3. Type a **Description** explaining the variable's function.
4. Select a **Variable Type** from the drop-down list.
NOTE: The Variable Type cannot be changed once saved.

5. If **Mask Type** is available to this type of variable, select the variable's mask from the drop-down list.
 - **NoMask**– The variable will not be masked within Multimedia Contact Center and associated screen pops, databases, etc.
 - **FullMask**– The entire variable will be masked within Multimedia Contact Center and associated screen pops, databases, etc.
 - **MaskAllExceptLastX**– The variable will be masked except for the specified number of final characters
 - **MaskAllExceptFirstX**– The variable will be masked except for the specified number of first characters
6. If you selected **MaskAllExceptLastX** or **MaskAllExceptFirstX**, specify the number of characters to be left unmasked.
7. To enable this variable to display in a toaster notification or screen pop select the **Send to agent desktop** check box.
8. After **Display Name**, type the name this variable has when it appears in a toaster notification or screen pop.
9. If you selected Dollars, Euros, or Pounds as the variable type, after **Currency Format**, select the format from the drop-down list.
10. If you selected Date Time as the variable type, after **Date Format**, select the date format from the drop-down list. After **Time Format**, select the time format from the drop-down list.
11. Click **Save**.

EDITING AND DELETING VARIABLES

Administrators should note the following limitations:

- 'Variable Type' cannot be edited for previously saved variables.
- System variables cannot be deleted.

To edit a variable

1. Click **Multimedia=>Variables**.
2. Select the variable, and click **Edit**.
3. Edit the variable and click **Save**.

To delete a variable

1. Click **Multimedia=>Variables**.
2. Select the variable, and click **Delete**.
3. When prompted, click **OK**.

VIEWING VARIABLES BY CATEGORY

Administrators can view variables selectively by category, including System, Custom, and media type, by applying filters to the Variables page. For more information, see "Viewing devices by category or type" on page 36.

BUILDING VISUAL WORKFLOWS IN MULTIMEDIA CONTACT CENTER: ACTIVITIES

Multimedia Contact Center's activities are used to build workflows and configure routing conditions for contacts. For example, activities can send automatic responses to incoming contacts, transfer contacts to queues, and offer contacts to the agents best suited to answer them. The following sections describe the activities in Multimedia Contact Center and how to configure them.

Note that activity availability varies by media and workflow type. For example, administrators can use the Ask activity in a Chat workflow but not in an Email workflow. The Offer to Agent Group activity can be used in an Inqueue workflow but not in an Inbound workflow.

Multimedia Contact Center ships with default workflows. We recommend administrators create workflows by duplicating and modifying reconfiguring, adding, and deleting activities in the default workflows to suit the contact center's needs. For more information, see "Multimedia Contact Center default workflows" on page 212.

COMMON CONFIGURATION PROCEDURES

This section explains configuration procedures common to activities, branches, and branching conditions.

NOTE: Branches route contacts to different portions of a workflow. Branching conditions represent the circumstances a contact must match to follow a particular branch.

Common activity options include

- Adding and removing expressions
- Selecting expressions
- Grouping expressions
- Adding activities to workflows
- Cutting, copying, and pasting activities and branches
- Deleting activities and branches from workflows
- Naming activities and branches
- Editing branching conditions
- Changing the order in which branches are evaluated
- Reporting on branches and branching conditions
- Annotating activities and branches

Building conditions

Many features in Multimedia Contact Center require users to configure conditions. These include:

- Schedule conditions
- Queue conditions
- Variable compare conditions

While the individual types of expressions that can be added to conditions and their configuration may vary between the conditions being built, Multimedia Contact Center's interface for adding, deleting, and grouping expressions remains consistent throughout Multimedia Contact Center.

Adding and removing expressions

To add an expression

- Click the **Add** button.
An expression is added to the condition.
NOTE: When an expression is added, it is highlighted in red if it requires additional configuration.
The expression will remain highlighted in red until completely configured.

To remove an expression

- Select the expression you want to delete and click the **Delete** button.
The expression is removed from the condition.

Selecting expressions

The following explains how to select expressions when building conditions.

To select an expression

1. Click the expression's drop-down menu button.
2. Choose **Select/Deselect Row**.

Alternatively,

- Click the expression's selector column on the left side of the expression's row.

Understanding operators

Multimedia Contact Center offers a number of different operators to use when building conditions. Table 17 outlines the operators available with Multimedia Contact Center.

Table 17: Operators

OPERATOR	USE
!=	With this operator the expression will only look for value that do not match the exact value entered. This operator is case-sensitive.
=	With this operator the expression will look only for the exact value entered in the expression. This operator is case-sensitive. If this operator is being used in a comparison, then the expression will look for an exact string match between the two items being compared.
Contains	With this operator, the expression matches values that contain the entered string. It is not case-sensitive.
Length	With this operator the expression will look for a value with the specified number of characters.
Starts With	With this operator, the expression will look for any value that starts with the entered value.

Grouping expressions

Multimedia Contact Center enables users to group expressions, facilitating construction of detailed and specific conditions. While grouping is associated with a number of different activities, configurations, and dialogs, the grouping clauses are consistent throughout Multimedia Contact Center. Expressions within a group may also be grouped together to create nested levels of sub-groups within a single group.

NOTE: We recommend you do not exceed eight levels of grouping within a group of expressions even though Multimedia Contact Center is capable of handling greater than eight levels of grouping.

Expressions may be grouped by one of two clauses:

- **AND:** Expressions grouped by the AND clause require that all the expressions in a group be met to successfully meet the condition.
NOTE: If no grouping is selected, the AND clause is applied by default.
- **OR:** Expressions grouped by the OR clause require that only one of the expressions in a group be met to successfully meet the condition.

To group expressions

1. Press the **CTRL** or **Shift** key and select the expressions you want to group. Clicking 'CTRL' enables you to select items one at a time and omit items from selection. Clicking 'Shift' selects a span of items.
2. Click either the **Group AND** or **Group OR** buttons.
NOTE: You can change the grouping clause by selecting the drop-down beside 'And' or 'Or', and changing your selection.

To ungroup grouped expressions

1. Click the group's drop-down menu button.
2. Select **Ungroup**.

To add a new expression to a group

1. Click the group's drop-down menu button.
2. Select **Add**.

NOTE: If you cannot add an expression to an existing group, ungroup the expression and then regroup it with the expression you want to add.

To remove a single expression from a group

1. Click the expression's drop-down menu button.
2. Select **Ungroup**.

Adding activities to workflows

Administrators add activities to workflows by dragging and dropping activities onto the Workflows Canvas. Activity availability varies by media and workflow type. We recommend administrators add activities to Inbound and Response workflows via the Inbound Routing and Response Routing tabs on the Media servers page. We recommend administrators add activities to Inqueue workflows via the Routing tab on the Queues page.

NOTE: Administrators can also access workflows by selecting **Multimedia=>Workflows**.

The following explains how to add activities to Inbound, Response, and Inqueue workflows

To add an activity to an Inbound or Response workflow

1. Click **Multimedia=>Media servers** and select the media server associated to the workflow.
2. Drag the activity from the **Toolbox** to the Workflows Canvas.
3. Configure the activity and validate any configuration errors. For more information, consult the configuration procedures for specific activities in this guide. See also "Validating workflows" on page 162.
4. Click **Save**.

To add an activity to an Inqueue workflow

1. Click **Multimedia=>Queues** and select the queue associated to the workflow.
2. Drag the activity from the **Toolbox** to the Workflows Canvas.
3. Configure the activity and validate any configuration errors. For more information, consult the configuration procedures for specific activities in this guide. See also "Validating workflows" on page 162.
4. Click **Save**.

Cutting, copying, and pasting activities and branches

Administrators can cut, paste, and copy activities within and between workflows. Administrators can also copy or cut a branch from one activity and paste it into other activities within and between workflows. This functionality enables administrators to create and edit workflows efficiently by duplicating preconfigured activities and their branches.

NOTE: Some activities are specific to media and workflow types. For example, a Say activity is used in Chat workflows but not Email workflows. The Offer to Agent group activity is used in Inqueue workflows but not Inbound workflows. Only cut and paste activities and branches into the appropriate media, workflow, and activity types.

To cut an activity or branch from a workflow

- Right-click the activity or branch and select **Cut**.

To paste an activity inside a workflow

1. Right-click the activity and select either **Copy** or **Cut**.
2. Right-click the activity that will precede the pasted activity, and select **Paste**.

To paste a branch inside an activity

1. Right-click the branch and select either **Copy** or **Cut**.
2. Right click a different branch inside the activity and select **Paste**.
The copied branch is inserted to the right.

Deleting activities or branches from workflows

The following explains how to remove activities or branches from workflows by deleting them.

To delete an activity or branch

1. Right-click the activity or branch and select **Delete**.
2. When prompted, click **OK**.

Naming activities and branches

For administrative and reporting purposes, give activities and branches unique names and system names. A system name is used by Multimedia Contact Center to identify the item and within reporting to identify branches and branching conditions. A name labels an activity, branch, or branching condition for the user to see.

To name an activity, branch, or branching condition

1. Select the activity, activity configuration, or branch.
2. In the activity, configuration, or branch header, type a **Name**.
3. With the item still selected, in the **Properties** pane, type a **System Name**. The System Name must be unique.
NOTE: If a system name is not provided, activities and branches are given sequential system names by default. For example, TerminateActivity1, TerminateActivity2.
4. Click **Save**.

Editing branching conditions

Editing branching conditions changes what is required for a contact to follow the branch.

To edit a branching condition

1. Expand the activity, right-click the branch, and select **Edit**.
2. Select the value to edit and perform one of the following actions
 - Change the condition and value by typing or using the drop-down lists.
 - Add a new condition by clicking **Add** and typing the desired values.
 - Delete a condition by selecting the condition and clicking **Delete**.
3. Click **OK**.
4. Click **Save**.

Changing the order in which branches are evaluated

Administrators change the order in which the system evaluates branches by placing the branches in sequence. The highest priority branch should be in the left-most position, as Multimedia Contact Center evaluates branches in the order of left to right.

To change the order in which branches are evaluated

1. Expand the relevant activity.
2. Drag and drop the branches into the desired position.
3. Click **Save**.

Reporting on branches and branching conditions

Reporting on branches and branching conditions enables supervisors to analyze workflow traffic and determine how contacts are moving through workflows.

You must select 'Child Reporting Enabled' for any branches and conditions on which you want to run Workflow Condition reports. For more information on Workflow reports, see the reports guide appropriate to your MiContact Center licensing level.

Note that system names are used to report on branches and branching conditions. For this reason, we recommend naming branches and branching conditions with unique and easily identifiable system names. For more information on naming, see "Naming activities and branches" on page 174.

To configure an activity or branch for reporting

1. Select the branch or branching condition and, in the **Properties** pane, select the **Reportable** or the **Child Reporting Enabled** check box.
NOTE: Selecting 'Child Reporting Enabled' on parent activities selects all child activities.
2. Click **Save**.

Annotating activities and branches

Administrators can tag activities and branches with notes using the annotation field. Similar to a sticky note, annotations enable administrators to mark an activity with descriptive information. For example, administrators can annotate a Timeout branch to indicate, at a glance, how long before the system times out and where contacts are directed in the workflow once a timeout occurs.

For an example of annotating activities, see the default workflows included with Multimedia Contact Center.

To annotate an activity

1. Click the **Notepad** icon on the activity.
2. Type the annotation in the field provided.
3. Click **Save**.

To delete an entire annotation

- Right-click the activity and select **Annotations...=>Delete**.

To display or hide an individual annotation

- Click the **Notepad** icon on the activity. This closes an open annotation and opens a closed annotation.

To expand all annotations in a workflow

- Right-click an activity and select **Annotations...=>Show All**.

To hide all annotations in a workflow

- Right-click an activity and select **Annotations=>Hide All**.

ACTIVITY LIST

This section describes Multimedia Contact Center activities.

NOTE: Red exclamation marks on activities indicate configuration errors to be corrected. Yellow exclamation marks on activities indicate warnings. Clicking the 'Validation' button opens a pane explaining the workflow's Errors and Warnings.

Asking questions with the Ask activity

The Ask activity enables a workflow to automatically ask questions of contacts and route them based on their responses. The Ask activity is configured with a single question that will be asked by the media server or queue auto response username in a chat session or the media server name or queue phone number in an SMS session. Depending upon their response, the contact is routed down the configured response branches. For example, if you wanted to route a contact in an Inbound chat workflow depending upon what product they were interested in, the question might be set to "Welcome to the Sales queue. If you are interested in Product X, type Product X. If you are interested in Product Y, type Product Y." Depending upon the answer, the contact could be routed down the Product X branch or down the Product Y branch.

The Ask activity can also be used to collect information from contacts. Contact responses are stored in the <<LastDataCollected>> variable. Using a Set Variable activity, this information can be set into other variables for use elsewhere or saved to a database with a Query activity. For more information on Set Variable activities, see "Populating variables with the Set Variables activity" on page 203. For more information on Query activities, see "Querying data providers with the Query activity" on page 193.

URLs entered into the Message field are turned into hyperlinks. Some website content can be embedded into chat sessions using the Ask activity. If a link to a supported website's content, such as a link to a YouTube video, is entered into the Message field, the content is embedded directly into the chat session. The following websites are supported for embedded content in chat:

- <https://twitter.com/>
- <http://www.slideshare.net>
- <https://soundcloud.com>
- <http://www.youtube.com>

NOTE:

- Ignite supports embedding content from Google Maps in chat sessions. However, this requires the use of embed maps URL, available from Google Maps, to embed a Google map, such as: `<iframe src="https://www.google.com/maps/embed?pb=!1m18!1m12!1m3!1d2804.500978803945!2d-75.90911198444678!3d45.3386984790996!2m3!1f0!2f0!3f0!3m2!1i1024!2i768!4f13.1!3m3!1m2!1s0x4cd1fff1517da8a9%3A0xe6bc8a721e90f2a5!2sMitel+Networks!5e0!3m2!1sen!2sus!4v1445531227487" width="600" height="450" frameborder="0" style="border:0" allowfullscreen"></iframe>`
- SMS does not support embedded content.

To configure the Ask activity, you must

- Configure the question to be asked
- Configure the accepted responses from the contact

The Ask activity is available to Chat and SMS Inbound and Inqueue workflows.

Configuring the question to be asked

The Ask activity poses questions to contacts from the automatic response username for the media server or the queue. It is recommended that the question be clearly worded and that if it requires specific responses, that these be listed.

By default, the user can respond incorrectly three times before they are routed down the Failure branch. The Invalid branch informs them that their response was invalid using a Say activity. By default, the user has 30 seconds to respond before they are routed down the Timeout branch and informed, using a Say activity, that they timed out and to try again. By default, users can timeout three times before being routed down the failure branch. For information on configuring the Say activity, see "Responding to contacts with the Say activity" on page 200.

The following procedures explain how to

- Configure the question being asked
- Set how many times the contact can respond incorrectly
- Set how long the user has to respond to the question

To configure the question to be asked

1. Select the **Ask** activity and click **Properties**.
2. After **Question**, click
3. Type the question and click **OK**.
In a chat session, the question will be asked using the chat media server's auto response username or the chat queue's username. In an SMS session, the question will be asked using the SMS media server's name or the SMS queue's phone number.
4. Click **Save**.

To set how many times the contact can respond incorrectly

1. Select the **Ask** activity and click **Properties**.
2. Set the number of **Invalid Attempts** allowed.
3. Click **Save**.

To set how long the user has to respond to the question

1. Select the **Ask** activity and click **Properties**.
2. Set the **Timeout (sec)** duration, in seconds.
3. Set the number of **Timeout Attempts** that can occur.
4. Click **Save**.

Creating response branching conditions

After configuring the question, you must configure the accepted responses the contact may enter to be used as branching conditions. Responses can be a set value or they can be a variable. When using a variable as a response, the Ask activity compares the <<LastDataCollected>> variable to the selected variable as if it were a Variable Compare activity. For more information on the Variables Compare activity, see "Routing contacts with the Variable Compare activity" on page 209. An answer branch may have multiple conditions applied to it. All conditions configured together in a single branch have the 'Boolean And' applied to them.

The following procedures explain how to

- Route contacts by their answer
- Edit a response branching condition
- Delete a response branching condition

To route contacts by an answer

1. Right-click on an **Ask** activity and click **Add Branch**.
2. Enter the **Name** of the branch.
3. Click **Add**.
4. In the second column select one of the following operators from the drop-down list:
 - != Not Equal
 - = Equal**NOTE:** This operator is case-sensitive. If this operator is being used in a comparison, then the expression will look for an exact string match between the two items being compared.

- Contains
 - Length
 - Starts With
5. In the third column, set the **Value** for the answer or select a Variable.
 6. Repeat steps 2-4 for each additional answer value you want to route down this branch.
 7. To enable reporting for this branch, select **Enable reporting**.
 8. If you want to add another branch, click **Add** at the bottom of the window.
 9. Click **OK**.
 10. Click **Save**.

To edit a response branching condition

- Right-click on a branching condition and click **Edit**.

To delete a response branching condition

- Right-click on a branching condition and click **Delete**.

Suspending workflows with the Delay activity

The Delay activity suspends a workflow for a predetermined time. For example, an administrator uses a Delay activity to suspend a workflow, enabling a third-party application to process a command before the workflow continues to an activity requiring that the processing be complete.

The Delay activity is available to all Multimedia Contact Center workflows.

Setting the duration of Delay activities

Setting the duration of Delay activities specifies how long Multimedia Contact Center suspends a workflow.

To specify how long Multimedia Contact Center suspends a workflow

1. Select the **Delay** activity and click **Properties**.
2. Set the **Duration** of the Delay activity, in seconds.
3. Click **Save**.

Sending emails with the Email activity

The Email activity sends emails from within a workflow, with or without attachments, to recipients via an SMTP server connection configured in YourSite Explorer. For example, an administrator can use the Email activity to send auto-acknowledgement messages to inbound emails.

Email activity templates support HTML and text-based content. Template fields can be populated with variables, and attachments can be populated with variables or files.

You can set email properties to avoid sending multiple auto-response emails when an incoming email is queued or transferred.

The Email activity is available to all Multimedia Contact Center workflows.

Adding and editing SMTP server information to the Email activity

The following explains how to add and edit the connection between Multimedia Contact Center and the email account on the SMTP server sending emails.

To add an SMTP server to an Email activity

1. Right-click the **Email** activity and select **Edit SMTP Server**.
2. Select a SMTP server and click **OK**.
3. Click **Save**.

To edit SMTP server information using the Email activity

1. Right-click the **Email** activity and select **Edit SMTP Server**.
2. Select the SMTP server and click **Edit**.
3. Follow the appropriate steps under "Configuring SMTP connections to Multimedia Contact Center" on page 44.

Populating Email activity templates

The following explains how to populate email templates.

NOTE: To see a list of Email variables and their descriptions, go to **Multimedia=>Variables**.

To populate an Email template

NOTE: Email content inserted via the <<Body>> variable in the Email activity is limited to 2MB. After 2 MB, content inserted via the <<Body>> variable is truncated.

1. Right-click the **Email** activity and select **Edit Email Template**.
2. Configure all email fields as applicable.
NOTE: In the To:, Cc:, and Bcc: fields, separate multiple addresses with semi-colons.
3. In the body of the email, type the template's text.
4. To populate fields with variables, right-click the field and select the variable from the drop-down list.
NOTE: When an email with multiple recipients arrives at an Email activity, if the <<To>> variable is used in the From field, no email response will be sent by the Email activity.
5. To indicate the importance of the email message, after **Priority:** select a level from the drop-down list.
NOTE: This option sets a visual indicator of the message's importance in supporting email clients only.
6. Click **OK**.
7. Click **Save**.

To add attachments

1. Right-click the **Email** activity and select **Edit Email Template**.
2. After **Attachments**, click the *Browse* button.
3. To add a variable, click **Attachments** and select the variable.
4. Click **Add**.
5. To add additional variables, repeat steps 3-4.
6. To add a file, click **Browse**.

7. Navigate to the file and click **Open**.
8. To add additional files, repeat steps 6-7.
9. To change the order of the attachments, select the attachment and click **Up** or **Down**.
10. To remove an attachment, select the attachment and click **Remove**.
11. Click **OK**.
12. Click **OK**.
13. Click **Save**.

Configuring email send settings

By default, every time a contact reaches an Email activity in a workflow, an email is sent. Email activities can be configured to only send an email once per contact, so that if that contact reaches the same Email activity again, as a result of a requeue or transfer, the Email activity will not send a second email. New contacts from the same source will still trigger the Email activity to send an email.

To configure auto-response email settings

1. Select the **Email** activity and click **Properties**.
2. Select the **Only Send Once** check box to avoid sending more than one email to the same contact with this activity.
3. Click **Save**.

Ending chat and SMS sessions with the End Session activity

The End Session activity ends an active chat or SMS session without terminating the workflow. For the contact, the conversation ends, but the workflow may continue to post-conversation activities. A Terminate Workflow activity is required to terminate a workflow after the End Session activity.

For example, an administrator uses the End Session activity in an Inqueue chat workflow that only has automated responses from Ask and Say activities to end the contact's chat session with the queue while enabling the workflow to continue to a Query activity that writes a transcript of the contact's conversation back to SQL.

The End Session activity requires no configuration. Administrators can optionally provide the activity with a name and system name. See "Naming activities and branches" on page 174 for more information.

The End Session is available in all Chat and SMS Inbound and Inqueue workflows.

Running external processes with the Execute activity

The Execute activity enables Multimedia Contact Center to interact with external systems by running the following four processes:

- **Executable/Script** – Runs an *.EXE file or *.BAT script on the server and delivers return values or parameters if the script executes successfully.
NOTE: The Execute activity requires *.EXE files and *.BAT scripts to be on a UNC path.
- **PowerShell** – Runs a PowerShell script on the server and delivers return values or parameters if the script executes successfully.
NOTE:
 - The Execute activity requires PowerShell scripts to be on a UNC path.
 - The Execution Policy for PowerShell scripts must be set in the command prompt window of PowerShell to Set-ExecutionPolicy RemoteSigned.
- **Web Service** – Enables the Execute activity to retrieve an XML response from an external web service using SOAP or REST and delivers return values if the script executes successfully.
NOTE: The data being returned must be valid XML characters. Any invalid characters (such as &, <, or >) will not return successfully and the workflow will route down the Failure branch. The XmlNode object type is not supported.
- **CRM Service** – Sends user defined queries to a Microsoft CRM 2011, Microsoft CRM 2013, or Microsoft CRM Online system and delivers return values if the script executes successfully.

For example, an administrator uses the Execute activity to retrieve customer information from a Web Service database. This information is stored in a custom variable for use within the workflow or to pass on to agents in a screen pop for enhanced customer service.

For an example of a workflow that uses the Execute activity to execute PowerShell and perform a web service SOAP call to a publicly accessible web service, see the following Mitel Knowledge Base article: <http://micc.mitel.com/kb/KnowledgebaseArticle52022.aspx>. Although the workflow is for IVR Routing, the configuration of the Execute activity is the same for Multimedia Contact Center workflows.

The Execute activity is available to all Multimedia Contact Center workflows.

NOTE: A success return value indicates the process executed without errors, and the Success branch is followed. A failure return value indicates the process exited with errors and did not complete as expected, and the Failure branch is followed.

Specifying the external processes to execute in workflows

The following procedures explain how to instruct the Execute activity to run

- Executable/Script processes
- PowerShell processes
- Web Service processes
- CRM Service processes

To set an Executable/Script or PowerShell process

1. Right-click the **Execute** activity and select **New Process=>Executable/Script or PowerShell script**.
2. For Executable/Script processes, after **Path**, click the **Browse** button and navigate to the *.EXE or *.BAT script. The script must be on a UNC path.
3. For Executable/Script processes, select the **Separator** required by the .exe file. The separator is the character separating the parameters in the process' command line statement.
4. For PowerShell processes, navigate to the PowerShell script.
5. To add a set of **Input Parameters**, click **Add** and select the **Parameter** the process uses to execute.
NOTE: If batch files or Executable/Script processes require delimiters, they must be entered manually in the Parameter column.
6. Under **Value**, select a variable or type a static value.
NOTE:
 - The variable is replaced when a contact progresses through the workflow.
 - To configure the process to use a value not linked to a parameter, select a variable from the Value field and leave the Parameter field blank.
7. Repeat steps 5 and 6 for each set of input parameters the process uses. To delete a set of parameters, click the arrow to the left of **Parameter** and click **Remove**.
8. Under **Test Value**, enter values to test the process and click **Execute**.
NOTE:
 - For Executable/Script processes, the Results dialog box lists return values and output pipeline values.
 - For PowerShell processes, the Results dialog box lists return values and PSObject[X] values.
9. Click **OK** to auto-populate the Output Mappings pane with Output values.
10. Leave the Process Setup window open and complete the steps under "Storing retrieved data as variables" on page 185.

To set a SOAP Web Service process

1. Right-click the **Execute** activity and select **New Process=>Web Service**.
2. Type the Web Service **URI** and, for the **Web Service Type**, select **SOAP**.
3. If using a SOAP Web Service, click the **Scan** button to verify the Web Service.
4. Select a **Web Method** from the drop-down list. The Web Method populates the Parameters field.
NOTE: SOAP Web Services populate the Web Methods field with a drop-down list of available functions.
5. Under **Value**, select a variable or type a static **Value**.
6. Under **Test Value**, enter values to test the process and click **Execute**.
7. On the results dialog box, click **OK**.
8. Click **OK** to auto-populate the Output Mappings pane with Output values.
9. Leave the Process Setup window open and complete the steps under "Storing retrieved data as variables" on page 185.

To set a REST Web Service process

1. Right-click the **Execute** activity and select **New Process=>Web Service**.
2. Type the Web Service **URI** and, for the **Web Service Type**, select **REST**.
CAUTION: If you are using the Execute activity with a web service as a part of a PCI compliant workflow, ensure that you
 - Use an HTTP Secure (https) address.
 - If the return or input fields of the REST call contain sensitive information, use masked variables in the Input and Output parameters of the Execute activity.Failure to do so could invalidate your PCI compliance.
3. Type the **Username** and **Password** for the Web Service. Login credentials might not be necessary depending on the Web Service used.
4. To add a set of **Headers**, click **Add** and type the **Parameter** the process uses to execute.
5. Under **Value**, select a variable or type a static value.
6. Repeat steps 4 and 5 for each set of headers the REST Web Service process uses.
7. To add a set of **Input Parameters**, click **Add** and type the **Parameter** the process uses to execute.
8. Under **Value**, select a variable or type a static **Value**.
9. Repeat steps 7 and 8 for each set of input parameters the REST Web Service process uses. To delete a set of parameters, click the arrow to the left of **Parameter** and click **Remove**.
10. To test the headers and input parameters, enter values under **Test Value** in Headers and Input Parameters and click **Execute**.
11. In the **XML Output** pane of the **Results** dialog box, select the node containing the information the Execute activity retrieves.
12. After **Selected Node**, click the **Show Results** button.
13. Click **OK** to auto-populate the Output Mappings pane with Output values.
14. Leave the Process Setup window open and complete the steps under "Storing retrieved data as variables" on page 185.

To configure a CRM Service process

1. Right-click the **Execute** activity and select **New Process=>Microsoft CRM**.
2. Type the **CRM URI** used to communicate with the CRM system.
3. Select the **CRM Version**.
4. Complete the following fields:
 - **Domain** – Type the domain name of the CRM site.
NOTE: Domain name is only required for CRM 2011 or 2013.
 - **Operation:** Select the operation the Execute activity is performing
 - **Username** – Type the username for the CRM site login.
 - **Password** – Type the password for the CRM site login.
 - **Entity Name** – Select the name of the CRM entity that the Execute activity queries.

5. To add a set of **Input Parameters**, click **Add** and select the **Parameter** the process uses to execute.
The parameters depend on the Entity Name selected.
6. Under **Value**, select a variable or type a static **Value**.
7. Repeat steps 5 and 6 for each set of input parameters the CRM Service process uses. To delete a set of parameters, click the arrow to the left of **Parameter** and click **Remove**.
8. Under **Test Value**, enter values to test the process and click **Execute**.
The results dialog shows mappings of the parameters to values.
9. Click **OK**.
10. Click **Mapping** to assign the output to variables, and click **OK** to store the data as variables.
11. Click **Save**.

Storing retrieved data as variables

The following procedure explains how to store data retrieved by the Execute activity as a variable. These variables can be used later in the workflow.

To store retrieved data as a variable

1. In the **Process Setup** window, under **Mapping**, select a variable from the drop-down list to correspond to each Output value.
2. Click **OK**.
When a contact progresses through the workflow, each variable in the Mapping field is assigned the value indicated in the Output field.
3. Click **Save**.

Specifying options for following the Success, Timeout, and Failure branches

The following procedure explains how to

- Instruct the system to follow the Success branch before a process completes
- Specify how long a process has to complete successfully before the Failure branch is followed

To specify routing options for the Execute activity's Success, Timeout, and Failure branches

1. Select the **Execute** activity and click **Properties**.
2. After **Timeout (sec)**, type the duration for an associated process to complete successfully before the Failure branch is followed.
3. Click **Save**.

Routing contacts with the From activity

The From activity checks the From: field of inbound emails and performs actions based on specified branching conditions.

For example, an administrator configures a From activity to recognize the email addresses of Platinum customers and route their emails to a Priority queue.

The From activity is available to Email workflows.

Applying branching conditions to the From activity

Applying branching conditions to the From activity enables administrators to

- Direct emails based on specified values
- Direct emails based on variables

To direct an email based on specified values

NOTE: To route based on specific email addresses in the 'From:' field, we recommend selecting 'Contains' and typing an email address for the activity to identify. This option identifies a wide range of content in email 'From:' fields. For example, <<From>> Contains sales@email.com.

1. Right-click the **From** activity and select **Add From Condition**.
2. Type a **Name** for the branching condition and click **Add**.
3. From the second column, select one of the following:
 - **NotEqual (!=)**
For example, administrators can specify that emails not sent from 'prioritysales@email.com' are not sent to the priority sales branch.
 - **Equal (=)**
For example, administrators can specify that emails sent from 'prioritysales@email.com' are directed to the priority branch.
NOTE: If selecting 'Equal', administrators must specify an email address as the '<Value>'.
 - **Contains**
For example, administrators can specify that emails with 'priority' in the From: field are directed to the priority branch.
 - **Length**
For example, administrators can specify that emails sent from addresses longer than 25 characters are directed to a branch for spam.
 - **StartsWith**
For example, administrators can specify that emails sent from addresses starting with 'priority' are sent to the priority sales branch.
4. Click **<Value>** and enter a criterion to branch emails, for example, 'priority'.
5. Click **OK** to create the branch or click **Add** to add the current branch to the workflow while leaving the dialog box open to create new branches.
6. Click **Save**.

To direct an email based on variables

NOTE: Directing emails based on variables requires first inserting and configuring an activity on the Canvas capable of populating the From activity's destination variable. For a list of Email variables, go to Multimedia=>Variables.

1. Right-click the **From** activity and select **Add From Condition**.
2. Type a **Name** for the branching condition and click **Add**.
3. From the second column, select an operator. See the procedure above for a description of each option.
NOTE: To route based on specific variables in the 'From:' field, we recommend selecting 'Contains' and selecting a variable for the activity to identify. This option identifies a wide range of content in email 'From:' fields.
4. From the third column, select **Variable**.
5. Select the variable used to branch emails and click **OK**.
6. Click **OK** to create the branch or click **Add** to add the current branch to the workflow while leaving the dialog box open to create new branches.
7. Click **Save**.

Routing contacts with the Go To activity

The Go To activity sends contacts to an alternate point in the workflow.

For example, an administrator is configuring the Offer to Agent Group activity for an Email Inbound workflow. The Go To activity, embedded in the Offer to Agent Group activity, is set with a destination of the Offer to Agent Group activity. If the system cannot offer an email to an agent, the Go To activity directs the email back to the Offer to Agent Group activity and the system searches again for an agent.

The Go To activity is available to all Multimedia Contact Center workflows.

Specifying the target activity for the Go To activity

The following procedure explains how to specify where the Go To activity sends contacts

To specify where the Go To activity sends contacts

1. Right-click the **Go To** activity and select **Target...**
2. Select the activity to which the Go To activity sends contacts and click **OK**.
3. If you do not want to increase the repeat count of your workflow, for example if your workflow uses embedded menus or the Collect Digits activity, in the **Properties** pane, select the **Reset Repeat Count** check box to give callers an unlimited number of attempts to enter information.
4. Click **Save**.

Configuring parent workflow destinations for subroutine Go To activities

If a Go To activity is placed in a subroutine, it can route contacts to the parent workflow to which the subroutine is assigned by setting its destination as 'Go To Parent Workflow'. A target destination must be set on the Subroutine activity to set where the contacts are routed to in the Parent workflow.

To configure a parent workflow destination for a subroutine Go To activity

1. In the parent workflow, select the **Subroutine** activity.
2. In the **Properties**, after **Target Activity** select the activity to which the subroutine Go To activity returns contacts from the drop-down list.
3. Click **Save**.

Routing contacts with the Interflow activity

The Interflow activity transfers messages that have been waiting in queue for a designated time to an alternate queue, a queue group, or to a variable. Configuring the Interflow activity to direct contacts based on variables in the workflow enables the activity to dynamically route messages in queue to appropriate interflow points.

The Interflow activity is available to Inqueue workflows for all media types.

Interflowing contacts to queues, queue groups, external addresses, and variables

The following procedures explain how to

- Interflow contacts from one queue to another queue or queue group
 - Interflow contacts to an external destination
 - Interflow contacts to a variable
- NOTE:** This variable must be a queue reporting number, dialable number, or name associated to the queue.

To interflow a contact from one queue to another queue or queue group

1. Select the **Interflow** activity.
2. Click **Properties** and, after **Destination**, click the ... button.
3. Select either **Queue** or **Queue group**, select the queue or queue group, and click **OK**.
NOTE:
 - To add a queue to the list, click **Add** and follow the appropriate steps under "Adding multimedia queues" on page 77.
 - To add a queue group to the list, click **Add** and follow the appropriate steps under "Adding queue groups" on page 87.
4. Optionally, to keep the current queue's priority for the interflowed contact in the destination, select **Maintain Queue Priority**.
5. After **Timeout Duration**, set the time allotted for the interflow before the call is routed down the Failure branch.
6. Click **Save**.

To interflow a contact to an external destination

1. Select the **Interflow** activity.
2. Click **Properties** and, in the **Destination** field, type the external phone number to which contacts are transferred.
3. Select **External Transfer**.
4. Click **Save**.

To interflow a contact to a variable

NOTE: Interflowing a contact to a variable requires first inserting and configuring an activity on the Canvas capable of populating the Interflow activity's destination variable.

1. Select the **Interflow** activity.
2. Click **Properties** and, in the **Destination** field, click the ... button.
3. Click **Variable**, select a variable, and click **OK**.
NOTE: This variable must be a queue reporting number, dialable number, name, or email address associated to the queue. The variable cannot be a personal email address.
4. Optionally, to keep the current queue's priority for the interflowed contact in the destination, select **Maintain Queue Priority**.
5. After **Timeout Duration**, set the time allotted for the interflow before the call is routed down the Failure branch.
6. Click **Save**.

Tagging contacts with the Junk Email activity

The Junk Email activity, used in conjunction with other activities, tags inbound emails as junk and prevents them from reaching a queue.

For example, an administrator configures a Variable Compare activity to identify spam keywords found in emails. Emails containing these words are directed to a branch containing a Junk Email activity. The Junk Email activity removes the contact from the workflow, preventing spam from reaching the queue.

The Junk Email activity requires no configuration. Administrators can optionally add a name and system name to the activity. See "Naming activities and branches" on page 174 for more information.

The Junk Email activity is available to Email Inbound and Inqueue workflows.

Tagging inbound contacts with the No Reply Email activity

The No Reply Email activity, used in conjunction with other activities, tags inbound emails as not requiring a reply and prevents them from reaching a queue.

For example, an administrator configures a Variable Compare activity to identify the words 'Out of Office' in email subject fields. Contacts meeting these conditions are directed to a branch containing a No Reply Email activity. The No Reply Email activity removes the contact from the workflow. The No Reply Email activity prevents messages not requiring a response from taking up space in queues and being sent to agents.

The No Reply Email activity requires no configuration. Administrators can optionally add a name and system name to the activity. See "Naming activities and branches" on page 174 for more information.

The No Reply Email activity is available to Email Inbound and Inqueue workflows.

Routing contacts with the Offer to Agent Group activity

The Offer to Agent Group activity specifies the agent groups that are offered contacts in queue, establishing a primary response agent group and overflow agent groups.

If an agent in the group is available, the Agent Available branch is followed and the agent is offered the contact. If the agent accepts, the Success branch is followed. If the agent does not accept, the Failure branch is followed and the system checks again for an available agent. If a contact terminates in the queue before reaching an agent, the Completed branch is followed. This activity also offers overflow options if agents are unavailable, if contacts wait in queue too long, and if agents in the primary group are logged out. Configuring the Offer to Agent Group activity also enables administrators to implement push, pick, and mixed model routing.

An agent group can only be associated with an Offer to Agent Group activity once per Inqueue workflow. Attempting to associate an agent group with additional Offer to Agent Group activities returns a validation error.

The Offer to Agent Group activity is available to Inqueue workflows for all media types.

The following procedures explain how to configure routing options for offering contacts to agent groups.

NOTE: To enable mixed model routing, where agents select their contacts from queues, but contacts waiting in queue past a specified time are offered to available agents, see "Enabling mixed model routing" on page 210.

Configuring routing options for offering contacts to agent groups

The following procedures explain how to

- Specify the agent groups offered contacts
- Set the time limit for accepting contacts
- Enable overflow to additional agent groups
- Disable overflow to additional agent groups
- Overflow contacts instantly if agents are logged out
- Instruct the system to push contacts to agents
- Enable agents to pick contacts out of queue
- Specify how frequently the Interval branch is followed

CAUTION: If an Offer To Agent Group activity is enabled for overflow and there are no activities in either the Overflowed branch of the Offer to Agent Group activity or following the Offer to Agent Group activity in the workflow, contacts will be lost when they are routed down the Overflowed branch.

To specify the agent groups offered contacts

1. Select the **Offer to Agent Group** activity and click **Properties**.
2. After **Answering Agent group**, click
3. Select the agent group to handle contacts and click **OK**.

NOTE: In the Properties pane, the workflow must have 'Validate workflow' selected to successfully offer contacts to the agent group. See "Validating workflows" on page 162 for more information.

4. Click **Save**.

To set the time limit for accepting contacts

1. Select the **Offer to Agent** activity and click **Properties**.
2. After **Requeue Time**, type a length of time in hh:mm:ss.
3. Click **Save**.

To enable overflow to additional agent groups

1. Select the **Offer to Agent Group** activity and click **Properties**.
2. After **Overflow Time**, type the time contacts wait in queue before the Overflow branch is followed.
NOTE: If the Inqueue workflow contains activities that can take a significant amount of time to execute such as: Ask, Delay, Query, or Subroutine, then the Overflow Time duration entered in the Offer to Agent Group activity must include the time spent within these activities in addition to the specified duration of time the contact will be offered to the group. For example: Offer to Agent Group activity (Overflow Time: 10 seconds) -> Delay activity (Delay: 1 minute) -> Offer to Agent Group activity (desired Overflow Time: 10 seconds). The second Offer to Agent Group activity would set its Overflow Time to 1 minute and 20 seconds.
3. Click **Save**.

To disable overflow to additional agent groups

1. Select the **Offer to Agent Group** activity and click **Properties**.
2. Select **Do Not Allow Overflow** and set the **Overflow Time** to **00:00:00**.
3. Ensure there are no subsequent Offer to Agent Group activities on the Canvas.
4. Click **Save**.

To overflow the contact instantly if agents are logged out

NOTE: This option also instantly overflows contacts if the preferred agent is logged off. For more information, see "Routing contacts with the Offer to Preferred Agent activity" on page 192.

1. Select the **Offer to Agent Group** activity and click **Properties**.
2. Select the **Overflow item when all agents are logged out** check box.
NOTE: Ensure 'Do Not Allow Overflow' is not selected.
3. Click **Save**.

To instruct the system to push contacts to agents

NOTE: A push model instructs the system to evaluate all agents within a skill level and direct the contact to agent longest idle. To assign skill levels to agents, see "Managing agent group membership, presence, and skill level" on page 75.

1. Select the **Offer to Agent Group** activity and click **Properties**.
2. Select the **Push Items to Agent** check box.
3. Click **Save**.

To enable agents to pick contacts out of queue

NOTE: A pick model enables agents to select contacts from the queue using Ignite.

1. Select the **Offer to Agent Group** activity and click **Properties**.
2. Deselect the **Push Items to Agent** check box.
3. Click **Save**.

To specify how frequently the Interval branch is followed

NOTE: The workflow follows the Interval branch to perform additional activities, at set intervals, while contacts are routed. For example, in a pick routing model, the Interval branch can check contacts' time in queue and, after a time, push them to agents. Administrators can add activities to the Interval branch to determine actions the system takes when this branch is followed.

1. In the **Offer to Agent Group** activity, select the **Interval** branch activity.
2. After **Interval Time**, type how often the Interval branch is followed.
3. Click **Save**.

Routing contacts with the Offer to Preferred Agent activity

The Offer to Preferred Agent activity directs ongoing conversations to the agent who either handled the contact previously or wrote the original outbound email. If an incoming contact is part of an ongoing conversation, the system automatically populates the preferred agent variable with the agent that last handled the conversation.

For example, if a support agent is handling an ongoing issue with a customer, the Offer to Preferred Agent activity directs all incoming contacts from the customer to that agent. If the agent is not available, the system waits until the Overflow Time is reached and follows the Overflow branch. Administrators can configure the activity to overflow contacts instantly if the agent is logged out.

The Offer to Preferred Agent activity offers the contact to the preferred agent only if their Workload permits handling this contact. The activity can also be configured to offer the contact to the preferred agent only if that agent is currently answering for the queue the contact came in on.

Preferred Agent is not set for agents handling emails that originated internally within a contact center. If an agent is responding to an email from another internal queue, Multimedia Contact Center does not set that agent as the Preferred Agent. For example, if a customer addressed an email to two different queues, the Preferred Agent would only be set for the email sent from the customer, rather than emails sent from the agents.

The Offer to Preferred Agent activity is available to all multimedia Inqueue workflows.

For information on configuring this activity's Overflow Time, Interval Time, and the option to overflow contacts instantly if the preferred agent is logged out, see "Routing contacts with the Offer to Agent Group activity" on page 189.

NOTE:

- Offer to Preferred Agent functionality requires that auto case and ticket number generation for the email media server is not disabled. See "Adding email to Multimedia Contact Center" on page 56 for more information.
- If contact centers use preferred agent routing, we recommend that agents do not adjust case and ticket numbers in email subject lines. Removing or otherwise altering case and ticket numbers in subject lines can interfere with preferred agent routing.
- If the Preferred Agent is deleted or moved to another agent group, they will no longer be considered to be the Preferred Agent.

To set the time limit for accepting contacts

1. Select the **Offer to Agent** activity and click **Properties**.
2. After **Requeue Time**, type a length of time in hh:mm:ss.
3. Click **Save**.

To only route contacts to preferred agents currently answering for this queue

- Select **Only offer to agents answering for this queue**.

Routing contacts with the Overflow activity

The Overflow activity sends contacts immediately to overflow agent groups.

For example, an administrator wants emails waiting in queue for four hours to overflow to a secondary agent group. The administrator adds an Offer to Agent Group activity to a workflow, and configures the Interval branch with a Queue activity reading the queue's Agents Available. The administrator places an Overflow activity after the Queue activity. Once the Queue activity registers that the queue has less than 2 available agents, the email moves to the Overflow activity and is directed to the secondary agent group.

The Overflow activity requires no configuration. Administrators can optionally provide the activity with a name and system name. See "Naming activities and branches" on page 174 for more information.

The Overflow activity is available to Inqueue workflows for all media types.

Querying data providers with the Query activity

The Query activity reads and writes information through an MS SQL connection, ODBC connection, Excel sheet, or LDAP provider. Administrators can use the Query activity to retrieve information and store it in custom variables for use within workflows. Advanced queries return multiple records of information that can be stored in multiple variables.

For example, an administrator uses a Query activity in an Inbound Email workflow to retrieve customer account balances from a SQL database. The administrator populates an Email activity template with a variable that will contain this information, retrieved from the Query activity. The workflow responds with balance information to customers inquiring via email.

The Query activity is available to all Multimedia Contact Center workflows.

NOTE:

- By default, the query result is stored within the <<LastQueryResult>> system variable. Each subsequent Query action overwrites this variable. It is not recommended to use the LastQueryResult variable when expecting protected information to be contained within this variable.
- For information on configuring data providers, see "Configuring data providers" on page 165.

Connecting Query activities to data providers

Connecting Query activities to data providers enables the Query activity to access data and use this information to route contacts. See "Configuring data providers" on page 165 for more information.

1. Select the **Query** activity and click **Properties**.
2. After **Data Provider**, click the **Browse** button.
3. Select a data provider and click **OK**.

NOTE: The Query activity cannot be saved without a query or write statement configured.

Running simple queries in workflows

Running simple queries enables administrators to retrieve information from a database and store it in a variable.

To run a simple query in a workflow

1. Select the **Query** activity and click **Properties**.
2. After **Query statement**, click the **Browse** button and, under **Query Type**, select **Simple Query**.
3. After **Database Table Name**, from the drop-down list, select the table to query.
'Database table names' refer to the tables in the data source from which the Query activity retrieves information.
4. After **Column Return Name**, from the drop-down list, select the column of data to query.
'Column return names' refer to the columns in the selected table, from which the Query activity retrieves information.
5. After **Variable Return Name**, from the drop-down list, select the variable to populate with the return value.
'Variable return names' refer to the variables populated as a result of the query.
6. After **Column Where Name**, from the drop-down list, select the name of the column of data to compare against.
'Column where names' refer to the columns in the data source against which the Query activity compares information.
7. After **Variable Where Name**, from the drop-down list, select the variable to use for comparison.
'Variable where names' refer to the variables against which the Query activity compares.

8. To test the query, after **Test with a value equal to**, enter an existing value from the data provider and click **Test Query**.
The Raw SQL window displays the SQL statement based on the selections from the drop-down lists.
9. To clear all fields and return to the Canvas, click **Clear**. To accept the query, click **OK**.
10. Click **Save**.

Running advanced queries in workflows

Advanced queries enable administrators with knowledge of SQL to write SQL statements retrieving information from a database provider. Advanced queries also support LDAP syntax for LDAP providers, and advanced queries for MS SQL Server and ODBC data providers support stored procedures.

Administrators can use an advanced query to retrieve single or multiple records from a database provider.

To run an advanced query in a workflow

1. Select the **Query** activity and click **Properties**.
2. After **Query** statement, click the **Browse** button, and under **Query Type**, select **Advanced Query**.
3. Under **Query**, type the SQL statements to be run directly against the data provider and click **Execute**.
The Execute window opens displaying a list of detected input and output parameters.
4. Under **Value**, type the numbers corresponding to the values contained in the data provider.
5. Click **Run**.
6. To assign variables to store information returned by the SQL statements, click the **Variable Assignment** tab.
Return Column will be populated with the column names in the data provider.
7. Under **Variable Name**, select the variables to store information returned by the SQL statements.
8. To assign values to the parameters filled by the SQL statements, click the **Parameter Assignment** tab.
Parameter Name will be populated with the SQL parameters used to query the data provider.
9. After **Variable Name**, select a variable from the drop-down list to store the information retrieved by the SQL parameter.
10. To view the values returned from the query, click the **Test Results** tab.
11. To clear the variables and their parameters, click **Clear**. To accept the query, click **OK**.
12. Click **Save**.

Defining write statements

Write statements define a delete, insert, or update statement against a specified data provider. Write statements enable administrators to delete, insert, or update column values in a data provider from within a workflow.

The following procedures explain how to configure simple and advanced write statements

NOTE: Advanced write statements enable users with knowledge of SQL to write insert, update, or delete SQL statements.

To define a simple write statement

1. Select the **Query** activity, click **Properties** and, after **Write** statement, click the **Browse** button.
2. Select **Simple Write** and select a **Write Type** from the drop-down list. Options vary by data provider.
3. After **Table Name**, select the table in the data provider against which the write statement is defined.
4. Under **Column Name**, select a column in the data provider against which the write statement is defined.
5. Under **Value**, select the data to be inserted into the data provider.
6. Under **Where**, select a column name.

NOTE:

- 'Where' statements display only if Delete or Update is selected
 - The column names displaying in the list derive from the Table Name selected.
7. Select an operator from the drop-down list
 - =
 - <>
 - >
 - <
 - >=
 - <=
 8. From the third drop-down list, select or type the variables used to evaluate the information selected from the first column
 9. To test the write statement, click **Test Syntax**.
 10. To empty column values, click **Clear**. To accept the write statement, click **OK**.
 11. Click **Save**.

To define an advanced write statement

1. Select the **Query** activity, click **Properties**.
2. After **Write** statement, click the **Browse** button and select the **Advanced Write** button.
3. Under **Query**, type the insert, update, or delete SQL statements to be run against the data provider and click **Execute**.
4. The Parameter name column will be populated with the column names in the data provider.

5. Under **Variable Name**, from the drop-down list, select the variables used to evaluate the information you selected from the first column.
6. To test the write statement, click **Test Syntax**.
7. To empty column values, click **Clear**. To accept the write statement, click **OK**.
8. Click **Save**.

Returning multiple results with queries

The Query activity supports returning multiple results from a query. When a Query activity returns multiple results from a query, the Success branch is followed for each result. When there are no more results, the message exits the Success branch of the Query activity and continues along the workflow.

Multiple result returning Query activities enable contact centers to build more complex workflow functions, such as providing callers access to an employee directory.

Routing contacts with the Queue activity

The Queue activity branches workflows based on real-time queue conditions, enabling administrators to route contacts based on emerging queue conditions.

For example, an administrator building an Email Inbound workflow configures the Queue activity to send emails waiting in queue four hours or longer to a secondary queue. This enables the contact center to meet its service level goals.

The Queue activity is available to all Multimedia Contact Center workflows.

Applying queue conditions to the Queue activity

The following explains how to

- Associate queue conditions to a queue or queue group
- Associate queue conditions to a variable
- Add queue condition to an existing branch
- Edit queue conditions
- Delete queue conditions
- Import and export queue conditions
- Group queue conditions

NOTE: Multimedia Contact Center evaluates Queue conditions from left to right. To change the order in which the activity evaluates conditions, see "Changing the order in which branches are evaluated" on page 175.

To associate queue conditions to a queue or queue group

1. Right-click the **Queue** activity and select **Add**.
2. Type a **Name** for the queue condition and, after **Queue**, click the ...button.
3. Select either **Queue** or **Queue Group**, select the queue or queue group; and click **OK**.
4. Click **Add** and, from the second column, select a real-time statistic from the drop-down list.
5. In the third column, select an operator from the drop-down list. Options vary according to the variable chosen.
6. Click the fourth column and select either **Value**, **Queue Stats**, or **Variable**.

7. For **Value**, type in a numeric value or enable the check box for the value.
8. For **Queue Stats**, select a queue stat from the drop-down list.
9. For **Variable**, select a variable from the drop-down list.
10. To test the conditions, click **Test Parameters**, enter a value in the relevant fields and click **Test**.
11. Click **OK**.
12. To add another condition, click **Add** and repeat steps 4-11.
13. Click **OK** to create the branch or click **Add** to add the current branch to the workflow while leaving the dialog box open to create new branches.
14. Click **Save**

Associate queue conditions to a variable

NOTE: Associating queue conditions to a variable requires first inserting and configuring an activity on the Canvas capable of populating the Queue activity's destination variable.

1. Right-click the **Queue** activity and select **Add**.
2. Type a **Name** for the queue condition and, after **Queue**, click the ...button.
3. Select the **Variable** tab, select a variable, and click **OK**.
To see a list of Multimedia Contact Center variables and their descriptions, go to Multimedia=>Variables.
4. Click **Add** and, from the second column, select a real-time statistic from the drop-down list.
5. In the third column, select an operator from the drop-down list. Options vary according to the variable chosen.
6. Click the fourth column and select either **Value**, **Queue Stats**, or **Variable**.
7. For **Value**, type in a numeric value or enable the check box for the value.
8. For **Queue Stats**, select a queue stat from the drop-down list.
9. For **Variable**, select a variable from the drop-down list.
10. To test the conditions, click **Test Parameters**, enter a value in the relevant fields and click **Test**.
11. Click **OK**.
12. To add another condition, click **Add** and repeat steps 4-11.
13. Click **OK** to create the branch or click **Add** to add the current branch to the workflow while leaving the dialog box open to create new branches.
14. Click **Save**

To edit queue conditions

1. Right-click the relevant branch in the **Queue** activity and select **Edit Condition**.
2. Click **Add** and, from the second column, select a real-time statistic from the drop-down list.
3. In the second column, select an operator from the drop-down list. Options vary according to the variable chosen.
4. Click the third column and select either **Value**, **Queue Stats**, or **Variable**.
5. For **Value**, type in a numeric value or enable the check box for the value.
6. For **Queue Stats**, select a queue stat from the drop-down list.
7. For **Variable**, select a variable from the drop-down list.

8. To test the conditions, click **Test Parameters**, enter a value in the relevant fields and click **Test**.
9. Click **OK**.
10. To add another condition, click **Add** and repeat steps 2-9.
11. Click **Save**.

To delete queue conditions

- To delete a queue condition, select the row for the condition and click **Delete**.

To import and export queue conditions

1. To import queue conditions, click the **Import** button and navigate to a *.csv file.

NOTE:

- Conditions on a single line and separated by a comma will be added to a single branch.
- Conditions on multiple lines and separated by a comma will be added to multiple branches.

2. To export queue conditions, click the **Export** button and navigate to a *.csv file.
3. To test the conditions, click **Test Parameters**, enter a value in the relevant fields and click **Test**.

To group conditions being compared

- See "Grouping expressions" on page 172.

Submitting callbacks with the Save Callback activity

The Save Callback activity saves a callback request to the SQL database. This activity works with IVR Routing to submit callback requests from Multimedia Contact Center to submit callback requests to IVR Routing. The Save Callback activity is included if you are licensed for IVR but not available if you are licensed for Messaging and Routing.

The Save Callback activity requires the following variables be set with information for the callback request to be submitted correctly:

- **CallbackClientNumber**—This variable must be populated with the phone number to which the callback request will be made.
- **CallbackDestination**—This variable must be populated with dialable number of the voice queue to which the callback request will be submitted.
- **CallbackOutboundWorkflowId**—This variable must be populated with the Outbound callback subroutine you want to use to submit callbacks to agents.
NOTE: It is recommended that you use the default abandon outbound callback subroutine as callbacks submitted by a Multimedia Contact Center workflow will not contain a message to be played for agents.

For additional information on the Save Callback activity and callbacks, see the *MiContact Center Installation and Administration Guide*.

The Save Callback activity has a Success and Pending branch. The activity routes down Pending when network issues prevent the callback from being submitted. When the network issues are resolved, the callback will be saved.

The Save Callback activity is available to all Multimedia Contact Center workflows.

To set the Save Callback request reason

1. Select the **Save Callback** activity.
2. After **Request Reason**, select New Request from the drop-down menu.
NOTE: If you are using this activity to submit a callback, you should use New Request.
3. Click **Save**.

Responding to contacts with the Say activity

The Say activity sends messages to contacts.

For example, if a chat message is sent to the contact center after hours, the Say activity can respond with the message 'Thank you for contacting us. Our chat queues are currently closed. Please try again Monday through Friday 9am – 5pm.'

URLs entered into the Message field are turned into hyperlinks and will open in another window or tab of the contact's browser when the customer clicks on them. Some website content is embeddable into chat sessions using the Say activity. If a link to a supported website's content, such as a link to a YouTube video, is entered into the Message field, the content is embedded directly into the chat session. The following websites are supported for embedded content in chat:

- <https://twitter.com/>
- <http://www.slideshare.net>
- <https://soundcloud.com>
- <http://www.youtube.com>

NOTE:

- Ignite supports embedding content from Google Maps in chat sessions. However, this requires the use of embed maps URL, available from Google Maps, to embed a Google map, such as: `<iframe src="https://www.google.com/maps/embed?pb=!1m18!1m12!1m3!1d2804.500978803945!2d-75.90911198444678!3d45.3386984790996!2m3!1f0!2f0!3f0!3m2!1i1024!2i768!4f13.1!3m3!1m2!1s0x4cd1fff1517da8a9%3A0xe6bc8a721e90f2a5!2sMitel+Networks!5e0!3m2!1sen!2sus!4v1445531227487" width="600" height="450" frameborder="0" style="border:0" allowfullscreen>></iframe>`
- SMS does not support embedded content.

The Say activity is available to Chat and SMS Inbound and Inqueue workflows.

To customize Say activity messages

1. Select the **Say** activity.
2. After **Message**, click
3. Type the content of the auto-response message and click **OK**.
In a chat session, the message will be said using the chat media server's auto response username or the chat queue's username. In an SMS session, the message will be said using the SMS media server's name or the SMS queue's phone number.
4. Click **Save**.

Routing contacts with the Schedule activity

The Schedule activity branches workflows based on date and time conditions, enabling a workflow to respond to a business' hours of operation.

For example, an administrator uses a Schedule activity to route chat messages arriving after hours to an after-hours branch. Contacts following this branch receive a response indicating that the contact center is closed and to send the chat again during business hours.

The Schedule activity is available to all Multimedia Contact Center workflows.

Applying branching conditions to the Schedule activity

The following procedures explain how to

- Route contacts by time of day
- Route contacts by day of the week
- Route contacts by date and holiday
- Modify schedule conditions
- Route contacts by schedule
- Import and export Schedule conditions
- Route contacts by grouped Schedule conditions

To route contacts by time of day

1. Right-click the **Schedule** activity and select **Add a schedule condition**.
2. Type a **Name** for the time condition.
3. Click **Add**, and, from the second drop-down list, select **Time**.
4. Click **00:00:00-00:00:00**, specify the **Start Time** and **End Time** for the business (hh:mm:ss), and click **OK**.
5. To test the conditions, under **Testing**, select a date and time and click **Test**.
6. Click **OK** to create the branch or click **Add** to add the current branch to the workflow while leaving the dialog box open to create new branches.
7. Click **Save**.

To route contacts by day of the week

1. Right-click the **Schedule** activity and select **Add a schedule condition**.
2. Type a **Name** for the day of the week condition.
3. Click **Add** and, from the second drop-down list, select **DOW**.
4. Click **<Value>**, select the days of the week the business is open, and click **OK**.
5. To test the conditions, under **Testing**, select a date and time and click **Test**.
6. Click **OK** to create the branch or click **Add** to add the current branch to the workflow while leaving the dialog box open to create new branches.
7. Click **Save**.

To route contacts by date and holiday

1. Right-click the **Schedule** activity and select **Add a schedule condition**.
2. Type a **Name** for the date or holiday condition.
3. Click **Add** and, from the second drop-down list, select either **Date** or **Holiday**.
4. From the third drop-down list, select the date or holiday that the contact center is closed and click **OK**.
NOTE: Administrators may select 'Reoccur every year' for date conditions if the business is regularly closed on that date.
5. To test the conditions, under **Testing**, select a date and time and click **Test**.
6. Click **OK** to create the branch or click **Add** to add the current branch to the workflow while leaving the dialog box open to create new branches.
7. Click **Save**.

To modify Schedule conditions

1. Right-click the branch to modify and click **Edit**.
2. Change the branch as required.
3. To test the conditions, under **Testing**, select a date and time and click **Test**.
4. Click **OK** to create the branch, or click **Add** to add the current branch to the workflow while leaving the dialog box open to create new branches.
5. Click **Save**.

To route contacts by schedule

NOTE: The default schedule conditions determine when Multimedia Contact Center executes business hour workflows and after hour workflows. These conditions include the default Monday to Friday, 9:00 AM to 5:00 PM schedule and the default 24/7 schedule. These default Schedule conditions can be used as is or modified to suit specific hours of operation. See also "Modifying default business hour schedules" on page 95.

1. Right-click the **Schedule** activity and select **Add a schedule condition**.
2. Type a **Name** for the schedule condition.
3. Click **Add** and, from the second drop-down list, select **Schedule**.
4. From the third drop-down list, select a schedule.
5. To test the conditions, under **Testing**, select a date and time and click **Test**.
6. Click **OK** to create the branch, or click **Add** to add the current branch to the workflow while leaving the dialog box open to create new branches.
7. Click **Save**.

To import and export Schedule conditions

1. Right-click the **Schedule** activity and select **Add a schedule condition**.
2. Type a **Name** for the schedule condition.
3. To import schedule conditions, click the **Import** button, navigate to a *.csv file, and click **Open**.

4. To export schedule conditions, click the **Export** button, navigate to a *.csv file, and click **Open**.

NOTE:

- Conditions on a single line and separated by a comma are added to a single branch.
 - Conditions on multiple lines and separated by a comma are added to multiple branches.
5. To test the conditions, under **Testing**, select a date and time and click **Test**.
 6. Click **OK** to create the branch, or click **Add** to add the current branch to the workflow while leaving the dialog box open to create new branches.
 7. Click **Save**.

To route contacts by grouped Schedule conditions

- See "Grouping expressions" on page 172.

Populating variables with the Set Variables activity

The Set Variables activity takes values generated within a workflow, and populates variables with this data for use later in the same workflow.

For example, an administrator configures a Set Variables activity to retrieve customer data from incoming emails. This information is used in an Email activity's template for automatic responses to the customer.

The Set Variables activity is available to all Multimedia Contact Center workflows.

Populating the Set Variables activity with data

The following explains how to retrieve workflow data and use it to populate Set Variables activities.

To populate the Set Variables activity with workflow data

1. Right-click the **Set Variables** activity and select **Edit Variable Settings**.
2. Type a **Name** for the activity and click **Add**.
3. **Select a variable** from the drop-down list and click **OK**.
To see a list of Multimedia Contact Center variables and their descriptions, go to 'Multimedia=>Variables'.
4. In the third column, either type a **Value**, an expression in **Advanced Text**, or select **Variable** and select a variable from the drop-down list. If selecting a value, note that options vary according to the variable selected. Advanced Text is only available with certain variables.
5. Click **OK**.
6. To add a variable row, click **Add**. To delete a variable row, select the row and click **Delete**.
7. Click **Save**.

Sending SMS with the SMS activity

The SMS activity sends SMS contacts from within a workflow to recipients via the SMS Gateway connection configured in YourSite Explorer. For example, an administrator can use the SMS activity to send auto-acknowledgement messages to inbound SMS contacts.

SMS activity templates support text-based content. Template fields can be populated with variables.

The SMS activity is available to all Multimedia Contact Center workflows.

To add an SMS template to an SMS activity

1. Select the **SMS activity**.
2. After **SMS template**, click
3. After **From**, click
4. Select an **SMS Provider** and click **OK**.
5. After **To**, type the dialable number or a variable containing the dialable number of the SMS recipient.
Dialable numbers must not contain punctuation or special characters.
6. Type the body of the message.
The body can have up to 320 characters.
7. Click **OK**.
8. Click **Save**.

Executing subroutines with the Subroutine activity

The Subroutine activity represents a set of workflow steps that can be inserted at any point in a workflow or in multiple workflows. Editing the subroutine changes all instances of that subroutine in workflows, enabling administrators to edit multiple workflows using a single point of configuration. The Subroutine activity is an efficient means of replicating and configuring workflow segments. For information on subroutines, see "Building subroutines" on page 163.

The Subroutine activity is available to all Multimedia Contact Center workflows.

NOTE: Go To activities nested in subroutines can have a target activity in either the subroutine or the parent workflow.

Assigning subroutines to workflows

The following section explains how to

- Assign subroutines to the Subroutine activity
- Assign variables to the Subroutine activity
- Expand subroutines in workflows

To assign a subroutine to the Subroutine activity

1. Right-click the **Subroutine** activity and click **Assign...**
2. Click the **Subroutines** tab, select a subroutine to assign and click **OK**.
3. Click **Save**.

To assign a variable to the Subroutine activity

NOTE: Assigning a variable to the Subroutine activity requires first inserting and configuring an activity on the Canvas capable of populating the variable.

1. Right-click the **Subroutine** activity and click **Assign...**
2. Click the **Variable** tab, select a variable to assign and click **OK**.
To see a list of Multimedia Contact Center variables and their descriptions, go to Multimedia=>Variables.
3. Click **Save**.

To expand a subroutine in a workflow

- Right-click the **Subroutine** activity and click **Open...**

Configuring parent workflow destinations for subroutine Go To activities

If a Go To activity is placed in a subroutine, it can route contacts to the parent workflow to which the subroutine is assigned by setting its destination as 'Go To Parent Workflow'. A target destination must be set on the Subroutine activity to set where the contacts are routed to in the Parent workflow.

To configure a parent workflow destination for a subroutine Go To activity

1. In the parent workflow, select the **Subroutine** activity.
2. In the **Properties**, after **Target Activity** select the activity to which the subroutine Go To activity returns contacts from the drop-down list.
3. Click **Save**.

Ending workflows with the Terminate Workflow activity

The Terminate Workflow activity ends a workflow at any stage.

For example, an administrator uses a Terminate Workflow activity to end an Inqueue workflow once a contact requires no further routing to an agent.

The Terminate Workflow activity requires no configuration. Administrators can optionally provide the activity with a name and system name. See "Naming activities and branches" on page 174 for more information.

The Terminate Workflow activity is available to all Multimedia Contact Center workflows.

Routing contacts with the To activity

NOTE: Email routing to blind-copied queues is not supported.

The To activity checks the 'To:' and 'Cc:' fields of inbound emails. The activity performs actions based on specified branching conditions. Administrators can specify whether the To activity checks one or all of the above fields for email.

For example, an administrator configures the To activity to route an email to the Sales queue if the email contains 'sales@email.com' in its To: or Cc: field.

The To activity is available to all Email workflows.

Applying branching conditions to the To activity

Applying branching conditions to the To activity enables administrators to

- Direct emails based on specified values
- Direct emails based on variables
- Group the conditions used to direct emails

To direct emails based on specified values

NOTE: To route based on specific email addresses in the 'To:' and 'Cc:' fields, we recommend selecting 'Contains' and typing an email address for the activity to identify. This option identifies a wide range of content in email 'To:' fields. For example, <<To>> Contains sales@email.com.

1. Right-click the **To** activity and select **Add a Condition**.
2. Type a **Name** for the branching condition and click **Add**.
3. Under **<Select a variable>**, select one of the following:
 - **CC**
 - **To**
4. From the third column, select one of the following:
 - **NotEqual (!=)**
For example, administrators can specify that emails not addressed to 'sales@email.com' are not directed to a Sales branch.
 - **Equal (=)**
For example, administrators can specify that emails addressed to 'sales@email.com' are directed to a Sales branch.
NOTE: If you select '=Equal to', you must specify an email address as the '<Value>'.
 - **Contains**
For example, administrators can specify that emails containing 'sales' in the To: field are directed to a Sales branch.
NOTE: If your organization uses email addresses containing the same words, add them to the 'Contains' condition in order of longest address to shortest address. For example, add technicalsupport@email.com before adding support@email.com. This ensures that the system evaluates the addresses correctly and route contacts to the correct destinations.
 - **Length**
For example, administrators can specify that emails sent to an address exceeding 25 characters are directed to a branch for spam.
 - **Starts With**
For example, administrators can specify that emails sent to an address starting with 'Sales' are directed to a Sales branch.
NOTE: Starts With reads the first address in the To: field only.
5. Click **<Value>** and enter a criterion to branch emails.
For example, 'sales@email.com'.
6. Click **OK** to create the branch or click **Add** to add the current branch to the workflow while leaving the dialog box open to create new branches.
7. Click **Save**.

To direct emails based on variables

NOTE: Directing emails based on variables requires first inserting and configuring an activity on the Canvas capable of populating the To activity's destination variable. For a list of Email variables, go to Multimedia=>Variables.

1. Right-click the **To** activity and select **Add a Condition**.
2. Type a **Name** for the branching condition and click **Add**.
3. From the second column, select an operator. See the procedure above for a description of each option.
NOTE: To route based on specific variables in the 'To:' field, we recommend selecting 'Contains' and selecting a variable for the activity to identify. This option identifies a wide range of content in email 'To:' fields.
4. From the third column, select **Variable**.
5. Select the variable used to branch emails and click **OK**.
6. Click **OK** to create the branch or click **Add** to add the current branch to the workflow while leaving the dialog box open to create new branches.
7. Click **Save**.

Routing contacts with the Transfer activity

The Transfer activity directs inbound messages to queues and queue groups. Administrators can configure the activity to dynamically route messages, either using the <<DestinationQueues>> variable or by routing according to database lookups. For example, an administrator configures the workflow to query a database containing customer statuses. Based on the results of this query, the Transfer activity transfers Platinum customers to a priority queue.

By default, Transfer activities added to an email Inbound workflow have the <<DestinationQueues>> variable set as a destination. This variable instructs the Transfer activity to compare all addresses in the To and CC fields of the inbound email to the email addresses configured for contact center's email queues. A copy of the email is transferred to queues matching the addresses in the To or CC fields of the inbound email. For information on associating email addresses to queues, see "Configuring general settings for multimedia queues" on page 78.

NOTE: If your contact center will be transferring emails between mail servers, ensure that all aliases are entered on the mail server page. For more information about adding aliases to the mail server, see "Configuring SMTP connections to Multimedia Contact Center" on page 44.

If you use a destination other than the <<DestinationQueues>> variable in an email Inbound workflow, the email will be transferred according to the configured destination and will ignore the email addresses in the To and CC fields of the email.

The Transfer activity is available to Inbound workflows for all media types.

Transferring messages to queues, queue groups, external addresses, or variables

The following procedures explain how to

- Transfer contacts to a queue or queue group
 - Transfer contacts to an external email address
 - Transfer contacts to a variable
- NOTE:** This variable must be a queue reporting number, dialable number, name, or email address associated to the queue. The variable cannot be a personal email address.

To transfer a contact to a queue or queue group

1. Select the **Transfer** activity.
2. Click **Properties** and, after **Destination**, click the ... button.
3. Select either **Queue** or **Queue group**, select the queue or queue group, and click **OK**.
NOTE:
 - To add a queue to the list, click Add and follow the appropriate steps under "Adding multimedia queues" on page 77.
 - To add a queue group to the list, click Add and follow the appropriate steps under "Adding queue groups" on page 87.
4. Click **Save**.

To transfer a contact to an external email address

1. Select the **Transfer** activity.
2. Click **Properties** and, in the **Destination** field, type the external email address to which contacts are transferred.
3. Select **External Transfer**.
4. Click **Save**.

To transfer a contact to a variable

NOTE: Transferring a contact to a variable requires first inserting and configuring an activity capable of populating the Transfer activity's destination variable.

1. Select the **Transfer** activity.
2. Click **Properties** and, in the **Destination** field, click the ... button.
3. Click **Variable**, select a variable to identify in the contact's contents, and click **OK**.
NOTE: This variable must be a queue reporting number, dialable number, name, or email address associated to the queue. The variable cannot be a personal email address.
4. To add a variable to the list, click **Add** and follow the appropriate steps under "Creating custom variables" on page 168.
5. Click **Save**.

Routing contacts with the Variable Compare activity

The Variable Compare activity routes contacts through workflow branches by comparing information, stored in either custom or system variables, against specified conditions.

For example, an administrator uses the Variable Compare activity to filter and prevent automatic email responses from reaching a queue. The Variable Compare activity compares a variable for automatic responses against an email's Subject line. If 'Automatic Reply' or 'Out of Office' is present in the Subject line, the email follows a branch configured to receive junk emails. If neither is present, the email follows the No Match branch and continues through the workflow.

The Variable Compare activity is available to all Multimedia Contact Center workflows.

Applying branching conditions to the Variable Compare activity

The following procedures explain how to

- Add conditions to be compared against workflow data
- Edit conditions being compared
- Delete conditions being compared
- Group conditions being compared

To add a condition to be compared against workflow data

1. Right-click the **Variable Compare** activity and select **Add Variable Compare Condition**.
2. Type a **Name** for the condition and click **Add**.
3. **Select a variable** from the drop-down list and click **OK**.
To see a list of Multimedia Contact Center variables and their descriptions, go to Multimedia=>Variables.
4. Select an operator from the second drop-down list. Options vary according to the variable chosen.
5. In the third column, type or select a value for the variable. If selecting a value, note that options vary according to the variable selected.
NOTE: " " means 'No Value'.
6. Click **OK** to create the branch or click **Add** to add the current branch to the workflow while leaving the dialog box open to create new branches.
7. Click **Save**.

To edit a Variable Compare condition

1. Right-click the condition's branch and select **Edit**.
2. Change the condition, and click **OK** to create the branch or click **Add** to add the current branch to the workflow while leaving the dialog box open to create new branches.
3. Click **Save**.

To delete a Variable Compare condition

- Right-click the condition's branch and select **Delete**.

To group Variable Compare conditions

- See "Grouping expressions" on page 172.

ENABLING MIXED MODEL ROUTING

In mixed model routing agents pick contacts out of queue, but items in queue that remain unpicked for a specified time are pushed to agents' Inboxes.

Enabling a mixed model requires administrators first to configure two agent groups, each containing the same agents. Administrators must then add two Offer to Agent Group activities, one after the other, to the Workflow Canvas. One of the agent groups is assigned to each activity. The first Offer to Agent Group activity enables a pick routing model, and allows overflow to a secondary agent group. The second Offer to Agent Group activity enables a push routing model, and does not allow overflow. When contacts overflow from the first Offer to Agent Group activity to the second, they overflow to an agent group with the same agents and are pushed to the agents' Inboxes.

For example, Support agents pick the emails they handle, but their supervisor wants to push emails waiting in queue over 30 minutes to the agents' Inboxes. The administrator creates one agent group, called Support Group 1, containing the contact center's Support agents. The administrator then creates a second agent group, called Support Group 2, containing the same Support agents.

The administrator adds an Offer to Agent group activity to the workflow and assigns it Support Group 1. The activity is configured to follow a pick model and to overflow emails waiting longer than 30 minutes in queue. The administrator adds the second Offer to Agent group activity, configures it to follow a push routing model, disables overflow, and assigns Support Group 2. If emails remain unpicked in the Support queue for more than 30 minutes, they overflow to the same Support agents and are pushed to the Inboxes of available agents.

The following procedures explain how to enable mixed routing models. For information on creating agent groups, see "Adding agent groups" on page 73.

To enable a mixed routing model

1. Place an **Offer to Agent Group** activity on the Canvas and click **Properties**.
2. Deselect the **Push Items to Agent** check box.
3. After **Answering Agent Group**, click the drop-down and select **Agent Group**.
4. Select the agent group to handle contacts and click **OK**.
5. After **Overflow Time**, type the time contacts wait in queue before the Overflow branch is followed and a push routing model begins.
NOTE: Ensure 'Do Not Allow Overflow' is not selected.
6. Place a second **Offer to Agent Group** activity on the Canvas and, in the **Properties** pane, select the **Push Items to Agent** check box.
7. After **Answering Agent Group**, click the drop-down and assign the second agent group to handle contacts.
NOTE: This group must contain the agents that are in the first agent group, assigned above.
8. Select **Do Not Allow Overflow** and set the **Overflow Time** to **00:00:00**.
9. Click **Save**.

POPULATING SCREEN POPS WITH WORKFLOW VARIABLES

When a contact is processed through a workflow, administrators can populate URLs or executable files with variables. These URL and executable files, and the variable information they contain, can be passed to agents in the form of a screen pop. Workflow-generated screen pops display when agents select ringing contacts in Ignite.

Any variable available to the workflow's media type, which also contains the 'Send to Agent's desktop' check box, can populate a workflow screen pop with information. Populating URLs and executable files with workflow variables enables administrators to customize screen pops on a queue-by-queue basis.

For example, an administrator can configure a workflow to query a database and retrieve a customer's name and account history. When the contact rings in the agent's Inbox, a web page pops on the agent's desktop, displaying the customer's information. The agent is immediately able to provide personalized, informed service.

Administrators must provide webcodes and servers for URLs and the executable codes behind executable files. URLs must include 'http://' in the URL string.

Executable files may prompt a Windows security warning on client desktops before popping. Administrators may disable this security setting in Internet Explorer. For more information, consult Microsoft documentation.

NOTE:

- Agents using Ignite (WEB) may need to disable pop-up blockers for the Ignite URL in order for screen pops to display.
- Ignite (WEB) supports URL screen pops only. Executable file screen pops are not supported.
- If Contact Center Client and Ignite are used on the same agent desktop and screen pops are populated with workflow variables in voice, email, chat, and SMS, then administrators should disable Contact Center Screen Pop in Contact Center Client. For information on enabling and disabling Contact Center Screen Pop, see the *MiContact Center User Guide*.
- If Contact Center Client and Ignite are used on the same agent desktop and screen pops are populated with workflow variables in voice, email, chat, and SMS, then Administrators should disable toaster notifications in Contact Center Client. This prevents screen pops and toaster notifications from Contact Center Client and Multimedia Contact Center from appearing on an agent's monitor at the same time.

To populate a screen pop with a workflow variable

1. Click **Multimedia=>Variables** and select the **ScreenPopOnRinging** variable.
2. Select **Send to agent Desktop**.
3. Click **Workflows** and, in an Inbound or Inqueue workflow, place a **Set Variables** activity on the Workflows Canvas.

NOTE: If values change after a screen pop has been sent to an agent's desktop, the screen pop will not refresh. We therefore recommend placing the Set Variables activity in close proximity to the Offer to Agent Group activity. This provides optimally current values and helps prevent the screen pop's value from being overwritten by another variable query in the workflow.

4. Right-click the **Set Variables** activity and select **Edit Variable Settings**.
5. Click **Add** and, from the **<Select a variable>** drop-down list, select **ScreenPopOnRingin**g.
6. Click **<Value>** and, in the **Value** tab, enter a complete URL string or the path to an executable file.
NOTE: The paths to executable files must be accessible to any clients who require its use. For example, administrators can place the file on a network share.
7. To populate a web page screen pop with variable information, insert the variable's name between double angle brackets where applicable in the URL string.
For example, <<DestinationQueueName>>.
8. Click **OK** to close the variable dialog box and click **OK** to return to the workflow.
9. Click **Save**.

MULTIMEDIA CONTACT CENTER DEFAULT WORKFLOWS

MiContact Center includes a number of default workflows. These workflows are based on common business scenarios and demonstrate how administrators can route email, chat, and SMS from customers to the agents best suited to respond. These default workflows are generated by the system once media servers and queues are created. The workflows are located in Multimedia Contact Center's Media servers and Queues panes, under the routing tabs, and can be modified according to the contact center's business needs.

Multimedia Contact Center includes the following default workflows

- Default Email Inbound
- Default Email Inqueue
- Default Chat Inbound
- Default Chat Inqueue
- Default Chat Response
- Default SMS Inbound
- Default SMS Inqueue

The following sections summarize the default workflows and explain how they operate. For ease of understanding, we recommend expanding the entire workflow and all annotations.

To expand the workflow

- Click the **Expand All** button.

To expand all annotations

- Right-click the workflow and select **Annotations...=>Show All**.

CUSTOMIZING THE DEFAULT WORKFLOWS

To create customized versions of these workflows, we recommend modifying the default workflows. To create multiple workflows of the same type, multiple copies of the default workflows can be made and reconfigured. See "Copying workflows" on page 160.

Each default workflow requires additional configurations to get up and running. For information on configuring the workflow activities to suit the contact center, follow the cross-references throughout each summary.

NOTE: Inbound Email workflows must contain either a Transfer, a Junk Email, or a No Reply Email activity. If they do not, email contacts will remain in system storage, using system memory and causing performance issues.

The following requirements are shared among default workflows. Administrators must

- Validate the workflow and activity configuration and correct any errors detected
See "Validating workflows" on page 162.
- Associate Inbound and, optionally, Response workflows to a server
See "Associating workflows to media servers" on page 162.

NOTE: Inbound workflows modified from the Inbound Routing tab of the Media servers pane and Response workflows modified from the Response Routing tab are already associated to that media server.

- Associate Inqueue workflows to at least one queue
See "Associating workflows to queues" on page 163.

NOTE: Inqueue workflows modified from the Routing tab of the Queues page are already associated to that queue.

DEFAULT EMAIL INBOUND WORKFLOW

This workflow instructs Multimedia Contact Center to route inbound emails to appropriate queues. Administrators can specify the queues to which inbound emails are directed and can prevent automatic reply messages from reaching the queue. This default Email Inbound workflow provides a template for efficiently routing inbound email contacts to the appropriate queues.

To further illustrate the workflow's activities and their operations, we recommend expanding the entire workflow and all annotations.

To expand the workflow

- Click the **Expand All** button.

To expand all annotations

- Right-click the workflow and select **Annotations...=>Show All**.

Description

The first step in the workflow is a Variable Compare activity. This activity is configured to stop automatic responses from reaching the queue. The Variable Compare activity checks an incoming email's Subject line. If the Subject line contains 'Automatic Reply', or 'Out of Office', but does not contain 'RE,' the email follows a branch for the matched condition identifying the email as 'auto response'. A No Reply Email activity marks the email as requiring no reply, and a Terminate activity stops the workflow so that the email is not directed to a queue. This prevents automatic reply messages from bouncing back and forth between a customer's email account and the email media server. You can modify or add to these 'auto response' conditions based on responses received by agents. To configure the Variable Compare activity to branch emails based on a different set, or an additional set, of conditions, see "Routing contacts with the Variable Compare activity" on page 209.

If the email's Subject line contains neither Automatic Reply nor Out of Office, the email follows a branch with activities routing emails to appropriate queues. In this default workflow, the branch is named 'Email is not an Auto Response'.

This branch contains a Transfer activity. By default, the destination of this activity is set to the <<DestinationQueues>> variable, which compares all addresses in the To and CC field of incoming email to existing queue email addresses. For example, emails directed to the Sales branch would be transferred to the Sales queue, and emails directed to the Support branch would be transferred to the Support queue. Emails failing to transfer to a queue follow the Failure branch. We recommend administrators configure the Failure branch with activities so that a course of action is taken if a transfer fails. Emails transferred to the appropriate queue follow the Success branch. Once an email is transferred to the appropriate queue, a Terminate activity ends the Email Inbound workflow, and the Email Inqueue workflow executes. To configure the Transfer activity to direct emails to queues and queue groups in the contact center, see "Routing contacts with the Transfer activity" on page 207.

The default workflow ends with three activities designed to notify administrators when emails are not successfully routed.

The first is an Email activity. Inbound emails reaching this activity have failed to reach a queue. For example, an email might reach this activity if the address in the email's To: field was not recognized by the system. The Email activity is intended to notify an administrator that a contact failed to reach a queue. To configure the Email activity with the administrator's email address and to assign the Email activity to an SMTP server, see "Enabling mixed model routing" on page 210.

The second is a Transfer activity. We recommend configuring this Transfer activity with a destination to receive emails not successfully routed to a queue. For example, an administrator can specify their email address as the Transfer activity's destination. See "Routing contacts with the Transfer activity" on page 207.

The third is another Email activity, nested in the Transfer activity's Failure branch. This Email activity contains a message indicating that the final routing activity in this workflow has failed and that the contact can be reviewed as a Failed item in Ignite. To configure the Email activity with an administrator's email address and to assign the Email activity to an SMTP server, see "Sending emails with the Email activity" on page 179. See also "Rerouting failed emails" on page 371.

NOTE: <<WorkflowName>> indicates a variable populated by the workflow's name as configured in YourSite Explorer. For a list of Multimedia Contact Center variables, go to Multimedia=>Variables. For information on renaming the workflow, see "Naming workflows" on page 161.

DEFAULT EMAIL INQUEUE WORKFLOW

This workflow is executed once an inbound email is transferred to a queue. The workflow offers the email to agents within a primary agent group or, if necessary, overflow agent groups. Administrators can specify the first and any subsequent agent groups to be offered contacts. This default Email Inqueue workflow provides a template for efficiently routing emails to the agents best suited to answer them.

To further illustrate the workflow's activities and their operations, we recommend expanding the entire workflow and all annotations.

To expand the workflow

- Click the **Expand All** button.

To expand all annotations

- Right-click the workflow and select **Annotations...=>Show All**.

Description

The first step in the workflow is a Schedule activity. The Schedule activity contains a Business Hours and an After Hours branch. If an email hits the queue from Monday to Friday between 9:00 AM and 5:00 PM, the Business Hours branch is followed. If an email is received after business hours, the After Hours branch is followed. To configure the Schedule activity with the contact center's business hours, see "Routing contacts with the Schedule activity" on page 201.

The Business Hours and After Hours branches contain Email activities programmed with a dedicated auto response message. The subject line of the Business Hours branch contains 'Auto Response [<<CaseIdPrefix>><<CaseId>> <<TicketIdPrefix>><<TicketId>>]'. The subject line of the After Hours branch contains 'After Hours Auto Response [<<CaseIdPrefix>><<CaseId>> <<TicketIdPrefix>><<TicketId>>]'. This populates the email subject line with the customer's case and ticket number and indicates that the message is an automatic response. By default, each Email activity's template is set with the From field to <<QueuePrimaryEmailAddress>>, which uses the queue's primary email address in responses. For more information on email queue email addresses, see "Configuring general settings for multimedia queues" on page 78.

NOTE: Emails will not be sent by the email activity if the <<To>> variable is used in the From field and an inbound email that is addressed to multiple queues arrives in the workflow.

Customers emailing during business hours receive a response message saying 'Hello <<From>>, Thank you for your email. We have received your message and it is being handled by one of our agents. Please expect a reply shortly. Thank you'. Customers emailing after business hours receive a response message saying 'Hello <<From>>, You've contacted us outside our regular hours of operation. Please expect a response during our regular business hours. Thank you'. To configure custom response messages for these branches and to connect the activity to an SMTP server, see "Sending emails with the Email activity" on page 179.

NOTE:

- <<From>> indicates a variable populated by the name appearing in the customer's email address. For a list of Multimedia Contact Center variables, go to Multimedia=>Variables.
- The <<CaseIdPrefix>>, <<CaseId>>, <<TicketIdPrefix>>, and <<TicketId>> variables are only populated if the email media server has been configured to send case and ticket number information. See "Configuring Advanced options for media servers" on page 52 for more information.
- The <<CaseIdPrefix>>, <<CaseId>>, <<TicketIdPrefix>>, and <<TicketId>> variables are only populated if the email media server has been configured to send case and ticket number information. See "Configuring Advanced options for media servers" on page 52 for more information.

- To include Case and Ticket number prefixes in auto-responses from the Email activity, insert the <<CaseIdPrefix>> variable before the <<CaseId>> variable, and insert the <<TicketIdPrefix>> variable before the <<TicketId>> variable.
- Each time an email arrives in an Inqueue workflow, an auto-acknowledgment email is sent to the customer. To prevent multiple identical auto-acknowledgment messages when emails move between queues, you can tailor the auto-acknowledgment messages to be queue specific or remove the Business Hours Auto Response Email activity and place Email activities with similar messages in the Inbound workflow before the Transfer activities to each queue. For more information, see "Default Email Inbound workflow" on page 213.

The first activity in this workflow is an Offer to Agent Group activity. This activity offers the contact to a specified agent group, in this example named 'Offer to Primary Agent Group'. If an agent in the primary agent group is available to receive an email, the Agent Available branch is followed. An Offer to Agent activity sends the email to an agent's Inbox. The system evaluates which available agents have the highest skill level and, of these, pushes the email to the agent longest idle. If the email is successfully offered to an agent, the Success branch is followed and a Terminate activity ends the Inqueue workflow. If the system cannot offer the email to an agent, or if an agent does not accept the contact, then the Failure branch is followed. A Go To activity nested in the Failure branch loops back to the Offer to Agent Group activity and the system searches again for an available agent in the group. If an agent or supervisor picks the email from the queue, the Completed branch is followed and a Terminate activity ends the workflow. To specify agent groups to be offered emails for the queue, see "Routing contacts with the Offer to Agent Group activity" on page 189. For information on configuring push, pick, or mixed routing models, see "Configuring routing options for offering contacts to agent groups" on page 190, and "Enabling mixed model routing" on page 210. To specify a different end point for the Go To activity, see "Routing contacts with the Go To activity" on page 187.

If agents in the primary agent group are not available, emails sitting in queue for five minutes follow the Overflow branch. Now the system searches for available agents in the second Offer to Agent Group activity, named 'Offer to Overflow Agent Group 1' in this example. The process repeats itself, and emails are overflowed to the third and fourth Offer to Agent Group activities if an available agent cannot be found in the first overflow agent group. The fourth and final Offer to Agent Group activity is configured to disallow overflow. This is to prevent emails from failing to route to an agent group, in the event that an agent in the final Offer to Agent Group activity is not available. Verify that, for the final Offer to Agent Group activity, the 'Do Not Allow Overflow' check box is selected in the Properties pane.

To disallow all overflow, delete the second, third, and fourth Offer to Agent Group activities from the workflow and follow the instructions on disabling overflow in "Configuring routing options for offering contacts to agent groups" on page 190. See this procedure also to maintain overflow but to adjust the Overflow Time.

NOTE: The default workflow does not make use of the Interval branch. For more information on this branch, see "Configuring routing options for offering contacts to agent groups" on page 190.

DEFAULT CHAT INBOUND WORKFLOW

This workflow instructs Multimedia Contact Center how to route inbound chat requests to the appropriate chat queues. By default, this workflow uses the <<DestinationQueue>> variable to route chats to the appropriate queues during business hours. Outside business hours, contacts receive an automated response informing them that the contact center is unavailable.

To better illustrate the workflow's activities and operations, we recommend you expand the workflow and all annotations.

To expand the workflow

- Click the **Expand All** button.

To show all annotations

- Right-click the workflow select **Annotations...=>Show all**.

Description

The first activity in this workflow is a Transfer activity. This activity is configured to route chats using the <<DestinationQueues>> variable, which is filled automatically when either a queue is selected from the drop-down list in the chat request page or when a customer uses the chat queue's Public URL to start a chat session. If the transfer is successful, the chat is sent to the destination queue and a Terminate activity ends the workflow. If the transfer fails, the chat request is sent down the Failure branch.

The next activity in the workflow is an Email activity. If the transfer failed, this activity sends an email to an administrator to notify them that an emergency routing has occurred for a chat. This activity must have an SMTP server added to it. The email's template must also be altered for sender and destination. The template may be customized, but changing the variables within the template is not recommended. For more information on configuring the Email activity, see "Sending emails with the Email activity" on page 179.

This activity is followed by a Transfer activity. This activity is intended to transfer chats that do not route correctly by <<DestinationQueue>> to be routed to a specified chat queue. This activity requires that a destination queue be selected. For more information on configuring a Transfer activity, see "Routing contacts with the Transfer activity" on page 207. The Success branch of this activity contains a Terminate activity that ends the workflow.

The Failure branch contains an Email activity that sends another email to the administrator, indicating that the final routing activity in this workflow has failed and that the contact can be reviewed as a Failed item in Ignite. The template must have a destination added. The template may be customized, but changing the variables within the template is not recommended. For more information on configuring the Email activity, see "Sending emails with the Email activity" on page 179.

The failed chat session is then routed to the final activity of the workflow, a Terminate activity, which ends the workflow.

DEFAULT CHAT INQUEUE WORKFLOW

This workflow is executed when an inbound chat is transferred to a queue. This workflow offers the chat session to idle agents within the primary agent group or, if necessary, an overflow agent group. You can specify the first and any subsequent agent group(s) to be offered the contact. This default Chat Inqueue workflow provides a template for efficiently routing chat sessions to the agents best suited to handle them.

To better illustrate the workflow's activities and operations, we recommend you expand the workflow and show all annotations.

To expand the workflow

- Click the **Expand All** button.

To show all annotations

- Right-click the workflow and select **Annotations...=>Show all**.

Description

The first activity in the Chat Inqueue workflow is a Schedule activity. The schedule activity contains a Business Hours and an After Hours branch. If a chat arrives in queue from Monday to Friday between 9:00 AM and 5:00 PM, the Business Hours branch is followed. If a chat is received after business hours, the After Hours branch is followed. To configure the Schedule activity with the contact center's business hours, see "Routing contacts with the Schedule activity" on page 201.

The After Hours branch contains a Say activity programmed with a dedicated auto-response message. The Say activity sends a greeting to the contact that states: "Hello, and thank you for contacting us. Our chat queues are currently closed. Please try again during our regular business hours. Thank you." To reconfigure the Say activity's message, see "Responding to contacts with the Say activity" on page 200. The next activity in the After Hours branch is an End Session activity, which ends the chat session with the contact. The branch continues to a Terminate workflow activity, which ends the workflow.

The Business Hours branch contains a Say activity. The Say activity sends a greeting to the contact that states: "One moment while we check for an available agent." To reconfiguring the Say activity's message, see "Responding to contacts with the Say activity" on page 200.

The next activity in this workflow is the Offer to Agent Group activity. This activity offers the chat session to the configured agent group for the activity, in this example named 'Primary Agent Group'. After you configure this activity with an agent group, it will offer the chat to that group first. An agent group must be associated to the activity. To specify agent groups to be offered chat sessions for the queue, see "Routing contacts with the Offer to Agent Group activity" on page 189.

NOTE: The default workflow does not make use of the Interval branch. For more information on this branch, see "Routing contacts with the Offer to Agent Group activity" on page 189.

If there are available agents in the primary agent group, the chat request is routed to the Agent Available branch. This branch contains an Offer to Agent activity that sends the chat to the agent's Ignite client. The system evaluates which available agents have the highest skill level and, of these, pushes the chat to the agent who has been the longest idle. If the chat is successfully offered to the agent, the Success branch is followed and a Terminate activity ends the Inqueue workflow. If it fails to be offered to an agent, it is routed to the Failure branch which contains a Go To activity that loops back to the Offer to Agent Group activity and the system searches for another available agent in the group.

If the overflow timer for the Offer to Primary agent group activity is exceeded, the chat session is routed down the Overflowed branch to the next Offer to Agent Group activity.

By default, the Overflow Time in the Properties pane is set to 5 minutes. If you do not want to direct chats to an overflow group, set the Offer to Agent Group's Overflow Timer to 0, select the 'Do Not Allow Overflow' check box, and delete the following Offer to Agent Group activities. For more information on modifying the overflow timer, see "Routing contacts with the Offer to Agent Group activity" on page 189.

If the chat session is removed while sitting in queue before reaching an agent, the Completed branch is followed and a Terminate activity ends the workflow.

The next three activities in this workflow are Offer to Agent Group activities. There are three Offer to Agent Group activities in the workflow, the agent groups configured with each activity functioning as 1st to 3rd Overflow groups. These activities are identical in configuration to the first Offer to Agent Group activity. The third and final Offer to Agent Group activity is configured to prevent overflow, preventing chats from failing to route to an agent group. These activities can be safely deleted from the workflow, if desired. The fourth and final Offer to Agent Group activity is configured to prevent overflow, preventing chats from failing to route to an agent group. Verify that the 'Do Not Allow Overflow' check box is selected in the Properties pane and that the Overflow Time is set to 0:00:00.

DEFAULT CHAT RESPONSE WORKFLOW

The default chat response workflow runs after a chat session has been terminated. It confirms if the chat queue is configured to send transcripts and, if so, emails the transcript to the email address entered by the customer when filling out the chat request form.

To further illustrate the workflow's activities and operations, we recommend you expand the workflow and show all annotations.

To expand the workflow

- Click the **Expand All** button.

To show all annotations,

- Right-click the workflow select **Annotations...=>Show all**.

Description

The first step in this workflow is a Variable Compare activity. This activity checks to see if the chat queue is configured to send transcripts. If it is, it routes down the "Queue is configured to send transcript" branch. If it is not configured to send transcripts, the workflow routes down the "Queue is not configured to send transcript" branch, which continues directly to the Terminate activity at the end of the workflow.

The "Queue is configured to send transcript" branch contains an Email activity. This activity is configured with the variables required to send the transcript back to the customer. The template may be customized, but changing the variables within the template is not recommended. This activity requires the assignment of a SMTP server. For information on configuring the Email activity, see "Sending emails with the Email activity" on page 179.

The final step in the workflow is a Terminate activity. This activity completes the workflow.

DEFAULT SMS INBOUND WORKFLOW

This workflow instructs Multimedia Contact Center how to route inbound SMS contacts to the appropriate SMS queues. By default, this workflow uses the phone number of SMS queues to route SMS contacts to the appropriate queues.

To better illustrate the workflow's activities and operations, we recommend you expand the workflow and all annotations.

To expand the workflow

- Click the **Expand All** button.

To show all annotations

- Right-click the workflow and select **Annotations...=>Show all**.

Description

The first activity in this workflow is a Transfer activity. The activity is configured to route SMS contacts using the <<DestinationQueues>> variable, which is filled in automatically with the phone number the SMS contact used and is compared to the phone numbers of the SMS queues. If the transfer is successful, the SMS contact is sent to the destination queue and a Terminate activity ends the workflow. If the transfer fails, the SMS contact is sent down the Failure branch.

The Failure branch continues to an Email activity. If the transfer failed, this activity sends an email to an administrator to notify them that the Transfer activity failed to route and that the contact can be reviewed as a Failed item in Ignite. The template must have a destination added to it and the Email activity must have an SMTP server added to it. The template may be customized, but changing the variables within the template is not recommended. For more information on configuring the Email activity, see "Sending emails with the Email activity" on page 179.

The next activity in the branch is a Transfer activity. This activity is intended to transfer SMS contacts that do not route correctly by <<DestinationQueues>> to be routed to a specified SMS queue. This activity requires that a destination queue be selected. For more information on configuring a Transfer activity, see "Routing contacts with the Transfer activity" on page 207. The Success branch of this activity contains a Terminate activity that ends the workflow.

The Failure branch continues to a Terminate Workflow activity, which ends the workflow.

DEFAULT SMS INQUEUE WORKFLOW

This workflow is executed once an inbound SMS contact is transferred to a queue. The SMS contact is offered to agents within a primary agent group or, if necessary, overflow agent groups. Administrators can specify the first and any subsequent agent groups to be offered contacts. This default SMS Inqueue workflow provides a template for efficiently routing SMS to the agents best suited to answer them.

To further illustrate the workflow's activities and their operations, we recommend expanding the entire workflow and all annotations.

To expand the workflow

- Click the **Expand All** button.

To expand all annotations

- Right-click the workflow and select **Annotations...=>Show All**.

Description

The first step in the workflow is a Schedule activity. The schedule activity contains a Business Hours and an After Hours branch. If a SMS arrives in queue from Monday to Friday between 9:00 AM and 5:00 PM, the Business Hours branch is followed. If a SMS is received after business hours, the After Hours branch is followed. To configure the Schedule activity with the contact center's business hours, see "Routing contacts with the Schedule activity" on page 201.

The After Hours branch contains a Say activity programmed with a dedicated auto-response message. The Say activity sends a greeting to the contact that states: "Hello, and thank you for contacting us. Our SMS queues are currently closed. Please try again during our regular business hours. Thank you." To reconfigure the Say activity's message, see "Responding to contacts with the Say activity" on page 200. The next activity in the After Hours branch is an End Session activity, which ends the SMS session with the contact. The branch continues to a Terminate workflow activity, which ends the workflow.

The Business Hours branch routes to an Offer to Agent Group activity. This activity offers the contact to a specified agent group, in this example named 'Offer to Primary Agent Group. After you configure this activity with an agent group, it will offer the SMS contact to that group first. An agent group must be associated to the activity. To specify agent groups to be offered for the queue, see "Routing contacts with the Offer to Agent Group activity" on page 189.

NOTE: The default workflow does not make use of the Interval branch. For more information on this branch, see "Routing contacts with the Offer to Agent Group activity" on page 189.

If an agent in the primary agent group is available to receive an SMS, the Agent Available branch is followed. This branch contains an Offer to Agent activity that sends to SMS contact to the agent's Ignite client. The system evaluates which agents have the highest skill level and, of these, pushes the SMS contact to the agent who has been idle the longest. If the SMS contact is successfully offered to an agent, the Success branch is followed and a Terminate activity ends the Inqueue workflow. If it fails to be offered to an agent, it is routed to the Failure branch, which contains a Go To activity that loops to the Offer to Agent Group activity and the system searches for another available agent in the group.

If the overflow timer for the Offer to Agent Group activity is exceeded, the SMS activity is routed down the Overflowed branch to the next Offer to Agent Group activity. By default, the Overflow Time in the Properties pane is set to 1 hour. If you do not want to direct SMS contacts to an overflow group, set the Offer to Agent Group's Overflow Timer to 0, select the 'Do Not Allow Overflow' check box, and delete the following Offer to Agent Group activity. For more information on modifying the Overflow Timer, see "Routing contacts with the Offer to Agent Group activity" on page 189.

If the SMS session is removed while sitting in queue before reaching an agent, the Completed branch is followed and a Terminate activity ends the workflow.

The next activity in this workflow is an Offer to Agent Group activity. This activity offers SMS contacts to the overflow agent group. This activity is identical in configuration to the first Offer to Agent Group, except that it is configured to prevent overflow, preventing SMS from failing to route to an agent group. Verify that the 'Do Not Allow Overflow' check box is selected in the Properties pane and that the Overflow Time is set to 0:00:00.

MANAGING IGNITE

Administrators can manage Ignite to improve agent experiences and productivity.

To manage Ignite, administrators can

- Add items to and clear items from Ignite's global spell checking dictionary
- Configure bounced email detection settings
- Configure maximum email message size
- Accessing diagnostics reports sent from Ignite (WEB)

ADDING ITEMS TO IGNITE'S GLOBAL SPELL CHECKING DICTIONARY

NOTE: The following pertains to email only.

Administrators can configure Ignite's global dictionary to include words that are used by agents across your contact center but are not included in the default dictionary. Examples include product names and services.

Adding items to Ignite's global dictionary eliminates the need for each agent to add these words to their local dictionary while ensuring agents spell the words correctly.

For information on adding items to Ignite's global dictionary, consult the following Knowledge Base article: <http://micc.mitel.com/kb/KnowledgebaseArticle52244.aspx>.

CONFIGURING BOUNCED EMAIL DETECTION SETTINGS

NOTE: You must use SSL to send emails in order to fully support bounce detection settings.

Ignite can be configured to filter bounced emails and either automatically junk them or place them in:

- DESKTOP - the Auto Replies/Failed Delivery subfolder (contained in the Failed folder) of the agent who last handled the email and the global failed route folder (where supervisors can view and process bounced emails when agents are absent).
- WEB - the Inbox of the agent who last handled the email and History=>Failed (where supervisors can view and process bounced emails when agents are absent).

Emails are considered bounced if:

- The email recipient had a vacation or out of office response configured
 - The email recipient had no more space in their mail box
 - The message to be delivered to the recipient was delayed by the mail server
 - Some of the addresses in the delivery list (To, CC, BCC) were invalid
- This applies only when the contact center mail server is configured to operate in SSL mode

For configuration setting details, see the following Mitel Knowledge Base article:
<http://micc.mitel.com/kb/KnowledgeBaseArticle52352.aspx>.

CONFIGURING MAXIMUM EMAIL MESSAGE SIZE

Maximum email message size can be configured on your system to provide visibility to contact center agents and supervisors when they attempt to send oversized emails. Size restriction settings are applied globally to all of your mail servers so must be set to meet the requirements of the mail server with the lowest supported message size. When set accurately, and an agent attempts to send an oversized email, an error message displays and they are given the option of editing the email size and resending.

For configuration setting details, see the following Mitel Knowledge Base article:
<http://micc.mitel.com/kb/KnowledgeBaseArticle52336.aspx>.

NOTE: You must use SSL to send emails in order to fully support maximum email message size setting associated behavior.

ACCESSING DIAGNOSTICS REPORTS SENT FROM IGNITE (WEB)

Administrators can access diagnostics reports sent from Ignite. Employees can report specific issues, and Ignite can be automated to send continuous information to the Enterprise Server.

NOTE: You may experience higher than normal bandwidth use, depending on the number of agents enabling continuous logging from Ignite.

A single file is created per employee. Additional reports append to this file. Reports contain log lines from employees' browsers and, for on-demand reports, any details added.

To access diagnostics reports from Ignite (WEB)

- On the Enterprise Server, navigate to **<installation drive>:\Mitel\MiContact Center\Logs\Clients** and select a file.

Chapter 2 Supervisors

MANAGING A MULTIMEDIA CONTACT CENTER



SUPERVISORS - MANAGING A MULTIMEDIA CONTACT CENTER

Supervisors use the following applications in order to effectively manage contact center employees.

- Contact Center Client
- Ignite
- CCMWeb

Within Contact Center Client, supervisors can access and oversee real-time customer activity and agent response using a series of desktop monitors, as well as review historical activity. They can affect service levels by manipulating agent group presence and distributing contacts among queues. Using monitor alarms they can be notified when agents are inappropriately inactive or queues become inordinately busy and react to these situations quickly and effectively to improve the customer experience and optimize agent productivity.

Ignite is available as either a desktop or Web version. They share much of the same functionality but also offer unique agent and supervisor experiences enabling you to choose the application that suits your individual needs. In our documentation, we refer to desktop Ignite and its features as Ignite (DESKTOP) and Web Ignite and its features as Ignite (WEB) or, where appropriate, as DESKTOP or WEB only.

When circumstances dictate, supervisors licensed for Multimedia Contact Center can use Ignite to temporarily handle contacts, alleviating customer wait times and ensuring a satisfactory service level is maintained. Searching email, chat, and SMS history can also be done in Ignite. This sort of information is essential when building a case history, following a trail to investigate a customer complaint or compliment, or to track agent performance.

With Ignite (WEB), supervisors can access real-time monitors to view current queue statistics and callback requests. They can also view agent and employee statistics and interact with agent presence to improve service levels.

NOTE: Supervisors have unrestricted access to search email, chat, and SMS history items with an Advanced Supervisor or System Administrator license.

Assessing the statistical information that is found in the wide array of multimedia reports available is an essential part of effective contact center supervision. Reports can be generated, viewed, and scheduled in CCMWeb, your center for reports, setting preferences, and accessing the Help resource documentation.

SETTING ALARMS TO MONITOR AGENT PERFORMANCE AND CUSTOMER SERVICE

You can define alarms to alert you to changes in contact center activity. Using the alarms, you specify performance thresholds for contact center elements such as queues and agents and can customize the visual, auditory, or email delivery of alarms. If any availability or performance issues arise, your alarms deliver a notification enabling you to react to and adjust agent and queue availability.

You can set alarms to notify you when there are a specified number of emails, chats, or SMS waiting or when agents have been in an unavailable state, such as Make Busy, for a specified length of time. If alarms indicate a queue is overloaded with contacts or understaffed, you can join that queue as an agent (dependent on licensing) or find an agent who is capable of handling the media type for that queue and use the Agent Group Presence controls to place them in the group associated to that queue. If an alarm demonstrates to you that an agent has been unavailable for an extended period of time, you can remove the agent from Do Not Disturb or Make Busy, if appropriate.

Client alarms are specific to each computer. To notify you that performance thresholds are not being met, you can configure alarms so that

- Monitor cells and statistics change color.
- A pop-up notification opens on your desktop.
- A sound prompt, such as a beep or .wav files plays.
- You are notified by mail.
- Contact Center Client opens on top of all other applications.

The *MiContact Center User Guide* describes alarm configuration in full. See the 'Setting alarms' section located there for detailed information.

ACCESSING REAL-TIME INFORMATION WITH CONTACT CENTER CLIENT

You use Contact Center Client to access real-time contact center agent, queue, and contact information.

The following section describes typical supervisor usage of the monitors available in Contact Center Client. For more detailed information regarding Contact Center Client, see the Real-time Monitors chapter in the *MiContact Center User Guide*.

STARTING CONTACT CENTER CLIENT

NOTE: Launching client-side desktop applications from the task bar causes them to bypass the MiContact Center Updater Service process. To ensure successful updates from the Enterprise Server, after an upgrade close all client-side applications for 15 minutes or reopen them from the Start menu/Start screen.

You use Contact Center Client to access real-time monitors and functionality. Supervisors can view real-time voice, email, chat, and SMS statistics. After starting Contact Center Client, supervisors can choose to minimize it to either the system tray or the taskbar.

To start Contact Center Client

1. Open **Contact Center Client**.
2. If prompted, type your **Username** and **Password** and verify the **Enterprise Server** IP address.
3. If you use Secure Socket Layer, select **SSL**.
4. Optionally, select **Remember my credentials**.
5. Click **Login**.

Hiding monitor control

Interactive Contact Center enables you to manage the presence of all devices in a monitor using Monitor Device Control. If you do not want to use monitor control, you can hide this option so it is not accessible.

To hide the Monitor control option

1. In **Contact Center Client**, click the **Contact Center Client button=>Options**.
2. Under **Device control**, clear the **Display monitor device control option** check box.
3. Click **OK**.

EMPLOYEE AND AGENT STATE INDICATORS

The following icons display in agent or employee monitors and indicate the current agent/employee state and media type with which they are engaged. You can choose to display the icons as shown in the following tables or select the Classic view (Contact Center Client tab=>Options=>Real-time icons).

NOTE: If Contact Center Client becomes disconnected from the server, upon re-connection agent states will be automatically synchronized with the server.

Table 18 displays Employee state icons and their meanings.

Table 19 displays Agent state icons and their meanings.

Table 18: Employee states






TERM	ICON	MEANING
Ringing		An ACD contact ringing on the employee, waiting to be handled
ACD		An employee handling an ACD contact
ACD Hold		An employee who has placed an ACD contact on hold
Idle		An employee logged on and waiting to receive a contact
Non ACD		An employee involved in an incoming non-ACD contact or employee-originated voice contact

Table 18: Employee states (continued)











TERM	ICON	MEANING
Non ACD Hold		An employee who has placed a non-ACD voice contact on hold
Outbound		An employee on an outgoing voice contact
Outbound Hold		An employee who has placed an outgoing voice contact on hold
Do Not Disturb		An employee who has activated Do Not Disturb and is not available to receive any ACD or non-ACD contacts
Make Busy		<p>An employee who is not available to receive ACD contacts but can receive transferred contacts and voice contacts dialed directly to the employee</p> <p>This icon also displays when an employee's external hot desk agent is in the Reseize Timer state</p>
System Make Busy		If an employee has multimedia agent IDs and is logged on to two or more media servers simultaneously, the system sends the agent only one incoming communication at a time. For example, when the agent answers a voice contact, the system places the agent ID(s) for the other media server types in System Make Busy
Work Timer		An employee who is completing post-contact work, such as paperwork, and is unavailable to receive contacts of that media type
Logged Off		An employee not currently logged in to any queue
Logged In Not Present		An employee logged in but not present to any of their agent groups, and employees not present to a media type across all groups
Unavailable		An employee who has not generated any activity since MiContact Center was started

Table 19: Agent states

















































TERM	VOICE	EMAIL	CHAT	SMS	MEANING
Ringing					An ACD contact ringing on an agent, waiting to be handled
ACD					An agent handling an ACD contact
ACD Hold					An agent who has placed an ACD contact on hold
Idle					An agent logged on and waiting to receive a contact
Non ACD		-	-	-	An agent involved in an incoming non-ACD contact or agent-originated voice contact
Non ACD Hold		-	-	-	An agent who has placed a non-ACD voice contact on hold
Outbound		-	-	-	An agent on an outgoing voice contact
Outbound Hold		-	-	-	An agent who has placed an outgoing voice contact on hold
Do Not Disturb					An agent who has activated Do Not Disturb and is not available to receive any ACD or non-ACD contacts
Make Busy					<p>An agent who is not available to receive ACD contacts but can receive transferred contacts and voice contacts dialed directly to the agent</p> <p>This icon also displays when an external hot desk agent is in the Resize Timer state</p>

Table 19: Agent states (continued)

TERM	VOICE	EMAIL	CHAT	SMS	MEANING
System Make Busy					If an agent is a multimedia agent and is logged on to two or more media servers simultaneously, the system sends the agent only one incoming communication at a time. For example, when the agent answers a voice contact, the system places the agent ID(s) for the other media server types in System Make Busy
Work Timer					An agent who is completing post-contact work, such as paperwork, and is unavailable to receive contacts of that media type
Unknown					An agent who has not generated any activity since MiContact Center was started
Logged Off					An agent not currently logged in to any queue
Logged In Not Present					An agent logged in but not present to any of their agent groups, and agents not present to a media type across all groups

OVERRIDING STATES IN REAL-TIME MONITORS

An overriding state is a state that 'trumps' another state as the state that appears in an Agent or Employee monitor. The states by order of priority are:

- Ringing
- ACD
- ACD Hold
- Non ACD
- Non ACD Hold
- Outbound
- Outbound Hold
- Work Timer
- Do Not Disturb

- Make Busy
- System Idle
- Idle

MONITORING AGENTS AND QUEUES

The real-time monitors in Contact Center Client are automatically updated to reflect current contact center activity and device and device group configuration changes. Supervisors can use the following monitors to access up-to-the-minute statistics and information to assist in identifying performance issues and dealing with such situations immediately as they arise.

You can customize the card design to display information in the monitors to suit your work environment. For more information on customizing Contact Center Client monitors, see the Real-time Monitors chapter in the *MiContact Center User Guide*.

Contact Center Client real-time monitors and charts are briefly described in the following section. If you require a more detailed description of the monitors and charts available with Contact Center Client, see the Real-time Monitors chapter in the *MiContact Center User Guide*.

Workload and monitors

Employee Workload can affect the value displaying in real-time monitors for ACD, Ringing, Hold, and Work Timer if employees are handling multiple contacts that are in the same state. If an employee is handling multiple contacts at the same time in the same state, the Agent or Employee monitor will display the time of the oldest contact. When the oldest contact changes its state, the time will change to the time of the next oldest contact.

For example, if an email agent in ACD was handling two emails, one at 5:30 and the other at 1:30, the displayed ACD time would be 5:30. If the employee finished handling the oldest email, the time would change to 1:30.

For more information on Workload, see "Configuring Workload" on page 63.

Agent or Employee State by Position monitor

The Agent and Employee State by Position monitors provide real-time information in cells that you can arrange to mirror your floor plan, enabling you to view employees by their physical position in your contact center. (See Figure 17.)

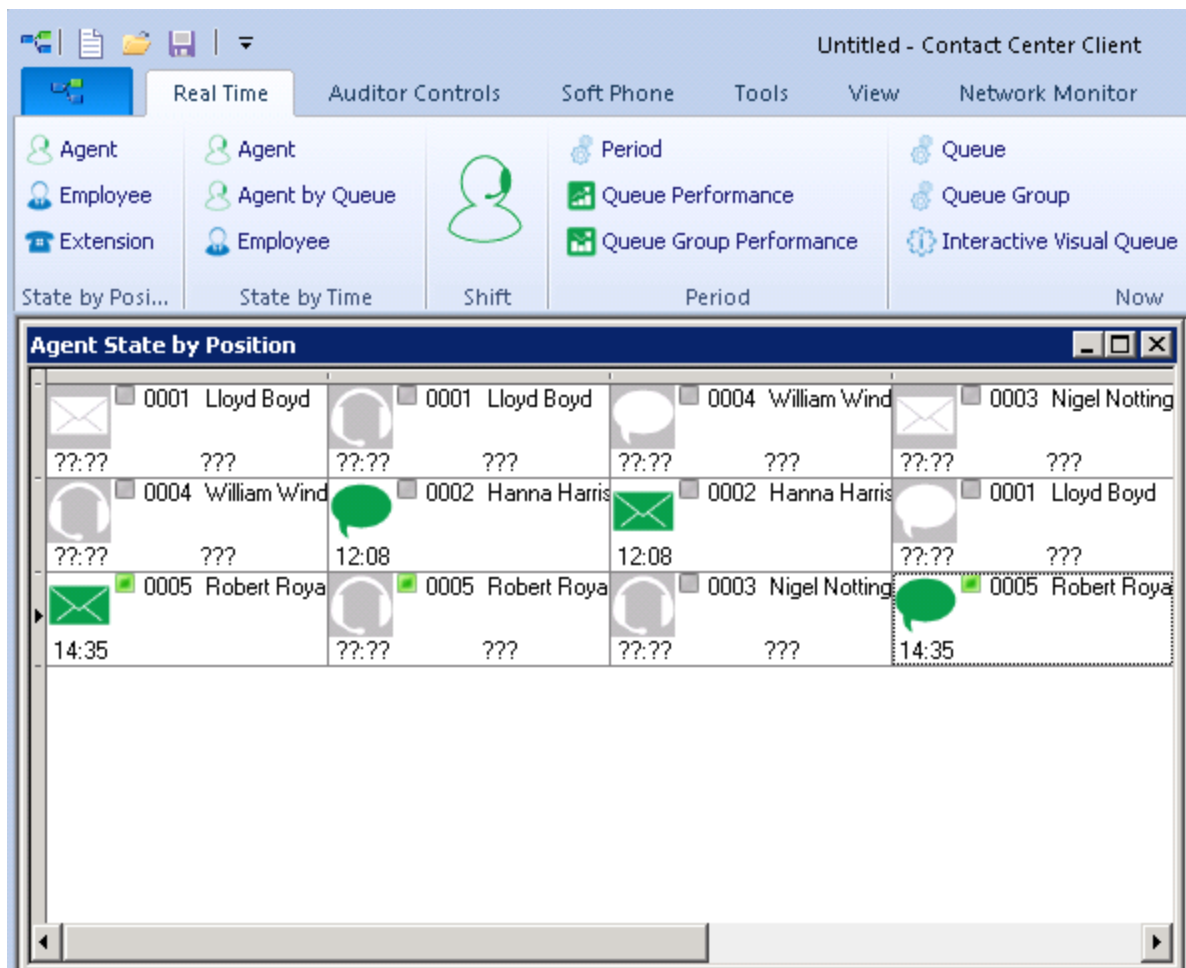


Figure 17: Agent or Employee State by Position monitor

Agent or Employee State by Time monitor

The Agent or Employee State by Time monitors provide real-time agent information under ACD, Idle, Non ACD, Unavailable, and Logged Off column headings. The difference between this monitor and the State by Position monitor is that the Agent or Employee State by Time monitors list agents in order of the time spent in the applicable state. You can specify which columns of agent statistics display and in what order they display. For example, you can sort logged off agents by designating the longest logged off agent to display first in the list. (See Figure 18.)

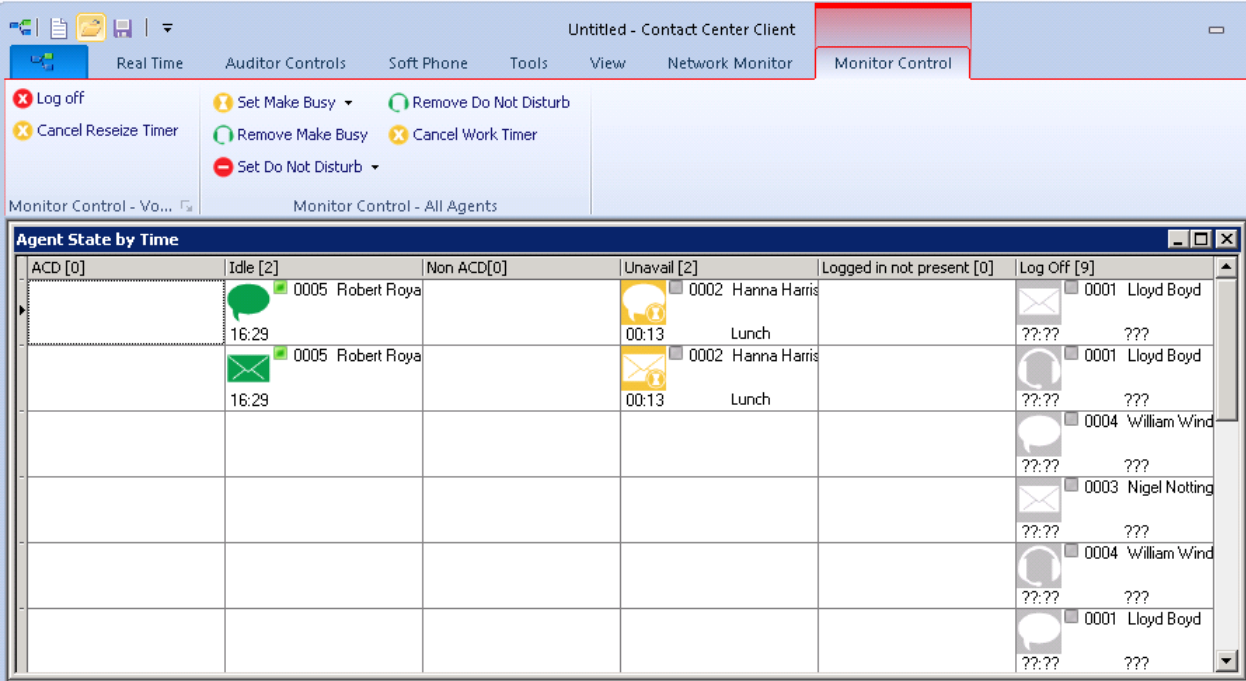


Figure 18: Agent or Employee State by Time monitor

Table 20 lists the Agent or Employee State by Time column headings and their associated agent states.

Table 20: Agent State by Time and Employee State by Time column headings

CATEGORY	ASSOCIATED AGENT STATES
ACD	includes agents in ACD and agents in ACD Hold
Idle	includes agents in the Idle state
Non ACD	includes agents in Non ACD, in Non ACD Hold, Outbound agents, and Outbound Hold agents
Unavailable	includes agents in Do Not Disturb, Make Busy, Work Timer, Reseize Timer, and Unknown
Logged in not present	includes agents logged in but not present to any of their agent groups, and agents not present to a media type across all groups
Log Off	includes agents in the Logged Off and Offline (Ignite, WEB) states

Agent State by Time for Queue monitor

The Agent State by Time for Queue monitor is designed specifically for contact centers who use Agent Group Presence functionality. This monitor is accessed from the Time menu in Contact Center Client and displays all agents configured in a specific queue and agents who are on ACD contacts, Idle, on Non ACD voice contacts, unavailable, logged onto the system but not present in the queue being monitored, and logged off. Virtual queue groups are shown under the Virtual queue groups section of this monitor and are marked in the title as (virtual). (See Figure 19.)

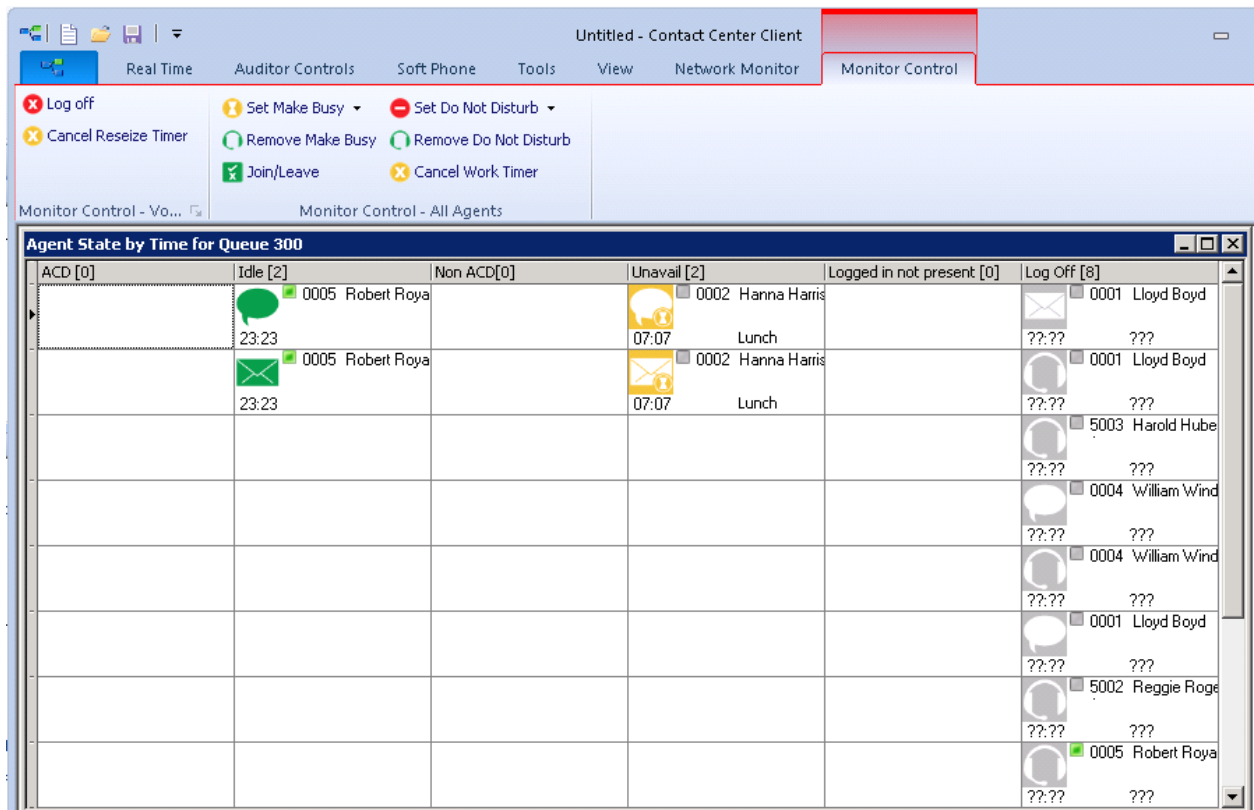


Figure 19: Agent State by Time for Queue monitor

Table 21 lists the Agent State by Time for Queue column headings and their associated agent states.

Table 21: Agent State by Time for Queue column headings

CATEGORY	ASSOCIATED AGENT STATES
ACD	includes agents in ACD and agents in ACD Hold
Idle	includes agents in the Idle state
Non ACD	includes agents in Non ACD, in Non ACD Hold, Outbound agents, and Outbound Hold agents
Unavailable	includes agents in Do Not Disturb, Make Busy, Work Timer, and Reseize Timer
Logged in not present	includes agents logged in but not present to any of their agent groups, and agents not present to a media type across all groups
Log Off	includes agents in the Logged Off, Unknown, and Offline (Ignite, WEB) states

Agent Shift monitor

The Agent Shift monitor provides running daily totals of statistics for individual agents. You can specify which columns of statistics display and the order in which they display. (See Figure 20.)

Media Server	Agent login ID	Name	Extn #	Log In	Last Event Recd	Shift Time	ACD Time	ACD Hold Time	Non ACD Time	Non ACD Hold Time	Out Time	Out Hold Time	DND Time	MKB Time	Wrap Up Time
DocsIgnite	0001	Lloyd Boyd				00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00
3300 ICP	0001	Lloyd Boyd				00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00
3300 ICP	500...	Harold Hubert				00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00
Chat_Server	0004	William Windsor				00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00
Chat_Server	0005	Robert Royale		5:09 PM	5:09...	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00
3300 ICP	0004	William Windsor				00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00
Chat_Server	0002	Hanna Harris		5:12 PM	5:25...	13:49	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00
DocsIgnite	0002	Hanna Harris		5:12 PM	5:25...	13:49	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00
Chat_Server	0001	Lloyd Boyd				00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00
DocsIgnite	0005	Robert Royale		5:09 PM	5:09...	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00
3300 ICP	500...	Reggie Rogers				00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00
3300 ICP	0005	Robert Royale				00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00

Figure 20: Agent Shift monitor

Table 22 lists the Agent Shift column headings and their definitions.

Table 22: Agent Shift column headings

TERM	ABBREVIATED NAME	MEANING
Agent State		The agent's media type and current state
Media Server	Media Server	The media server to which the agent is associated
Agent Shift Name	Name	The name of the agent being monitored
Agent login ID	Agent login ID	The login ID of the agent being monitored
Extension Number	Extn #	The extension where the agent logged in (voice only)
Logged On	Log In	The most recent time the agent logged in
Last Event Received	Last Event Recd	The most recent time an agent event occurred
Shift Time	Shift Time	The total elapsed time logged for the agent, calculated based on the difference between log in and last event received
ACD Time	ACD Time	The duration of ACD contacts handled, from agent pickup to completion (not including hold time)
ACD Hold Time	ACD Hold Time	The duration of time ACD contacts spent on hold
Non ACD Time	Non ACD Time	The duration of non-ACD contacts handled, from agent pickup to completion (not including hold time) (voice only)
Non ACD Hold Time	Non ACD Hold Time	The duration of time non-ACD contacts spent on hold (voice only)
Outbound Time	Out Time	The duration of time agents spent handling outbound calls (voice only)
Outbound Hold Time	Out Hold Time	The duration of time outbound calls spent on hold, for agents (voice only)
Do Not Disturb Time	DND Time	The duration of time the agent entered the Do Not Disturb State
Make Busy Time	MKB Time	The number of times the agent entered the Make Busy state

Table 22: Agent Shift column headings (continued)

TERM	ABBREVIATED NAME	MEANING
Wrap Up Time	Wrap Up Time	The duration of time where Wrap Up Time was the overriding state for the agent. Wrap up time does not include any time spent making or taking contacts during the wrap up timer.
Do Not Disturb Count	DND Cnt	The number of times the agent entered the Do Not Disturb state
Make Busy Count	MKB Cnt	The number of times the agent entered the Make Busy state
ACD Count	ACD Cnt	The number of ACD contacts handled by the agent
Short ACD Count	Shrt ACD Cnt	The number of ACD contacts handled by the agent where the handle time was less than the Short Handle parameter
Non ACD Count	Non ACD Cnt	The number of non-ACD contacts handled by the agent (voice only)
Hold ACD Count	Hold ACD Cnt	The number of times ACD contacts were placed on hold
Non ACD Hold Count	Non ACD Hold Cnt	The number of times non-ACD contacts were placed on hold (voice only)
Outbound Count	Out Cnt	The number of outbound calls made by the agent (voice only)
Outbound Hold Count	Out Hold Cnt	The number of times outbound calls were placed on hold (voice only)
Contacts Per Hour	Contacts Per Hour	The total ACD contact count minus the ACD short handle count, divided by the shift time for the agent
On Failover	On failover	Indicates whether the primary media server is offline and has failed over to the secondary media server (voice only)
Agent Unavailable Percent	Agt Unavail %	The percentage of shift time for which the agent was unavailable to receive contacts
Logged In Not Present Time	Logged In Not Present Time	The duration of time the agent was logged into but not present to any of their agent groups, and the duration of time the agent was not present to a media type across all groups

Table 22: Agent Shift column headings (continued)

TERM	ABBREVIATED NAME	MEANING
Average Handle	Avg Hndl	The average amount of time the agent spent handling ACD contacts (ACD Time divided by ACD Count, excluding ACD Hold Time).
Occupancy	Occp	The duration of time the agent spent processing contacts, including ringing time

Queue by Period monitor

The Queue by Period monitor collates queue statistics by 15-minute intervals over a 24-hour period. The monitor refreshes each time there is a change in a statistic and at 15-minute intervals. The current 15-minute interval always displays at the top of the monitor. (See Figure 21.)

Multimedia Contact Center Installation and Deployment Guide

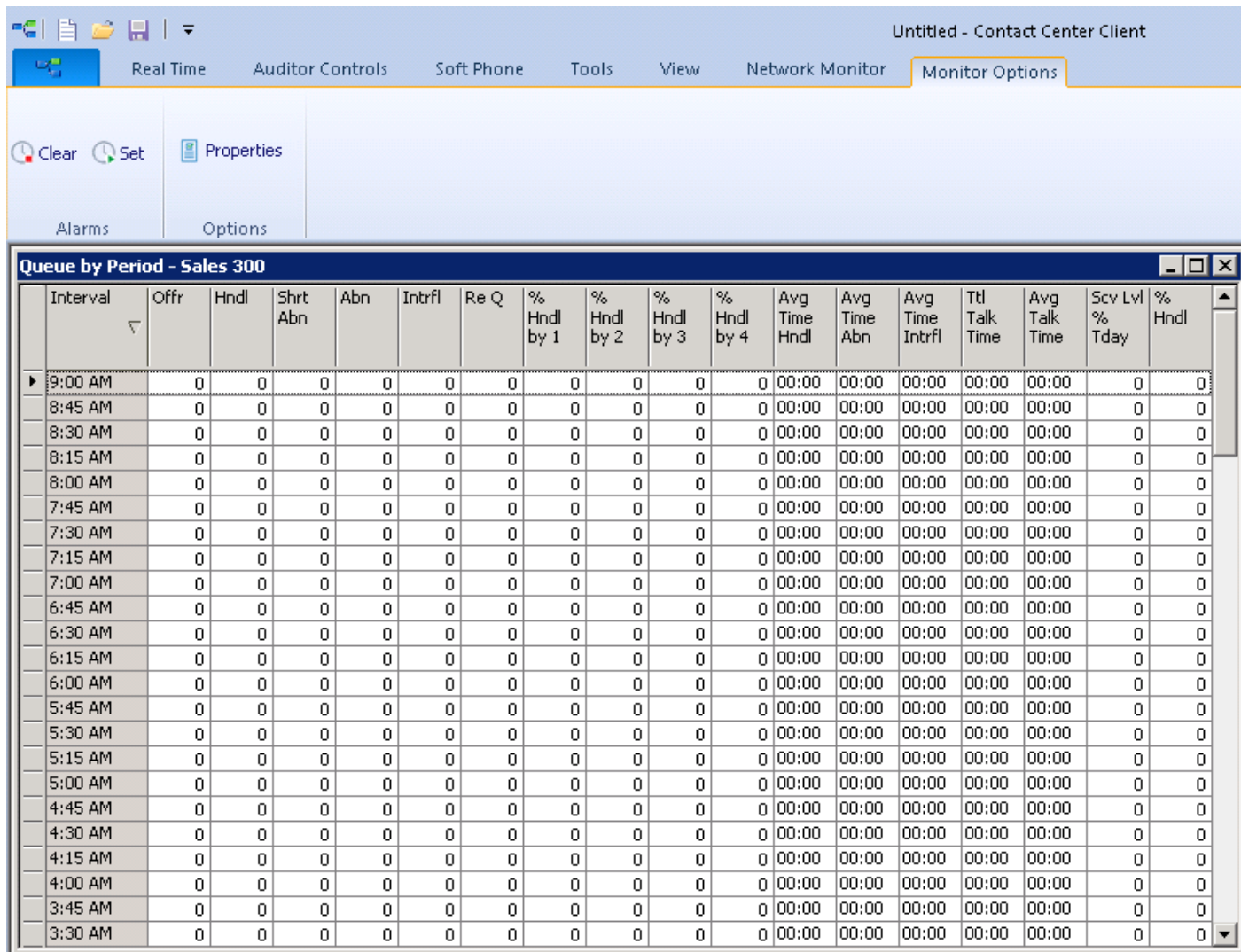


Figure 21: Queue by Period monitor

Table 23 lists the Queue by Period column headings and their definitions.

Table 23: Queue by Period column headings

TERM	ABBREVIATED NAME	MEANING
Interval time	Interval	The 15 minute interval of time
Offered	Offr	The total number of contacts offered to the queue during the 15-minute interval
Handled	Hndl	The total number of contacts answered by agents during the 15-minute interval
Short Abandoned	Shrt Abn	During the 15-minute interval, the total number of contacts abandoned before the short abandon time configured in YourSite
Abandoned	Abn	The total number of contacts abandoned during the 15-minute interval before being answered by members
Interflowed	Intrfl	The total number of contacts interflowed during the 15-minute interval
Requeued	Re Q	The total number of contacts re-queued during the 15-minute interval NOTE: This statistic displays information for ACD paths and multimedia queues only. Statistics for Ring Groups display as '0'.
% Handled by 1-4	% Hndl by 1-4	A count of all of the contacts answered by the first, second, third, and fourth agent groups during the 15-minute interval NOTE: This statistic displays information for ACD paths and multimedia queues only. Statistics for Ring Groups display as '0'.
Average Time to Handle	Avg Time Hndl	The average number of minutes contacts waited to be taken out of queue (answered or picked) by an members during the 15-minute interval
Average Time to Abandon	Avg Time Abn	The average number of minutes contacts waited during the 15-minute interval before they abandoned their contacts
Average Time to Interflow	Avg Time Intrfl	The average number of minutes contacts waited during the 15-minute interval before being interflowed
Total Conversation Time	Ttl Conv Time	The total time members spent communicating (talking, chatting, or replying) with contacts during the 15-minute interval

Table 23: Queue by Period column headings (continued)

TERM	ABBREVIATED NAME	MEANING
Average Conversation Time	Avg Conv time	The average time members spent communicating with contacts during the 15-minute interval
Service Level % Level	Scv Lvl % Tday	During the 15-minute interval, the percentage of contacts answered within the Service Level Time specified for the queue
% Handled	% Hndl	During the 15-minute interval, the percentage of contacts answered compared to the total number of contacts offered to the ACD queue for the day NOTE: This statistic displays information for ACD paths and multimedia queues only. Statistics for Ring Groups display as '0'.
Wrap Up	Wrap Up	The total time the agent spent in the Work Timer state during the 15-minute interval NOTE: This statistic displays information for ACD paths and multimedia queues only. Statistics for Ring Groups display as '0'.
Make Busy	Make Busy	The total time the agent spend in the Make Busy state during the 15-minute interval NOTE: This statistic displays information for ACD paths and multimedia queues only. Statistics for Ring Groups display as '0'.
Occupancy	Occp	The total time the agent spent in an occupied state during the 15-minute interval (occupied state excludes idle time)
# Handled by 1-4	# Hndl by 1-4	The number of contacts answered by the first, second, third, and fourth agent groups during the 15-minute interval NOTE: This statistic displays information for ACD paths and multimedia queues only. Statistics for Ring Groups display as '0'.

Queue Now and Queue Group Now monitors

The Queue Now monitor enables supervisors to view queue statistics in real-time, as well as expand individual queues in the monitor to view statistics on each queue's associated member agents or extensions. When you expand the Queue Now monitor to display the Name column, the monitor also displays member presence in the queue. Presence is indicated by a colored star in the Present column. A green star indicates the member is present in the queue. A gray star and gray row indicate the agent is not present in the queue. (See Figure 22.)

NOTE:

- Multimedia contacts in queue tagged as Junk or No Reply from Interactive Visual Queue and Ignite are not included in queue Handled, Completed, and Offered counts.
- Prior to Version 7.1, Queue Now monitors displayed queue's member agent groups with agent group statistics. As of Version 7.1, this functionality has been removed. Instead, queue members are grouped by agent group.

Real TimeAuditor ControlsSoft PhoneToolsViewNetwork MonitorMonitor Options

ClearSet

Add/Remove devicesProperties

Set Do Not DisturbRemove Do Not Disturb

Set Do Not DisturbRemove Do Not Disturb

AlarmsOptionsQueue Control - 300Monitor Control

Queue Now

Queue Status	Media Server	Queue #	Name	Calls Wtg	Long Wtg	Agts Avail	ACD	Idle	Non ACD	Out	Unavail	Offr	Hndl	Abn	Interf owed	Dial Out Of Queue	Re Q	Avg Time Hndl	Avg Time Abn	Avg Time Tir			
ACD	Chat_Server	300	Sales	2	02:58	0	0	0	0	0	0	2	1	1	0	0	?	1	00:07	00:00	0		
Agent group				DND Cnt	MKB Cnt	ACD Cnt	Shrt ACD Cnt	Hold ACD Cnt	Non ACD Cnt	Hold Non ACD Cnt	Out Cnt	Out Hold Cnt	Avg Hndl	Shift Time	DND Time	MKB Time	Wrap Up Time	ACD Time	Hold ACD Time	Non ACD Time	Hold Non ACD Time	Out Time	Out Hold Time
Sales Group				0	1	2	0	1	0	0	0	1.6	01:1...	00:0...	00:0...	00:0...	00:0...	00:0...	00:0...	00:0...	00:0...	00:0...	00:0...
ACD	3300 ICP	P300	Sales	0	00:00	0	0	0	0	0	0	0	0	0	0	0	?	0	00:00	00:00	0		
Agent group				DND Cnt	MKB Cnt	ACD Cnt	Shrt ACD Cnt	Hold ACD Cnt	Non ACD Cnt	Hold Non ACD Cnt	Out Cnt	Out Hold Cnt	Avg Hndl	Shift Time	DND Time	MKB Time	Wrap Up Time	ACD Time	Hold ACD Time	Non ACD Time	Hold Non ACD Time	Out Time	Out Hold Time
Sales Group				0	1	2	0	1	0	0	0	1.6	01:1...	00:0...	00:0...	00:0...	00:0...	00:0...	00:0...	00:0...	00:0...	00:0...	00:0...
ACD	DocsIgnite	300	Sales	0	00:00	1	0	1	0	0	1	0	0	0	0	0	?	0	00:00	00:00	0		
Agent group				DND Cnt	MKB Cnt	ACD Cnt	Shrt ACD Cnt	Hold ACD Cnt	Non ACD Cnt	Hold Non ACD Cnt	Out Cnt	Out Hold Cnt	Avg Hndl	Shift Time	DND Time	MKB Time	Wrap Up Time	ACD Time	Hold ACD Time	Non ACD Time	Hold Non ACD Time	Out Time	Out Hold Time
Sales Group				0	1	2	0	1	0	0	0	1.6	01:1...	00:0...	00:0...	00:0...	00:0...	00:0...	00:0...	00:0...	00:0...	00:0...	00:0...

Figure 22: Queue Now monitor

The Queue Group Now monitor enables supervisors to view aggregated statistics for Reporting, Virtual, and Unified queue groups in real-time, as well as expand individual queue groups in the monitor to view statistics for the queue group's associated queues. (See Figure 23.)

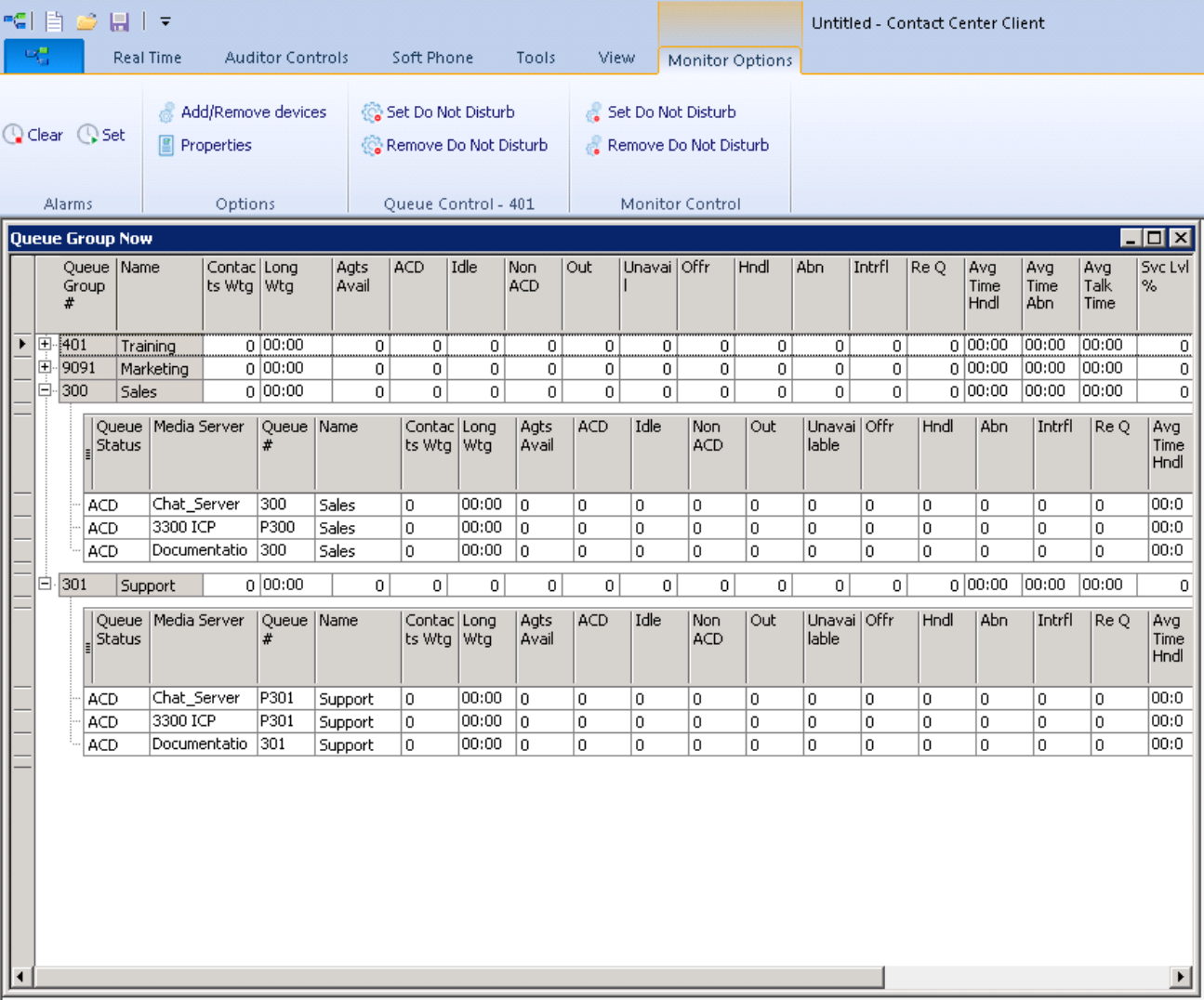


Figure 23: Queue Group Now monitor

Table 24 lists the real-time and over-the-business-day Queue Now and Queue Group Now queue and queue group statistics and their definitions.

NOTE: Some statistics in the Queue Now monitor display in the Queue Group Now monitor as member statistics.

Table 24: Queue Now and Queue Group Now queue statistic column headings

TERM	ABBREVIATED NAME	MEANING
Queue Status	Queue Status	The current status of the queue—either Open, Closed, or Do Not Disturb (voice only)

Table 24: Queue Now and Queue Group Now queue statistic column headings (continued)

TERM	ABBREVIATED NAME	MEANING
Queue Group Number	Queue Group #	The queue group reporting number (Queue Group Now only)
Media Server	Media Server	The queue's media server
Queue Number	Queue #	The queue's reporting number
Queue Name	Name	The queue or queue group name
Contacts Waiting	Contacts Wtg	The current number of contacts in queue waiting for an member to become available, including those listening to silence, music, or recorded announcements
Longest Waiting	Long Wtg	The current duration, in minutes and seconds, of the contact waiting the longest in queue or queue group
Available (Queue Now)	Avail (Queue Now)	The total number of members logged in and not in Do Not Disturb, Make Busy, Work Timer, Ringing, Reseize Timer, Unknown, and Offline (Ignite, WEB)
Agents Available (Queue Group Now)	Agts Avail (Queue Group Now)	
ACD	ACD	The current number of members handling ACD contacts
Idle	Idle	The current number of members logged on and ready to receive contacts
Non ACD	Non ACD	The current number of members handling non-ACD calls (voice only)
Outbound	Out	The current number of members on outgoing calls (voice only)
Unavailable	Unavail	The current number of agents in Do Not Disturb, Make Busy, Work Timer, or Unknown
Offered	Offr	The total number of contacts offered to the queue / queue group
Handled	Hndl	The total number of ACD contacts handled by members

Table 24: Queue Now and Queue Group Now queue statistic column headings (continued)

TERM	ABBREVIATED NAME	MEANING
Abandoned	Abn	<p>The total number of contacts abandoned before being answered by members</p> <p>NOTE: Abandoned does not peg short abandons as abandoned contacts while the Abandoned column in the Interactive Visual Queue monitor displays all abandoned contacts. Because of this difference, you may notice discrepancies between the abandoned call information in these two monitors.</p>
Interflowed	Intrfl	<p>The total number of ACD contacts interflowed. Interflow is a mechanism that directs a contact waiting in queue to another answer point.</p>
Requeued	Re Q	<p>The total number of ACD contacts requeued</p> <p>NOTE: This statistic displays information for ACD paths and multimedia queues only. Statistics for Ring Groups display as '0'.</p>
Average Time to Handle	Avg Time Hndl	<p>The average time it takes for the contact to be taken out of queue (answered or picked) by a member</p>
Average Time to Abandon	Avg Time Abn	<p>The current average amount of time customers wait in queue before abandoning contacts</p>
Average Conversation Time	Avg Conv Time	<p>The current average time members spent communicating (talking, chatting, or replying) with contacts</p>
Service Level %	Svc Lvl %	<p>For a queue, this is the percentage of contacts handled within the queue's Service Level Time value over the day.</p> <p>For a queue group, this is the lowest percentage of contacts handled within the queue's Service Level Time value over the day across all queues.</p>
Handled %	% Hndl	<p>For a queue, this is the percentage of contacts handled compared to the total number of contacts offered to the queue for the day.</p> <p>For a queue group, this is the lowest percentage of contacts handled compared to the total number of contacts offered to the queue for the day across all queues.</p>

Table 24: Queue Now and Queue Group Now queue statistic column headings (continued)

TERM	ABBREVIATED NAME	MEANING
% Handled by 1-4	% Hndl by 1-4	<p>For a queue, this is the percentage of all of the contacts answered by the first, second, third, and fourth agent groups.</p> <p>For a queue group, this is the highest percentage of all of the contacts answered by the first, second, third, and fourth agent groups.</p> <p>NOTE: This statistic displays information for ACD paths and multimedia queues only. Statistics for Ring Groups display as '0'.</p>
Total Conversation Time	Ttl Conv Time	The current total time members spent communicating (talking, chatting, or replying) with contacts
Total Queue Unavailable	Ttl Q Unavail	The total number of times during the day that contacts are rerouted because the queue is in Do Not Disturb or has no members logged in
Current Queue Unavailable	Curr Q Unavail	The current number of contacts are rerouted because no members are logged in or the queue is in Do Not Disturb. Once the queue becomes available, this value resets to 0.
Offered Last Hour	Offr Last Hour	The total number of contacts offered to the queue during the last hour of business
Time to Handle Last Hour	Time Hndl Last Hour	The time contacts waited in queue during the last hour of business before being handled by an agent
% Handled Last Hour	% Hndl Last Hour	<p>For a queue, this is the percentage of contacts handled in the last hour of business, compared to the total number of contacts offered to the ACD queue for the day.</p> <p>For a queue group, this is the lowest percentage of contacts handled in the last hour of business, compared to the total number of contacts offered to the ACD queue for the day.</p>
Service Level % Last Hour	Svc Lvl % Last Hour	<p>For a queue, this is the percentage of contacts answered or picked within your Service Level Time value in the last hour.</p> <p>For a queue group, this is the lowest percentage of contacts answered or picked within your Service Level Time value in the last hour.</p>

Table 24: Queue Now and Queue Group Now queue statistic column headings (continued)

TERM	ABBREVIATED NAME	MEANING
Handled Last Hour	Hndl Last Hour	The total number of contacts handled by members during the last hour of business
Abandoned Last Hour	Abn Last Hour	The total number of contacts abandoned during the last hour of business
Interflowed Last Hour	Intrfl Last Hour	The total number of contacts interflowed during the last hour of business. Interflow is a mechanism that directs a contact waiting in queue to another answer point.
Unavailable Last Hour	Unavail Last Hour	The total number of times, in the last hour of business, contacts were rerouted because the queue they tried to access was in Do Not Disturb or had no members logged in See Current Queue Unavailable.
Average Handling Time Last Hour	Avg Hndl Last Hour	The average duration of contacts from agent pick up to client hang up (including hold time) during the last hour of business
Offered Last 15 Minutes	Offr Last 15 Min	The total number of contacts offered to the queue in the last 15 minutes of business
Time to Handle Last 15 Minutes	Time Hndl Last 15 Min	The time contacts waited in queue during the last 15 minutes of business before being handled by a member
% Handled Last 15 Minutes	% Hndl Last 15 Min	For a queue, the percentage of contacts answered in the last 15 minutes of business, compared to the total number of contacts offered to the ACD queue for the day For a queue group, the lowest percentage of contacts answered in the last 15 minutes of business, compared to the total number of contents offered to the ACD queue for the day.
Service Level % Last 15 Minutes	Svc Lvl % Last 15 Min	For a queue, this is the percentage of contacts answered or picked within your Service Level Time value in the last 15 minutes of business. For a queue group, this is the lowest percentage of contacts answered or picked within your Service Level Time value in the last 15 minutes of business.

Table 24: Queue Now and Queue Group Now queue statistic column headings (continued)

TERM	ABBREVIATED NAME	MEANING
Handled Last 15 Minutes	Hndl Last 15 Min	The total number of contacts handled by members during the last 15 minutes of business
Abandoned Last 15 Minutes	Abn Last 15 Min	The total number of contacts abandoned during the last 15 minutes of business
Interflowed Last 15 Minutes	Intrfl Last 15 Min	The total number of contacts interflowed during the last 15 minutes of business. Interflow is a mechanism that directs a contact waiting in queue to another answer point.
Unavailable Last 15 Minutes	Unavail Last 15 Min	The total number of times, in the last 15 minutes of business, contacts were rerouted because the queue they tried to access was in Do Not Disturb or had no members logged in See Current Queue Unavailable.
Average Handling Time Last 15 Minutes	Avg Hndl Last 15 Min	The average handling duration of contacts from contact pickup to contact completion, including hold time, during the last 15 minutes of business
% Abandoned	% Abn	For a queue, this is the percentage of contacts that were abandoned ($\% \text{ Abandoned} = \text{Contacts Abandoned} \div \text{Contacts Offered}$) For a queue group, this is the highest percentage of contacts that were abandoned ($\% \text{ Abandoned} = \text{Contacts Abandoned} \div \text{Contacts Offered}$)
% Abandoned Last Hour	% Abn Last Hour	For a queue, this is the percentage of contacts that were abandoned in the last hour of business For a queue group, this is the highest percentage of contacts that were abandoned in the last hour of business
% Abandoned Last 15 Minutes	% Abn Last 15 Min	For a queue, this is the percentage of contacts that were abandoned in the last 15 minutes of business For a queue group, this is the highest percentage of contacts that were abandoned in the last 15 minutes of business
Wrap Up	Wrap Up	The total time that agents spent in the Work Timer state NOTE: This statistic displays information for ACD paths and multimedia queues only. Statistics for Ring Groups display as '0'.

Table 24: Queue Now and Queue Group Now queue statistic column headings (continued)

TERM	ABBREVIATED NAME	MEANING
Make Busy	Make Busy	The total time that agents spent in the Make Busy state NOTE: This statistic displays information for ACD paths and multimedia queues only. Statistics for Ring Groups display as '0'.
Occupancy	Occp	The total time that members spent in an occupied state (states other than Idle)
# Handled by 1-4	# Hndl by 1-4	The number of contacts answered by the first, second, third, and fourth agent groups NOTE: This statistic displays information for ACD paths and multimedia queues only. Statistics for Ring Groups display as '0'.
Logged Out	Logged out	The number of agents associated with the queue but not logged in to the system. (Queue Now only) NOTE: For Ring Groups, this statistic displays either the number of extensions out of service or hot desk users logged out.
Logged In Not Present	Not Present	The number of agents that are logged in, but not present in the queue.

Table 25 lists the real-time and over-the-business-day Queue Now and Queue Group Now member statistics and their definitions.

Table 25: Queue Now and Queue Group Now member statistic column headings

TERM	MEANING
State	The queue member's agent or extension state For a list of agent states, see "Employee and Agent state indicators" on page 227. For a list of extension states, see the <i>Mitel MiContact Center User Guide</i> .
Name	The name of the member being monitored. The icon beside the name indicates the media type the member handles
Present	Indicates whether the member is present in the queue Presence is indicated by a colored star. A green star indicates the agent or extension is present in the queue. A gray star and gray row indicates the agent is not present in the queue.

Table 25: Queue Now and Queue Group Now member statistic column headings (continued)

TERM	MEANING
Media Server	The media server to which the member is associated
Reporting	The reporting number of the member being monitored
Extn #	The extension where the member logged in (voice only)
Log In	The most recent time the member logged in NOTE: This statistic displays information for ACD path and multimedia queue members only and is not calculated for Ring Group members.
Last Event Recd	The most recent time a member event occurred
Shift Time	The total elapsed time logged for the member, calculated based on the difference between log in and last event received NOTE: This statistic displays information for ACD paths and multimedia queues only. Statistics for Ring Groups display as '0'.
DND Time	The duration of time where Do Not Disturb was the overriding state for the member
MKB Time	The duration of time where Make Busy was the overriding state for the member NOTE: This statistic displays information for ACD paths and multimedia queues only. Statistics for Ring Groups display as '0'.
Wrap Up Time	The duration of time where Wrap Up Time was the overriding state for the member. Wrap up time does not include any time spent making or taking contacts during the wrap up timer. NOTE: This statistic displays information for ACD paths and multimedia queues only. Statistics for Ring Groups display as '0'.
ACD Time	The duration of ACD contacts handled, from member pickup to completion (not including hold time)
Hold ACD Time	The duration of time ACD contacts spent on hold
Non ACD Time	The duration of non-ACD contacts handled, from member pickup to completion (not including hold time) (voice only)
Hold Non ACD Time	The duration of time non-ACD contacts spent on hold (voice only)
Out Time	The duration of time members spent handling outbound calls (voice only)

**Table 25: Queue Now and Queue Group Now member statistic column headings
(continued)**

TERM	MEANING
Out Hold Time	The duration of time outbound calls spent on hold, for agents (voice only)
DND Cnt	The number of times the member entered the Do Not Disturb state
MKB Cnt	The number of times the member entered the Make Busy state NOTE: This statistic displays information for ACD paths and multimedia queues only. Statistics for Ring Groups display as '0'.
ACD Cnt	The number of ACD contacts handled by the member
Shrt ACD Cnt	The number of ACD contacts handled by the member where the handle time was less than the Short Handle parameter
Hold ACD Cnt	The number of times ACD contacts were placed on hold
Non ACD Cnt	The number of non-ACD contacts handled by the member (voice only)
Hold Non ACD Cnt	The number of times non-ACD contacts were placed on hold (voice only)
Out Cnt	The number of outbound calls made by the member (voice only)
Out Hold Cnt	The number of times outbound calls were placed on hold (voice only)
Avg Hndl	The average amount of time the members spent handling ACD contacts (ACD Time divided by ACD Count, excluding ACD Hold Time).
Agt Grp	The agent group to which the agent belongs NOTE: This statistic displays information for ACD paths and multimedia queues only. Statistics for Ring Groups display as '0'.
Occupancy	The duration of time the member spent processing contacts
Contacts per Hour	The total ACD contact count minus the ACD short handle count, divided by the shift time for the member
On failover	Indicates whether the primary media server is offline and has failed over to the secondary media server (voice only)
Unavail %	The percentage of time for the shift that the member was in Do Not Disturb, Make Busy, and Work Timer states
Not Present Time	The duration of time the member was logged into but not present in an agent group or Ring Group

Table 25: Queue Now and Queue Group Now member statistic column headings (continued)

TERM	MEANING
External handle time	The duration of time the member spent handling external calls (voice only)
External inbound cnt	The number of incoming external calls (voice only) NOTE: This statistic displays information for ACD paths and multimedia queues only. Statistics for Ring Groups display as '0'.
External outbound cnt	The number of outgoing external calls (voice only) NOTE: This statistic displays information for ACD paths and multimedia queues only. Statistics for Ring Groups display as '0'.

Interactive Visual Queue monitor

The Interactive Visual Queue monitor enables supervisors to monitor and control traffic in contact center queues. The Interactive Visual Queue monitor is described in detail in "Interacting with customer contacts to improve service levels" on page 270.

Interactive Visual Queue works in conjunction with Contact Center Client. Before you use Interactive Visual Queue, ensure your configuration in YourSite Explorer mirrors that of your telephone system.

NOTE: In order to use Interactive Visual Queue, you must enable all HCI options on Class of Service Assignment form 1 (COS 1).

Configuring options in YourSite Explorer

In YourSite Explorer, for each queue you want to monitor, you must configure the priority level and the method for handling interflowed contacts.

NOTE: If the telephone system settings and Interactive Visual Queue settings do not match, Interactive Visual Queue will not display the correct voice contact activity. For example, if Queue 1 is set to a priority of 10 on the telephone system and a priority of 20 in YourSite Configuration, Interactive Visual Queue will display voice contacts in Queue 1 as priority 20. However, the actual queue will handle the voice contacts as priority 10.

Queue Now and Queue Group Now charts

The Queue Now and Queue Group Now charts offer visual representation of Queue Now and Queue Group Now real-time statistics, grouped by the type of statistics displayed. Three different series of statistics are available to view in charts:

- **Integer**—displays numerically-based real-time statistics
- **Percentage**—displays percentage-based statistics
- **Time**—displays time-based statistics

Users can specify which statistics display in their charts. Figure 24 shows a Queue Now Integer Chart

NOTE: Multimedia contacts in queue tagged as Junk or No Reply from Interactive Visual Queue and Ignite are not included in queue Handled, Completed, and Offered counts.

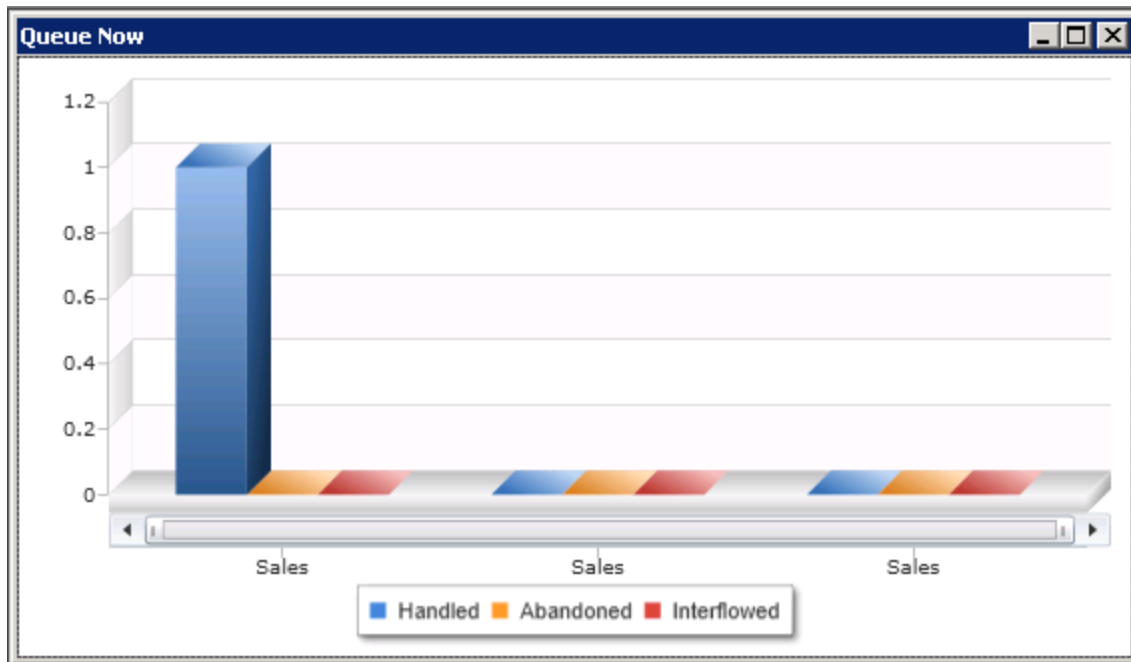


Figure 24: Queue Now (Integer chart)

The Integer chart shows:

- Handled (Default)
- Abandoned (Default)
- Interflowed (Default)
- Calls Waiting
- Agents Available
- ACD
- Idle
- Non ACD
- Outbound
- Unavailable
- Offered
- Requeue
- Total Hour
- Interflowed Last Hour
- Unavailable Last Hour
- Offered Last 15 Minutes
- Handled Last 15 Minutes
- Abandoned Last 15 Minutes
- Interflowed Last 15 Minutes

- Unavailable Last 15 Minutes
- Logged out
- Logged in not present
- # Handled by 1-4

The Percentage chart shows, by default:

- Service Level %
- Handled %
- % Handled by 1-4
- % Handled Last Hour
- Service Level % last Hour
- % Handled Last 15 Minutes
- Service Level % Last 15 Minutes
- %Abandoned
- %Abandoned Last Hour
- %Abandoned Last 15 Minutes.

Time charts show, by default:

- Longest Waiting
- Average Time to Handle
- Average Time to Abandon Minutes
- Average Talk Time
- Ttl Talk Time
- Time to Handle Last Hour
- Average Time to Handle Last Hour
- Hdnl Last 15 Min
- Average Handling Time Last 15 Minutes
- Rmt Long Wtg
- Total Work Timer minutes
- Total make busy minutes
- Total occupancy minutes

For descriptions of the statistics, see "Queue Now and Queue Group Now monitors" on page 242.

NOTE: The following statistics are for ACD path voice queues and multimedia queues only and will not display information for Ring Groups:

- Requeue
- # Handled by 1, 2, 3, 4
- % Handled by 1, 2, 3, 4
- Total Work Timer Minutes
- Total Make Busy minutes

Queue Performance by Period and Queue Group Performance by Period charts

The Queue Performance by Period and Queue Group Performance by Period charts offer visual representations of Queue and Queue Group Performance by Period statistics, grouped by the type of statistic displayed. Three different series of statistics are available to view in charts:

- **Integer**—displays numerically-based real-time statistics
- **Percentage**—displays percentage-based statistics
- **Time**—displays time-based statistics

Figure 25 displays a Queue Performance by Period chart displaying the default statistics of the Integer series.

NOTE: Multimedia contacts in queue tagged as Junk or No Reply from Interactive Visual Queue and Ignite are not included in queue Handled, Completed, and Offered counts.

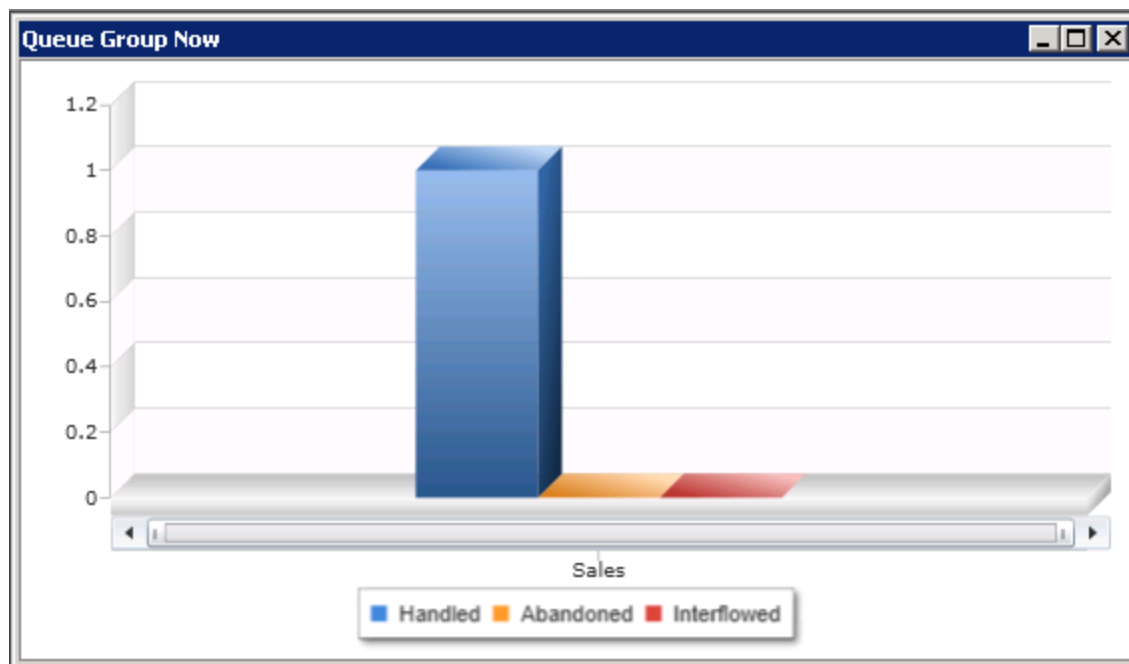


Figure 25: Queue Performance by Period chart

The Integer series shows the following statistics across 15 minute intervals for queues or queue groups:

- Handled (Default)
- Interflowed (Default)
- Offered
- Short Abandoned
- Abandoned
- Requeue
- # Handled by 1-4

The Percentage series shows the following statistics across 15 minute intervals for queues or queue groups, by default:

- % Handled by 1-4
- Service Level % Today
- % Handled

The Time series show the following statistics across 15 minute intervals for queues or queue groups, by default:

- Average Time to Handle
- Average Time to Abandon
- Average Time to Interflow
- Ttl Talk Time
- Average Talk Time
- Total Work Timer minutes
- Total make busy minutes
- Total occupancy minutes

For more information for the definitions of these statistics, see "Queue by Period monitor" on page 238.

NOTE: The following statistics are for ACD path voice queues and multimedia queues only and will not display information for Ring Groups:

- Requeue
- # Handled by 1, 2, 3, 4
- % Handled by 1, 2, 3, 4
- Total Work Timer Minutes
- Total make busy minutes

INTERACTING WITH AGENT PRESENCE TO IMPROVE SERVICE LEVELS

Interactive Contact Center is a feature that enables supervisors to control the availability of employees and their agents.

Using Interactive Contact Center, supervisors can

- Log employees and their agents in and out of their voice and multimedia applications
- Have agents join or leave their agent groups
- Place employees in and remove them from Make Busy
- Place employees in and remove them from Do Not Disturb
- Cancel the employee Work Timer
- Cancel the employee Resize Timer

Using Interactive Contact Center with Contact Center Client, you can control agents on the following monitors: Agent and Employee State by Position, Agent and Employee State by Time, and Agent Shift.

Using Interactive Contact Center with Ignite (WEB), you can control agents on the following monitors: Employee State and Agent State.

Individual supervisors can be restricted through security roles from managing particular monitors and devices. For more information, consult your System Administrator.

Agent and Agent Group Presence

Employees can be enabled to handle voice, email, chat, or SMS media. When an employee is enabled to handle a media type, YourSite Explorer automatically creates a corresponding agent. These multimedia agents can be assigned to agent groups, which are in turn associated to queues.

When agent groups are created, an employee's agents are assigned a default group presence, either Present or Absent. If an employee's default presence is Absent will be set in the Logged In Not Present agent state when they log in. To handle that media type, the employee has to manually change their agent presence in Ignite or Contact Center Client. Employees whose agents default presence is Present will be set in the Idle agent state when they log in. For details about agent states, see "Employee and Agent state indicators" on page 227.

Controlling employees and agents in real-time monitors

Interactive Contact Center enables supervisors, depending on their security settings, to control employees via the Contact Center Client and Ignite (WEB) employee and agent monitors. For example, if a supervisor notices a dramatic increase in the number of incoming emails in the Sales email queue, they can, using the agent monitor, remove the employee's chat agent from their agent group in the Sales chat queue, ensuring that the employee can focus entirely on incoming emails.

Depending on whether an employee or an agent monitor is open, Contact Center Client displays two tabs in the Contact Center Client ribbon for controlling employees or their agents. Supervisors can perform actions using either a right-click and select method within the monitor or by accessing the action menu in the Employee, Agent, or Monitor Control tab views. If they have Context Sensitivity enabled for monitors, the Agent or Employee tab automatically becomes the active tab when an employee or agent is selected. If an empty cell is selected, the Monitor Control tab becomes the active tab. The following tabs are displayed with employee or agent real-time monitors:

- **Employee or Agent Control**—Employee Control gives you control over individual employees and their agents. Employee monitor controls offer supervisors the greatest flexibility in controlling an employee and all of their agents. Supervisors can manage an employee's availability, and all of an employee's agents, or manage specific agents belonging to individual employees. (See Figure 26.)
- **Monitor Control**—Monitor Control gives you control over all of the employees or agents on a monitor, enabling simultaneous management of presence for all employees or agents. (See Figure 28 and Figure 29.)

NOTE: Context sensitivity and monitor control are not supported with Ignite (WEB). You can only alter the state for one employee or agent at a time.

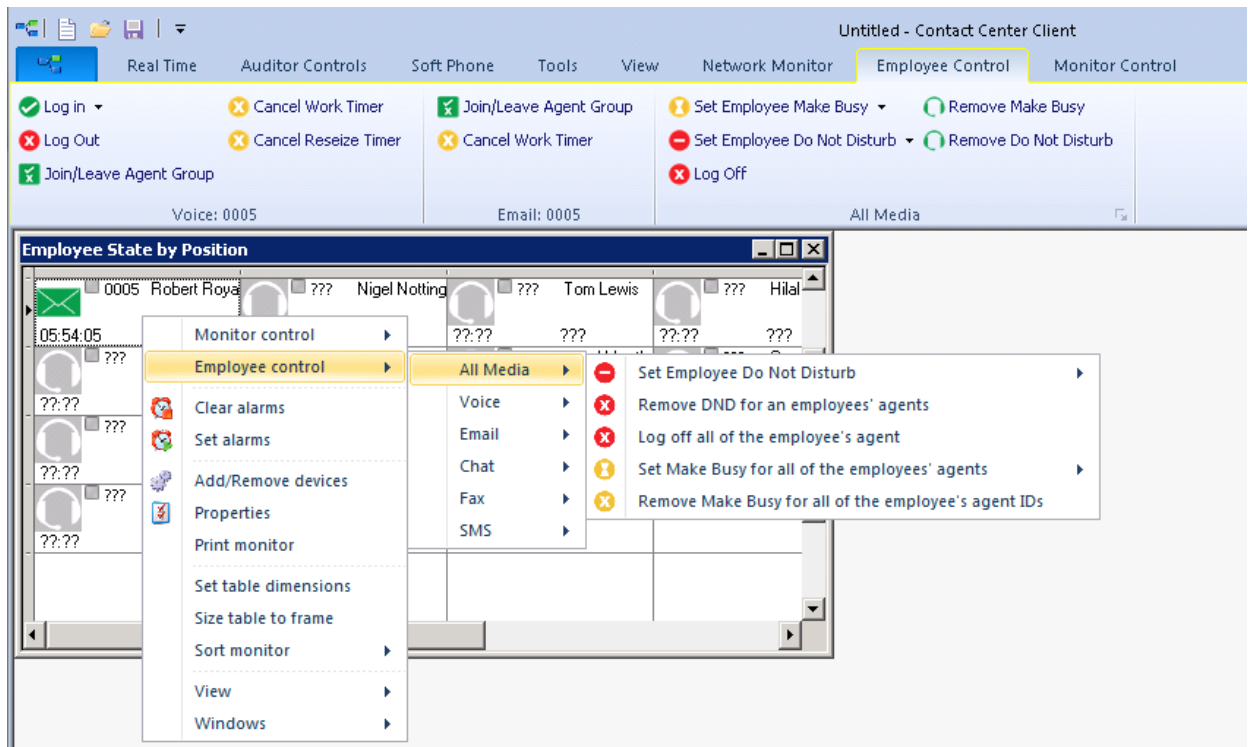


Figure 26: Employee State by Position - Employee Control tab options

Supervisors can control employees on the following Contact Center Client monitors:

- Employee State by Position
- Employee State by Time

Supervisors can control employees on the following Ignite (WEB) monitor:

- Employee State

Agent Control gives you control over individual agents in an agent monitor. Agent monitor controls enable supervisors a more targeted look at specific aspects of an employee's presence, enabling supervisors to limit their influence to specific agents or media types. Since agent monitors enable supervisors to view agents by agent group, Agent Control enables supervisors to better manage their agent groups. (See Figure 27.)

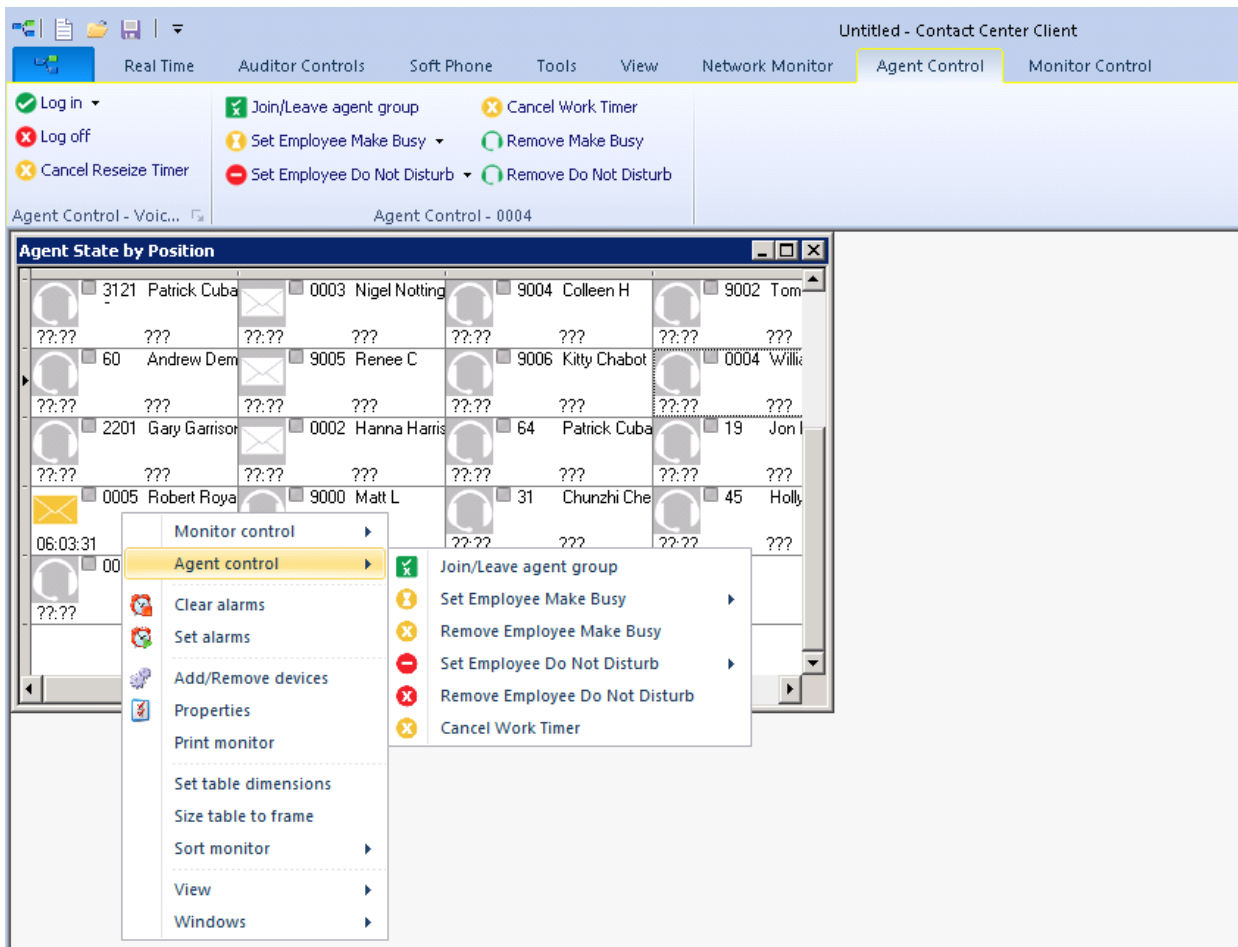


Figure 27: Agent State by Position - Agent Control tab options

Supervisors can control agents on the following Contact Center Client monitors:

- Agent State by Position
- Agent State by Time
- Agent State by Time for Queue
- Agent Shift

Supervisors can control agents on the following Ignite (WEB) monitor:

- Agent State

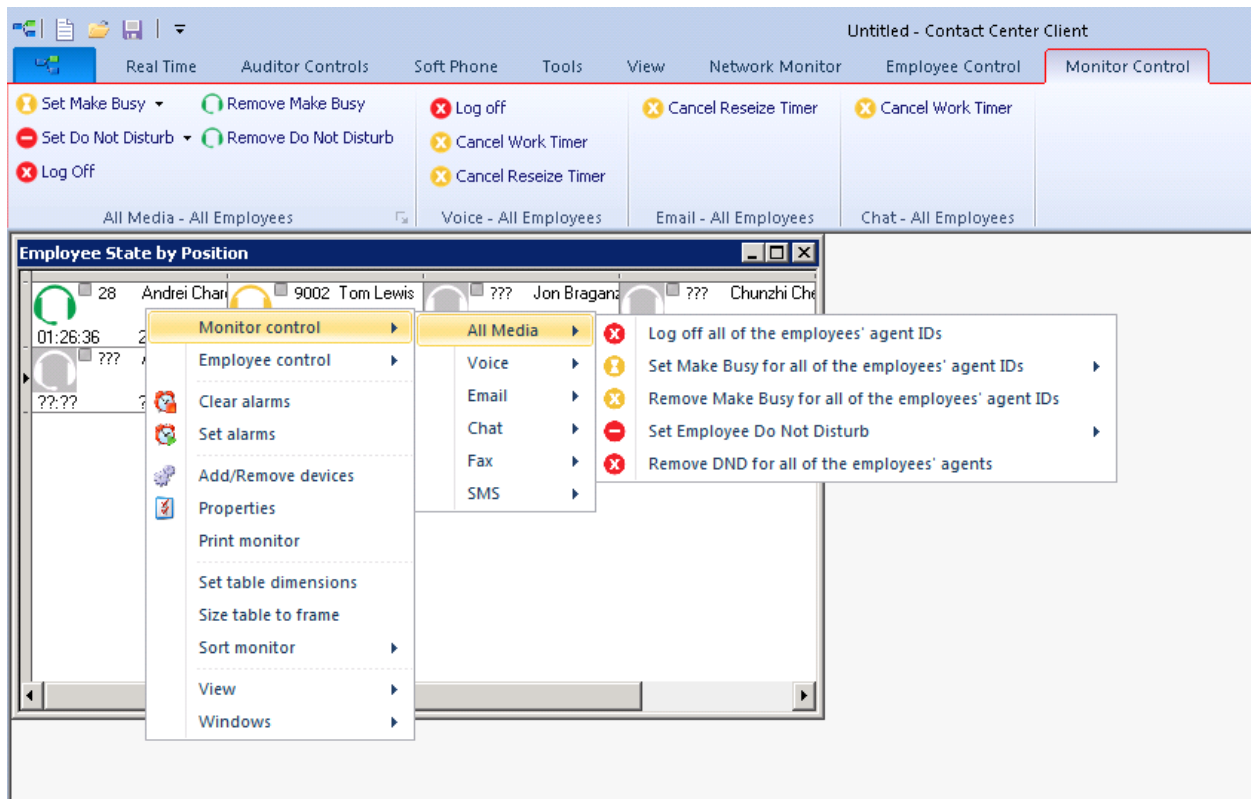


Figure 28: Employee State by Position - Monitor Control tab options

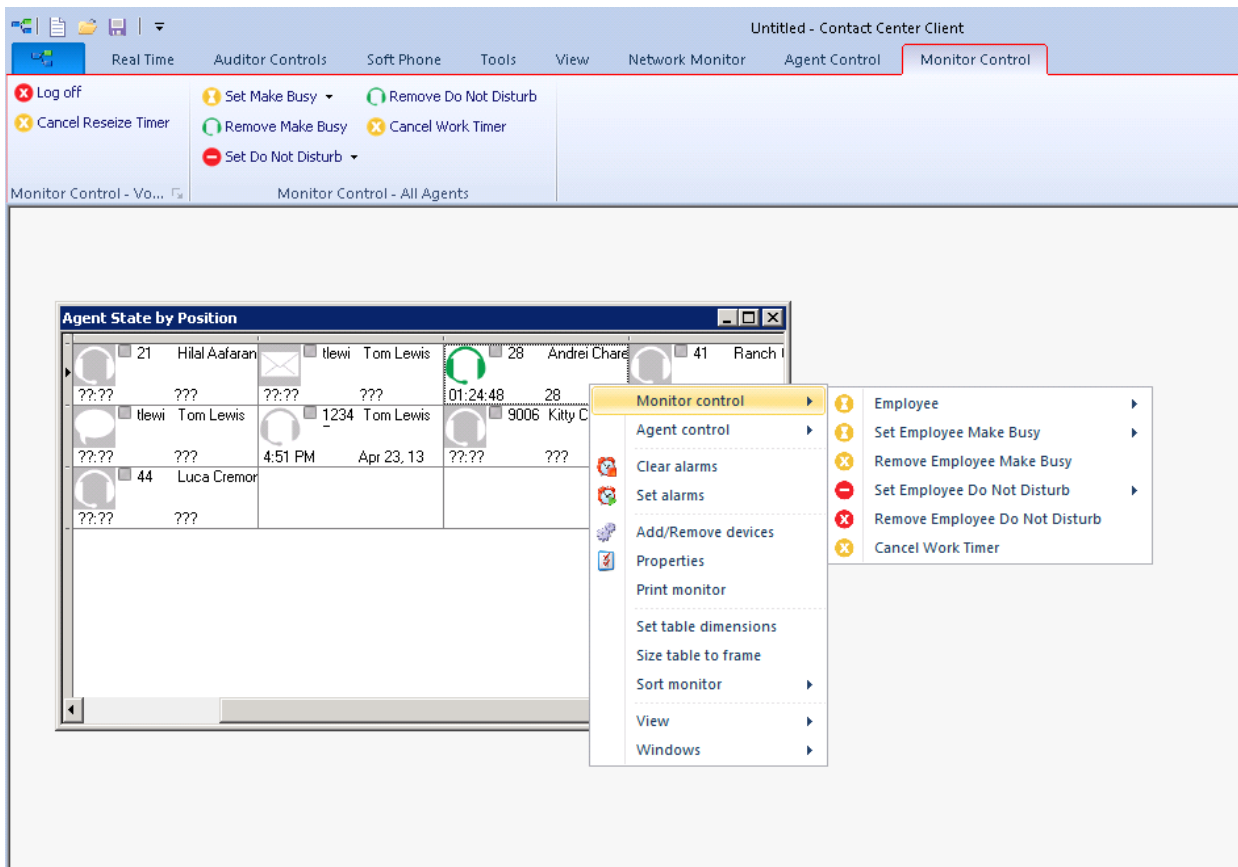


Figure 29: Agent State by Position - Monitor Control tab options

Logging on an agent - Contact Center Client

NOTE:

- An ACD hot desking agent must enter an extension number each time the agents logs on to the ACD routing system using Interactive Contact Center. The agent cannot rely on the extension number last used when logging on. This is because the ACD data stream unifies the agent ID and the extension. After a hot desking agent logs on or off of the ACD routing system using Interactive Contact Center, sometimes the Interactive Contact Center agent controls are not available to the agent for two to five minutes.
- You will be unable to log on an agent to the system if there are no available user licenses.
- If your contact center participates in the use of PINs, supervisors with the correct Class of Service do not require an agent's PIN to interactively log in a hot desking agent.
- Depending on security roles and telephone switch settings, employees who are licensed as Advanced Supervisor or System Administrator may not be prompted to enter a PIN when logging into Interactive Contact Center, Softphone, or PhoneSet Manager.
- If a hot desking agent logs into an extension that serves as the overflow point for a Ring Group, calls to that Ring Group will not be offered to the extension and will remain queued or ringing until abandoned or answered.
- Hot desking users logging into a Ring Group extension must also be a member of the Ring Group to ensure accurate reporting.

You log employee voice agents in and out in either an open Employee or Agent Monitor in Contact Center Client. Multimedia agents are not logged in with voice agents.

To log in an agent in an open Employee monitor

- Right-click the cell of an employee and click **Employee control=>Log in=>voice agent**. Alternatively, select the employee cell in an open monitor, click **Log in** from the **Employee Control** tab on the Contact Center Client ribbon, and select the voice agent.
NOTE: When you log in an employee's voice agent, you must enter the extension for the agent. See the procedure below.

To log in an agent by extension in an open Employee monitor

1. Right-click the cell of an employee and click **Employee control=>Log in=>By extension**.
2. If the employee has multiple voice agents, select the agent to log in from the drop-down list.
3. Type the **Agent's extension**.
4. Click **OK**.

To log in an agent in an open Agent monitor

- Right-click the cell of a voice agent who is not logged into and click **Agent Control=>Log in=>voice agent**. Alternatively, select the agent cell in an open monitor and click **Log in** from the Contact Center Client ribbon.
NOTE: When you log in a voice agent, you must enter the extension for the agent. See the procedure below.

To log in an agent by extension in an open Agent monitor

1. Right-click the cell of a voice agent and click **Agent control=>Log in=>By extension**.
2. If the employee has multiple voice agents, select the agent to log in from the drop-down list.
3. Type the **Agent's extension**.
4. Click **OK**.

Logging off an agent - Contact Center Client

You can log off an employee from all media in an Employee monitor or Agent monitor. Logging off an agent logs off all of the employee's voice agents and sets the employee's multimedia agents to Absent in all their agent groups. If the employee is logged into their soft phone in Contact Center Client, they will also be logged out of the soft phone.

The following procedures take place in either an open Employee monitor or an open Agent monitor in Contact Center Client.

To log off all of an employee's agents in an open Employee monitor

- Right-click the cell of an employee and click **Employee control=>Log off**. Alternatively, select the employee cell in an open monitor and click **Log Off** from the **Employee Control** tab on the Contact Center Client ribbon.

To log off an agent in an open Agent monitor

NOTE: Logging off an employee's agent logs off all of the employee's agents simultaneously.

- Right-click the cell of an agent and click **Agent control=>Log off**. Alternatively, select the agent cell in an open monitor and click **Log Off** from the **Agent Control** tab on the Contact Center Client ribbon.

To log off all employees' agents in an open Employee monitor

1. Right-click the monitor and click **Monitor control=>Log off**.
Alternatively, click the **Monitor Control** tab in the Contact Center Client ribbon and select **Log Off**.
2. Click **Yes**.

To log off all agents in an open Agent monitor

1. Right-click the monitor and click **Monitor control=>Log off**.
Alternatively, click the **Monitor Control** tab in the Contact Center Client ribbon and select **Log Off**.
2. Click **Yes**

Logging on an agent - Ignite (WEB)

When you log on an agent in Ignite (WEB), you make them available to receive voice contacts.

The following procedure takes place in either an Agent State or Employee State monitor in Ignite (WEB).

To log on a voice agent

1. In the monitor, select the agent you want to log on.
2. Click **State=>Available**.
3. Enter the agent's extension and PIN (if enabled) and click **Login**.
NOTE: This step is not required if the agent is set to automatically log in when the 'Available' state is selected.

Logging off an agent - Ignite (WEB)

When you log off an agent in Ignite (WEB), you make them unavailable to receive all media contacts, including voice, email, chat, and SMS.

The following procedure takes place in either an Agent State or Employee State monitor in Ignite (WEB).

To log off an agent

1. In the monitor, select the agent you want to log off.
2. Click **State=>Offline**.

Joining and leaving agent groups - Contact Center Client

After logging into Contact Center Client, agents can use Interactive Contact Center to control their presence status in agent groups. Optionally, supervisors can use Interactive Contact Center to control the presence status of agents in specific agent groups.

NOTE:

- An agent's ACD hot desk line remains in service while they are logged in as an ACD hot desk user even if they are not present in any ACD groups and not receiving ACD calls.

To join an agent to or have an agent leave an agent group in an open Employee monitor

1. Right-click the cell of an employee and click **Employee control=>Join/Leave Agent Group=>[Agent]**.
Alternatively, select the cell of an employee and in the **Employee Control** tab of the Contact Center Client ribbon, click **Join/Leave agent group=>[Agent]**.
2. Select the agent group(s) to which you want the employee's agent(s) to join or deselect the agent group(s) to have the employee's agent(s) leave the agent groups.
3. Click **OK**.

To join an agent to or have an agent leave an agent group in an open Agent monitor

1. Right-click the cell of an agent who is logged on and click **Agent control=>Join/Leave Agent Group**.
Alternatively, select the cell of an agent and click **Join/Leave Agent Group** from the Agent Control tab in the Contact Center Client ribbon.
2. Select the agent group(s) to which you want the agent(s) to join or deselect the agent group(s) to which you want the agent(s) to leave.
3. Click **OK**.

Joining and leaving agent groups - Ignite (WEB)

After signing into Ignite (WEB) and logging into their phone, agents can use interactive Contact Center to control their presence in agent groups. Optionally, supervisors can use Interactive Contact Center to control the presence status of agents in specific agent groups from within the Agent and Employee State monitors in Ignite (WEB).

The following procedures take place in either an Agent State or Employee State monitor in Ignite (WEB).

To join an agent to an agent group

1. In the monitor, select the agent for which you want to modify agent group presence.
2. Click **Agent Groups**.
3. Hover over the agent group's avatar and select **Join All**.
4. Click **Update**.

To remove an agent from an agent group

1. In the monitor, select the agent for which you want to modify agent group presence.
2. Click **Agent Groups**.
3. Hover over the agent group's avatar and select **Leave All**.
4. Click **Update**.

To join an agent to or remove an agent from all agent groups

1. In the monitor, select the agent for which you want to modify agent group presence.
2. Click **Agent Groups**.
3. To join an agent to all agent groups, click **Join All=>Update**.
4. To remove an agent from all agent groups, click **Leave All=>Update**.

To make an agent available or unavailable to answer contacts of a specific media type

1. In the monitor, select the agent for which you want to modify agent group presence.
2. Click **Agent Groups**.
3. To become available to answer contacts of a specific media type, click the media icon in the agent group so the icon displays in blue.
4. To become unavailable to answer contacts of a specific media type, click the media icon in the agent group so the icon displays in grey.
5. Click **Update**.

Placing employees in Make Busy - Contact Center Client

NOTE: Agents in Work Timer can directly enter Busy/MKB or DND if the state is applied manually. Changing states from Work Timer to Busy/MKB or DND without first entering a Classification Code could register a 'Non-Compliant' against voice agents, if Classification Codes are required for the queue.

Placing employees into Make Busy places both employees and all of their agents into Make Busy.

The following procedures take place in either an open Employee monitor or an open Agent monitor in Contact Center Client.

To place an employee in an open Employee monitor in Make Busy

- Right-click the cell of an employee and click **Employee control=>Set Make Busy=>reason code**. Alternatively, select an empty cell in an open monitor and click **Set Employee Make Busy=>reason code** from the **Employee Control** tab in the Contact Center Client ribbon.

To place all employees in an open Employee monitor in Make Busy

1. Right-click the monitor and click **Monitor control=>Set Make Busy=>reason code**. Alternatively, select an empty cell in an open monitor and click **Set Make Busy=>reason code** from the **Monitor Control** tab in the Contact Center Client ribbon.
2. Click **Yes**.

To place an employee in an open Agent monitor in Make Busy

- Right-click the cell of an agent and click **Agent control=>Set Employee Make Busy=>reason code**. Alternatively, select the agent cell in an open monitor and click **Set Employee Make Busy=>reason code** from the **Agent Control** tab in the Contact Center Client ribbon.

To place all employees in an open Agent monitor in Make Busy

1. Right-click the monitor and click **Monitor control=>Set Employee Make Busy=>reason code**. Alternatively, select an empty cell in an open monitor and click **Set Make Busy=>reason code** from the **Monitor Control** tab in the Contact Center Client ribbon.
2. Click **Yes**.

Removing employees from Make Busy - Contact Center Client

Removing employees from Make Busy removes both employees and all of their agents from Make Busy.

The following procedures take place in either an open Employee monitor or an open Agent monitor in Contact Center Client.

To remove an employee in an open Employee monitor from Make Busy

- Right-click the cell of an employee whose agents are in Make Busy and click **Employee control=>Remove Make Busy**. Alternatively, select an empty cell in an open monitor and click **Remove Make Busy** from the **Employee Control** tab in the Contact Center Client ribbon.

To remove all employees in an open Employee monitor from Make Busy

1. Right-click the cell of an employee who is in Make Busy and click **Monitor control=>Remove Make Busy**. Alternatively, select an empty cell in an open monitor and click **Remove Make Busy** from the **Monitor Control** tab in the Contact Center Client ribbon.
2. Click **Yes**.

To remove an employee in an open Agent monitor from Make Busy

- Right-click the cell of an agent in Make Busy and click **Agent control=>Remove Make Busy**. Alternatively, select the agent cell in an open monitor and click **Remove Make Busy** from the **Agent Control** tab in the Contact Center Client ribbon.

To remove all employees in an open Agent Monitor from Make Busy

1. Right-click the cell of an employee and click **Monitor control=>Remove Make Busy**. Alternatively, select an empty cell in an open monitor and click **Remove Make Busy** from the **Monitor Control** tab in the Contact Center Client ribbon.
2. Click **Yes**.

Placing employees in Busy - Ignite (WEB)

NOTE: Agents in Work Timer can directly enter Busy/MKB or DND if the state is applied manually. Changing states from Work Timer to Busy/MKB or DND without first entering a Classification Code could register a 'Non-Compliant' against voice agents, if Classification Codes are required for the queue.

Placing an employee into Busy places them in Busy across all media types for which they answer contacts. While in Busy, they can receive transferred multimedia contacts, however, inbound multimedia contacts will not be routed to them. They can also receive non-ACD voice contacts and pick contacts waiting in queue.

The following procedure takes place in either an Agent State or Employee State monitor in Ignite (WEB).

To place an employee in Busy

1. In the monitor, select the employee you want to place in Busy.
2. Click **State=>Busy...**
3. Choose a Busy code.

Removing employees from Busy - Ignite (WEB)

Removing employees from Busy re-enables them to answer inbound multimedia contacts and ACD calls.

The following procedure takes place in either an Agent State or Employee State monitor in Ignite (WEB).

To remove an employee from Busy

1. In the monitor, select the employee you want to remove from Busy.
2. Click **State** and select an alternate state.
NOTE: Select **Available** if you want to make them available to receive contacts.

Placing employees in Do Not Disturb - Contact Center Client

NOTE:

- If an agent on an ACD calls puts themselves into MKB or DND, Work Timer events are not received for that call.
- Agents in Work Timer can directly enter Busy/MKB or DND if the state is applied manually. Changing states from Work Timer to Busy/MKB or DND without first entering a Classification Code could register a 'Non-Compliant' against voice agents, if Classification Codes are required for the queue.

Placing employees into Do Not Disturb places employees and all of their agents into Do Not Disturb.

The following procedures take place in either an open Employee monitor or an open Agent monitor in Contact Center Client.

To place an employee in an open Employee monitor in Do Not Disturb

- Right-click the cell of an employee and click **Employee Control=>Set Do Not Disturb=>reason code**. Alternatively, select the employee cell in an open monitor and click **Set Employee Do Not Disturb=>reason code**.

To place all employees in an open Employee Monitor in Do Not Disturb

1. Right-click the monitor and click **Monitor control=>Set Do Not Disturb=>reason code**. Alternatively, select an empty cell in an open monitor and click **Set Do Not Disturb** from the **Monitor Control** tab in the Contact Center Client ribbon.
2. Click **Yes**.

To place an employee in an open Agent monitor in Do Not Disturb

- Right-click the cell of an agent who is logged on and click **Agent control=>Set Employee Do Not Disturb=>reason code**. Alternatively, select the agent cell in an open monitor and click **Set Do Not Disturb=>reason code** from the Agent Control tab in the Contact Center Client ribbon.

To place all employees in an open Agent monitor in Do Not Disturb

1. Right-click the monitor and click **Monitor control=>Set Do Not Disturb=>reason code**. Alternatively, select an empty cell in an open monitor and click **Set Do Not Disturb** from the Monitor Control tab in the Contact Center Client ribbon.
2. Click **Yes**.

Removing employees from Do Not Disturb - Contact Center Client

Removing employees from Do Not Disturb removes employees and all of their agents from Do Not Disturb.

The following procedures take place in either an open Employee monitor or an open Agent monitor in Contact Center Client.

To remove an employee in an open Employee monitor from Do Not Disturb

- Right-click the cell of an employee who is in Do Not Disturb and click **Employee control=>Remove Do Not Disturb**. Alternatively, select the employee cell in and click **Remove Do Not Disturb** from the **Employee Control** tab in the Contact Center Client ribbon.

To remove all of a monitor's employees in an open Employee monitor from Do Not Disturb

- Right-click the monitor and click **Monitor control=>Remove Do Not Disturb**. Alternatively, select an empty cell in an open monitor and click **Remove Do Not Disturb** from the **Monitor Control** tab in the Contact Center Client ribbon.

To remove an employee in an open Agent monitor from Do Not Disturb

- Right-click the cell of an agent who is in Do Not Disturb and click **Agent control=>Remove Do Not Disturb**. Alternatively, select the agent cell in an open monitor and click **Remove Do Not Disturb** from the **Agent Control** tab in the Contact Center Client ribbon.

To remove all of a monitor's employees in an open Agent monitor from Do Not Disturb

- Right-click the monitor and click **Monitor control=>Remove Do Not Disturb**. Alternatively, select an empty cell in an open monitor and click **Remove Do Not Disturb** from the **Monitor Control** tab in the Contact Center Client ribbon.

Placing employees in Do Not Disturb - Ignite (WEB)

NOTE: Agents in Work Timer can directly enter Busy/MKB or DND if the state is applied manually. Changing states from Work Timer to Busy/MKB or DND without first entering a Classification Code could register a 'Non-Compliant' against voice agents, if Classification Codes are required for the queue.

Placing an employee into Do Not Disturb places them in Do Not Disturb across all media types for which they answer contacts. While in Do Not Disturb, they are unable to receive inbound multimedia contacts and internal voice contacts, including transfers.

The following procedure takes place in either an Agent State or Employee State monitor in Ignite (WEB).

To place an employee in Do Not Disturb

1. In the monitor, select the employee you want to place in Do Not Disturb.
2. Click **State=>Do Not Disturb...**
3. Choose a DND code.

Removing employees from Do Not Disturb - Ignite (WEB)

Removing employees from Do Not Disturb re-enables them to receive contacts for all applicable media types.

The following procedure takes place in either an Agent State or Employee State monitor in Ignite (WEB).

To remove an employee from Do Not Disturb

1. In the monitor, select the employee you want to remove from Do Not Disturb.
2. Click **State** and select an alternate state.

NOTE: Select **Available** if you want to make them available to receive contacts.

Canceling Work Timer for employees - Contact Center Client

NOTE: Agents in Work Timer can directly enter Busy/MKB or DND if the state is applied manually. Changing states from Work Timer to Busy/MKB or DND without first entering a Classification Code could register a 'Non-Compliant' against voice agents, if Classification Codes are required for the queue.

In an Employee monitor or Agent monitor, you can cancel Work Timer for one or more employees. The following procedures take place in either an open Employee monitor or an open Agent monitor in Contact Center Client.

To cancel Work Timer in an open Employee monitor

- Right-click the cell of an employee who is in Work Timer and click **Employee control=>Cancel Work Timer**. Alternatively, select the employee cell in an open monitor and click **Cancel Work Timer** in the appropriate media section of the **Employee Control** tab in the Contact Center Client ribbon.

To cancel Work Timer for all employees in an open Employee monitor

- Right-click the monitor and click **Monitor control=>Cancel Work Timer**. Alternatively, select an empty cell in an open monitor and click **Cancel Work Timer** in the media type's section of the **Monitor Control** tab in the Contact Center Client ribbon.

To cancel Work Timer for an employee in an open Agent monitor

- Right-click the cell of an agent who is in Work Timer and click **Agent control=>Cancel Work Timer**. Alternatively, select the agent cell in an open monitor and click **Cancel Work Timer** from the **Agent Control** tab in the Contact Center Client ribbon.

To cancel Work Timer for all employees in an open Agent monitor

- Right-click the monitor and click **Monitor control=>Cancel Work Timer**. Alternatively, select an empty cell in an open monitor and click **Cancel Work Timer** from the **Monitor Control** tab in the Contact Center Client ribbon.

Canceling Work Timer for employees - Ignite (WEB)

NOTE: Agents in Work Timer can directly enter Busy/MKB or DND if the state is applied manually. Changing states from Work Timer to Busy/MKB or DND without first entering a Classification Code could register a 'Non-Compliant' against voice agents, if Classification Codes are required for the queue.

The following procedure takes place in either an Agent State or Employee State monitor in Ignite (WEB).

To remove an employee from Work Timer

1. In the monitor, select the employee you want to remove from Work Timer.
2. Click **State** and select an alternate state.
NOTE: Select **Available** if you want to make them available to receive contacts.

Canceling Reseize Timer for voice agents

The following procedures take place in either an open Employee monitor or an open Agent monitor in Contact Center Client.

To cancel Reseize Timer for an employee's voice agent in an open Employee monitor

- Right-click the cell of an employee who is in Reseize Timer and click **Employee control=>Cancel Reseize Timer**. Alternatively, select the employee cell in an open monitor and click **Cancel Reseize Timer** in the appropriate media section of the **Employee Control** tab in the Contact Center Client ribbon.

To cancel Reseize Timer for all employee voice agents in a monitor in an open Employee monitor

- Right-click the monitor and click **Monitor control=>Cancel Reseize Timer**. Alternatively, select an empty cell in an open monitor and click **Cancel Reseize Timer** from the **Monitor Control** tab in the Contact Center Client ribbon.

To cancel Reseize Timer for an employee's voice agent in an open Agent monitor

- Right-click an agent who is in Reseize Timer and click **Agent control=>Cancel Reseize Timer**. Alternatively, select the agent cell in an open monitor and click **Cancel Reseize Timer** in the appropriate media section of the **Agent Control** tab in the Contact Center Client ribbon.

To cancel all of the voice agents on a monitor in the Reseize Timer state in an open Agent monitor

- Right-click the monitor and click **Monitor control=>Cancel Reseize Timer**. Alternatively, select an empty cell in an open monitor and click **Cancel Reseize Timer** from the **Monitor Control** tab in the Contact Center Client ribbon.

CONTROLLING THE AVAILABILITY OF VOICE QUEUES

Using Interactive Contact Center and Contact Center Client, you can control the availability of voice queues on the Queue Now or Queue Group Now monitor. Multimedia queues cannot be controlled using Interactive Contact Center and Contact Center Client. For information on controlling voice queues, see the Interactive Contact Center chapter of the *MiContact Center User Guide*.

INTERACTING WITH CUSTOMER CONTACTS TO IMPROVE SERVICE LEVELS

Interactive Visual Queue is a Contact Center Client real-time monitor that works in conjunction with YourSite Explorer and Interactive Contact Center to enable supervisors to both monitor and control the content in contact center queues. With Interactive Visual Queue monitors open, supervisors can monitor the contents of queues and queue groups, easily move contacts between queues, assign contacts to agents, and proactively remove unwanted contacts from the queues.

Interactive Visual Queue is comprised of a Queued media grid and, for voice media, an Abandoned media grid and a Callback to be processed grid. The Interactive Visual Queue Queued media grid displays all types of media contacts that are currently queued. It does not display items that have already been offered to agents or are currently being handled by agents.

Using a drag-and-drop operation, supervisors can balance traffic by moving contacts from busy queues to less active queues and ensure optimum customer service by directing high priority contacts to experienced agents. Supervisors can pick contacts from the queue and handle them, and can tag email contacts as junk or no reply needed to remove them from the queue. Supervisors can also preview email contacts.

For information on using Interactive Visual Queue with voice media, see the Interactive Visual Queue chapter of the *MiContact Center User Guide*.

Opening Interactive Visual Queue

You access Interactive Visual Queue by logging on to Contact Center Client and then opening the Real-time toolbar.

To open an Interactive Visual Queue monitor

1. Log on to Contact Center Client.
2. In the Contact Center Client ribbon, click **Real Time**.
3. Click **Interactive Visual Queue**.
The Add/Remove device IDs window opens.
4. Select the queue group(s) or queue(s) that you want to monitor and click **OK**.
See Figure 30.

NOTE:

- Virtual, Reporting, and Unified Queue Groups are shown in the Queue groups list.

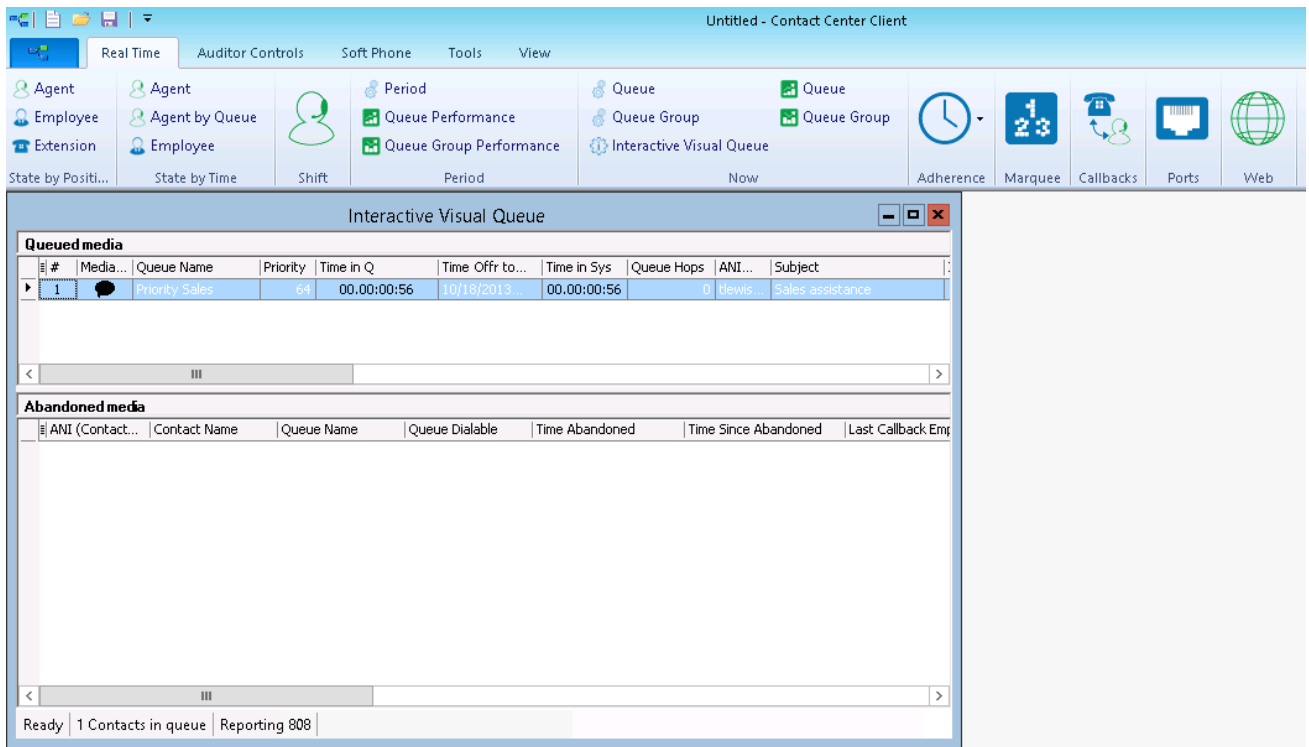


Figure 30: Interactive Visual Queue monitor

Accessing queue and contact information and statistics

To access detailed multimedia queue information, including voice, refer to the Interactive Visual Queue Queued media grid. Here you will find the statistics you need to make informed decisions to ensure contacts are being handled efficiently within your business.

The following list provides descriptions of the column headings available in the Queued media grid:

- *Position (#)* displays the answer position relative to other contacts in the queue
- *Media icon* displays the media type
- *Queue Name* displays the name of the queue
- *Queue Dialable* displays:
 - Voice—the dialable number of the queue
 - Chat—Queue Auto Response User Name
 - SMS—the dialable number of the queue
 - Email—Email address of the queue
- *Priority* is the priority of the contact in the queue (the lower the number, the higher the priority)
- *Time in Queue* is the contact's total time in the current queue
- *Time Offered to System* is the time the contact first entered the system
- *Time in System* is the contact's total time in the system
- *Queue Hops* is the number of times a contact has changed queues
- *ANI (Contact ID)* displays:
 - Voice—caller # / ANI

- Chat—Chat email address from pre-chat form
- SMS—From mobile number
- Email—From email address
- *Subject* displays
 - Voice—blank
 - Chat—Chat subject from pre-chat form
 - SMS—blank
 - Email—Email subject
- *Is Callback* indicates if the queued media is a callback request (voice only)
- *Service level countdown* provides a countdown in seconds when the conversation will exceed the target time to meet the service level
- *Contact Name* is the name associated with the contact (if available)
 - Voice—caller ID
 - Chat—Chat name from pre-chat form
 - SMS—blank
 - Email—Email “From” name, if available
- *Time Offered to Queue* is the time the contact entered the current queue
- *DNIS (To Address)* displays
 - Voice—DNIS Number
 - Chat—blank
 - SMS—blank
 - Email—receiver’s email address
- *To Name* displays
 - Voice—DNIS Name, if configured in YourSite Explorer for the associated DNIS number
 - Chat—blank
 - SMS—blank
 - Email—Email “To” name, if available
- *Collected Information* displays the single or series of collected results provided by IVR Routing or Intelligent Queue. Collected information requires IVR Routing or Intelligent Queue, Verified Collected Digits and, optionally, Remote Database Verification or CTI Developer Toolkit
- *Queue Reporting* is the queue’s reporting number

For information on other Interactive Visual Queue grids that are voice media only, see the Interactive Visual Queue chapter of the *MiContact Center User Guide*. For information on hiding or making columns visible, sorting data in a column, or re-arranging columns, see the Contact Center Client options section of the Real-Time Monitors chapter of the *MiContact Center User Guide*.

Understanding contact priority

Each queue has a default priority level. When a contact enters the system for the first time, the contact adopts the default priority of whichever queue it enters. If all contacts in a queue have the same priority, the position of the contacts are based on each contact's total time in the current queue. If a queue contains contacts that have multiple priority levels, higher priority contacts will have a higher position in the queue than lower priority contacts.

As long as a contact remains in a queue, it maintains its priority. However, if a contact moves from one queue to another queue, the contact's priority may change, based on the method used to move the contact.

When you redirect a contact manually, the contact always adopts the default priority level of the destination queue.

When you redirect a contact manually, the contact always adopts the default priority level of the destination queue. For example, suppose Queue 1 has a priority of 1 and Queue 2 has a priority of 15. When a contact first enters Queue 1, it has a priority of 1. However, if you manually move that contact to Queue 2, using either a drag-and drop operation or the right-click menu, the contact priority lowers to 15. The rules work the same in reverse. If you manually move a priority 15 contact from Queue 2 to Queue 1, the contact priority increases to 1 when it enters Queue 1.

Contacts interflowed automatically retain the original contact priority.

Redirecting contacts

A contact can move between queues automatically (interflow) or manually (redirection).

Interflow

You can configure Inqueue workflows to automatically move a contact from one queue to another after a specific duration through the Interflow activity. For example, you could configure your system to move a contact from Queue 1 to Queue 2 if the contact has not been answered within 30 seconds. For more information on the Interflow activity, see "Routing contacts with the Interflow activity" on page 188.

Redirection

Using Interactive Visual Queue, you can manually redirect a contact from a queue to another queue, to an agent, or, if it is a voice contact, a dialable number.

There are two ways a voice contact can be removed from the system. If a voice contact is moved more than 10 times, either by redirection or by interflow, the contact is dropped from the system. You can see the current number of times a contact has moved between queues in the Queue Hops column. A voice contact will also be automatically removed from the system if its total time in the system exceeds 24 hours. The Total Time column lists the contact's duration in the system. Email, SMS and chat contacts are removed from the system if they are offered to agents over 50 times.

If a contact is an email contact, it can also be set to No Reply or Junk and removed from the system.

You can manually redirect a contact in the Queued media grid using the following methods:

- Drag and drop a contact between queues.
- Use the right-click menu to move a contact between queues.
- Use the right-click menu to send a contact to a specific dialable number or email address

You may notice that the first two methods perform the same action. However, the second method is convenient when a queue monitor is maximized and you want to move a contact without having to resize one or more monitors.

You can remove contacts in the Interactive Visual Queue Monitor in the following ways:

- Delete voice contacts from the monitor (voice only)
- Tag emails as No Reply needed
- Tag emails as Junk

When you manually redirect (drag and drop) a contact in Interactive Visual Queue, MiContact Center changes the way the voice contact is pegged on the Queue Performance reports. If you redirect a contact before the short abandon time set for the queue, the contact is pegged as *Unavailable*. If you redirect a contact after the short abandon time set for the queue, the contact is pegged as *Interflowed*. An internal ACD contact is pegged as *Abandoned* if the contact is redirected at any time.

Redirecting multimedia contacts between queues

To drag and drop contacts between queues

1. In the Queued media grid, click anywhere in the row of the contact you want to move.
2. Use a drag-and-drop operation to move the contact from its original queue monitor to a new queue monitor.

NOTE:

- You can only drag a contact from one Interactive Visual Queue monitor to another if the destination monitor has the same media type (such as email to email, chat to chat, etc.).
- Only one contact can be moved over at a time.
- If the destination monitor has multiple queues for the same media type, the system will assign the redirected contact to the queue with the fewest contacts in queue.

To redirect a contact between queues using the menu

1. In the Queued media grid, right-click the row of the contact you want to redirect and click **Send to=>Queue**.
A list of available queues displays.

NOTE: You can use the search button to locate a specific queue, either by name or reporting number.

2. Click the name of the queue to which you want to redirect the contact.
3. Click **OK**.

Alternatively, to redirect a contact from one queue to another queue

1. In the Queued media grid, right-click the row of the contact you want to redirect and click **Send to**.
2. In the list of queues beneath **Queue**, select a queue.

Redirecting multimedia contacts to agents

You can transfer contacts in queue directly to agents who are available or in Make Busy/Overloaded states. Agents who are logged out, in DND, Offline (WEB), or whose presence is Unknown cannot receive transferred contacts and do not appear in the list of available agents.

To redirect multimedia contacts to agents

1. In the Queued media grid, right-click the row of the contact you want to redirect and click **Send to=>Agent**.
A list of available agents who can handle the contact's media type displays.
NOTE: You can use the search button to locate a specific agent, either by name or reporting number.
2. Click the name of the agent to which you want to send the contact.
3. Click **OK**.

Redirecting email contacts to specific email addresses

Using the Send to menu option, you can redirect contacts in Interactive Visual Queue to any email address.

To redirect an email contact to another email address

1. In the Queued media grid, right-click the row of the email contact you want to redirect and click **Send to=>[Destination]**.
2. When you click [Destination], it changes to a text box.
3. Type an email address into the text box and press **Enter**.
You can enter multiple email addresses, separating each with a semi-colon (e.g. recipient1@email.com;recipient2@email.com).
NOTE: If you are licensed to access multimedia functionality in Ignite, you can alternatively redirect contacts directly to an agent by forwarding or transferring. See "Handling emails in Ignite" on page 359 and "Handling chats in Ignite" on page 375.

Tagging emails and SMS as Junk

Supervisors can mark email or SMS contacts in an Interactive Visual Queue monitor as junk, removing junk contacts from the queue.

To tag an email or SMS contact as Junk

1. In the Queued media grid, select the contact(s) you want to tag as Junk.
Select multiple emails by holding **CTRL** or **Shift** and clicking the emails.
2. Right-click the row of the contact you want to tag as Junk.
3. Click **Junk Conversation**.
4. Click **Yes**.

NOTE:

- Multimedia contacts in queue tagged as Junk or No Reply from Interactive Visual Queue and Ignite are not included in queue Handled, Completed, and Offered counts.
- If you are licensed to access multimedia functionality in Ignite, you can alternatively tag emails as Junk using Ignite. See "Marking emails as No Reply and Junk" on page 367.

Tagging email and SMS contacts as No Reply Needed

Supervisors can mark email and SMS contacts in an Interactive Visual Queue monitor as requiring no reply, such as out of office emails, removing them from the queue.

To tag an email and SMS contact as No Reply needed

1. In the Queued media grid, select the contact you want to tag as No Reply needed. Select multiple contacts by holding **CTRL** or **Shift** and clicking the emails.
2. Right-click the row of the contact you want to tag as No Reply needed.
3. Click **No Reply**.

NOTE:

- Multimedia contacts in queue tagged as Junk or No Reply from Interactive Visual Queue and Ignite are not included in queue Handled, Completed, and Offered counts.
- If you are licensed to access multimedia functionality in Ignite, you can alternatively tag email and SMS contacts as No Reply Needed using Ignite. See "Marking emails as No Reply and Junk" on page 367 and "Marking SMS contacts as No Reply and Junk" on page 392.

PREVIEWING QUEUED MULTIMEDIA CONTACTS

Supervisors monitoring queues in Interactive Visual Queue can preview the contents of queued email, SMS and chat contacts. Figure 31 shows a previewed email. Previewed emails display in a new window that shows the contents of the email. Supervisors can preview embedded files in the email and download attachments, such as images and e-signatures, but they cannot edit previewed emails, however, nor can they preview an email in an agent's inbox. A supervisor can only have one email preview open at a time.

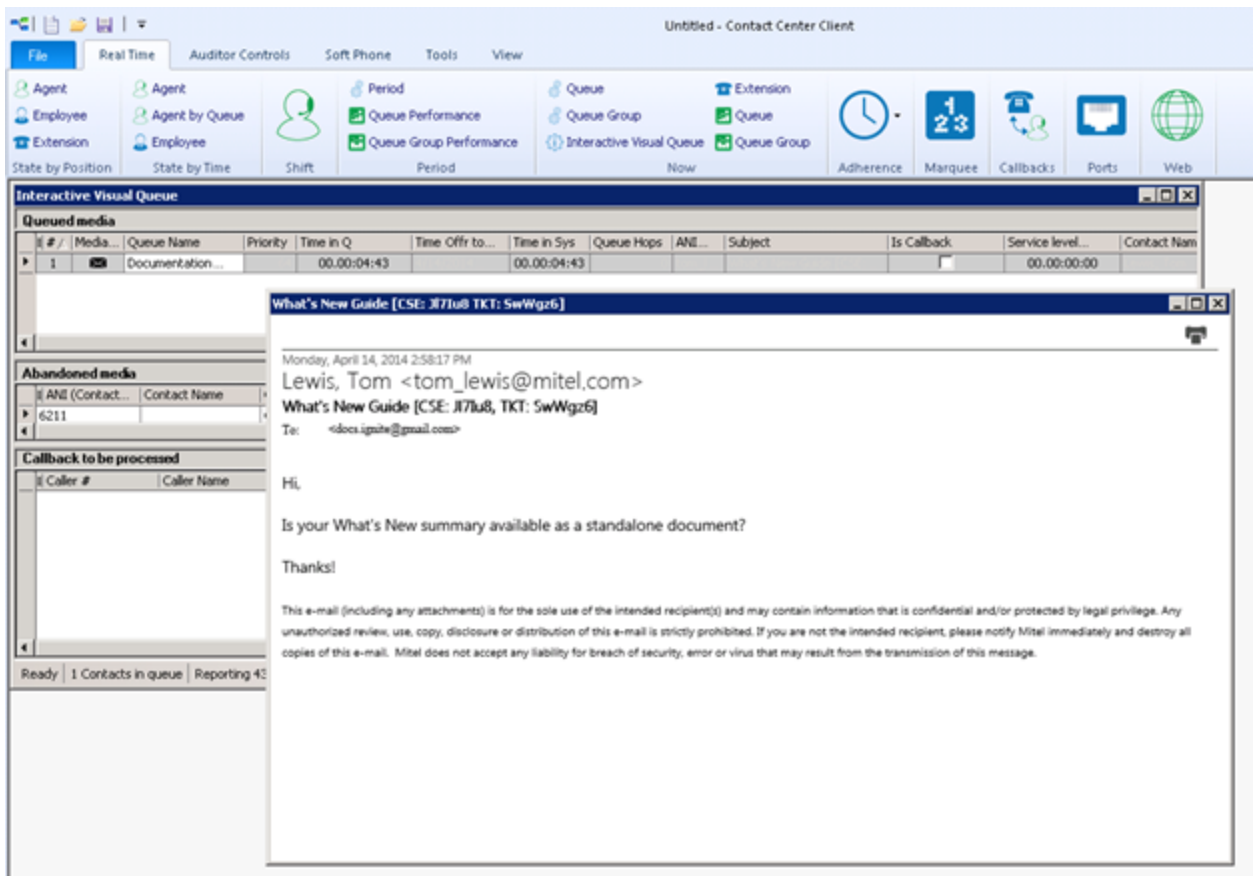


Figure 31: Previewed email

Figure 32 shows a previewed chat session. Previewed chats show the content of the chat session. Supervisors can open links in the previewed chat session, but they cannot view embedded media or participate in the chat. A supervisor can only preview one chat at a time. Supervisors previewing chats must have an associated chat agent.

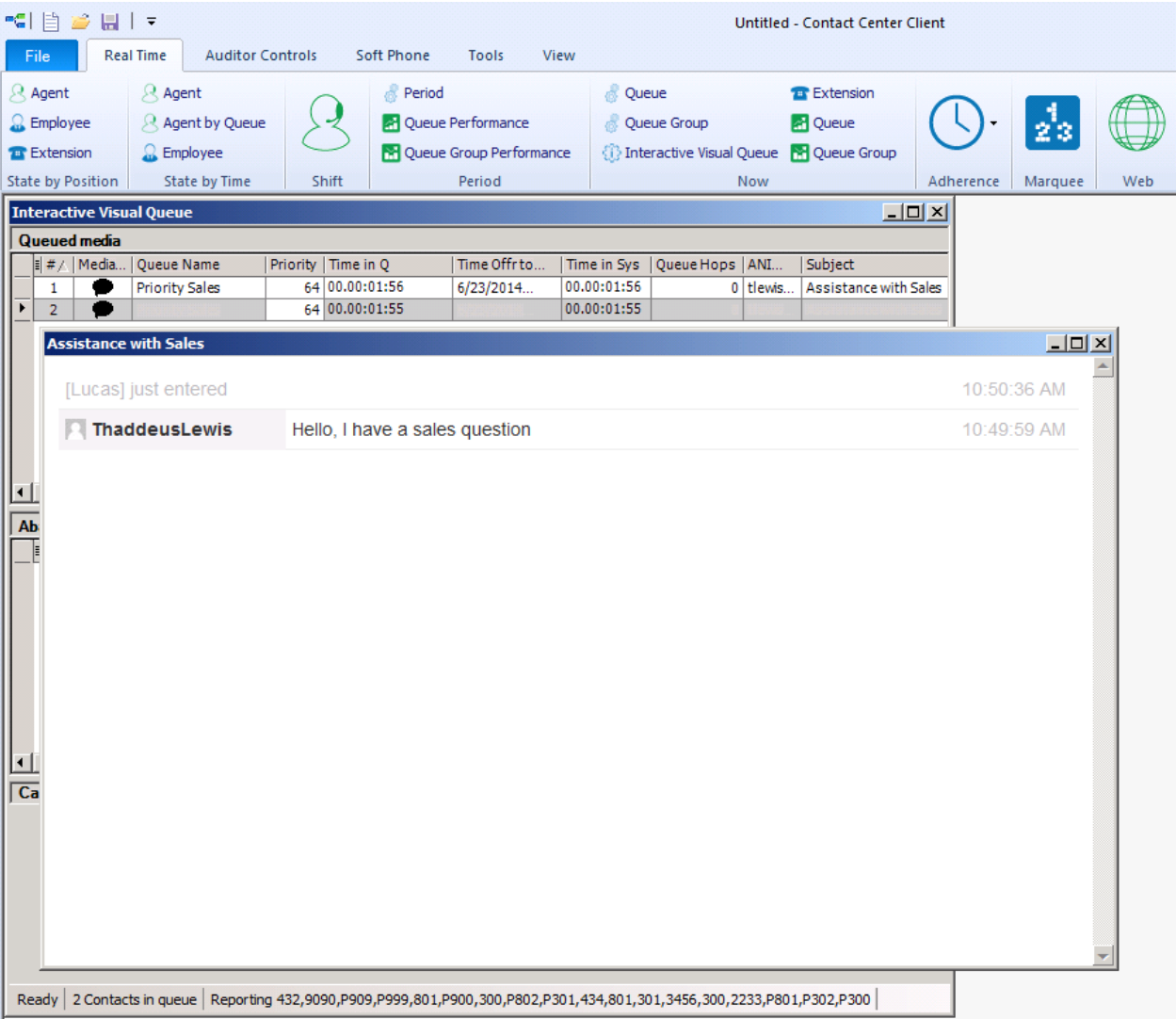


Figure 32: Previewed chat

Figure 33 shows a previewed SMS contact. Previewed SMS contacts show the content of the SMS session. Supervisors can open links in the previewed SMS session, but they cannot view embedded media or participate in the SMS contact. A supervisor can only preview one SMS contact at a time. Supervisors previewing SMS contacts must have an associated SMS agent.

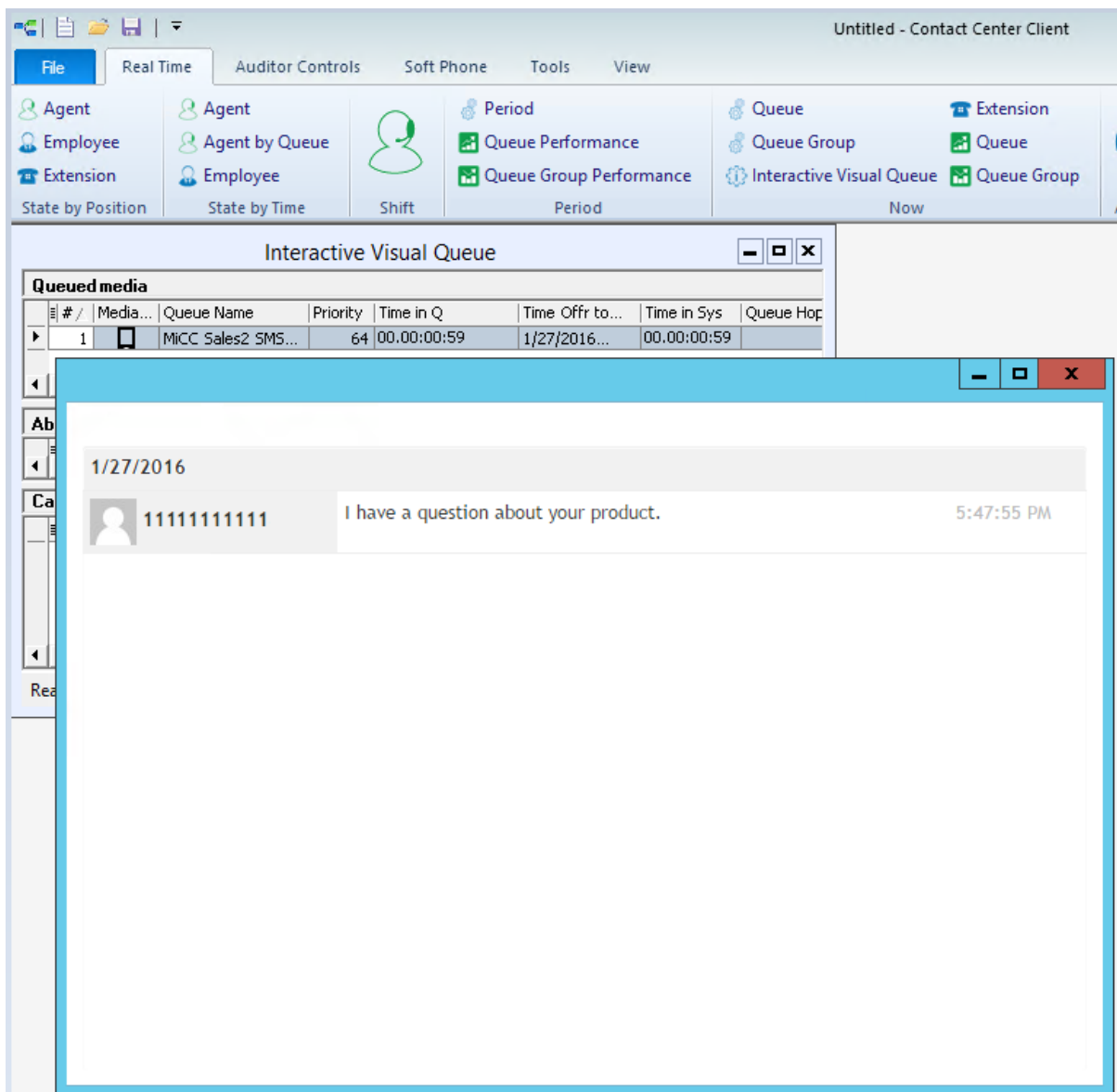


Figure 33: Previewed SMS

While the preview window is open, no other actions can be taken in Contact Center Client, although you can still answer phone calls from the desktop notification. Previewing a multimedia contact does not impact the ability of that multimedia contact to interflow to another queue, to be offered to or picked by an agent, or any other activity in Multimedia Contact Center.

The following procedures take place in an open Interactive Visual Queue monitor in Contact Center Client.

To preview a multimedia contact

- Right-click the email, SMS or chat you want to preview and select **Preview**

To print an email preview window

- Click the **printer** icon in the email preview.

Removing contacts from Interactive Visual Queue monitors

Contact can be removed from Queued and Abandoned media monitors. Deleting a contact from Interactive Visual Queue does not remove the contact from the actual queue. Instead, it removes the contact from the monitor and stops Interactive Visual Queue from tracking it.

To remove a contact from Interactive Visual Queue

1. Right-click the row of the contact you want to remove.
2. Click **Delete**.

The contact is removed from Interactive Visual Queue

FORECASTING MULTIMEDIA CONTACT CENTER STAFFING REQUIREMENTS

The Forecasting tool built into Contact Center Client and Workforce Scheduling enables supervisors to take historical data generated by their contact center's ACD routing systems and multimedia servers and use it to predict future traffic volumes and patterns to estimate required resources to handle their contact center's workload.

The Forecasting tool forecasts for each media separately when generating forecasts and does not adjust for agent Workload. Agents allowed to handle simultaneous contacts are likely to be more efficient than those handling a single call due to their ability to multitask. As a result, the number of required agents in a forecast may be met by fewer agents if their Workload permits them to handle different media contacts and numbers of contacts concurrently. Supervisors should adjust their forecast statistics to compensate for the Workload of the agents being forecasted. It is recommended that Workload be the same for all members in an agent group being forecasted.

For more information on forecasting, see the Forecasting chapter of the *MiContact Center User Guide*. For information on using the Forecasting tool within Workforce Scheduling to schedule your employees based on multimedia queue traffic needs, see the Workforce Scheduling chapter of the *MiContact Center User Guide*.

ACCESSING HISTORICAL REAL-TIME INFORMATION WITH CONTACT CENTER CLIENT

Using Auditor you can view historical, multimedia real-time events, at your own pace. Auditor makes it easy for you to analyze when and why past service problems occurred. By understanding the series of events you can prevent such issues from recurring.

For example, you notice that on July 15 you have 12 contacts abandon between 10:00 AM and 10:15 AM. You can review the contacts and the agents' actions on that date for that time period with Auditor. Did all of the contacts arrive at the same time? Did all of the agents go on break at the same time? If all of the contacts arrived at once, you need to schedule more people. If all of the agents went on break at the same time, you need to adjust their break schedule.

Using Auditor you can also track when employees log on and log off the system. It is easy to determine if any of the employees consistently start late or finish early.

With Auditor, you can use existing profiles, including alarm thresholds, when viewing past days run in real time.

Your access to Auditor is determined by administrator-set security roles.

The first toolbar consists of real-time monitors that provide information on agent availability, queue statistics, and graphic displays on queues. (See Figure 34.)

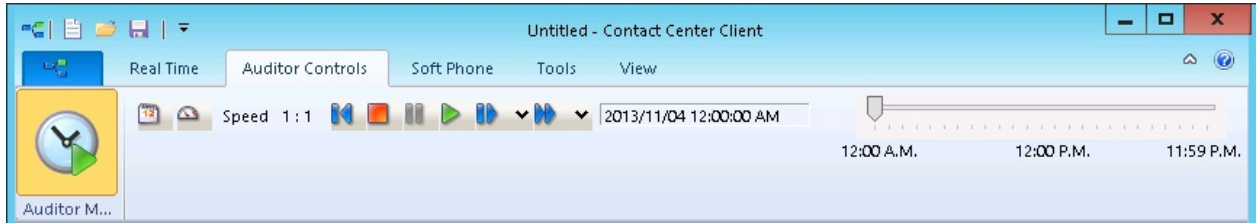








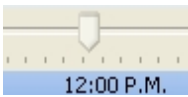


Figure 34: Auditor toolbar

AUDITOR ICONS

Using Auditor's second toolbar you select the date of the historical real-time events that you want to view and the speed at which to play the events. The icons are described in Table 26.

Table 26: Auditor Icons

ICON	TERM	MEANING
	Calendar	You can select the date of the historical real-time events that you want to view by clicking the calendar.
	Speed of audit	The Speed of audit is expressed as a ratio of real-time to play speed. You can select the speed from a list of ratios that opens when you click the clock: 1:1, 1:2, 1:5, 1:10, 1:30, 1:60, and 1:120. If you select the ratio 1:1, it will take you one second to view one second of the past day. If you select 1:60, it will take you one second to view one minute of the past day.
	Rewind	If you click Rewind when the play is stopped, you jump back to the beginning of the day.
	Stop	You can stop the real-time historical events from playing, and jump back to the beginning of the day, by clicking Stop.
	Pause	You can pause the real-time historical events by clicking Pause.
	Play	You can play the real-time historical events by clicking Play.
	Step forward	You can select the increment (in seconds) you will advance from a list that opens when you click the down arrow to the right of Step forward: 1 sec, 2 sec, 5 sec, 10 sec, 15 sec, 30 sec, and 45 sec. If you select 30 seconds, then when the play is stopped, you can step forward in 30 second increments each time you click Step forward. When you reach the end of data for that day, you will automatically jump to the end of the day.
	Jump forward	You can select the increment (in minutes) you will advance from a list that opens when you click the down arrow to the right of Jump forward: 1 min, 2 min, 5 min, 10 min, 15 min, 30 min, and 60 min. If you select 10 minutes, then when the play is stopped, you can jump forward in 10 minute increments each time you click Jump forward. When you reach the end of data for that day, you will automatically jump to the end of the day.
	Slider	As you view the events of the day, the slider indicates the time at which the events occurred. The length of the slider represents the length of the day for which you are viewing historical real-time events.

VIEWING HISTORICAL REAL-TIME EVENTS

You start Contact Center Client to gain access to Auditor functionality. For more information on Contact Center Client real-time monitoring, see the Contact Center Client chapter of the *MiContact Center User Guide*.

To view historical real-time events, you must

1. Start Contact Center Client.
2. Open the grids in which you want to view historical events.
NOTE: When viewing a Queue or Queue Group monitor, emails in queue that arrived from a previous day in the auditing period will not show up in the monitor statistics until an action is taken on them during the auditing period.
3. Start Auditor.

STARTING AND USING AUDITOR

You start Contact Center Client to gain access to Auditor functionality.

To view historical real-time events, you must

1. Start Contact Center Client.
2. Open the grids in which you want to view historical events.
NOTE: When viewing a Queue or Queue Group monitor, emails in queue that arrived from a previous day in the auditing period will not show up in the monitor statistics until an action is taken on them during the auditing period.
3. Start Auditor.

NOTE: If you are using the Contact Center Client marquee, Contact Center PhoneSet Manager, Contact Center Softphone, or Interactive Visual Queue applications (which function in real time only), open Auditor in another instance of Contact Center Client.

To start and use Auditor

1. In the Contact Center Client ribbon, click **Auditor Controls**.
2. Click **Auditor Mode** in the toolbar ribbon.
The Auditor toolbar displays.
3. Click the calendar icon and select a date.
The date displays on the left of the slider.
4. Click the speed icon and select the speed of the audit.
The speed of the audit, expressed as a ratio of real time to play speed, displays on the right of the speed icon.
5. Move the slider to select the time of day at which you want to start monitoring.
6. Click the play button to play the real-time events of the selected date.
The historical real-time events play at the speed you selected.

ACCESSING REAL-TIME INFORMATION WITH IGNITE (WEB)

New to Version 8.1, Ignite (WEB) enables real-time monitoring of employees, agents, queues, and callback requests. The Ignite (WEB) real-time monitors do not duplicate those available in Contact Center Client but, instead, offer a succinct set of the most essential statistics in the highly accessible online format of Ignite (WEB).

The following real-time monitors are available in Ignite (WEB):

- Employee State
- Agent State
- Queue Now
- Callback Requests

To access the real-time monitors in Ignite (WEB)

1. In Ignite (WEB), click Dashboards.
2. Click the down arrow and select the dashboard from the list that contains the monitor you want to display.

NOTE:

- Alarms are not supported for real-time monitors in Ignite (WEB).
- Access to real-time monitors is determined by administrator-set security roles.

To learn how to add and configure settings for real-time monitors in Ignite (WEB), see "Configuring Ignite (WEB) dashboards" on page 337.

MONITORING EMPLOYEE STATE IN IGNITE (WEB)

The Employee State monitor available in Ignite (WEB) enables you to view activity and, if enabled for Interactive Contact Center, adjust presence for individual employees in your contact center.

You can view the following real-time employee information:

- Employee name, reporting number, and avatar
- ACD availability and state (with colored state icon)
- Busy duration for the day
- Do Not Disturb duration for the day
- Number of contacts handled for the day (voice, email, chat, SMS, as applicable)
- Date/Time of first login
- Total shift duration

NOTE: Only one employee at a time can display in the Employee State monitor but you can optionally add several employee monitors to a dashboard to access information for multiple employees.

The Employee State monitor in Ignite (WEB) is accessible from your Ignite (WEB) Dashboard. To learn how to add and configure settings for the Employee State monitor in Ignite (WEB), see "Configuring Ignite (WEB) dashboards" on page 337.

MONITORING AGENT STATE IN IGNITE (WEB)

The Agent State monitor available in Ignite (WEB) enables you to view the real-time state of agents in your contact center and, if enabled for Interactive Contact Center, adjust agent presence.

Each column lists agents in order of time in state, with the longest in state at the top. For example, the agent at the top of the Idle column is the next longest idle agent and should receive the next inbound contact.

The following table lists and describes real-time agent state information that displays in the Agent State monitor in Ignite (WEB).

Table 27: Agent State monitor statistics - Ignite (WEB)

STATISTIC	DESCRIPTION
ACD	includes agents in ACD and ACD Hold
Idle	includes agents who are available for ACD but currently not handling any contacts
Non ACD	includes agents in Non ACD, Non ACD Hold, Outbound, and Outbound Hold
Unavailable	includes agents in Do Not Disturb, Busy, Work Timer, and Reseize Timer
Not Present	includes agents who are logged in as an agent but not present to any agent groups
Offline	includes agents who are logged in as an ACD agent

The Agent State monitor in Ignite (WEB) is accessible from your Ignite (WEB) Dashboard. To learn how to add and configure settings for the Agent State monitor in Ignite (WEB), see "Configuring Ignite (WEB) dashboards" on page 337.

MONITORING QUEUES IN IGNITE (WEB)

The Queue Now monitor available in Ignite (WEB) enables supervisors to view queue or queue group statistics and a summary of current agent states for each queue or queue group in real time.

Queue statistics include Offered, Service Level %, Contacts Waiting, Requeued, and Longest Waiting. Handled, Interflowed, and Abandoned counts can also be accessed by hovering over 'Offered' for each queue or queue group.

The following table lists and describes queue statistics that display in the Queue Now monitor in Ignite (WEB).

Table 28: Queue Now monitor statistics - Ignite (WEB)

STATISTIC	DESCRIPTION
Offered	the total number of contacts offered to the queue or queue group
Service Level %	<p>for a queue, this is the percentage of contacts handled within the queue's Service Level Time value over the day</p> <p>for a queue group, this is the lowest percentage of contacts handled within the queue's Service Level Time value over the day across all queues</p>
Contacts Waiting	the current number of contacts in queue waiting for a member to become available, including those listening to silence, music, or recorded announcements
Requeued	<p>the total number of ACD contacts requeued</p> <p>NOTE: This statistic displays information for ACD paths only. Statistics for Ring Groups display as '0'</p>
Longest Waiting	the current duration, in minutes and seconds, of the contact waiting the longest in queue or queue group
Handled	the total number of ACD contacts handled by members
Interflowed	<p>the total number of ACD contacts interflowed</p> <p>interflow is a mechanism that directs a contact waiting in queue to another answer point</p> <p>NOTE: If a contact waiting in queue is redirected before the queue's short abandoned time has elapsed, the queue is pegged with a Queue Unavailable count rather than an interflowed count. In order for the Interflowed peg to occur, the redirection must occur after the short abandoned time has elapsed</p>
Abandoned	<p>the total number of contacts abandoned before being answered by members</p> <p>NOTE: Abandoned does not peg short abandons as abandoned contacts in the Queue Now monitor. The Abandoned column in the Interactive Visual Queue monitor displays all abandoned contacts. Because of this difference, you may notice discrepancies between the abandoned call information in these two monitors</p>

The current number of agents, by state, also displays for each queue or queue group for the following agent states:

- **Idle:** includes agents who are available for ACD but not currently handling any contacts
- **ACD:** includes agents in ACD and ACD Hold
- **Non-ACD:** includes agents in Non ACD, Non ACD Hold, Outbound, and Outbound Hold
- **Unavailable:** includes agents in Do Not Disturb, Busy, and Work Timer

The Queue Now monitor in Ignite (WEB) is accessible from your Ignite (WEB) Dashboard. To learn how to add and configure settings for the Queue Now monitor in Ignite (WEB), see "Configuring Ignite (WEB) dashboards" on page 337.

VIEWING AND MANAGING CALLBACKS IN IGNITE (WEB)

When licensed for IVR, the Callback Requests monitor, available in Ignite (WEB), enables you to interact with callbacks and monitor their state in real time.

The Callback Requests monitor enables users to requeue, reject, and delete callbacks from within the monitor. Requeued callbacks are re-entered into their queue. Rejected callbacks are removed from the queue and will not be offered to employees. Deleted callbacks are removed from the monitor, but are not removed from the system.

To requeue, reject, or delete a callback

- In the row of the call you want to interact with, in the **Actions** column, left-click either **Requeue**, **Reject**, or **Delete**.

The following table lists and describes the statistics available in the Callback Requests monitor.

Table 29: Callback Requests monitor statistics - Ignite (WEB)

STATISTIC	DESCRIPTION
Name	the name of the caller
Number	the phone number provided by the caller
Status	the status of the callback
Offer At	the specific time the callback will be executed
Received	the specific time the caller submitted the callback request
Preferred Time	the time the caller is available to receive the callback (if the caller does not enter a preferred time, this column will be blank)
Destination	the queue, agent, and extension for which the callback is intended
# of Attempts	the number of times the callback has been attempted
Last Attempted	the specific time the last callback attempt to the caller was made
Actions	within this column, you can choose to requeue, reject, or delete a callback

The Callback Requests monitor in Ignite (WEB) is accessible from your Ignite (WEB) Dashboard. To learn how to add and configure settings for the Callback Requests monitor in Ignite (WEB), see "Configuring Ignite (WEB) dashboards" on page 337.

MANAGING A MULTIMEDIA CONTACT CENTER WITH IGNITE

As a supervisor, there may be situations where you want to access Ignite's agent features. For example, you may want to occasionally log in to alleviate contact center congestion by handling contacts.

Ignite is also useful for directly transferring contacts to specific agents or as an alternative method for tagging contacts as Junk or No Reply Needed. In addition, supervisors access Ignite to search email, chat, and SMS history.

Supervisors can use the real-time monitors available in the Ignite (WEB) Dashboard to view real-time queue, agent, and employee statistics as well as interact with agent presence to improve service levels. You can also view callback requests and choose to requeue, reject, or delete items from the list.

NOTE: Employees must be licensed for Multimedia Contact Center to access the full multimedia features in Ignite. For more information, see "Adding multimedia capabilities to employees" on page 66.

HANDLING MULTIMEDIA CONTACTS

When traffic levels necessitate, supervisors with appropriate licensing can log into Ignite and alleviate congestion by handling contacts. Emails can be configured to overflow to a supervisor after a specified length of time in queue. If a supervisor primarily uses Contact Center Client, they can minimize Ignite and be notified when they receive an overflow email.

See the Ignite section of this guide for information regarding handling contacts in Ignite.

SEARCHING EMAIL, CHAT, AND SMS HISTORY

Building a case history is an essential part of investigating situations that result from a customer complaint or a customer commendation. Searching email, chat, and SMS history helps you to follow the trail of activity, enabling you to react appropriately in an informed way.

See "Searching Ignite" on page 340 and "Reviewing contact history" on page 356 for more information.

ACCESSING REAL-TIME MONITORS IN IGNITE (WEB)

Real-time monitoring of employees, agents, queues, and callback requests is available via the dashboards in Ignite (WEB).

For more information, see "Configuring Ignite (WEB) dashboards" on page 337, "Accessing real-time information with Ignite (WEB)" on page 285, and "Interacting with agent presence to improve service levels" on page 256.

Chapter 3 Agents

HANDLING CUSTOMER CONTACTS IN
A MULTIMEDIA CONTACT CENTER

AGENTS - HANDLING CUSTOMER CONTACTS IN A MULTIMEDIA CONTACT CENTER

Agents in a multimedia contact center are enabled to handle contacts of various media types, including voice, email, chat, and SMS. Ignite enables agents to interact with customers, view and adjust their Agent Group Presence and Busy/Make Busy and Do Not Disturb states, and view statistics in real time to determine availability of other agents and to be aware of current contact center conditions.

Agent preferences, such as login ID and language, can be modified in CCMWeb, your online center for personal settings and accessing the Help resource documentation.

MANAGING AGENT PREFERENCES

Agents can manage their preferences in CCMWeb, a web-based application that provides agents with the ability to view and change settings associated with their login ID. Using the options under CCMWeb's My options tab, agents can set their language preferences, view their security roles, change their password, and manage lists of contacts for emailing reports. Via options under the Help tab, agents can access help documentation, view software information, and download the Client Component Pack installation file.

See the Getting Started chapter of the *MiContact Center User Guide* to learn how to set user preferences, view security roles, and configure email contacts.

IGNITE

Ignite is used by agents to handle all types of media, including voice, email, chat, and SMS.

Ignite is available as either a desktop or Web version. They share much of the same functionality but also offer unique agent and supervisor experiences enabling you to choose the application that suits your individual needs. In our documentation, we refer to desktop Ignite and its features as Ignite (DESKTOP) and Web Ignite and its features as Ignite (WEB) or, where appropriate, as DESKTOP or WEB only.

If you want access to the following features, we recommend using Ignite (DESKTOP):

- Fully supported integration with MiCollab Client, including:
 - State indicator collaboration (state changes in either Ignite or MiCollab are reflected in each application)
 - Ability to dock Ignite to MiCollab Client and minimize/maximize both applications simultaneously
 - Auto-logout from MiCollab Client when agent logs out of Ignite

- Recording and implementing pre-announce and agent greetings
- Requesting help from other agents or supervisors while on a call
- Viewing agents' Inbox contents
- Being notified by email of Enterprise Server alarms
- Using the 'Next Longest button' to access longest-waiting Chat and SMS contacts with a single click
- Grouping, sorting, and organizing contacts using the card and grid views

If you want access to the following features, we recommend using Ignite (WEB):

- Accessing Ignite from any supported, Web-enabled device
 - Full support for tablets (Apple, Android, and Microsoft)
 - Partial support for mobile phones (Apple, Android, and Microsoft), including the ability to log in and out, view dashboards, change ACD state, set and remove Make Busy and Do Not Disturb, remove Work Timer, and interact with agent states via dashboards
- Viewing multiple windows simultaneously to enable greater, immediate access to different types of information
- Switching between desktop, tablet, and mobile device, while maintaining consistent access to all relevant information
- Logging into Ignite, without necessarily logging into queues, enabling agents to access Ignite without being presented with ACD calls
- Using MiCollab Client in conjunction with Ignite, to handle voice contacts, but without integration functionality, such as collaborative state updates, docking, minimizing/maximizing together, click to IM other agents and supervisors, and MiCollab Client auto-logout when logging out of Ignite
- Accessing supervisor-light version of Contact Center Client's Interactive Contact Center capabilities, including interacting with agent states and agent group presence, and moving contacts from queues to agents, based on agent availability and queue activity levels

The following sections describe Ignite's functionality and include procedures for working in Ignite, with a focus on non-voice media types. If your contact center also handles voice contacts, we recommend implementing the MiCollab and Ignite integration described in the *MiContact Center User Guide*.

GETTING STARTED WITH IGNITE (DESKTOP)

The following sections provide a walkthrough of Ignite's interface. While this section contains some procedures for viewing and orienting Ignite, agents can access in-depth information on how to use Ignite by following the cross-references throughout.

Figure 35 illustrates Ignite's UI, in the My Folders view. This is the view where agents perform most of their tasks related to handling multimedia contacts.

NOTE: If you display taskbars on multiple monitors, maximizing Ignite on the secondary display does not cover the taskbar and in some instances causes the taskbar to obscure a portion of Ignite. To correct this, see the following Mitel Knowledge Base article:
<http://micc.mitel.com/kb/KnowledgebaseArticle52017.aspx>.

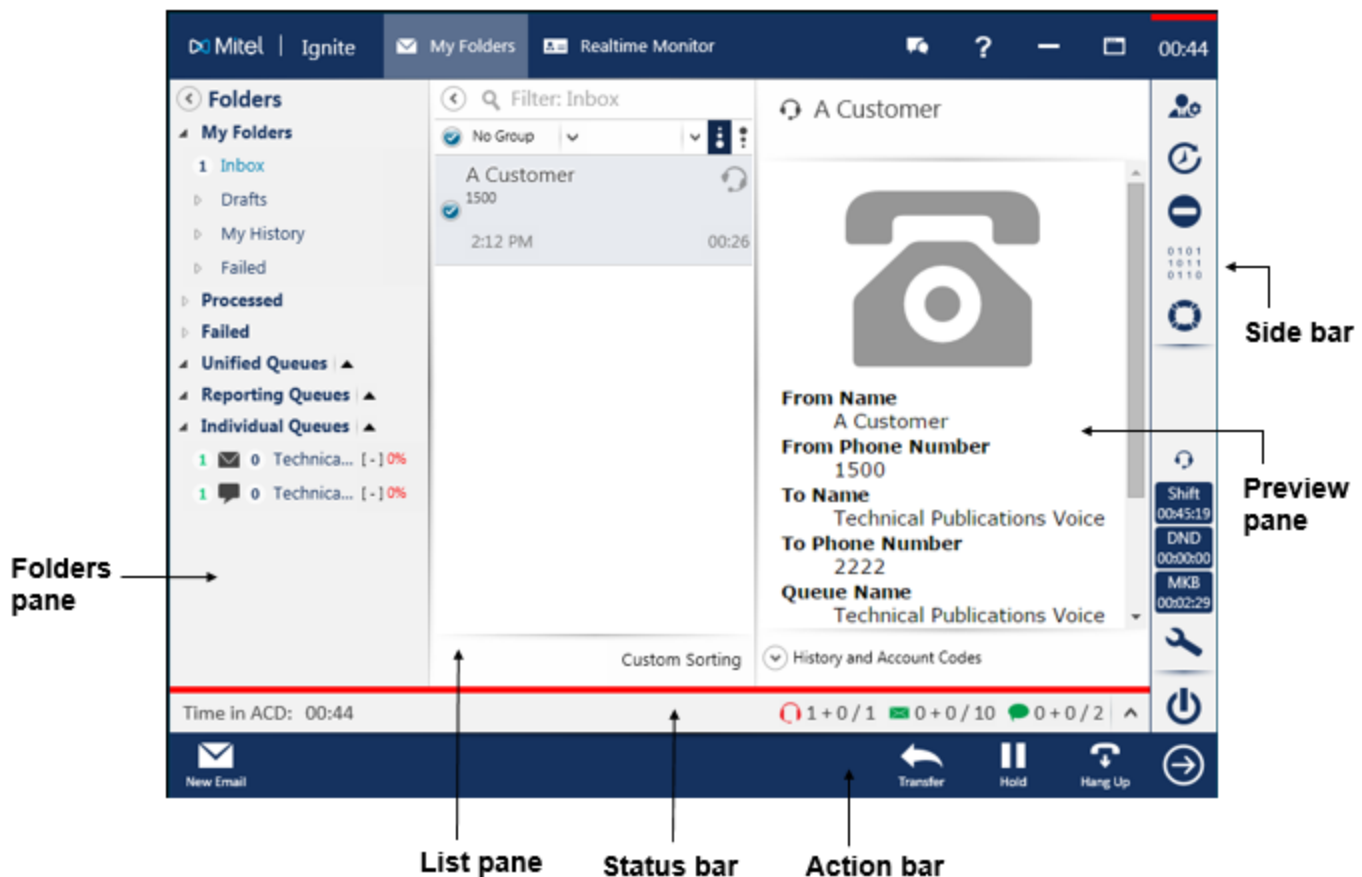


Figure 35: The Ignite UI for handling multimedia contacts

The Sign In screen (DESKTOP)

Agents access Ignite via the Sign In screen.

Agents with multimedia and voice capabilities should follow best practices for logging into voice and multimedia. For more information, see "Logging in and out of Ignite (DESKTOP)" on page 306.

For information on exiting Ignite, see "Opening and closing Ignite (DESKTOP)" on page 306.

Note that the availability of Ignite's functionality depends on employee licensing. If you log into Ignite and are not able to access its functionality, or if you receive a message saying you are not configured for ACD, contact your supervisor or system administrator.

The Agent Group Presence Status screen (DESKTOP)

The Agent Group Presence Status screen is where agents can view

- The Agent Groups for which the agent handles contacts.
- Whether the agent is present in or absent from these groups.
- The default presence settings configured in YourSite Explorer.

If permitted, agents can adjust their agent group presence on this screen.

For information on accessing the Agent Group Presence Status screen, see "Viewing Agent Group Presence in Ignite" on page 346.

For information on using the Agent Group Presence Status screen to become present in, or absent from, agent groups, see "Adjusting Agent Group Presence in Ignite" on page 347.

The Folders pane (DESKTOP)

The Folders pane contains the media folders and the queues for which the employee's agent groups handle contacts. For more information, see "The Media Folders view (DESKTOP)" on page 300 and "The Queue Folder view (DESKTOP)" on page 302.

Agents can expand or collapse Ignite's Folders pane to give more or less space to the Media Folder and Queue Folders views. By default, the Folders pane is expanded.

To expand or contract Ignite's Folders pane, click the arrow button beside **Folders**, at the top of the **Folders** pane.

The Sidebar (DESKTOP)

Ignite's Sidebar displays the following agent controls. (See Figure 36.)

- Agent Group Presence
See "Viewing Agent Group Presence in Ignite" on page 346 and "Adjusting Agent Group Presence in Ignite" on page 347.
- Make Busy
See "Setting and removing Busy/Make Busy in Ignite" on page 349.
- Do Not Disturb
See "Setting and removing Do Not Disturb in Ignite" on page 351.
- Remove Work Timer (displays when Work Timer is active)
See "Work Timer" on page 352.
- Set Account Code
See "Tagging contacts with Account Codes" on page 357.
- Classify
See "Tagging calls with Classification Codes" on page 397.
- Request help
See "Requesting help (DESKTOP)" on page 400.
- Agent Handling Statistics by Media Type
Agents can select up to three agent handling statistics, by media type, to display in the Sidebar. If you are enabled for multiple media types, you can toggle between media-specific statistics using the icon directly above the statistical displays. Select the headphone icon for voice, the envelope icon for email, the conversation icon for chat, or the phone icon for SMS statistics. By default the Sidebar displays Shift Time, DND Time, and MKB Time. However, using the 'Settings' button in the Sidebar, you can select any agent statistics to display.
- Settings
See "Your Ignite profile (DESKTOP)" on page 318.
- Sign Out or Exit
See "Logging in and out of Ignite (DESKTOP)" on page 306 and "Opening and closing Ignite (DESKTOP)" on page 306.

- Expand Ignite / Collapse Ignite
Clicking the 'Expand Ignite / Collapse Ignite' button toggles the view based on your configured settings. See "Your Ignite profile (DESKTOP)" on page 318.

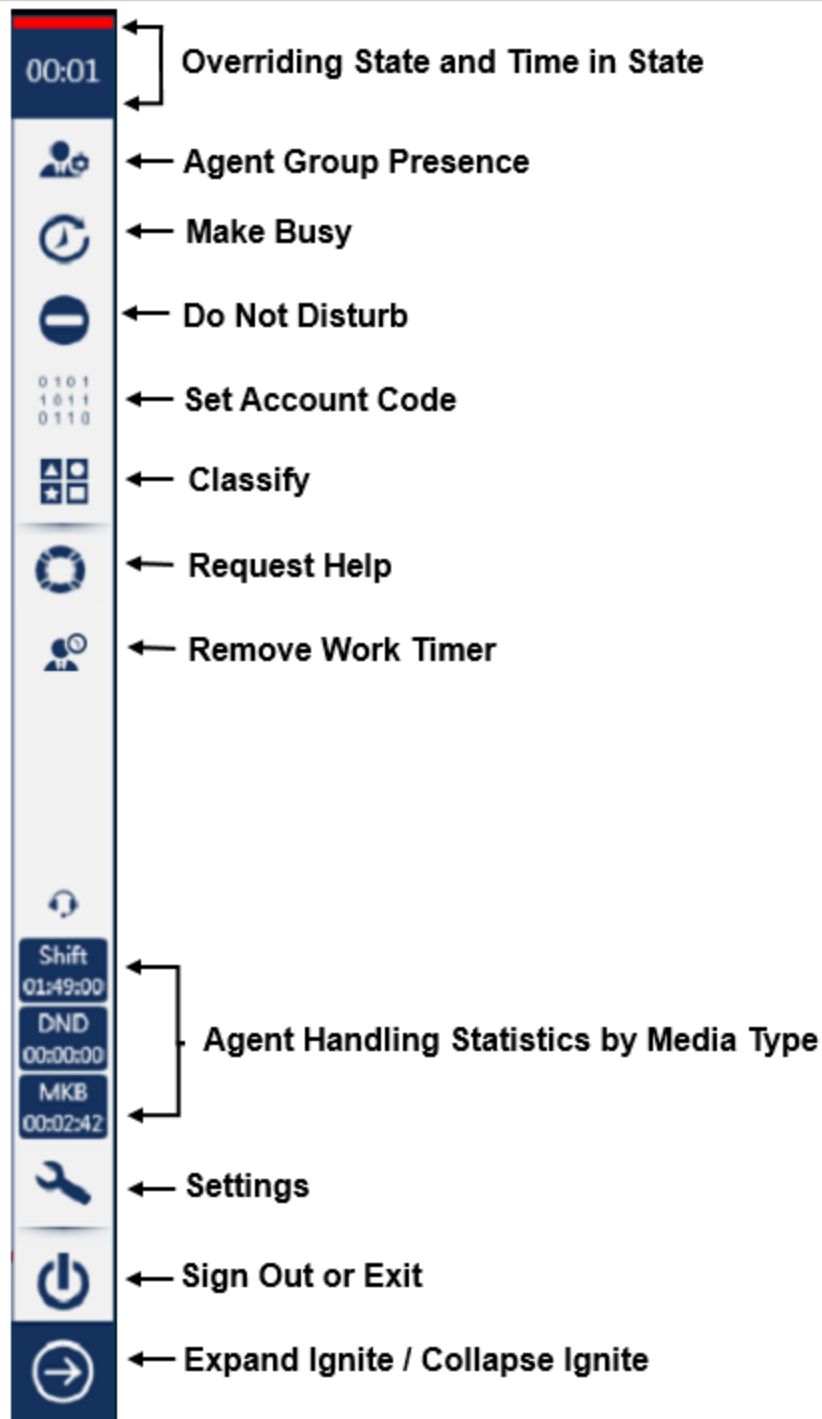


Figure 36: Ignite's Sidebar and controls

The Action bar (DESKTOP)

Ignite's Action bar displays multimedia contact handling options, which vary by a contact's media type and the stage at which the contact is being handled.

For information on handling multimedia using the Action bar, see "Handling multimedia contacts in Ignite" on page 353, "Handling emails in Ignite" on page 359, "Handling chats in Ignite" on page 375, and "Handling SMS in Ignite" on page 384

The Status bar (DESKTOP)

NOTE: The Status bar is only visible to employees with associated multimedia agents. For example, supervisors without an associated voice, email, chat, or SMS agent do not see the Status bar in Ignite.

Ignite's Status bar displays the employee's overriding state, including

- **Time in Ringing** – Displays when an employee has contacts ringing in the Inbox
- **Time in ACD** – Displays when an employee has placed ACD contacts in reply mode
- **Time in ACD Hold** – Displays when an employee has placed ACD contacts on hold
- **Time in Non ACD** – Displays when an employee is handling non-ACD contacts
- **Time in Non ACD Hold** – Displays when an employee has placed non-ACD contacts on hold
- **Time in Outbound** – Displays when an employee has placed an outgoing call
- **Time in Work Timer** – Displays after the employee has handled a contact, provided none of the employee's agents are in an ACD, Non ACD, Outbound, Make Busy, or Do Not Disturb state

For more information, see "Work Timer" on page 352.

NOTE: If Work Timer is the overriding state, the Status bar displays the Work Timer state that the agent has been in longest.

- **Time in Do Not Disturb** – Displays when the employee is in a Do Not Disturb state
For more information, see "Setting and removing Do Not Disturb in Ignite" on page 351.
- **Time in Make Busy** – Displays when the employee is in a Make Busy state
For more information, see "Setting and removing Busy/Make Busy in Ignite" on page 349.
- **Time Logged in Not Present** – Displays when an employee is not present to any of their agent groups
For more information, see "Adjusting Agent Group Presence in Ignite" on page 347.
- **Time in Idle** – Displays when an employee does not have contacts in the Inbox

An overriding state is one that 'trumps' another state, as represented by the list above. States higher in the list override the states appearing lower in the list. Note that all of the employee's agents are considered when the system calculates overriding state.

For example, if an employee's Chat agent is Idle, but their Email agent is ACD, the Status bar displays ACD. In this example, ACD is the overriding state. If the employee's Chat agent is in Work Timer, and their Email agent is in Make Busy, the Status bar displays Work Timer until Work Timer expires or is removed. In this example, Work Timer is the overriding state.

The oldest time for a state 'trumps' other times for the same state if an agent is handling multiple contacts. For example, if an employee had two emails in ACD, the displayed value in the status bar would be the time of the oldest email. When the oldest email is completed, the displayed value in the status bar would switch to the other email's Time in ACD.

Ignite's Status bar also contains statistics on agent performance, offering agents quick access to their current handling statistics across media types. Icons indicate the media type to which the following statistics pertain.

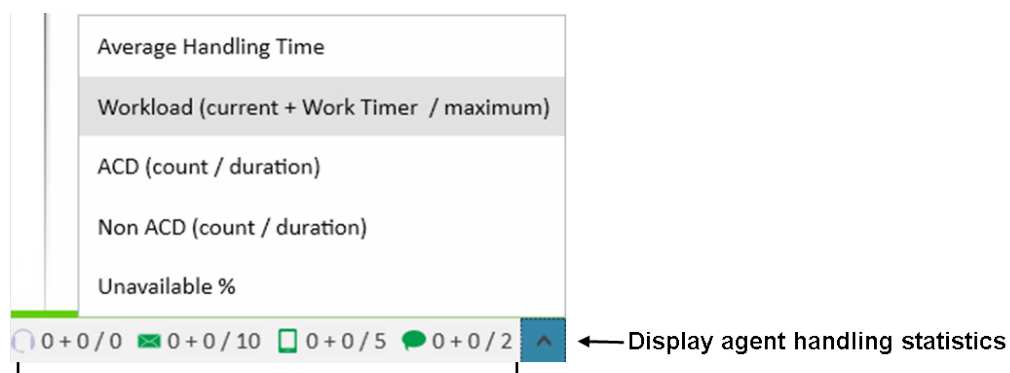
- **Average Handling Time (mins)** – The average time the agent has taken to handle contacts of each media type
- **Workload (current + Work Timer / maximum)** – Displays active conversations, and any Work Timer states, against the maximum number of contacts an agent can be pushed per media type, as defined by the agent's Workload. Note that Work Timer states count against Workload, and will affect whether agents are pushed contacts. For more information, see "Work Timer" on page 352.
- **ACD (count / duration)** – Displays the number of ACD contacts the agent has handled for a media type, and the time spent handling contacts of that media type
- **Non ACD (count / duration)** – Displays the number of non-ACD contacts the agent has handled for a media type, and the time spent handling the contact.
- **Unavailable %** – Displays the percentage of time the agent is unavailable during their shift, including DND, MKB, Unknown, and Work Timer states, and when the agent is logged in but not available to receive ACD contacts.

Agents access their handling statistics by clicking the ^ button on the right-hand side of the Status bar. (See Figure 37.)

The color of the multimedia icons in the Status bar indicates the agent's state.

- **Green** – Indicates an Idle state
- **Red** – Indicates an ACD or Do Not Disturb state
- **Yellow** – Indicates either a Make Busy or Work Timer state, or that the agent is logged in but not present to any of their agent groups.
- **Blue** – Indicates the agent is in a non-ACD state
- **Gray** – Indicates the agent is logged out or otherwise Unavailable

Figure 37 displays agent handling statistics in Ignite.



Current active conversations + Work Timer states, against agent Workload

Figure 37: Agent handling statistics as displayed in Ignite's Status bar

The My Folders view (DESKTOP)

The My Folders view is where agents perform the majority of their contact-related tasks, including viewing media folders, queues, and handling contacts.

A red banner indicates the number of contacts ringing in the agent's Inbox. For more information, see "Ringing states in Ignite" on page 355.

In addition to the above functions, supervisors can use My Folders to view

- Contacts in agent Inboxes
- Contacts sent to the queue
- Outbound emails and agent replies to contacts (email only)
- Contacts in the process of being sent (email only)
- Contacts that failed to route

The My Folders view is divided into the Folder, List, and Preview panes. (See Figure 38.)

For more information, see "The Folders pane (DESKTOP)" on page 294, "The List pane (DESKTOP)" on page 304, and "The Preview pane (DESKTOP)" on page 305.

To access the My Folders view

- At the top of Ignite, click the **My Folders** tab.

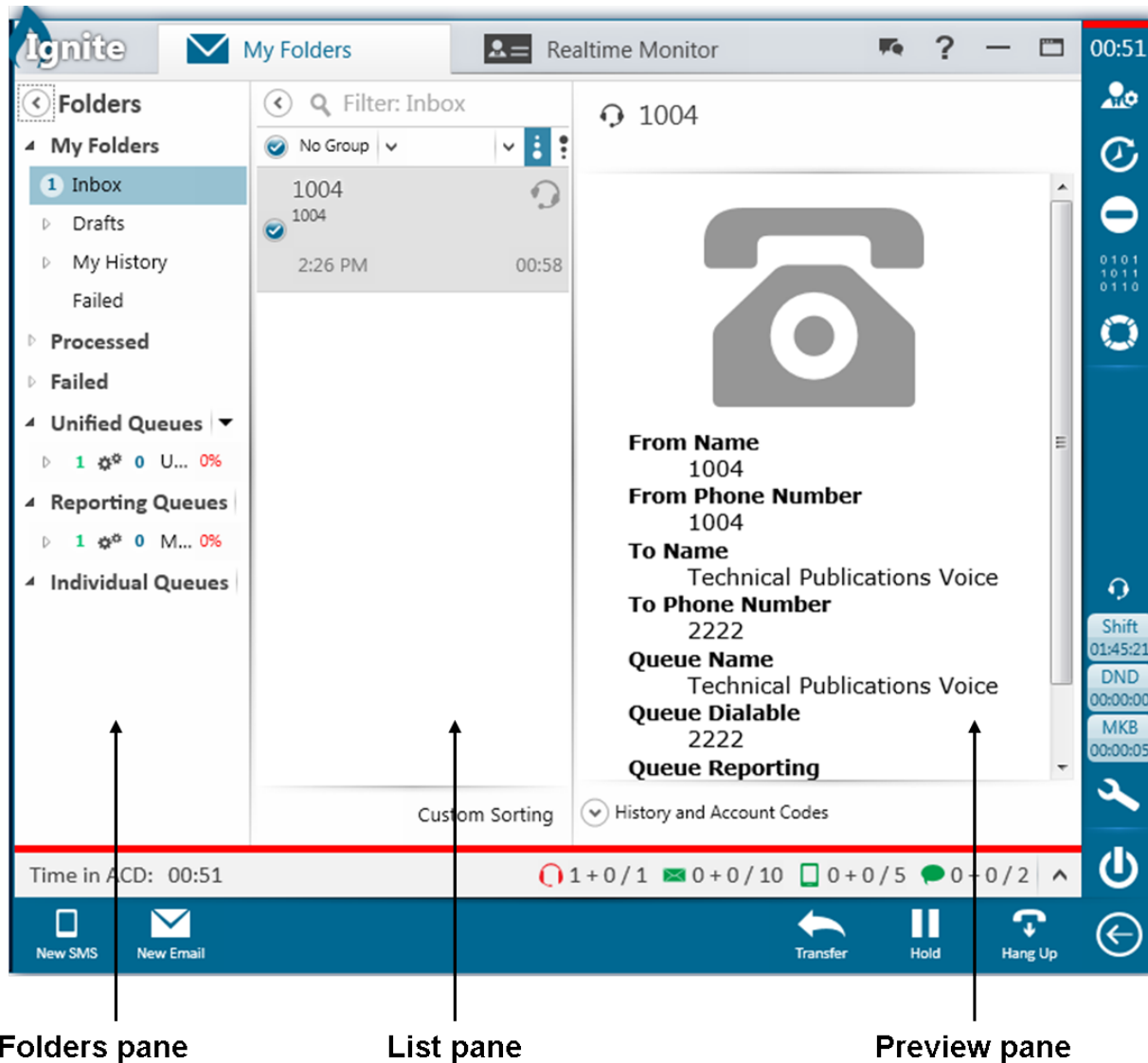


Figure 38: Ignite's My Folders view

Viewing media folders (DESKTOP)

The following procedures explain how to

- View the My Folders folder, which includes the Inbox, Drafts and Drafts subfolders, My History and My History subfolders, and Failed folder.
- View the Processed folder, which includes the In Progress (supervisors only), History and History subfolders, and Failed folder.
- View the Failed folder.

The My History and Processed folders pertain only to email, chat, and SMS contacts. For more information on Ignite's folders, see "The Media Folders view (DESKTOP)" on page 300.

For information on the specific contacts agents can view in Ignite's media folders, see "Viewing and organizing contacts in Ignite (DESKTOP)" on page 308.

To view the My Folders folder

- Expand the **Folders** pane and expand the **My Folders** folder.

To view the Processed folder

- Expand the **Folders** pane and expand the **Processed** folder.

To view the Failed folder

- Expand the **Folders** pane and expand the **Failed** folder.

Viewing contacts in Ignite's folders (DESKTOP)

Ignite's List pane has two views: Card view and Grid view. Card view is the default view. Expanding the Card view's borders converts it to the Grid view.

The Card view indicates when a contact entered the Inbox and how long an agent has to handle a contact before the Service Level timer expires. (See Figure 39.)

Agents can customize how data displays in the Card view. For more information, see "Choosing how contact data displays in the Card view (DESKTOP)" on page 308.

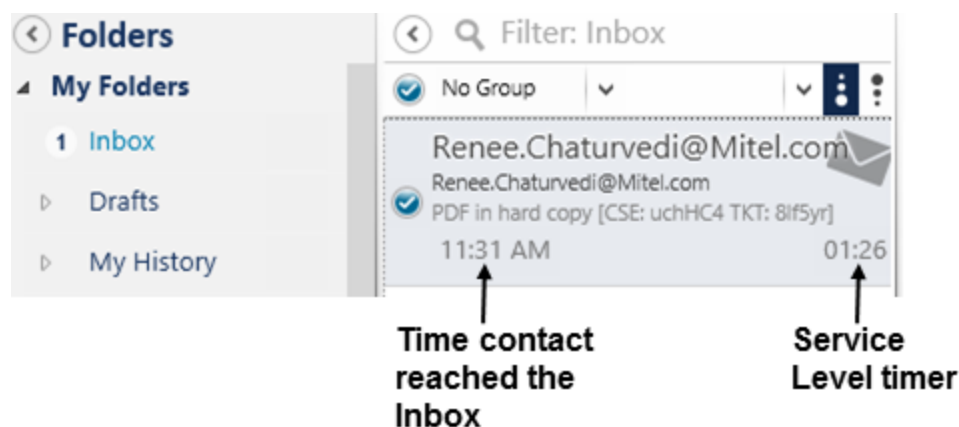


Figure 39: Data displayed in the List pane's Card view: Inbox

In the Grid view, agents can see extended contact information and customize the data displayed. For more information, see "Choosing how contact data displays in the Grid view (DESKTOP)" on page 310.

The Media Folders view (DESKTOP)

Ignite's Media Folders view displays folders containing contacts dealt with by the queues' agent groups.

The Media Folders view is divided into three main folders: My Folders, Processed, and Failed. Each is comprised of several subfolders.

NOTE: The My History and Processed folders pertain only to email, chat, and SMS contacts.

My Folders – The agent's 'Personal' folder. This folder contains multimedia contacts being offered to the Inbox, multimedia contacts the agent has handled, the agent's email replies, and multimedia contacts that were unable to route. My Folder is organized into the following subfolders.

- **Inbox** – Contains contacts being offered to the agent and contacts on which the agent is working. The Inbox indicates the number of ringing contacts, in red. When a customer responds to a chat, the number of chat conversations awaiting the agent's response is indicated, in orange. A contact selected in the Inbox becomes the active contact.
- **Drafts** – Contains the agent's emails in progress. These contacts are organized into the following subfolders:
 - **Inbox** – Contains replies in progress to inbound emails
 - **New Emails** – Contains outbound emails in progress
 - **Forward** – Contains email forwards in progress
- **My History** – Contains email, chat, and SMS contacts that the agent has worked on. These contacts are organized into the following subfolders:
 - **Handled** – Contains the email, chat, and SMS contacts to which the agent has replied or transferred from reply mode
NOTE: For email, the Handled folder displays only the original, inbound emails.
 - **Sent** – Contains outbound emails and agent replies to email contacts
 - **No Reply** – Contains email contacts designated as needing no reply, such as out of office messages
 - **Junk** – Contains email contacts and chat transcripts designated as Junk
- **Failed** – Contains email, chat, and SMS contacts that were unable to route

Processed – A queue-level folder. This folder contains email, chat, and SMS contacts that agents answering for the queue have worked on and are currently working on. Processed also includes email contacts in the process of being sent, and email and chat contacts that were unable to route. Processed is organized into the following subfolders.

- **In Progress** – Available only to supervisors. This folder contains email contacts currently in agent Inboxes. By searching agent names, supervisors can identify all contacts in an agent's Inbox.
NOTE: Supervisors cannot see agent replies in progress.
- **History** – This folder contains email and chat contacts that agents have worked on. These contacts are organized into the following subfolders:
 - **Handled** – Contains the email, chat, and SMS contacts to which the agent has replied or transferred from reply mode
NOTE: For email, the Handled folder displays only the original, inbound emails.
 - **Sent** – Contains outbound emails and agent replies to email contacts
 - **No Reply** – Contains email contacts designated as needing no reply, such as out of office messages
 - **Junk** – Contains email contacts and chat transcripts designated as Junk
 - **Outbox** – Contains outbound emails and agent email replies in the process of being sent. If send attempts exceed the default limit of five, the contact's media icon flashes and displays in red.

Failed – Contains email, chat, and SMS contacts that were unable to route in the queues the agent or supervisor have permission to view.

Failed is organized into the following subfolders.

- **Failed** – Contains email, chat, and SMS contacts that were unable to route
- **Failed to Send** – Contains emails that failed to send because they exceeded the supported email message size for the mail server
- **Auto Replies/Failed Delivery** – Contains emails that failed because the recipient had no more space in their inbox, the recipient had an out of office reply configured, the message was delayed by the recipient's mail server, or there were invalid addresses in the delivery list

The contacts contained in each folder can be searched and sorted according to various criteria. For more information, see "Searching Ignite" on page 340.

The Queue Folder view (DESKTOP)

The Queue Folder view displays the Unified Queues, Reporting Queues, and Individual Queues for which an employee's agent group answers contacts.

Unified Queues – A collection of queues of different media types receiving contacts for a single service group. For example, a Unified Queue Group called 'Technical Support' can contain a voice, a chat, an email, and an SMS queue receiving tech support contacts. You can view these queues in a single folder, 'Unified Queues', in Ignite. You can control which queues are visible under Unified Queues in Settings. For more information, see "Queue selection settings (DESKTOP)" on page 320.

Reporting Queues – A collection of queues, typically of a single media type, created for reporting purposes. For example, a collection of queues called 'Email Technical Support' can contain all email queues receiving tech support contacts. You can view these queues in a single folder, 'Reporting Queues', in Ignite. You can control which queues are visible under Reporting Queues in Settings. For more information, see "Queue selection settings (DESKTOP)" on page 320.

Individual Queues – Queues of a single media type, either voice, email, chat, or SMS, which are not part of a Unified Queue. Individual Queues that are grouped into Reporting Queues also display here. You can control which queues are visible under Reporting Queues in Settings. For more information, see "Queue selection settings (DESKTOP)" on page 320.

Viewing Unified Queue Groups, Reporting Queues, and Individual Queues (DESKTOP)

You must be licensed for Multimedia Contact Center to view queues. Supervisors must also be configured as agents answering for the queue in order to see its contents.

Selecting a specific queue folder updates Ignite to display the contacts in queue. See "Viewing contacts in Ignite's folders (DESKTOP)" on page 300 for more information. You can organize your queues and queue groups in alphabetical or reverse-alphabetical order for ease of viewing.

Agents can choose which queues display in Ignite. For more information, see "Queue selection settings (DESKTOP)" on page 320. Supervisors can restrict the devices that agents can view in Ignite. For more information, see "Configuring security roles" on page 97.

Each queue indicates

- The number of agents available in each queue's answering agent groups. For Reporting Queues and Unified Queue Group folders, the total number of agents available for the queues is displayed.
- The number of contacts in queue, or 'Conversations Waiting', for the queue and the queue groups
- The time that the longest waiting contact has been in queue
- The queue or queue group's Service Level. This Service Level is color-coded to give an indication of how the queue is faring. 75% or greater is green, 50% to 74% is orange, and less than 50% is red.

Figure 40 illustrates where each statistic displays.

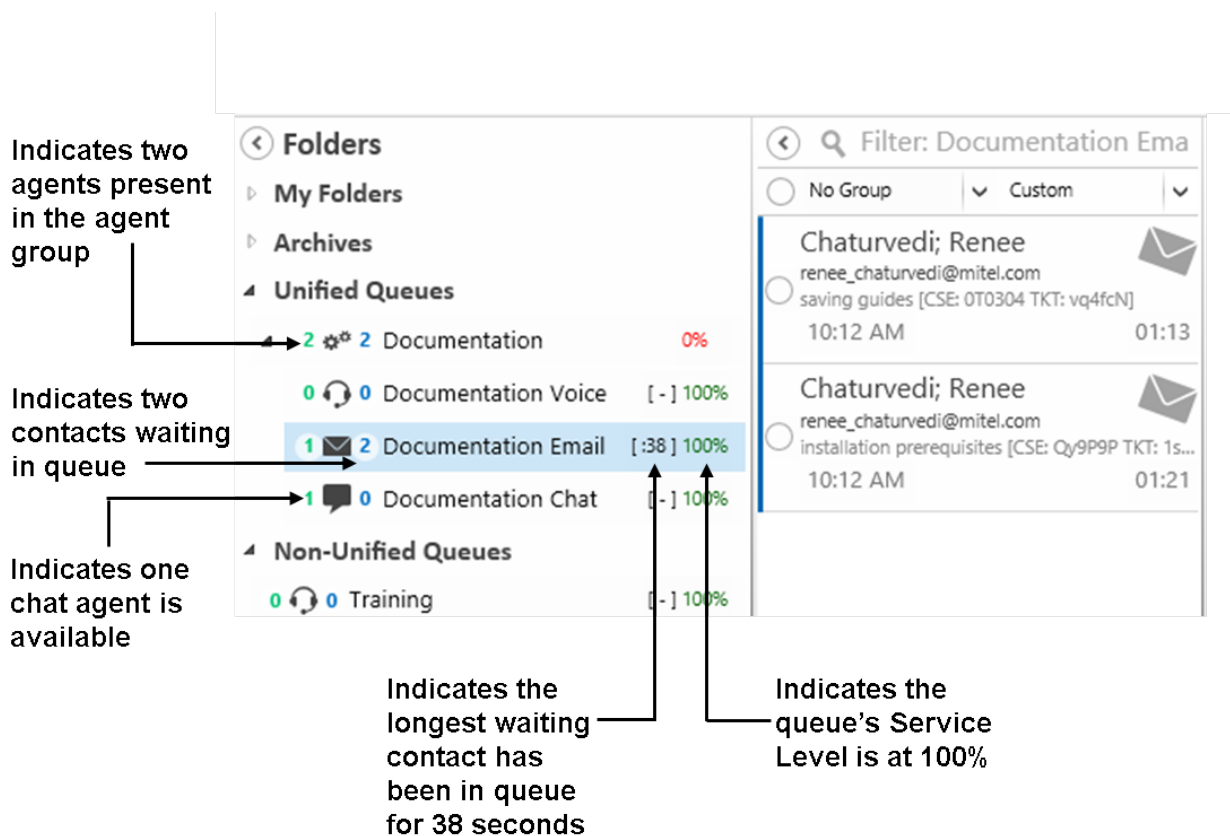


Figure 40: Queue statistics displayed in the Queue Folder view

The following procedures explain how to

- View Reporting Queues and Unified Queue Groups
- View queues within Reporting Queues and Unified Queue Groups
- View Individual Queues
- Sort queues and queue groups

To view Reporting Queues and Unified Queue Groups

1. In the **My Folders** view, expand the **Folders** pane.
2. In the **Folders** pane, expand either **Reporting Queues** or **Unified Queues**.

To view the queues within Reporting Queues and Unified Queue Groups

1. In the **My Folders** view, expand the **Folders** pane.
2. In the **Folders** pane, expand either **Reporting Queues** or **Unified Queues**.
3. Expand the queues for which you want to see members.

To view Individual Queues

1. In the **My Folders** view, expand the **Folders** pane.
2. In the **Folders** pane, expand **Individual Queues**.

To sort queues and queue groups

1. In the **My Folders** view, expand the **Folders** pane.
 2. In the **Folders** pane, expand **Reporting Queues**, **Unified Queues**, and **Individual Queues**.
 3. Click the **Sort Ascending/Descending** button. (See Figure 41.)
- NOTE:** An upward-facing triangle indicates alphabetical sorting (Ascending). A downward-facing triangle indicates reverse-alphabetical sorting (Descending).

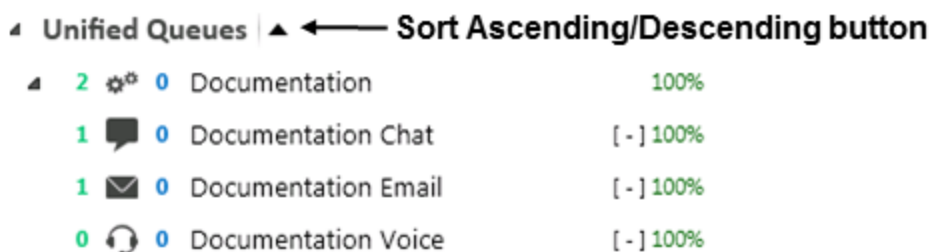


Figure 41: Ignite's Sort Ascending/Descending button

The List pane (DESKTOP)

Ignite's List pane displays the contents of folders selected in the Folders pane. You can view the List pane in Card view and Grid view.

Each view can display different contact details. For information on customizing the data displaying in the List pane's Card and Grid views, see "Choosing how contact data displays in the Card view (DESKTOP)" on page 308 and "Choosing how contact data displays in the Grid view (DESKTOP)" on page 310.

Viewing the List pane's Grid and Card views (DESKTOP)

The following procedures explain how to

- Expand or collapse the List pane
- View the List pane in Grid view
- View the List pane in Card view

To expand or collapse the List pane, click the arrow beside the Search box at the top of the **List** pane. By default, the List pane is expanded.

To view the List pane in Grid view

- When in **Card view**, expand the right-hand border of the **List** pane until it displays in Grid view.

To view the List pane in Card view

- When in **Grid view**, reduce the right-hand border of the **List** pane until it displays in Card view.

The Preview pane (DESKTOP)

Ignite's Preview pane serves a number of functions. If administrative configurations permit, the contents of email, chat, and SMS contacts selected in a folder or in queue are displayed in the Preview pane before an agent handles them. Unpreviewed contacts display a blue line beside them.

Requeued emails contain any response text drafted. This text is visible to other employees who handle the email. Agents can choose to include the drafted content when previewing requeued emails in queue.

Requeued chat and SMS contacts contain all of the previous conversation between contact and agent.

For voice contacts, the Preview pane displays call information such as the caller's ANI. The Preview pane is the location for formatting replies, applying Account Codes, and viewing historical transcripts of communications. Functions available in the Preview pane vary by a contact's media type.

NOTE: In this guide, 'reply mode' refers to the state of the Preview pane when an agent has selected a contact in their Inbox or in queue and has clicked either 'Reply', 'Reply all', or 'Pick & Reply'. 'Preview mode' refers to the state of the Preview pane when an agent has selected a contact without clicking reply.

The Realtime Monitor view (DESKTOP)

The Realtime Monitor view displays current statistics for the following devices:

- Queue Groups
- Queues
- Agent Groups
- Agents
- Employees

Agents can customize which devices within a group display in the Monitor. For more information, see "Ignite's Realtime Monitor (DESKTOP)" on page 313 and "Viewing device statistics in the Realtime Monitor (DESKTOP)" on page 314.

To access the Realtime Monitor

- At the top of Ignite, click **Realtime Monitor**.

ACCESSING IGNITE (DESKTOP)

The following procedures explain how to

- Open and close Ignite
- Log in and out of Ignite

Voice agents should consult "Logging in and out of Ignite (DESKTOP)" on page 306 for important instructions on logging into Ignite in conjunction with Contact Center Softphone, PhoneSet Manager, or hard set desk phones.

For information on accessing the Ignite web client, see "Launching Ignite (WEB)" on page 332.

Opening and closing Ignite (DESKTOP)

Accessing Ignite and its features requires employees to be licensed for Multimedia Contact Center and to have specific security roles enabled. Employees experiencing difficulty accessing Ignite should consult their supervisors or system administrators.

NOTE: Employees without Multimedia Contact Center licensing can be licensed to use Ignite but will have access to voice contacts only.

The following procedures explain how to

- Open Ignite
- Close Ignite

NOTE: When Ignite closes, it logs the agent out of all associated devices.

To open Ignite

- Ignite can be opened from Windows' Start menu, Programs menu, Taskbar, or from a Desktop shortcut.

NOTE:

- Launching client-side desktop applications from the task bar causes them to bypass the MiContact Center Updater Service process. To ensure successful updates from the Enterprise Server, after an upgrade close all client-side applications for 15 minutes or reopen them from the Start menu/Start screen.
- If MiContact Center applications are configured to use Windows Authentication, opening Ignite also logs agents into the program.

To close Ignite

- In the **Sidebar**, click the **Sign Out or Exit** button and select **Exit Application**.

Logging in and out of Ignite (DESKTOP)

The following provides important information on logging in and out of Ignite in conjunction with voice devices and with contacts in the Inbox.

We recommend that agents using Ignite log into their voice device before logging into Ignite. Once logged into their voice device, the agent can minimize Contact Center Client to the system tray and log into Ignite.

Agents can configure Contact Center Client to launch Ignite when logging into the phone, so the agent only has to launch one application to handle voice and multimedia. If you choose the 'Remember Me' option on the Ignite Sign In screen, Ignite launches and automatically logs you in. For more information, see "Automatically launching Ignite upon voice login (DESKTOP)" on page 307. This option is available for Contact Center Softphone and PhoneSet Manager only.

Agents may find that, after logging into their phone and into Ignite, they are placed in Make Busy across all agent capabilities. This is a recommended administrative configuration. After logging into Ignite the agent can remove Make Busy and become available to receive ACD voice and multimedia contacts.

When an employee logs out of Ignite, all agents representing the employee are logged out, including voice agents. However, voice agents on active calls are not logged out until the call is complete. Logging out of the voice device logs multimedia agents out of Ignite and may requeue items in the Inbox, depending on administrative configurations.

Agents logging out of Ignite with contacts in the Inbox are notified if active contacts will requeue. Contacts that requeue are indicated in Ignite's List pane and display a larger media icon than contacts that do not requeue. To avoid losing work on these items, agents should finish their reply or transfer the items to a queue before logging out.

The following procedures explain how to

- Log into Ignite
- Log out of Ignite

To log into Ignite

1. Start **Ignite**.
2. If prompted, type your **Username** and **Password** and verify the **Enterprise Server** IP address.
3. If you use Secure Socket Layer, select **SSL**.
4. Optionally, select **Remember my credentials**.
5. Click **Login**.

To log out of Ignite and restart the program to the login screen

- In the **Sidebar**, click the **Sign Out or Exit** button and select **Sign Out**.
The agent is logged out of Ignite, and Ignite restarts to the login screen.

To log out Ignite and close the application

- In the **Sidebar**, click the **Sign Out or Exit** button and select **Exit Application**.
The agent is logged out of Ignite, and the application closes.

Automatically launching Ignite upon voice login (DESKTOP)

If you use both Contact Center Client and Multimedia Contact Center, you can instruct Contact Center Client to automatically launch Ignite after you log into your phone. This enables you to launch one application to handle both voice and multimedia. If you choose the 'Remember Me' option on the Ignite Sign In screen, Ignite launches and automatically logs you in.

This option can be saved to your Contact Center Client profile. However, the option is only available when using PhoneSet Manager and Contact Center Softphone.

To automatically launch Ignite upon voice login

1. Open **Contact Center Client** and click the **File** icon.
2. Select your profile name and click **OK**.
NOTE: If you have not configured a profile, see "Setting up the soft phone" in the *MiContact Center User Guide*.
3. In the ribbon, select **Soft Phone** and click the **Soft Phone** icon.
4. In the **Soft phone configuration** window, select the **Automatically launch the Ignite Client on ACD login** check box.
5. Click **OK**.
6. On the ribbon, click **Save**.

NOTE: If you are running the MiCollab Client Ignite integration, when you log into MiCollab Client, Ignite is automatically launched. You can set your profile to also automatically launch MiCollab Client when you start and log into Ignite. See "General settings (DESKTOP)" on page 320.

VIEWING AND ORGANIZING CONTACTS IN IGNITE (DESKTOP)

Agents can view, organize, and search for contacts using Ignite's Folders pane and List pane.

Selecting a folder in the Folders pane displays its contents in the List pane. Agents can organize how Folder content displays in the List pane. These options vary depending on whether the List pane is in Card view or Grid view.

Under My Folders, agents can only view contacts that they personally have handled. For queues, agents can only view contacts sent to the queues for which the agent answers. To view contacts handled by other agents in the queue you must search the Processed folder.

Employees licensed as Advanced supervisors or System Administrators may search Ignite's entire repository. This includes Ignite's In Progress folder (DESKTOP), which enables supervisors to see contacts currently in agent Inboxes. This search capability does not require Multimedia Contact Center licensing. However, to view and search contacts in queue using Ignite, employees must have a Multimedia Contact Center license and multimedia agents assigned to the queue.

Descriptive information on folders in Ignite can be found in "Getting started with Ignite (DESKTOP)" on page 292.

The following sections explain

- Choosing how contact data displays in the List pane's Card view
- Choosing how contact data displays in the List pane's Grid view
- Searching Ignite's folders

Choosing how contact data displays in the Card view (DESKTOP)

By default, contacts in the List pane Card View are sorted in the following order:

1. By media type – voice, email, chat, or SMS
2. By Service Level – Expired first, then in order of the least amount of time remaining to the highest amount of time remaining
3. By time waiting in queue

This order prioritizes real-time contacts, and places contacts with the lowest Service Level time or, if expired, the longest waiting time, at the top of the list.

Agents can choose how and what contact data displays in the List pane's Card view.

The following procedures explain how to

- Group contacts in a selected folder
- Ungroup contacts in a selected folder
- Sort contacts by a single condition and remove this condition
- Sort contacts by multiple conditions and remove these conditions
- Restore default sorting conditions
- Filter contacts in a folder and remove filters

To group contacts in a selected folder

1. From the **Folders** pane, select a folder in which to group contacts.
2. In the **List** pane's **Card** view, after **No Group**, select the drop-down list.
3. Select a grouping condition from the drop-down list. Beside each condition, Ignite indicates the number of items currently displayed. To display more, click **Show more results**
4. Expand individual rows to see contacts matching the grouping criteria. Expand all rows by clicking the **plus** icon beside the grouping conditions drop-down list.

To ungroup contacts in a selected folder

1. From the **Folders** pane, select a folder for which you want to remove grouping conditions.
2. In the **List** pane's **Card** view, after **No Group**, select the drop-down list.
3. Select **No Group**.

To sort contacts by a single condition and remove this condition

1. From the **Folders** pane, select a folder in which to sort contacts.
2. In the **List** pane's **Card** view, after **Custom**, select the drop-down list.
3. Select a sorting condition from the drop-down list.
4. Optionally, order the sorted contacts in ascending or descending order by selecting the **Sort Ascending** or **Sort Descending** buttons.
5. To remove the sorting condition, select the drop-down from which you selected the sorting condition and select **No Sort**.

To sort contacts by multiple conditions and to remove these conditions

1. From the **Folders** pane, select a folder in which to sort contacts.
2. In the **List** pane's **Card** view, click **Custom Sorting**.
3. From the drop-down lists, select sorting conditions. Ignite prioritizes the conditions you select by the order in which they display in this pane.
4. Optionally, for each condition, order the sorting contacts in ascending or descending order by selecting the **Sort Ascending** or **Sort Descending** buttons.
5. Click **Apply**.
6. To remove custom sorting conditions, click **Custom Sorting=>Clear**.
7. Click **Close**.

To restore default sorting conditions

1. From the **Folders** pane, select the folder to restore default sorting conditions.
2. In the **List** pane's **Card** view, click **Custom Sorting**.
3. Click **Defaults**.
NOTE: For the Processed folder, clicking 'Defaults' removes all sorting conditions.
4. Click **Close**.

To filter contacts in a folder and remove filters

1. From the **Folders** pane, select a folder in which to filter contacts.
2. In the **List** pane's **Card** view, type filter keywords over the ghost text in **Filter** and press **Enter**.
3. Remove filters by clicking the **x** button.

Choosing how contact data displays in the Grid view (DESKTOP)

In the Grid view, agents can choose the contact data displaying for the selected folder and can customize the order of columns appearing in the grid. Agents can sort and filter column data to further customize the data displaying for the selected folder.

NOTE: To complete the following procedures, expand the Card view's right-hand borders until the **List** pane displays in **Grid** view.

The following procedures explain how to

- Choose the data columns that display
- Restore data columns to the default view
- Change data column order
- Group column data using drag-and-drop functionality

To choose the data columns that display

1. From the **Folder** pane, select a folder.
2. Click the **Show column chooser** button.
3. Select data columns to display. Deselecting data columns removes them from display. Table 30 lists the contact statistics you can choose to see in the Grid view.
NOTE: Column availability depends on the folder selected.
4. When finished, click **Close**.

To restore data columns to the default view

- Click the **Reset grid to defaults** button.

Table 30: Column data in the List pane's Grid view

COLUMN HEADING	DATA DISPLAYED
Agent Received	The time at which the contact arrived in the agent's Inbox
Agent Time	How long since the contact arrived in the agent's Inbox
Case ID	The case number associated to the contact Not applicable to voice or chat
Collected Information	Digits collected from the caller, such as an account number Not applicable to email and chat
From Address	Email: The contact's 'From' email address Chat: The contact's 'From' email address as entered on the chat request form SMS: The contact's 'From' SMS number
From Name	Voice: The Caller ID, if supported by the customer Email: The name associated to the contact's 'From' email address Chat: The name as entered on the chat request form SMS: The contact's 'From' SMS number
Dialable	The dialable number of the queue Not applicable to email, chat, or SMS
Last Agent Action	The last action taken by the agent on the contact Not applicable to voice
Last Agent ID Response	The reporting number of the agent who last responded to the contact
Last Agent Response	The time since the agent last responded to the contact
Last Agent Response Date/Time	The date and time since the agent last responded to the contact
Last Customer Response	The time since the customer last responded to the agent
Last Handled Agent Name	The name of the agent who last handled the contact
Media	The contact's media type
Position	The contact's position in queue
Priority	The priority level of the queue the contact is in. 64 is the default

Table 30: Column data in the List pane's Grid view (continued)

COLUMN HEADING	DATA DISPLAYED
Queue	The queue in which the contact is sitting
Queue Received	The time at which the contact entered the queue
Queue Reporting	The reporting number associated to the queue
Queue Time	How long contact has been waiting in queue
Reporting	The queue's reporting number
Retries Exceeded	Whether the contact's maximum send attempts have been exceeded Not applicable to voice, chat, or SMS
SL Countdown	The amount of time in which an agent has to respond to a contact before the Service Level timer expires The timer begins counting down once a contact arrives in an agent's Inbox. The timer stops counting once an agent clicks 'Reply'
State	The current state of the contact Also indicates if a server request is pending. For example, this column indicates if the server is processing a request to transfer the contact to a different agent or queue
Subject	Email: The subject line of the email Chat: The pre-chat topic as entered on the chat request form SMS: The first 40 characters of the SMS message Not applicable to voice
System Received	For inbound email contacts, the date/time that a contact was received by the mail server For inbound chat and SMS contacts, the date/time that a contact was received by the media server For outbound contacts, the date/time that a contact was initiated by an agent
System Time	How long since the contact entered Multimedia Contact Center
Ticket ID	The ticket number associated to the contact Not applicable to voice
Transfers	How many times a contact has been transferred, interflowed, or re-queued

To change data column order

- Drag and drop a column into the desired position. Animated arrows display when a column can be dropped into position.

To group column data using the drag-and-drop functionality

NOTE: When grouping with the drag-and-drop method, animated arrows indicate when an item can be dropped into position.

1. From the **Folders** pane, select a folder.
2. In the List pane's **Grid** view, drag and drop a column to the **Drag columns here to group** section of the Ignite UI.
3. Expand or close the data rows by clicking the arrow button beside the rows of filtered data. To expand all rows, click the **Expand group headers button**. See Figure 42.
4. To remove a row, drag the column header from the **Drag columns here to group** section back to the column headers in the Grid view.

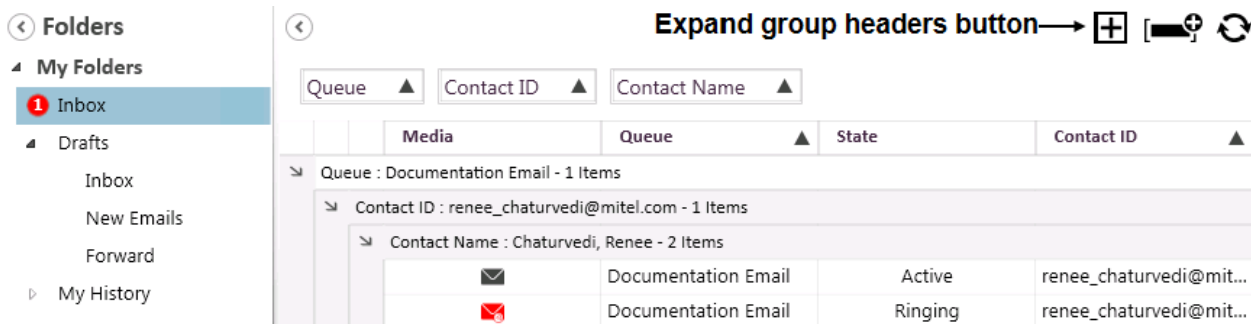


Figure 42: The Expand group headers button

IGNITE'S REALTIME MONITOR (DESKTOP)

Ignite's Realtime Monitor displays current statistics for devices including queue groups, queues, agent groups, agents, and employees. Ignite's Realtime Monitor enables you to navigate efficiently through a hierarchy of devices and see associations among them. Pinning items to the Realtime Monitor lets you see only the items associated to the pinned item.

Color bars on each device statistic window indicate the device's state. You can use these bars to view device availability. To see the states indicated by each color, see "The Status bar (DESKTOP)" on page 296.

The following procedures explain how to

- Viewing device statistics in Realtime Monitor
- Pinning items in the Realtime Monitor

NOTE: For a description of statistics viewable in the Monitor, see "Realtime Monitor statistics available in Ignite (DESKTOP)" on page 316.

Viewing device statistics in the Realtime Monitor (DESKTOP)

The following procedures explain how to

- Toggle through multimedia devices
- View real-time statistics for select items and clear selections
- Search for device items
- Clear searches

To toggle through multimedia devices

- Select the **Realtime Monitor** tab and select either **Queue Group**, **Queue**, **Agent Group**, **Agent**, or **Employee**.

To view real-time statistics for select items and clear selections

1. Select the **Realtime Monitor** tab and select either **Queue Group**, **Queue**, **Agent Group**, **Agent**, or **Employee**.
2. Select the radio-button for the item you want to display.
NOTE: Select multiple devices by holding 'Shift'. Optionally, display all items by clicking **Select All**.
3. To clear selections, deselect the associated radio buttons. Optionally, clear all selections by clicking **Deselect All**.

To search for a device item

NOTE: You can only search within, not between, multimedia devices.

1. Select the **Realtime Monitor** tab.
2. In the **Search** field, type the search keywords and click the **Search** icon.
3. Select the radio button for the item you want to display. Select multiple items by holding **Shift**. Optionally, display all items by clicking **Select All**.
NOTE: Icons beside media-specific devices identify an item's media type. For example, an email icon identifies an email queue.

To clear a search

- In the **Search** pane, select the **x** button.

Pinning items in the Realtime Monitor (DESKTOP)

You can pin items in Ignite's Realtime Monitor. Once an item is pinned, the Monitor displays only the other items associated to the pinned item.

For example, when the contact center is busy, the agent group answering emails for the Training queue is offered emails from the Support queue. An agent in Training wants to transfer a support-related email back to the Support agent group, but needs to see who is available to take the email. In the Realtime Monitor, the agent pins the 'Support' agent group. When the agent toggles the Monitor to agent statistics, only agents in the Support group display. The Training agent can see who is available in Support to receive the transfer.

The following procedure explains how to pin items to the Monitor and remove pins.

To pin an item to the Monitor and remove pins

1. Click **Realtime Monitor** and select either **Queue Group**, **Queue**, **Agent Group**, **Agent**, or **Employee**.
2. Click the **pin** icon on a device item. Toggling devices displays only items associated to the pinned item.
NOTE: To view statistics for additional items, select them in the device pane. To revert back to viewing only statistics associated to the pinned item, click 'Select Related Only'.
3. To remove a pin, click the **pin** icon again. Alternatively, click the **X** button in the device pane. See Figure 43.

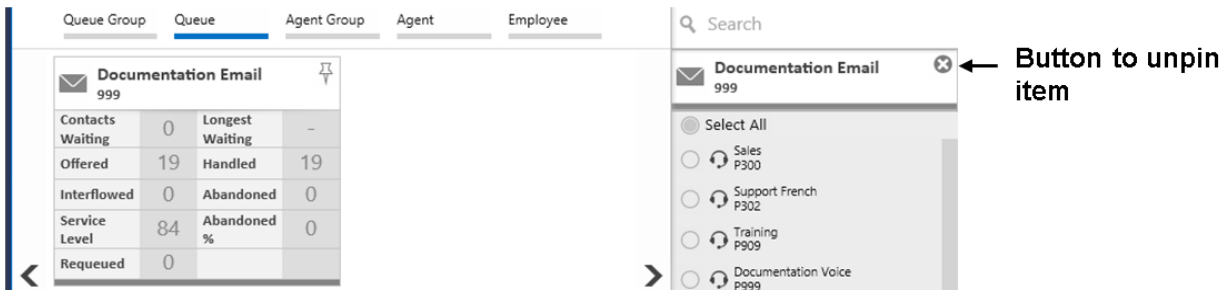


Figure 43: Device pane button to unpin an item

Realtime Monitor statistics available in Ignite (DESKTOP)

See the following tables for definitions of the real-time statistics available by device.

Statistics in the Realtime Monitor dynamically update as device conditions change. Color bars on each device statistic window indicate the device's state. You can use these bars to view device availability. To see the states indicated by each color, see "The Status bar (DESKTOP)" on page 296.

NOTE:

- The specific statistics displaying in the Agent Realtime Monitor vary by media type.
- Interflow statistics include contacts manually transferred from one queue to another.

Table 31: Queue Group Statistics

MONITOR FIELD	STATISTIC
Available Agents	The number of agents available in the queue group's answering agent groups
Offered	The number of contacts sent to the queue that were completed, interflowed, or abandoned
Handled	The number of contacts dealt with by agents in the queue group's answering agent groups
Interflowed	The number of contacts redirected from queues in the group to an alternate answer point, such as another queue or, for email, an external email address
Abandoned	The number of contacts sent to queues in the group, where the customer disconnected before reaching an agent Not applicable to email and SMS
Requeued	The number of contacts sent back to the queues after being offered to an agent answering for the queues

Table 32: Queue statistics

MONITOR FIELD	STATISTIC
Contacts Waiting	The number of contacts waiting in queue to be handled
Longest Waiting	The amount of time a contact has been waiting in queue the longest
Offered	The number of contacts sent to the queue that were completed, interflowed, or abandoned
Handled	The number of contacts dealt with by agents in the queue's answering agent groups
Interflowed	The number of contacts redirected from the queue to an alternate answer point, such as another queue or, for email, an external email address
Abandoned	The number of contacts received by the queue where the customer disconnected before reaching an agent Not applicable to email and SMS
Service Level %	The percentage of contacts handled, abandoned (voice and chat only) and interflowed before the defined Service Level time
Abandoned %	The percentage of contacts affecting Service Level that were abandoned Not applicable to email and SMS
Requeued	The number of contacts sent back to the queue after being offered to an agent

Table 33: Agent Group statistics

MONITOR FIELD	STATISTIC
ACD	The number of ACD contacts handled by agents in the agent group.
Non ACD	The number of non-ACD contacts handled by agents in the agent group. Not applicable to email, chat, and SMS.
MKB	The number of times agents in the agent group went into Make Busy
DND	The number of times agents in the agent group went into Do Not Disturb
Hold	The number of times agents in the agent group put contacts on hold

Table 34: Agent statistics

MONITOR FIELD	STATISTICS
ACD Count	The number of ACD contacts handled by the agent
Non ACD Count	The number of non-ACD contacts handled by the agent Not applicable to email, chat, and SMS
ACD Time	The amount of the agent's shift spent handling ACD contacts
Average Handled	The average amount of time taken to handle ACD contacts
Outbound	The number of outbound contacts made Not applicable to email, chat, or SMS
Outbound Duration	The time spent on outbound contacts Not applicable to email, chat, or SMS
MKB Count	The number of times the agent went into Make Busy
DND Count	The number of times the agent went into Do Not Disturb

Employee statistics

The following employee statistics display in the Realtime Monitor

- Employee name
- Employee ID
- The number of contacts handled for each media type
NOTE: These statistics reset at midnight
- The employee's overriding state
- The time at which the employee first logged on, or the time at which the employee logged off
NOTE: This data resets at midnight
- How long the employee has been logged on, or how long the employee has been logged off

YOUR IGNITE PROFILE (DESKTOP)

Ignite enables you to customize, organize, and change display elements to satisfy both personal preferences and work needs. The customizations and changes constitute your Ignite profile, associated to the username used to access Ignite.

Each time you close Ignite your profile is automatically saved. When Ignite is reopened with your username, your most recent profile settings are reloaded. If Ignite shuts down suddenly, it resumes your last saved profile on restart.

Ignite always opens to the Inbox in the My Folders view. Ignite remembers the device monitors you had open in the Realtime Monitor view, if the Realtime Monitor view was open when Ignite was closed. Your profile does not reopen folders that were active when you last shut down Ignite.

Ignite remembers your changes to the following elements of Ignite:

- Ignite window size
- Position of Ignite on your screen
- Pane size
- Folder view:
 - Queue folder sorting
 - Selected queues to display
- Grid view:
 - Displayed columns
 - Column order
 - Grouping
- Card view:
 - Grouping
 - Filtering
 - Custom sorting
- Realtime Monitor:
 - Device monitor last open
 - Selected devices
 - Pinned devices

You can reset your profile to Ignite's default settings when logging into Ignite. Resetting your profile restores all elements to their default display.

To reset your profile to the default settings

1. Log in to Ignite with your username and password.
2. As Ignite is signing you in, press and hold **CTRL+ R**. Hold these keys until Ignite indicates it is restoring your profile and loading the configuration.

In addition to auto-settings, Ignite offers general and Sidebar stats configuration options via the Settings button in the Sidebar.

General settings (DESKTOP)

By clicking the Settings button in the Sidebar and then clicking the General settings tab, you can customize Ignite display and behavior.

- **Launch MiCollab Client if installed but not running when signing into Ignite:** This setting is selected by default and automatically opens MiCollab Client, if not currently running, when an agent signs into Ignite.
NOTE: You will be prompted to register and log in your voice agents in MiCollab Client before signing into Ignite.
- **Always show Sidebar:** This setting is checked by default. If unchecked, you will not have access to the options listed below and you will need to use the arrow icon to show or hide the Sidebar.
- **Expand Ignite when a multimedia item is accepted:** This setting is checked by default. When selected, if the main Ignite window is collapsed and an email, chat, or SMS is accepted via the toaster, the main Ignite window automatically expands. If not selected, Ignite will not automatically expand when an email, chat, or SMS is accepted and the agent must expand it manually by clicking the arrow at the bottom of the Sidebar.
- **Expand Ignite when a voice item is accepted:** This setting is not checked by default and if the main Ignite window is collapsed and a call is accepted via the toaster, Ignite does not automatically expand. We recommend deselecting this setting as the main Ignite window is not essential for handling voice contacts. If selected, if the main Ignite window is collapsed and a call is accepted via the toaster, Ignite automatically expands.
- **Collapse Ignite on startup:** This setting is not checked by default. When you start Ignite, the main window will not collapse. If this check box is selected, only the Ignite Sidebar displays at startup. You can use the arrow icon at the bottom of the Sidebar to expand the main Ignite window. If this setting is not selected, when you start Ignite the main window and the Sidebar will display.
- **Collapse Ignite when inbox is emptied:** This setting is not checked by default. When selected, and your inbox empties, the main Ignite window collapses. If not selected, the main Ignite window does not collapse when your inbox has been emptied.

Sidebar stats settings (DESKTOP)

By clicking the Settings button in the Sidebar and then clicking the Sidebar Stats settings tab, you can select which three agent handling statistics you want to display in the Ignite Sidebar.

Queue selection settings (DESKTOP)

You can select which queues are visible by clicking the Settings button in the Sidebar and clicking Queue Selection. You are still offered contacts for the queues to which you are assigned, even though they may not be visible.

Ignite can display a maximum of 64 queues. If your profile is new, from an upgrade, or has been restored from a reset, Ignite automatically loads the maximum number of queues, starting with Unified Queues and then Individual Queues. Queues under Reporting Queues are never loaded by default.

Agent Greeting settings (DESKTOP)

The Agent Greeting feature enables agents to record messages (as .wav files) that play automatically to callers when the agent answers an inbound ACD call. The greeting can provide a consistent experience for each caller and free the agent from having to repeat the same introductory phrase for every call.

Agents can record multiple greeting messages in Ignite and assign them to different queues or use the same recorded greeting on all queues. The agent greeting is a two-way playback, where both the caller and the agent hear the recording.

Agents record and manage their greetings on the Agent Greeting tab on the Settings page.

NOTE:

- When the agent greeting is playing, the caller is able to hear the agent speaking. To prevent the caller from hearing the agent or other contact center background noise during the agent greeting, mute the agent's headset for the duration of the greeting.
- Administrative settings determine whether you have access to Agent greeting functionality. If your contact center is not enabled for agent greetings, the Agent Greeting tab will not display in Ignite.

On the Agent Greeting tab, you can:

- Record greetings
- Assign greetings to specific queues
- Designate a recording as the default greeting
- Play or re-name an existing greeting
- Re-record or delete an existing greeting

Recording agent greetings (DESKTOP)

When you click the Record button to create a recording, the system's Record Agent Greeting workflow is triggered. The Record Agent Greeting workflow instructs the system to call your DN and prompts you to record and save a greeting.

NOTE: When recording messages, your voice agent is in a non-ACD state, and is not offered calls from any incoming queues.

To record your first agent greeting

1. Click the **Settings** button in the **Sidebar**, then click the **Agent Greeting** tab.
2. Hover over the **Add New Recording** label to make the **Record** button visible on the right-hand side.
3. Click the **Record** button.
4. Enter a name for the recording and click **OK**.
The Record Agent Greeting workflow is triggered and instructs the system to call your DN.
5. Answer the incoming call and follow the system prompts to record and save your greeting.
The new greeting displays under the Default Recording heading.

By default, the system selects the first recording as your default recording. The default recording is played on all incoming calls, regardless of the originating queue, unless there is a specific recording assigned to the queue. For more information, see "Assigning a recorded greeting to a queue (DESKTOP)" on page 322.

You can record additional greetings and designate any one of your saved recordings as the default recording, or you can choose not to use a default recording.

To record additional greetings

1. Click the **Settings** button in the **Sidebar**, then click the **Agent Greeting** tab.
2. Click on the down arrow beside the **Advanced Options** heading to expand the section.
3. Hover over the **Add New Recording** label to make the **Record** button visible on the right-hand side.
4. Click the **Record** button.
5. Enter a name for the recording and click **OK**.
The Record Agent Greeting workflow is triggered and instructs the system to call your DN.
6. Answer the incoming call and follow the system prompts to record and save your greeting.
The new recorded message displays under the Recordings heading.
7. Repeat steps 3 to 6 to record additional greetings.

Assigning a recorded greeting to a queue (DESKTOP)

By default, the recording listed under the Default Recording heading on the Agent Greeting tab is played on all incoming calls, regardless of the originating queue. However, you can assign different recordings to different queues if you want to customize your greeting for certain inbound calls.

NOTE: If you do not have a designated default recording, you must assign a recording to each queue explicitly. If there is no default recording, and a queue does not have a recording assigned to it, no greeting is played to customers on incoming calls from that queue.

The Queues section of the Agent Greeting (under Advanced Options) lists all of the queues to which you are assigned. The recorded greeting that plays on incoming calls from a queue is shown to the right of the queue name.

To assign a recording to a queue

1. Click the **Settings** button in the **Sidebar**, then click the **Agent Greeting** tab.
2. Click on the down arrow beside the **Advanced Options** heading to expand the **Advanced Options** section.
3. Under the **Queues** heading, select the queue to which you want to assign a recording by selecting the check box beside it.
 - You can search for a specific queue by typing the name in the **Search** box.
 - You can filter the list of queues to show only the queues that do not have the default recording assigned to them by clicking the **Only Show Non-Default** option.

4. Click the **Apply Recording** button.
The Apply Recording window opens. The selected queue is displayed at the top, and a list of available recordings displays below.
5. Hover over the recording you want to assign to the queue to make the check mark visible on the right-hand side.
6. Click on the check mark to apply the selection.
The check mark turns green and the new recording displays beside the selected queue in the Queues list on the main Agent Greeting tab.
7. To remove the custom greeting from the queue and revert back to using the default recording, click the **X** button beside the recording you just assigned to the queue.
The Default Recording label displays beside the queue.

Managing recorded greetings (DESKTOP)

You can review, modify, and delete existing recordings in Ignite. You can:

- Play a greeting
- Re-record a greeting
- Rename a greeting
- Designate a greeting as the default greeting
- Delete a greeting

To play a greeting

1. Click the **Settings** button in the **Sidebar**, then click the **Agent Greeting** tab.
2. To select a non-default greeting, click the down arrow beside the **Advanced Options** heading to expand the section.
3. Under the **Recordings** section, hover over the name of the recording in the list to make the row of icons visible on the right-hand side.
4. Click the **Play** button (second icon from the left).
The system plays the recorded greeting on your PC.

To re-record a greeting

1. Click the **Settings** button in the **Sidebar**, then click the **Agent Greeting** tab.
2. Click on the down arrow beside the **Advanced Options** heading to expand the section.
3. Under the **Recordings** section, hover over the name of the recording in the list to make the row of icons visible on the right-hand side.
4. Click the **Record** button.
The Record Agent Greeting workflow is triggered and instructs the system to call your DN.
5. Answer the incoming call and follow the system prompts to record and save your greeting.
The changes are saved to your existing recording.

NOTE: You can also re-record the default greeting. Hover over the greeting listed under the **Default Greeting** header and click the **Record** button (as noted above) to re-record the greeting.

To rename a greeting

1. Click the **Settings** button in the **Sidebar**, then click the **Agent Greeting** tab.
2. Click on the name of the recording you want to rename (either in the **Default Greeting** section or the **Recordings** section).
The name field becomes editable.
3. Type the new name of the recording in the name field, then click **Rename**.
The recording displays in the list with the new name.

To designate a greeting as the default greeting

1. Click the **Settings** button in the **Sidebar**, then click the **Agent Greeting** tab.
2. Hover over the name of the recording in the list to make the row of icons visible on the right-hand side.
3. Click the **Pin** button to make the greeting the default greeting.
The newly-designated greeting displays in the Default Recording section.
4. To clear the default recording designation, hover over the name of the default recording to make the row of icons visible, and click the **Pin** button.
The greeting is removed from the Default Recording section.

To delete a greeting

1. Click the **Settings** button in the **Sidebar**, then click the **Agent Greeting** tab.
2. Hover over the name of the recording in the list to make the row of icons visible on the right-hand side.
3. Click the **Trash** button to delete the greeting.
The system displays a confirmation dialog.
4. Click **Yes** to confirm that you want to delete the greeting.
The greeting is removed from the system.

GETTING STARTED WITH IGNITE (WEB)

The following sections provide a walkthrough of Ignite's interface. While this section contains some procedures for viewing and orienting Ignite, agents can access in-depth information on how to use Ignite by following the cross-references throughout.

Feedback (WEB)

The Feedback button (Figure 44), enables you to submit feedback and suggestions to Mitel. For information about submitting feedback, see "Posting feedback and viewing our forums (WEB)" on page 335.



Figure 44: Feedback button

Contacts (WEB)

The Contacts button allows you to search for contacts you have handled as well as fellow employees in your contact center, and contact them by voice, email, or SMS.

For information on using Contacts, see "Sending outbound emails" on page 372, "Sending outbound SMS contacts" on page 392, or "Making calls" on page 396.

Avatar and agent state (WEB)

The avatar displays your agent avatar, your agent's first name, your current state, and how long you have been in that state. See Figure 45.

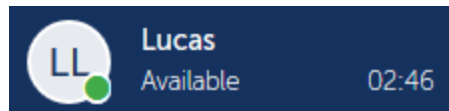


Figure 45: Avatar and agent state

The color of the circle over the avatar indicates your current presence.

- **Green**— Indicates an Available state
- **Red**— Indicates an ACD or Do Not Disturb state
- **Yellow** — Indicates a Make Busy or Work Timer state, or that the agent is logged in, but not present to any of their agent groups
- **Blue** — Indicates that the agent is in a non-ACD state
- **Gray** — Indicates the agent is logged out or otherwise unavailable

If you have been enabled to adjust your agent group presence and agent state, you can click your avatar to both view and change your agent group presence or agent state. For information on your agent state, see "Viewing agent state and state statistics (WEB)" on page 325.

For information on changing your agent group presence and status, see "Managing agent group presence and agent states" on page 346.

For information on changing your avatar, see "Your Ignite profile (WEB)" on page 335.

Viewing agent state and state statistics (WEB)

The agent state section of the Avatar displays the employee's overriding state, including:

- **Incoming** – Displays when an employee has contacts ringing in the Inbox
- **ACD** – Displays when an employee is handling ACD contacts
- **ACD Hold** – Displays when an employee has placed ACD contacts on hold
- **Non ACD** – Displays when an employee is handling non-ACD contacts
- **Non ACD Hold** – Displays when an employee has placed non-ACD contacts on hold or have themselves been placed on hold during a Non ACD call
- **Outbound** – Displays when an employee has placed an outgoing call
- **Outbound Hold** – Displays when an employee has placed an outgoing call on hold.
- **Work Timer** – Displays after an employee has handled a contact, provided none of an employee's agents are in an ACD, non-ACD, Outbound, Make Busy, or Do Not Disturb state
- **Do Not Disturb** – Displays when the employee is in a Do Not Disturb state

- **Busy** – Displays when an employee is in a Make Busy state
- **Away (Not Present)** – Displays when an employee is not present in any of their agent groups
- **Offline** – Displays when an employee is signed in, but their agents are logged out
- **Reseize Timer** – Displays when an call fails to route to an employee
- **Available** – Displays when an employee does not have inbound contacts in the Inbox

An overriding state is a state that supersedes other states. States higher in the list override the states appearing lower in the list. Note that all an employee's agents are considered when the system calculates the overriding state.

The oldest length for a state supersedes other times for the same state if an agent is handling multiple contacts. For example, if an employee had two emails in ACD, the displayed value in the status bar would be the time of the oldest email. When the oldest email is completed, the displayed value in the status bar would switch to the other emails.

Agent states by media are available in the Inbox. For more information, see "Viewing agent handling statistics (WEB)" on page 327.

Dashboards

The Dashboards page enables you to customize different dashboard displays of information relevant to your agent. You can add the following widgets to a dashboard:

- Employee State
- Callback Requests
- Queue Now
- Agent State

For more information on creating dashboards, see "Configuring Ignite (WEB) dashboards" on page 337.

Inbox (WEB)

Ignite's Inbox displays all contacts currently handled by the employee, ringing the employee, drafts, as well as failed send and autoreply items belonging to the employee.

When there is an active contact or draft in the Inbox, a red badge appears over the Inbox icon, indicating how many contacts and drafts there are in the Inbox.

Additionally, the Inbox displays current real time agent handling statistics. For more information, see "Viewing agent handling statistics (WEB)" on page 327.

Viewing contacts in Inbox (WEB)

Contacts in the Inbox provide you with relevant information for handling the contact. (See Figure 46).

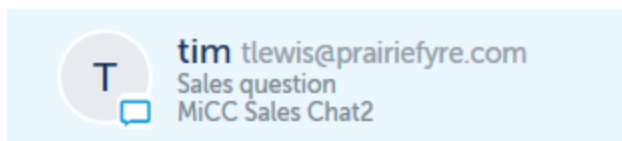


Figure 46: Contact in Inbox

If a contact is a draft, it will be labeled as such. When you select a contact in your Inbox, in addition to handling options, the handling time for the contact is displayed. (See Figure 47).

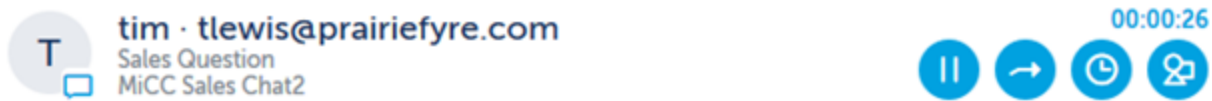


Figure 47: Active contact

You can adjust the Inbox column size using the '<' and '>' buttons.

Viewing agent handling statistics (WEB)

The Inbox contains agent handling statistics for each of the media types the agent handles. Figure 48 displays agent handling statistics across media types.























Figure 48: Inbox agent handling statistics (Average Handling Time)

Each media type's icon indicates the corresponding state of the employee's agents. Table 35 outlines the different states.

Table 35: Agent states

STATE	VOICE	CHAT	EMAIL	SMS	DESCRIPTION
Ringing					An ACD contact ringing on an agent, waiting to be handled
ACD					An agent handling an ACD contact
ACD Hold					An agent who has placed an ACD contact on hold
Idle					An agent logged on and waiting to receive a contact
Non ACD		--	--	--	An agent involved in an incoming non-ACD contact or agent originated voice contact
Non ACD Hold		--	--	--	An agent who has placed a non-ACD voice contact on hold
Outbound		--	--	--	An agent on an outgoing voice contact
Outbound Hold		--	--	--	An agent who has placed an outgoing voice contact on hold

Table 35: Agent states (continued)

STATE	VOICE	CHAT	EMAIL	SMS	DESCRIPTION
Do Not Disturb					An agent who has activated Do Not Disturb and is not available to receive any ACD or non-ACD voice contacts
Make Busy					An agent who is not available to receive ACD contacts but can receive transferred contacts and voice contacts dialed directly to the agent
Work Timer					An agent who is completing post- contact work, such as paperwork, and is unavailable to receive contacts of that media type
Offline					An agent unavailable to handle contacts
Away (Not Present)					An agent whose presence is removed from an agent group or media type

The Inbox offers five different types of handling statistics:

- **Average Handling Time (mins)** – The average time the agent has taken to handle contacts of each media type
- **Workload (current + Work Timer / maximum)** – Displays active conversations, and any Work Timer states, against the maximum number of contacts an agent can be pushed per media type, as defined by the agent's Workload. Note that Work Timer states count against Workload, and will affect whether agents are pushed contacts. For more information, see "Work Timer" on page 352
- **ACD (Count / Duration)** – Displays the number of ACD contacts the agent has handled for a media type, and the time spent handling contacts of that media type
- **Non-ACD (Count / Duration)** – Displays the number of non-ACD contacts the agent has handled for a media type, and the time spent handling the contact
- **Unavailable %** – Displays the percentage of time the agent is unavailable during the shift, including Do Not Disturb, Make Busy, Unknown, and Work Timer states, and when the agent is logged in but not available to receive ACD contacts

By clicking the More button, agents can change the statistics being displayed. See Figure 49.

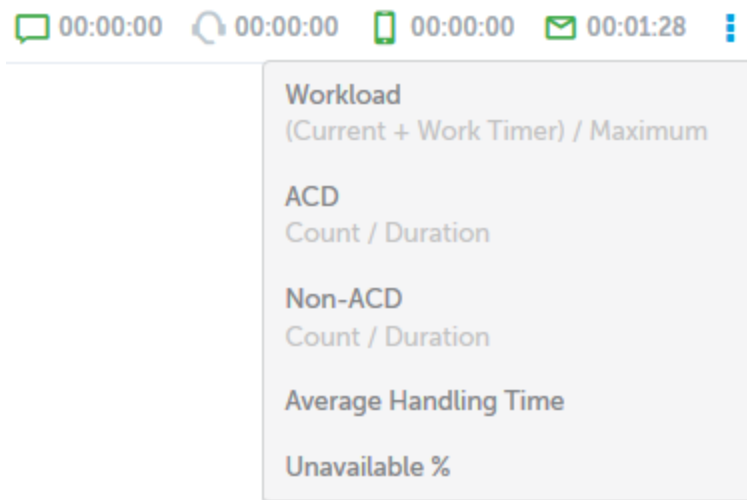


Figure 49: Inbox real-time statistics

History (WEB)

The History page contains a searchable archive of all contacts handled by an agent as well as contacts sent to the queues for which the agent answers. Agents can filter these historical contacts by type, limit the display contacts to items the agent has handled, or search for specific contacts.

For more information on filtering historical contacts, see "Filtering historical contacts (WEB)" on page 331.

For more information on searching contacts in History, see "Searching Ignite" on page 340

For more information on reviewing contact history, see "Reviewing contact history" on page 356.

Queues (WEB)

Queues displays the queues and queue groups from which an employee's agent handles contacts. Queues groups the display by queues groups and queues. There are three kinds of queue groups:

- **Unified Queue Groups**—A collection of queues of different media types receiving contacts for a single service group. For example, a Unified Queue Group called 'Technical Support' can contain a voice, a chat, an email, and an SMS queue receiving tech support contacts.
- **Reporting Queue Groups**—A collection of queues, typically of a single media type, created for reporting purposes. For example, a collection of queues called 'Email Technical Support' can contain all email queues receiving tech support contacts.
- **Virtual Queue Group**—A collection of voice queues that offer calls to the same pool of agent groups, providing resiliency. For example, a collection of queues called 'Sales' can contain voice queues all routing calls to the same pool of agents handling sales calls.

Queues displays queues, both queues not associated to a queue group as well as queues belonging to queue groups. You can search for queues and queues to display or you can set queues and queue groups as favorites so that they always display when you go to Queues.

Viewing queue groups and queues (WEB)

You must be licensed to handle a media type to view queues of that media type. Supervisors must also be configured as agents answering for the queue in order to see its contents.

Agents can pin queues and queue groups as favorites so that your most handled queues are always readily available. By selecting a pinned queue or queue group in the Queues page, agents can view contacts in queue. Each queue and queue group indicates

- The number of agents available in each queue's answering agent groups. For reporting queue groups and unified queue groups, the total number of agents available for their component queues is displayed.
- The number of contacts in queue, or 'Conversations Waiting', for the queue and the queue groups.
- The queue or queue group's Service Level percentage.

Agents can search for pinned queues and queue groups by keyword. Ignite displays all queues and queue groups matching the keyword. The search remains until you navigate away from the Queues page. You can sort search results and favorites by name or queue media type. Sorting by name sorts the queues and queue groups alphabetically. Sorting by media arranges queues in the order of Chat, Email, SMS, and Voice and sorts queue groups in the order of Unified, Virtual, and Reporting.

The following procedures explain how to

- Pin queues and queue groups as favorites
- Set queues and queue groups as favorites
- Sort queues by name
- Sort queues by media

To pin queues or queue groups as favorites

1. Click **Queues**.
2. Click the **Select Favorite Queues** button.
3. Select the queues and queue groups you want to favorite.
4. Click **Save**.

To search for a queue or queue group

1. Click **Queues**.
2. In the **Search** field, enter the keyword.

To sort queues by name

1. Click **Queues**.
2. Click **Name**.

To sort queues by media

1. Click **Queues**.
2. Click **Media**.

Options (WEB)

The Options page enables you to customize your Ignite profile, set Ignite defaults, configure your extension, and report performance issues. For more information, see "Your Ignite profile (WEB)" on page 335 and "Reporting performance issues in Ignite (WEB)" on page 336.

VIEWING AND ORGANIZING CONTACTS IN IGNITE (WEB)

Agents can view, organize, and search for current contacts in Inbox and Queues. Agents can view and search for historical contacts in History.

In Inbox, agents can view contacts they are handling or are currently ringing them. For Queues, agents can view contacts sent to the queues for which the agents answer.

Employees licensed as Advanced supervisors or System Administrators may search all contacts in the History tab of Ignite. This search capability does not require the supervisor be licensed to handle multimedia.

For more information on Inbox, History, and Queues, see "Inbox (WEB)" on page 326, "History (WEB)" on page 329, and "Queues (WEB)" on page 329.

Filtering historical contacts (WEB)

There are six filters for contacts in History:

- **All**—all contacts
- **Handled**—all contacts to which the agent has replied or transferred from reply mode.
NOTE: For email, the Handled folder displays only the original, inbound emails.
- **Sent**—all outbound emails and SMS contacts and agent replies to email contacts
- **No Reply**—contains email and SMS contacts designated as needing no reply, such as out of office messages
- **Junk**—contains email and SMS contacts designated as Junk.
- **Failed**—contains email, chat, and SMS contacts that were unable to route.

Historical contacts can also be limited to only contacts you have handled or sent display, rather than all contacts for the queues you handle.

The contacts contained in each filter can be searched for more specific contacts. For more information, see "Searching Ignite" on page 340.

The following procedures explain how to

- Filter historical contacts
- Limit displayed contacts to only your items

To filter historical contacts

1. Click **History**.
2. Select the **Filter**.

To limit displayed contacts to only your items

1. Click **History**.
2. Select **Only show my items**.

Selecting multiple email and SMS contacts in Ignite (WEB)

You can select multiple email and SMS contacts in Ignite to perform a single action on several items at once. For example, a supervisor can select multiple emails in queue and classify them all as 'Junk'.

You can multi-select email and SMS contacts using either the Ignite (WEB) UI or Windows' CTRL+ or SHIFT+ functionality.

Once multi-select is invoked, handling options and the option to select all items display.

NOTE: The option to multi-select displays only on the History and Queues pages.

The following procedures explain how to:

- Select multiple email and SMS contacts
- Select all email and SMS contacts on the page
- Deselect all email and SMS contacts on the page

To select multiple email and SMS contacts

1. Select either **History** or **Queues**.
2. Hover over the item avatar and select the check mark that displays. Repeat this step for any additional items.
3. Once multiple items are selected, at the top of the items list choose an action to perform.
NOTE: On the History page you may only perform an action across items that failed to route.

To select all email and SMS contacts on the page

1. Select either History or Queues.
2. Hover over the item avatar and select the check mark that displays.
3. At the top of the items list, click the 'master' check mark.
4. Once multiple items are selected, at the top of the items list choose an action to perform.
NOTE: On the History page you may only perform an action across items that failed to route.

To deselect all email and SMS contacts on the page

1. Once multi-select is active, at the top of the items list, select the 'master' check mark. If all items are selected, disregard this step.
2. Once all items are selected, at the top of the items list, select the 'master' check mark.

LAUNCHING IGNITE (WEB)

Once Ignite is launched you can sign into the application. See "Signing into and out of Ignite (WEB)" on page 333.

NOTE:

- The intended users of Ignite (WEB) are employees connected either locally on the LAN or to the network via VPN.
- Ignite (WEB) does not support Compatibility Mode.
- Ignite (WEB) requires JavaScript be enabled on your browser. For more information, consult your browser documentation.

Launch Ignite by typing the following URL into a supported web browser:

- **http://<EnterpriseServerName >/Ignite**
OR

- **http://<EnterpriseServerIP>/Ignite**

NOTE: If your system uses SSL, type 'https' in place of 'http' and insert a valid domain or FQDN in place of an IP address.

For a list of supported web browsers, contact your supervisor or system administrator. Ignite supports default browser configuration settings.

You can launch 2 instances of Ignite per device and can launch Ignite on multiple devices.

NOTE:

- We recommend that you do not use the Ignite web and desktop applications simultaneously.
- Editing responses across multiple, open browsers simultaneously is not supported.
- If you are drafting an email response and change browsers, hit 'Refresh' to pull down your drafted content.

Signing into and out of Ignite (WEB)

NOTE: After signing into Ignite and becoming Available, you may be placed in Busy across all agent capabilities. This is an administrative configuration. To remove Busy, see "Setting and removing Busy/Make Busy in Ignite" on page 349.

Your default sign-in state is Offline. This means you are signed into Ignite but your ACD agents are logged out. You cannot receive ACD contacts until your state is Available. To change states, see "Adjusting agent states in Ignite (WEB)" on page 349.

If you are enabled for voice, you can set Ignite to log you into your phone. See 'To sign into Ignite and log into the phone', below. Otherwise, we recommend you log into your phone before signing into Ignite so that your agents may become Available.

Logging out of the phone logs multimedia agents out of Ignite and may requeue items in the Inbox, depending on administrative configurations. To avoid losing work on these items, agents should finish their reply or transfer the items to a queue before signing out.

The following procedures explain how to

- Sign into Ignite
- Sign into Ignite and log into the phone
- Sign out of Ignite

To sign into Ignite

1. Launch a supported web browser and type: **http://EnterpriseServerName>/Ignite**.
OR
http://<Enterprise Server IP>/Ignite.
NOTE: If your system uses SSL, type 'https' in place of 'http' and insert a valid domain or FQDN in place of an IP address.
2. Enter your **Username** and **Password**.
NOTE: If you use Windows Authentication, enter your DOMAIN\Username and your domain password.
3. Click **Sign in**.

To sign into Ignite and log into the phone

NOTE:

- This feature is supported for hot desk and external hot desk agents only
 - You can set or change phone settings from Ignite's Options page.
1. Launch a supported web browser and type: **http://EnterpriseServerName>/Ignite**.
OR
http://<Enterprise Server IP>/Ignite.
NOTE: If your system uses SSL, type 'https' in place of 'http'.
 2. Enter your **Username** and **Password**.
NOTE: If you use Windows Authentication, enter your DOMAIN\Username and your domain password.
 3. Click **Sign in**.
 4. On the **Log in to a phone** dialog window, specify your **Extension** and **PIN** (if applicable).
 5. To log into your phone once your sign-in is complete, select the **Automatic login** checkbox and click **Login**.
NOTE:
 - Clicking 'Save' dismisses the dialog window and signs you in as Offline. However, the phone information is saved to your profile and you are logged into your phone once your state is Available.
 - Clicking 'Cancel' dismisses the dialog window and signs you in as Offline across all media types.

To sign out of Ignite

- Click your avatar and select **State=>Logout**.
NOTE: Voice agents on active calls are not logged out until the call is complete.

Reconnecting Ignite (WEB)

If Ignite experiences connectivity issues, a 'Reconnecting' message displays. If Ignite cannot reconnect within the time allotted, a 'Connection lost' dialog pops with the option to Reconnect.

Once the connection is reestablished Ignite refreshes and functionality is restored.

To reconnect Ignite

- Under **Connection lost**, click **Reconnect**.

Posting feedback and viewing our forums (WEB)

Mitel has partnered with UserVoice, a third-party service, to host customer suggestions on <https://micontactcenter.uservoice.com>. When you post an idea to our feedback forum, others will be able to subscribe to it and make comments.

Our forums enable you to send feedback directly to the people building the product. While we cannot comment on every suggestion, feedback is analyzed and considered for future releases.

NOTE: Please do not use the forums to submit product defects. To submit product defects, please contact your administrator or dealer.

To post feedback and view our forums

- Click the **Feedback** button
- OR

Access the following URL: <https://micontactcenter.uservoice.com>.

YOUR IGNITE PROFILE (WEB)

Ignite provides each user with a profile, associated to the username used to log into Ignite. You can adjust several of the profile's default settings to customize your Ignite experience.

Ignite remembers your changes to the following elements:

- Contact history
- Favorited queues
- Dashboard
- Default landing page
- Phone settings, including Extension, PIN, and automatic login to your phone
- Automated diagnostics reporting

You cannot delete your profile, however you can reset the above to Ignite's default settings.

The following procedures explain how to:

- Set an avatar image
- Clear or change your avatar image
- Specify your language preference
- Set Ignite's default landing page
- Configure phone settings, including Extension, PIN, and automatic log-in to the phone
- Enable automated diagnostics reporting from Ignite
- Reset your profile to Ignite's default settings

To set an avatar image

1. Click **Options=>Profile**.
2. Click **Change Photo**.
3. Under **Upload**, click to upload a photo or drag-and-drop a photo to the space provided.
4. Click **Save**.

To clear or change your avatar image

1. Click **Options=>Profile**.
2. Click **Change Photo** and select **Clear**.
3. To change the image, follow the steps in 'To set an avatar image,' above.

To specify your language preference

1. Click **Options=>Profile**.
2. After **Language**, select a language from the drop-down.
3. Click **Save**.

To set Ignite's default landing page

1. Click **Options=>Customization**.
2. Under **Default landing page**, select a page from the drop-down.
3. Click **Save**.

To configure phone settings

NOTE: These settings enable login to your phone from Ignite. This feature is supported for hot desk and external hot desk agents only.

1. Click **Options=>Phone**.
2. Specify your **Extension** and, if applicable, **PIN**.
3. To be logged into your phone after making yourself Available, select the **Automatic login** checkbox.
4. Click **Save**.
The next time you sign into Ignite and set your state to Available, you will be logged into your phone.

To enable automated diagnostics reporting from Ignite

NOTE: You can send on-demand reports in addition to automated reporting. See "Reporting performance issues in Ignite (WEB)" on page 336.

1. Click **Options=>Diagnostics**.
2. Under **Continuously send diagnostics information**, toggle the switch to blue.

To reset your profile to Ignite's default settings

1. Click **Options=>Customization**.
2. Under **Factory reset**, click **Reset Application Options**.
3. When prompted, click **Reset**.

Reporting performance issues in Ignite (WEB)

You can report performance issues in Ignite on-demand, to be reviewed by a supervisor or system administrator. Reports include log lines from your browser and any details you enter.

On-demand reports are sent in addition to Ignite's automated diagnostics reporting. For information on enabling automated diagnostics reporting, see "Your Ignite profile (WEB)" on page 335.

Supervisors looking to access diagnostics reports should consult "Accessing diagnostics reports sent from Ignite (WEB)" on page 223.

To report a performance issue in Ignite

1. Click **Options=>Diagnostics**.
2. In the field provided, describe the issue experienced.
3. Click **Send**.

CONFIGURING IGNITE (WEB) DASHBOARDS

Real-time monitoring of employees, agents, queues, and callback requests is available via the dashboards in Ignite (WEB). You can create multiple dashboards, customize the widgets that display in each, and give them meaningful names to indicate their purpose.

NOTE: The real-time monitors in Ignite (WEB) are known as 'widgets' in the dashboard user interface.

Adding and configuring dashboards

Upon first use of Ignite (WEB), a default dashboard is created, containing the Employee State widget only. You can rename this dashboard and include additional widgets to display.

See "Accessing real-time information with Ignite (WEB)" on page 285 for information on how to use the real-time monitors.

To access the dashboards

1. In Ignite (WEB), click **Dashboards**.
2. Click the down arrow to see a list of dashboards, with the number of widgets you have added for each one
NOTE: If this is your first use of Ignite (WEB), only the Default Dashboard will display.
3. Open a dashboard by selecting it from the list.

To create a new dashboard

1. Click **Dashboards**.
2. Click the **Add Dashboard** button.
3. Click **Save**.

To modify a dashboard's title and display format

1. In a dashboard, click the **Edit Dashboard** button.
2. Click **Options**.
3. Optionally, rename the dashboard by entering text in the field under **Title**.
4. Optionally, reorganize the template by selecting from the choices under **Structure**.
5. Click **Close**.
6. Optionally, click **Undo** to revert changes or click **Save** to accept changes.

To delete a dashboard

1. In the dashboard you want to delete, click the **Delete Dashboard** button.
NOTE: The dashboard you want to delete must be one that was previously saved. If not, then you must save it first before deleting.
2. Click **Confirm** to delete the dashboard or click **Cancel** to retain the dashboard.

Adding and configuring dashboard widgets

The following widgets can be added to dashboards:

- **Employee State** – displays employee presence and shift information
- **Callback Requests** – displays a list of callback requests
- **Queue Now** – displays queue and queue group statistics
- **Agent State** – displays agents organized by time spent in the following states: ACD, Idle, Non-ACD, Unavailable, Not Present, and Offline

To add widgets to a dashboard

1. In a dashboard, click **Add Widget**.
2. Select the widget you want to add to the dashboard.
3. Repeat steps 2-3 to select additional widgets if desired.
4. Click **Save**.
5. If you want to add more widgets after saving, select the dashboard to which you want to add widgets and click the **Edit Dashboard** button.

When a dashboard is in edit mode, you can edit the content within widgets, collapse widgets, change the widgets' location on the dashboard, or remove widgets from the dashboard.

NOTE: You can collapse or expand the widget at any time (you do not have to be in edit mode).

The following procedure describes the editable features that are common to all widgets.

To modify a widget (common procedures)

1. In the dashboard, click the **Edit Dashboard** button.
2. In the widget toolbar:
 - Click the **Edit Widget Configuration** button to edit the content within the widget (see the relevant procedures for each widget for specific details).
 - Click the **Collapse Widget** button to collapse the widget or the **Expand Widget** button to expand the widget.
 - Select the **Change Widget Location** button to drag and drop the widget to a different position on the dashboard.
 - Click the **Remove Widget** button to remove the widget from the dashboard.
3. If you edited the content within the widget, click **Apply**.
4. Click **Save** to save the changes to the dashboard or **Undo** to revert the change to the dashboard.

Configuring options in the Employee State widget

When you configure options in the Employee State widget, you optionally change the name of the monitor and add an employee to be monitored.

To configure options in the Employee State widget

1. In the dashboard, click the **Edit Dashboard** button.
2. In the Employee State widget, click the **Edit Widget Configuration** button.
3. Optionally, under **Title**, type a new name for the monitor.
4. Under **Employees**, either select from the displayed list or type the employee ID in the search field to find the employee you want to monitor.
5. Click **Apply**.
6. Click **Save** to save the change to the dashboard or **Undo** to revert the change to the dashboard.

Configuring options in the Callback Requests widget

The only option available to be configured in the Callback Requests widget is to rename the monitor.

To rename the Callback Requests widget

1. In the dashboard, click the **Edit Dashboard** button.
2. In the Callback Requests widget, click the **Edit Widget Configuration** button.
3. Under **Title**, type a new name for the monitor.
4. Click **Apply**.
5. Click **Save** to save the change to the dashboard or **Undo** to revert the change to the dashboard.

Configuring options in the Queue Now widget

When you configure options in the Queue Now widget, you optionally change the name of the monitor and add queues or queue groups to be monitored.

To configure options in the Queue Now widget

1. In the dashboard, click the **Edit Dashboard** button.
2. In the Queue Now widget, click the **Edit Widget Configuration** button.
3. Optionally, under **Title**, type a new name for the monitor.
4. Click the drop-down beside **Queue** and select either **Queue** or **Queue Group**.
5. Optionally, enter text into the **Search** field to search for queues or queue groups.
6. Select the check box beside each queue or queue group you want to monitor, or select the check box beside **ID** to select all queues or queue groups.
7. Click **Apply**.
8. Click **Save** to save the change to the dashboard or **Undo** to revert the change to the dashboard.

Configuring options in the Agent State widget

When you configure options in the Agent State monitor, you optionally change the name of the monitor and add agents to be monitored.

To configure options in the Agent State monitor

1. In the dashboard, click the **Edit Dashboard** button.
2. In the Agent State widget, click the **Edit Widget Configuration** button.
3. Optionally, under **Title**, type a new name for the monitor.
4. Optionally, type content into the **Search** text box to filter the agents that display in the list.
5. Select the check box beside each agent you want to monitor, or select the check box beside each media icon to select all agents who are configured to handle that media type.
NOTE: You can optionally select multiple voice agents for each employee, if applicable, by selecting the check boxes located under the voice (telephone) icon, beside the employee name.
6. Click **Apply**.
7. Click **Save** to save the change to the dashboard or **Undo** to revert the change to the dashboard.

SEARCHING IGNITE

You can search Ignite to view select contacts. Please note the following.

Agents may only search contacts sent to queues for which the agents answer.

DESKTOP - Employees licensed as Advanced supervisors or System Administrators may search Ignite's entire repository. This includes Ignite's In Progress folder (DESKTOP), which enables supervisors to see contacts currently in agent Inboxes. This search capability does not require Multimedia Contact Center licensing. However, to view and search contacts in queue using Ignite, employees must have a Multimedia Contact Center license and multimedia agents assigned to the queue.

WEB - Agents may only search contacts sent to queues for which the agents answer. Employees licensed as Advanced supervisors or System Administrators may search all contacts in the History tab of Ignite (WEB). This search capability does not require the supervisor be licensed to handle multimedia.

Time stamps on contacts reflect the Ignite client time. To search contacts by date or time, use the date or time for the Ignite client.

Contacts that are removed from the queue are removed from queue folder search results.

New contacts in queue matching search criteria will not be displayed until the search is executed again.

DESKTOP - You cannot search for voice contacts, but you can filter voice contacts to view them selectively. See "Choosing how contact data displays in the Card view (DESKTOP)" on page 308, and "Choosing how contact data displays in the Grid view (DESKTOP)" on page 310 for more information.

WEB - You cannot search for voice contacts in History, but you can search for voice contacts in queue.

The following procedures explain how to

- Perform keyword searches of Ignite's folders
- Search Ignite using search filters

Performing keyword searches

DESKTOP - Performing keyword searches of Ignite's folders enables you to search for contacts.

WEB - You can perform a keyword search for either historical contacts or contacts in queue.

To perform keyword searches of Ignite's folders (DESKTOP)

1. From the **Folders** pane, select a folder. If necessary, expand the **My Folders**, **Processed**, **Unified Queues**, **Reporting Queues**, or **Individual Queues** folder.
2. In the **Search** or **Filter** field, type keywords over the ghost text.
NOTE: To display more search results, click **Show more results**
3. To clear searches, click the **x** button.

To perform keyword searches for historical contacts in Ignite (WEB)

1. Click **History**.
2. Optionally, select a **Filter**.
3. Optionally, select **Only show my items**.
4. In the **Search conversations** field, type the keyword(s).
5. To clear searches, delete the keyword(s).

To perform keyword searches for contacts in queue in Ignite (WEB)

1. Click **Queues** and select a queue or queue group.
2. In the queue's **Search** field, type the keyword(s).
3. To clear searches, delete the keyword(s).

Searching Ignite using search filters

Agents may only search contacts sent to queues for which the agents answer. Users can search Ignite's folders by entering filters into Ignite's Search fields. Employees licensed as Advanced supervisors or System Administrators may search Ignite's entire repository.

DESKTOP - This includes Ignite's In Progress folder, which enables supervisors to see contacts currently in agent Inboxes. This search capability does not require Multimedia Contact Center licensing. However, to view and search contacts in queue using Ignite, employees must have a Multimedia Contact Center license and multimedia agents assigned to the queue.

If administrative configurations permit, selecting the search result contact previews them.

The following explains how to use filters to search Ignite. This information does not apply to voice contacts.

NOTE:

- Time stamps on contacts reflect the Ignite client time. To search contacts by date or time, use the date or time for the Ignite client.
- To display more search results, click 'Show more results...'.

Using the filters in Table 36, you can perform the following searches in Ignite.

NOTE: DESKTOP - The following search filters cannot be applied to the Inbox.

Table 36: Ignite search filters

FILTER	EXPLANATION
No filter	Finds contacts containing a specific word E.g.: order
AND	Finds contacts containing one word and another E.g.: sales AND order
Space	Finds contacts containing one word and another E.g. sales order
;	Finds contacts containing one word and another E.g. sales;order
NOT	Finds contacts containing one word but not another E.g. order NOT closed
-	Finds contacts containing one word but not another E.g. order -closed
OR	Finds contacts containing either of the words specified E.g. sales OR order
Quotation marks	Finds contacts containing the exact phrase E.g. "sales order"
date	Finds contacts received on specific dates E.g. date:01/01/2014
Today	Finds contacts received today E.g. date:Today

Table 36: Ignite search filters (continued)

FILTER	EXPLANATION
Yesterday	Finds contacts received yesterday E.g. date:Yesterday
This week	Finds contacts received this week E.g. date:This week
This month	Finds contacts received this month E.g. date:This month
This year	Finds contacts received this year E.g. date:This year
Month name NOTE: Ignite will search the month by the current year, if no year is specified.	Finds contacts received on a specific month. You can also search by a specific date in the month. E.g. date:August, or date:August 2013, or date:August 18, or date:August 18 2013
Abbreviated month name	Finds contacts received on a specific month, by a three letter abbreviation E.g. date:Aug, or date:Aug 2013, or date:Aug 18, or date:Aug 18 2013
Day name	Finds contacts received on a specific day of the week E.g. date:Monday
> (for searches by date or attachment size)	Finds contacts by dates after the specified date or date keyword E.g. date:>August 18 2013, or date:>August, or date:>August 18 Find email contacts by attachments larger than the attachment size E.g. attachments:>200KB
>= (for searches by date or attachment size)	Finds contacts by dates after or on the specified date or date keyword E.g. date:>=August 18 2013, or date:>August, or date:>=August 18 Finds email contacts by attachments larger than or equal to the attachment size E.g. attachments:>=200KB

Table 36: Ignite search filters (continued)

FILTER	EXPLANATION
< (for searches by date or attachment size)	<p>Finds contacts by dates before the specified date or date keyword</p> <p>E.g. date:<August 18 2013, or date:<August, or date:<August 18</p> <p>Finds email contacts by attachments smaller than the attachment size</p> <p>E.g. attachments:<200KB</p>
<= (for searches by date or attachment size)	<p>Finds contacts by dates before or on the specified date or date keyword</p> <p>E.g. date:<=August 18 2013, or date:<=August, or date:<=August 18</p> <p>Finds email contacts by attachments smaller than or equal to the attachment size</p> <p>E.g. attachments:<=200KB</p>
AND or space (for searches by date)	<p>Finds contacts received on two or more dates</p> <p>E.g date:Today AND Yesterday, or date:Today Yesterday</p>
NOT or - (for searches by date)	<p>Finds contacts received on one date but not another</p> <p>E.g. date:This month NOT Last week, or date:This month -Last week</p>
OR (for searches by date)	<p>Finds contacts received on either of the dates specified</p> <p>E.g. date:Today OR August 25</p>
subject:	<p>Finds contacts containing text by subject</p> <p>E.g. subject:sales AND order</p>
from:	<p>Finds contacts received from a specific sender. You can search by the sender's first name, last name, full name, or email address.</p> <p>E.g. from:Renee</p>
to:	<p>Finds contacts sent to a specific recipient. You can search by the recipient's first name, last name, full name, or email address.</p> <p>E.g. to:jane@gmail.com</p>
cc:	<p>Finds contacts cc'd to a specific recipient. You can search by the recipient's first name, last name, full name, or email address.</p> <p>E.g. cc:jane@email.com</p>
bcc:	<p>Finds contacts bcc'd to a specific recipient. You can search by the recipient's first name, last name, full name, or email address.</p> <p>E.g. bcc:jane@gmail.com</p>

Table 36: Ignite search filters (continued)

FILTER	EXPLANATION
case:	Finds contacts tagged with a specific case ID E.g. case:kxPKEz
ticket:	Finds contacts tagged with a specific ticket number E.g. ticket:pAsMDc
media:	Finds contacts of a specific media type E.g. media:email
agent:	Finds contacts last handled by a specific agent. You can search by the agent's first name, last name, full name, or by reporting number. E.g. agent:Renee or agent:1000
queue:	Finds contacts last sent to a specific queue E.g. queue:sales
attachments:	Finds email contacts by attachment. You can search by attachment name, size, content, or type. E.g. attachments:docx or attachments:<200KB NOTE: If no size unit is specified, the default search unit is bytes.

You can perform the following types of searches in Ignite:

General searches – Any keywords can be typed in the search field, and the search returns contacts containing the keywords.

For example, if an agent types 'sales order' in the Filter field, Ignite searches for contacts in the selected folder containing the terms sales and order.

Targeted searches – You can limit searches to fields and folders by inserting a colon between the field and the search term.

For example, an agent searching contacts' Subject fields for the word 'order' can type 'subject:order'. In this example, Ignite searches the 'Subject' fields of contacts in the selected folder for the term 'order'.

Multiple targeted searches – You can limit searches to more than one field using semi-colons.

For example, an agent searching for an order placed by a specific customer can type 'subject:order;from:Renee'. Ignite interprets this as (Subject contains Order) AND (From contains Renee). In this example, the program searches the Subject fields of contacts to find orders from Renee.

NOTE:

- If at least one of the filters ends with ':', you must separate all filters with ";". For example, 'from:Renee;date:yesterday'.
- If at least one of the filters ends with ':', you cannot use 'NOT', '-', and 'OR' between the filters. For example, typing 'order:Renee OR from:Tom' to retrieve orders placed by either Renee or Tom is invalid. Typing 'order;from:Renee OR from:Tom' is valid and will retrieve orders placed by either Renee or Tom.

Complex targeted searches – You can perform complex searches to further narrow results returned.

For example, an agent searching for a completed order, placed by a specific customer, can type 'completed;subject:sales order;from:Renee'. Ignite interprets this as: Completed AND (Subject = (Sales AND Order)) AND (From contains Renee). In this example, Ignite searches the Subject fields of contacts for completed sales orders placed by Renee.

Email attachment size searches - You can search emails by attachment size. Searches by bytes ('b'), kilobytes ('KB'), and megabytes ('MB') are supported. If no size unit is specified, the default search unit is bytes. If searching for attachments by size, specifying "attachments.size:" in your query returns results more efficiently.

MANAGING AGENT GROUP PRESENCE AND AGENT STATES

Agent group presence refers to whether an ACD agent is present to or absent from an agent group.

Agents present to an agent group can receive contacts in the Inbox, pick contacts out of queue, and be sent contacts from a supervisor. Agents absent from an agent group cannot handle contacts for the queue.

Agent states refers to an agent's availability to receive ACD contacts. Examples of agent states include Available, Busy/Make Busy, and Do Not Disturb. An agent's state determines Ignite handling options available to them.

WEB - An agent in the Offline state is logged into Ignite but their ACD agents are not logged into the system. In this state contacts cannot be handled for the queue.

Viewing Agent Group Presence in Ignite

Agents can view the agent groups of which they are members. Viewing Agent Group Presence helps agents verify that they are able to handle contacts for the appropriate queues.

Agents can view Agent Group Presence on a group-by-group basis across media types. If administrative configurations permit, agents may also make themselves present to and absent from agent groups and the media types that the group handles.

To view Agent Group Presence (DESKTOP)

- In the **Sidebar**, click the **Agent Group Presence** button.
Check marks display beside agent groups to which the agent is present. Media types that an agent is present to handle display a blue background. Media types that an agent is not present to handle display a white background.

To view Agent Group Presence (WEB)

- Click your avatar and select **Agent Groups**.
Media types that an agent is present to handle display in blue. Media types that an agent is not present to handle display in grey.

Adjusting Agent Group Presence in Ignite

If agents have the required permissions, they can make themselves present to, or absent from, agent groups.

Adjusting Agent Group Presence enables agents to make themselves available or unavailable for contacts of different media types. For example, an agent belongs to the Sales (voice and chat) and the Training (email) agent groups. This agent makes herself available to answer only email contacts by becoming absent from the Sales group.

Agents can also make themselves available or unavailable to answer contacts of specific media types. For example, the agent makes herself available to answer only Sales voice contacts by becoming absent from chat in the Sales agent group.

Agents can also make themselves available or unavailable to all agent groups of which they are members, in one motion.

DESKTOP - When agents are not present to any of their agent groups, Ignite's Status bar displays a 'Time Logged in Not Present' status. See "The Status bar (DESKTOP)" on page 296 for more information.

WEB - When agents are not present to any of their agent groups, their state becomes Away (Not Present). See "Viewing agent state and state statistics (WEB)" on page 325.

NOTE: Agents may be made automatically present to their agent groups upon logging into Ignite, with multimedia contacts routing as soon as the login is complete. This is an administrative configuration and is not controlled by the agent. However, without this administrative configuration, agents must make themselves present to agent groups in order to be offered contacts.

The following procedures explain how to

- Become present to an agent group
- Become absent from an agent group
- Become either present to or absent from all agent groups
- Become available or unavailable to answer contacts of a specific media type
- Apply default Agent Group Presence settings (DESKTOP)

To become present to an agent group (DESKTOP)

1. In the **Sidebar**, click the **Agent Group Presence** button.
2. Select the group or groups from the **Agent Group Presence** screen and click **Apply**.
Multimedia contacts begin routing.

To become present to an agent group (WEB)

1. Click your avatar and select **Agent Groups**.
2. Hover over the agent group's avatar and select **Join <Agent Group name>**.
3. Click **Update**.

To become absent from an agent group (DESKTOP)

1. In the **Sidebar**, click the **Agent Group Presence** button.
2. Deselect the group or groups from the **Agent Group Presence** screen and click **Apply**.

To become absent from an agent group (WEB)

1. Click your avatar and select **Agent Groups**.
2. Hover over the agent group's avatar and select **Leave <Agent Group name>**.
3. Click **Update**.

To become either present to or absent from all agent groups (DESKTOP)

1. In the **Sidebar**, click the **Agent Group Presence** button.
2. To become present to all agent groups, click **Select All**.
3. Click **Apply**.
You become present to all agent groups and media types within the group.
4. To become absent from all agent groups, click **Clear All**.
5. Click **Apply**.
You become absent from all agent groups and media types within the group.

To become either present to or absent from all agent groups (WEB)

1. Click your avatar and select **Agent Groups**.
2. To become present to all agent groups, click **Join All=>Update**.
3. To become absent from all agent groups, click **Leave All=>Update**.

To become available or unavailable to answer contacts of a specific media type (DESKTOP)

1. In the **Sidebar**, click the **Agent Group Presence** button.
2. To become available to answer contacts of a specific media type, click the media icon in the agent group so the icon displays a blue background.
3. To become unavailable to answer contacts of a specific media type, click the media icon in the agent group so the icon displays a white background.
4. Click **Apply**.

To become available or unavailable to answer contacts of a specific media type (WEB)

1. Click your avatar and select **Agent Groups**.
2. To become available to answer contacts of a specific media type, click the media icon in the agent group so the icon displays in blue.
3. To become unavailable to answer contacts of a specific media type, click the media icon in the agent group so the icon displays in grey.
4. Click **Update**.

To apply default agent group presence settings (DESKTOP)

1. On the **Agent Group Presence** screen, click **Defaults**.
2. Click **Apply**.

Adjusting agent states in Ignite (WEB)

Agents can adjust their states to make themselves available or unavailable to receive ACD contacts without logging out of the application.

Agents can set the following states in Ignite:

- **Available:** Agents are logged into Ignite and their ACD agents are available to receive ACD contacts.
- **Offline:** Agents are logged into Ignite and can peruse the contact repository, but their ACD agents are offline and cannot receive ACD contacts.
NOTE: Time in Offline does not count towards shift duration.
- **Busy:** See "Setting and removing Busy/Make Busy in Ignite" on page 349.
- **Do Not Disturb:** See "Setting and removing Do Not Disturb in Ignite" on page 351.

To adjust your agent state

1. Click your avatar and select **State**.
2. Select a state

Setting and removing Busy/Make Busy in Ignite

When agents must become temporarily unavailable for inbound multimedia contacts, they can put themselves into Busy/Make Busy (MKB) and choose a code indicating why they are unavailable.

Setting Busy/MKB for one agent capability applies a Busy/MKB status across all of the employee's media capabilities. Inbound multimedia contacts are not routed to the agent; however, agents in Busy/MKB can receive transferred contacts. While in Busy/MKB, voice agents are able to receive non-ACD voice contacts without being removed from Busy/MKB and can pick contacts waiting in queue.

Entering Busy/MKB while handling contacts ensures that agents are not offered more once finished. However, existing voice, chat, and SMS contacts continue until one of the parties ends the conversation.

Agents also enter Busy/MKB when they decline a contact, fail to answer a ringing contact within the allotted time, and place an item on hold for longer than is permitted. In each instance, the agent is automatically put into Busy/MKB across all media capabilities, and a System Make Busy is registered for the employee. For information on the time allotted to answer a ringing contact and the duration for which contacts can be on hold, contact your supervisor or system administrator.

The following procedures explain how to

- Set Busy/MKB and change Busy/MKB codes
- Remove Busy/MKB
NOTE: Agents must remove Busy/MKB to become available to receive inbound multimedia contacts and internal voice contacts.
- Change to a Do Not Disturb (DND) state while in Busy/MKB

To set MKB and change MKB codes (DESKTOP)

1. In the **Sidebar**, click the **Make Busy** button.
2. Select a MKB code and click **Apply**.
NOTE: Agents cannot program MKB codes and can only select from the list provided.
3. To change a MKB code assigned to you, follow the above steps.

To set Busy and change Busy codes (WEB)

1. Click your avatar.
2. Click **State=>Busy...**
3. Choose a Busy code.

To remove MKB (DESKTOP)

- In the **Status** bar, click the **X** button.

To remove Busy (WEB)

1. Click your avatar.
2. Click **State** and select a different state.

To change to a DND state while in MKB (DESKTOP)

NOTE: DND and Busy/MKB states layer. If an agent in Busy/MKB changes their state to DND, the agent will remain in Busy/MKB once DND is removed. This prevents agents from receiving contacts when switching states between Busy/MKB and DND.

1. In the **Sidebar**, click the **Do Not Disturb** button.
2. Select a DND code and click **Apply**.
3. To remove DND and revert to MKB, in the **Status** bar, click the **X** button.

To change to a DND state while in Busy (WEB)

1. Click your avatar.
2. Click **State => Do Not Disturb...**
3. Select a DND reason code.
4. To remove DND and revert to Busy, click your agent name and select **State=>Busy ...**

Setting and removing Do Not Disturb in Ignite

When agents must become temporarily unavailable for receiving inbound multimedia contacts and internal voice contacts, including transfers, they can put themselves into Do Not Disturb (DND) and choose a code indicating why they are unavailable.

Agents in DND can receive external voice contacts, and existing chat and inbound/internal voice contacts continue until one of the parties ends the conversation.

Setting DND for one agent capability applies a DND status across all of the employee's media capabilities.

The following procedures explain how to

- Set DND and change DND codes
- Remove DND
NOTE: Agents must remove DND to become available to receive inbound multimedia contacts or internal voice contacts
- Change to a Busy/Make Busy (MKB) state while in DND

To set DND and change DND codes (DESKTOP)

1. In the **Sidebar**, click the **Do Not Disturb** button.
2. Select a DND code and click **Apply**.
NOTE: Agents cannot program DND codes and can only select from the list provided.
3. To change a DND code, follow the above steps.

To set DND and change DND codes (WEB)

1. Click your avatar.
2. Click **State=>Do Not Disturb**
3. Choose a DND code.

To remove DND (DESKTOP)

- In the **Status** bar, click the **X** button.

To remove DND (WEB)

1. Click your avatar.
2. Click **State** and choose a different state.

To change to a MKB state while in DND (DESKTOP)

NOTE: If an agent changes their DND state to MKB, the agent remains in DND until this state is removed.

1. In the **Sidebar**, click the **Make Busy** button.
2. Select a Make Busy code and click **Apply**.
3. In the **Status** bar, click the **X** button to remove yourself from DND and enter MKB.

To change to a Busy state while in DND (WEB)

1. Click your avatar.
2. Click **State** and choose **Busy....**
3. Choose a Busy code.

WORK TIMER

NOTE:

- When agents are in Work Timer, contacts remain in the Inbox until Work Timer is removed.
- Agents in Work Timer can directly enter Busy/MKB or DND if the state is applied manually. Changing states from Work Timer to Busy/MKB or DND without first entering a Classification Code could register a 'Non-Compliant' against voice agents, if Classification Codes are required for the queue.

DESKTOP - Contacts in Work Timer are marked with yellow.

WEB - Contacts in Work Timer are marked with yellow and a clock icon.

If administrative configurations permit, agents are placed in a Work Timer state after completing a contact. During Work Timer agents can complete after-contact work, such as speaking with a supervisor, without having this downtime affect their performance statistics.

Work Timer counts against an agent's Workload, and can determine whether agents are pushed contacts. If agents are in a Work Timer state for the maximum number of contacts they can handle for a media type, they are not offered another contact of that media type until Work Timer expires or is removed. For example, an agent permitted to handle two emails at a time is in Work Timer for both. Until one Work Timer state expires or is removed, the agent is not offered another inbound email. However, this agent will be pushed chat contacts, unless they are also in Work Timer for the maximum number of chat contacts their Workload permits them to receive.

Ignite displays Workload statistics, including the number of Work Timer states the agent is in for each media type. See "The Status bar (DESKTOP)" on page 296 for more information. See "Viewing agent handling statistics (WEB)" on page 327. For more information on Workload, see "Handling multimedia contacts in Ignite" on page 353.

The duration of Work Timer is configured on a queue-by-queue basis. To determine this duration, contact your supervisor or system administrator.

When Work Timer is the overriding state, agents can remove Work Timer and put themselves back into an overriding state across all media capabilities. Once agents have removed Work Timer, they cannot put themselves back into this state.

The following procedures explain how to remove Work Timer.

To remove Work Timer (DESKTOP)

- In the **Sidebar**, click the **Remove Work Timer** button.
NOTE: Alternatively, remove Work Timer via the Action bar.

To remove Work Timer (WEB)

- Click **Clear Work Timer**.
Alternatively, click your avatar, select **State**, and choose an alternate state.

HANDLING MULTIMEDIA CONTACTS IN IGNITE

NOTE: To retain the integrity of Excel charts pasted in Ignite, first copy the Excel table to Word and then copy/paste it in Ignite.

Multimedia Contact Center supports skills-based routing. When an agent is available, they receive contacts based on the following criteria

1. Highest queue priority (optional)
2. Highest skill priority (optional)
3. Longest idle

Agents can handle multiple contacts at a time. However, an employee's Workload determines the number and type of media contacts that can be pushed to an agent at any one time. For example, agents may not be permitted to receive voice and chat contacts concurrently. Or, agents may be permitted to receive a maximum of five emails and two chats at one time.

If you are not being pushed contacts, it may be that you have reached the maximum number of contacts your Workload permits you to handle. For more information on viewing your Workload status, see "The Status bar (DESKTOP)" on page 296.

Note also that agents who have reached their Workload maximum for a media type can pick items out of queue and can receive transferred contacts of that type.

To provide context on how contacts reach queues and agents, this section explains

- Overflowing and interflowing contacts
- Routing models in Multimedia Contact Center
- Receiving notifications of new contacts
- Receiving information in screen pops

In addition, the following sections explain general contact handling procedures, including

- Reviewing contact history
- Tagging contacts with Account Codes
- Sending contacts back to the queue

For information on procedures specific to handling different media types, see "Handling calls in Ignite" on page 394, "Handling emails in Ignite" on page 359, and "Handling chats in Ignite" on page 375.

Overflowing and interflowing contacts

The following section explains the concepts of overflow and interflow for multimedia contacts.

Once a contact has reached a queue, it is offered to an agent group. Agents in the group are responsible for accepting the contact. Contacts wait in queue until an agent from an assigned agent group accepts them. Overflow and interflow are two routing methods designed to reduce the length of time that contacts wait in queue

Overflowing contacts

Overflow is the process of offering a contact, already offered to one agent group, to additional agent groups after the contact has been waiting in queue past a set time. The amount of time before a contact overflows is determined by an administrative configuration, and the system overflows the contact without agent intervention.

Interflowing contacts

Interflow is the process of taking a contact out of one queue and routing it to a different answer point, such as another queue or an external email address. Interflow is an administrative configuration occurring under specified queue conditions, and occurs without agent intervention.

Routing models in Multimedia Contact Center

Push, Pick, and Mixed routing models determine how agents receive contacts in queue. Note that administrative configurations determine the routing models that your contact center uses and that the routing model can vary by queue. For more information, consult your supervisor or system administrator.

NOTE: Push, Pick, and Mixed routing models determine how agents receive email and chat contacts in queue. Delivery of voice contacts is determined by programming on the 3300 ICP. For more information, contact your supervisor or system administrator.

Push model

In a Push model contacts in queue are sent to an available agent's Inbox. The number of contacts that can be pushed to an agent's Inbox at one time depends on the agent's Workload, as configured in the system, and can vary by media type. For example, the system may be permitted to push five emails at a time to an agent's Inbox but only two chats.

Contacts are also pushed to agents on the basis of Agent Skills (as configured in the system), Queue Priority, and Preferred Agent. A Preferred Agent is one who is engaging in an ongoing conversation with a customer.

With the exception of transferred contacts, agents do not receive items in their Inbox if the Inbox contains ringing contacts of the same media type.

Picking contacts out of queue is permitted in a Push model.

Pick model

In a Pick model agents pick contacts out of queue exclusively. Agents in Do Not Disturb cannot pick contacts out of queue.

Mixed model

In a Mixed model agents pick contacts out of queue, but items sitting in queue past a set time are pushed to agents' Inboxes. Workload determines the number and type of media contacts that can be pushed to an agent at any one time. For more details, see 'Push model', above.

With the exception of transferred contacts, agents do not receive items in their Inbox if the Inbox contains ringing contacts of the same media type.

Receiving notifications of new contacts

Agents receive notifications of new contacts in one of two ways. A contact can 'ring' in the Inbox and agents can receive toaster notifications of new contacts.

Ringling states in Ignite

When contacts reach an agent's Inbox, the contacts are in a ringing state until the agent puts them into reply mode or until the requeue timer expires.

Ignite indicates a ringing contact as follows:

- DESKTOP - Ignite marks ringing contacts in red, and indicates in red the number of contacts ringing in the Inbox.
- WEB - Ignite marks ringing contacts with a 'ringing' icon, and the agent's state indicates 'Incoming'.

NOTE: With the exception of transferred contacts, in Push and Mixed routing models agents do not receive items in their Inbox if the Inbox contains ringing contacts of the same media type. Once ringing contact is put into reply mode, another contact of that media type is pushed to the Inbox in a ringing state if the agent's Workload permits. This behavior continues until an agent's Workload is met.

Receiving toaster notifications of new contacts

Ignite sends agents toaster notifications of contacts offered to the Inbox.

Toaster notifications indicate the contact's media type and display information such as originating phone number, subject, and queue name. Information displayed varies by media type.

Agents can accept or decline the contact by selecting the appropriate option on the toaster notification. Option availability varies by the contact's media type.

NOTE: Accepting emails sends them to the agent's Inbox and opens them in reply mode, with Cc'd recipients included in the reply.

Please note the following behavior:

DESKTOP

- If agents are permitted to preview contacts, clicking anywhere within the notification opens Ignite with the item ringing in the Inbox. Agents are then able to preview the contact.
- If the agent does not act on the notification by accepting, declining, or previewing the contact, the Ignite icon flashes in the taskbar and eventually remains a solid color until the application is selected.

WEB

- When Ignite is in focus, the toaster notification pops with options to Accept and, depending on the contact's media type, Decline the contact. If Ignite is not in focus, a notification indicates a ringing contact. Clicking a notification takes you to the relevant contact.
NOTE: Internet Explorer does not pop notifications when Ignite is not in focus.
- When Ignite is minimized, clicking the notification opens Ignite with the item ringing in the Inbox. Agents are then able to handle the contact.

Receiving information in screen pops

When contacts are ringing in the Inbox, agents may receive screen pops on their desktops.

Screen pops differ from toaster notifications. Toaster notifications alert agents to ringing contacts and indicate basic information such as the contact's media type. A screen pop displays information relevant to handling a specific contact.

For example, a screen pop may display a web page listing a customer's recent contact history. Agents use screen pops to provide more personalized, informed customer service. It is the agent's responsibility to close the screen pop once the information is no longer required.

Screen pops open on agents' desktops when a ringing item is selected in the Inbox.

If you are receiving two screen pops and/or two toaster notifications for a single contact, consult your supervisor or system administrator. For more information on toaster notifications, see "Receiving toaster notifications of new contacts" on page 355.

NOTE:

- If you receive a security warning when your screen pop displays, consult your supervisor or system administrator about disabling the warnings.
- WEB - By default, screen pops open in a new tab but obey browser configuration and may therefore open in a new window.
- WEB - If screen pops are not displaying you may need to disable pop-up blockers for this site.

Reviewing contact history

Ignite stores transcripts of email, chat, and SMS multimedia conversations and enables agents to review these transcripts by case and customer.

For example, an agent gets a response from a customer saying 'How do I do that?'. However, the customer has deleted all prior communication in the email chain. The agent can retrieve transcripts of previous conversations with the customer in order to answer the question.

If a conversation's history is not visible via the History function, we recommend searching Ignite's repository. For more information on searching, see "Searching Ignite" on page 340.

The following procedures explain how to

- Review contact history by case
NOTE: This function is only available if the system has case and ticket numbers enabled. This is an administrative configuration and cannot be adjusted by agents.
- Review contact history by customer

To review contact history by case or customer (WEB)

NOTE: You can pare down the list of contacts displaying on the History page using filters. For information, see "Searching Ignite using search filters" on page 341.

1. Select a contact or hover over the item's avatar and select **History**.
2. Select either **Case** or **Customer** and select the contact to review.
You can display specific contacts by entering search criteria in the 'Search conversations' field.
3. To exit out of this view, click **Back to <page>**.

To review contact history by case (DESKTOP)

1. In the **Folders** pane, select a folder and select a contact in the folder.
2. In the **Preview** pane, select **History and Account Codes**, and select **By Case**.
3. To see more items, double-click **Show more results...**
4. Optionally, sort items in each pane in ascending or descending order by clicking the column headers.
5. To view a transcript of the communication, double-click the contact in the pane.

To review contact history by customer (DESKTOP)

1. In the **Folders** pane, select a folder and select a contact in the folder.
2. In the **Preview** pane, select **History and Account Codes**, and select **By Customer**.
3. To see more items, double-click **Show more results...**
4. Optionally, sort items in each pane in ascending or descending order by clicking the column headers.
5. To view a transcript of the communication, double-click the contact in the pane.

Tagging contacts with Account Codes

NOTE: Account Code categories are supported for Ignite (DESKTOP) only. Ignite (WEB) enables agents to filter Account Codes rather than sorting them by categories.

Account Codes are used for reporting purposes. They are numbers identifying services, departments, or other elements of the contact center. Agents can tag contacts with Account Codes in Ignite to indicate in reports what the conversation was about.

For example, an agent handling chats for three catalog companies enters an Account Code of '01' to indicate that the customer is inquiring about Company A. Later in the same chat conversation the agent enters an Account Code of '06' to indicate that the customer is inquiring about Company A's mail-out services.

Agents can only apply Account Codes when replying to contacts. Agents can tag contacts with multiple Account Codes but cannot configure Account Codes in Ignite.

Please note the following limitations regarding tagging voice contacts with Account Codes in Ignite

- Voice contacts handled in Ignite can only be tagged with non-verified Account Codes. Verified Account Codes are entered before an outbound voice contact and can be applied via Contact Center Client. For more information on verified Account Codes in your contact center, contact your system administrator.
- Tagging contacts with Classification Codes is supported from Ignite for voice contacts only. Classification codes associate the entire contact handling duration to the Account Code selected. This includes transfer time, time calls were handled at other extensions, and Work Timer durations if 'Include queue work timer as part of handling time' is enabled on the queue. To learn more about applying Classification Codes to voice contacts, see "Tagging calls with Classification Codes" on page 397.

NOTE: Account Codes on emails are terminated after employee logout. Agents logging into Ignite to resume work on emails must re-enter their last Account Code.

To tag a contact with an Account Code (DESKTOP)

1. In the **Preview** pane, expand **History and Account Codes** and select **Account Codes**.
2. Expand any Account Code groups, if required.
3. Beside the Account Code you are using to tag the contact, click **Apply**.
Account Codes applied to a contact are marked in bold.

NOTE: Alternatively, apply Account Codes via the Account Code button that displays in the Sidebar.

To tag a contact with an Account Code (WEB)

1. Select a contact or hover over the item avatar and click **Classify**.
2. Select an Account Code. You can type the name or number of a Code in the **Search** field.
NOTE: If you enter a number in the search field, you can apply the Code by pressing 'Enter' when prompted.

Sending contacts back to the queue

When contacts reach an agent's Inbox, the contacts are in a ringing state until the agent clicks the Reply button and Ignite goes into reply mode.

Contacts can be sent back to the queue for several reasons. First, contacts requeue when declined by an agent. Second, ringing contacts in the Inbox requeue when the ringing timer expires. Third, contacts on hold requeue when the hold timer expires, including emails automatically placed on hold after agents logout. Fourth, contacts in the Inbox can requeue on employee logout. However, administrative configuration determines requeue behavior for email contacts in the Inbox.

In each instance, the contact is returned to the queue as the longest waiting. Unless logged out, the employee is put into a Busy/Make Busy state across all agent capabilities, and a System Make Busy is registered.

Agents logging out of Ignite with contacts in the Inbox are notified whether relevant contacts will be requeued (DESKTOP). However, in these instances a System MKB is not registered against the employee.

Requeued emails contain any response text drafted. This text is visible to other employees who handle the email. Agents can choose to include the drafted content when previewing requeued emails in queue.

Requeued chat and SMS contacts contain all of the previous conversation between contact and agent.

If the system immediately requeues contacts on logout, to avoid losing work we recommend that agents either complete their work or transfer the item to a queue before logging out.

NOTE:

- The time allotted to answer ringing contacts, the duration for which contacts can be on hold before requeuing, and requeue behavior for email contacts on employee logout is determined by administrative configuration. For more information, contact your supervisor or system administrator.
- Logging in and logging out of Ignite does not reset the duration contacts can be on hold before requeuing.

HANDLING EMAILS IN IGNITE

Handling emails in Ignite mirrors common email client behavior, offering agents and supervisors a familiar and user-friendly environment. Ignite supports both HTML and plain text emails.

NOTE: Removing or otherwise altering case and ticket numbers in subject lines before handling emails can interfere with preferred agent routing. Agents should contact their supervisors or system administrators before editing case and ticket numbers in email subject lines.

The following explains how to

- Preview emails
- Preview drafted content for emails in queue (DESKTOP)
- Pick emails out of queue
- Reply to emails
- Forward emails
- Add attachments to emails
- Insert images in emails
- Preview and save attachments
- Transfer emails to internal and external destinations
- Decline emails
- Mark emails as 'No Reply' and 'Junk'
- Place emails on hold and retrieve emails from hold
- Correct spelling in email responses
- Apply reply templates to emails
- Apply personalized signatures to emails
- Reroute Failed emails
- Handle oversized emails
- Handle bounced emails
- Send outbound emails

NOTE: DESKTOP - To complete the following procedures, you must be in Ignite's My Folder's View.

Previewing emails

If administrative configurations permit, agents can preview contacts before picking them out of queue or handling them.

The following explains how to

- Preview emails in queue
- Preview emails in the Inbox

To preview an email in queue (DESKTOP)

1. In the **Folders** pane, select a queue.
2. In the **List** pane, select an email.

To preview an email in queue (WEB)

1. Click **Queues** and select a queue.
2. Select an email to preview.

To preview an email in the Inbox (DESKTOP)

1. In the **Folders** pane, click **Inbox**.
2. In the **List** pane, select an email.

To preview an email in the Inbox (WEB)

- Click **Inbox** and select an email to preview.

Previewing drafted content for emails in queue (DESKTOP)

If administrative configurations permit previewing emails in the Preview Pane before picking emails out of queue, agents can also choose to preview content drafted by other agents in requeued emails.

Normally agents only see the original content of the email contact when viewing emails in the List pane or the Preview pane. Requeued emails, however, may contain content drafted by employees for use by other agents in the contact center. Agents can choose to filter the List pane's contents for a queue to only show the emails in queue that have drafted content from other agents and include the drafted contents in the List pane and in the Preview pane. If agents navigate away from the queue to another queue, the filter is removed.

NOTE: Previewing drafted content for emails in queue in Ignite requires agent previews to be enabled on the media server. See "Configuring Advanced options for media servers" on page 52 for more information.

The following procedures explain how to

- Preview drafted content for emails in queue
- Revert to viewing all emails in queue

To preview drafted content for emails in queue

1. In the **Folders** pane, right-click the email queue for which you want to preview drafted content.
2. Select **Drafts**.
The List pane displays the requeued emails in queue that have drafted content. The Folder pane displays the queue name in orange and italics.

To revert to viewing all emails in queue

1. In the **Folders** pane, right-click the email queue.
2. Select the queue name.
The List pane displays all emails in queue. Drafted content is not displayed.

Picking emails out of queue

Pick behavior occurs in the following ways: First, agents can pick contacts out of queue and send them to the Inbox. Once ringing in the Inbox, the contact can be handled. Second, agents can choose to pick and reply to a contact in one motion. Choosing to pick and reply sends the contact to the agent's Inbox and immediately opens the contact in reply mode. Cc'd recipients are included in the reply.

Emails picked out of queue ring in the agent's Inbox until the contact is put into reply mode. For more information on ringing behavior, see "Ringing states in Ignite" on page 355.

NOTE:

- Agents cannot pick or pick and reply to contacts from the queue if they are in Do Not Disturb.
- Agents may only pick or pick and reply to contacts from the queue if they have the appropriate permissions.

The following procedures explain how to

- Pick an email out of queue and handle the email
- Pick and automatically reply to an email

To pick an email out of queue and handle the email (DESKTOP)

1. From the **Folders** pane, select the queue from which the email will be picked.
2. From the **List** pane, select an email from the queue and, from the **Action** bar, click the **Pick** button.
The email is transferred to your Inbox.
3. To handle the email, select **Inbox** and, in the **List** pane, select the email.
NOTE: Additional handling options display in the Action bar. For information on handling the email, see the appropriate procedures in this section.

To pick an email out of queue and handle the email (WEB)

1. Click **Queues** and select the appropriate queue.
2. Select a contact or hover over the item avatar and click **Pick=>Pick**.
The email is transferred to your Inbox.
3. To handle the email, click **Inbox** and select the email or hover over the item avatar.
4. Select either **Reply** or **Reply all**.

To pick and automatically reply to an email (DESKTOP)

NOTE: This action functions as 'reply all' if there are recipients Cc'd on the original email.

1. In the **Folders** pane, select the queue from which an email will be picked.
2. In the **List** pane, select an email from the queue and, from the **Action** bar, click the **Pick & Reply** button.
The email is transferred to your Inbox and opens in reply mode, with all recipients copied.

NOTE:

- Additional handling options display in the Action bar. For information on handling the email, see the appropriate procedures in this section.
- If the email to which you are replying has an existing draft, the To:, CC:, and BCC: fields are cleared and refilled with the default addresses based on the reply type selected.

To pick and automatically reply to an email (WEB)

1. Click **Queues** and select the appropriate queue.
2. Select a contact or hover over the item avatar and click **Pick=>Pick and Reply**.
The contact is transferred to your Inbox and opens in reply mode with all recipients copied.

Replying to emails

Once an email is in the Inbox, agents can write and send a response. Agents can reply to the email's sender only, reply to all email recipients, insert additional addresses in their email's To: field, and, if enabled for the email queue, select a From address from one of the email queues they handle. Agents can also copy and blind-copy other email addresses on replies.

DESKTOP - Emails to which an agent has replied display under 'Handled', in the Folders pane.

Formatted URLs entered by agents in email responses will become links when the agent sends the email reply.

Note that, by default, the maximum file size for emails, including attachments, signatures, and images, is 25 MB.

To reply to an email (DESKTOP)

1. In the **Folders** pane, click **Inbox**.
2. In the **List** pane, select an email and, in the **Action** bar, click **Reply** or **Reply All**.
NOTE: If the email to which you are replying has an existing draft, the To:, CC:, and BCC: fields are cleared and refilled with the default addresses based on the reply type selected.
3. Insert addresses in the **To:** field, and copy or blind-copy additional recipients by filling in the appropriate fields. Separate multiple addresses with semi-colons.
4. If enabled for this queue, you can select a different From address by clicking **From** and selecting the email address.
By default, From is set to the email address of the last queue the email was handled from.
5. Type the email's contents and, in the **Action** bar, click **Send**. An icon displays over the Preview pane, indicating the email is being sent.
NOTE: Additional handling options display in the Action bar. For more information, see the appropriate procedures in this section.

To reply to an email (WEB)

1. Click **Inbox** and select an email or hover over the item avatar.
2. Click **Reply** and select either **Reply** or **Reply All**.
NOTE: If the email to which you are replying has an existing draft, the To:, CC:, and BCC: fields are cleared and refilled with the default addresses based on the reply type selected.
3. Insert addresses in the **To:** field, and copy or blind-copy additional recipients by filling in the appropriate fields. Separate multiple addresses with semi-colons.
4. If enabled for this queue, you can select a different From address by clicking **From** and selecting the email address.
By default, From is set to the email address of the last queue the email was handled from.
5. Type the email's contents and click **Send**.

Forwarding emails

You can forward emails to multiple parties with additional recipients copied and blind-copied on forwarded mails.

DESKTOP - You can forward emails from the My History folder and its subfolders, the History folder and its subfolders, and the Failed folders. Forwards in progress are housed in the agent's personal Drafts folder, in the Forward subfolder. When forwarding an email that failed to route, the options to reroute or junk the email will not be available.

WEB - You can forward emails from the History page. Forwards in progress are housed as drafts in the Inbox.

Agents cannot forward emails from reply mode. Instead, agents can transfer emails to internal and external destinations. For more information, see "Transferring emails to internal and external destinations" on page 365 and "Replying to emails" on page 362.

The following procedures explain how to

- Forward an email
- Discard forwards in progress

To forward an email (DESKTOP)

1. In the **My Folders** view, expand the **Folders** pane.
2. In the **Folders** pane, select either the **History**, **My History**, the **Failed** folder, or their subfolders.
3. In the **List** pane, select the email and, in the **Action** bar, click **Forward**.
4. Insert addresses in the **To:** field, and copy or blind-copy additional recipients by filling in the appropriate fields. Separate multiple addresses with semi-colons.
5. Click **Send**.

To forward an email (WEB)

1. Click **History** and, optionally, select a **Filter**.
2. Select an email or hover over the item avatar and click **Forward**.
3. Insert addresses in the **To:** field, and copy or blind-copy additional recipients by filling in the appropriate fields. Separate multiple addresses with semi-colons.
4. Click **Send**.

To discard a forward in progress (DESKTOP)

1. In the **My Folders** view, expand the **Folders** pane.
2. In the **Folders** pane, click **Drafts**. If necessary, expand the **My Folders** folder first.
3. Expand the **Drafts** folder and select **Forward**.
4. In the **List** pane, select the email and, in the **Action** bar, click **Discard Draft**.

To discard a forward in progress (WEB)

- Click **Inbox** and either select the forward in progress or hover over the item avatar and click **Discard**.

Adding attachments to emails

When replying to or forwarding an email, agents can add attachments. Agents can either drag and drop attachments into emails or add attachments by following the steps below. Note that files attached by drag-and-drop are not embedded in the body of the email. To embed an image in the body of an email, see "Inserting images in emails" on page 364.

Note that, by default, the maximum file size for emails, including attachments, signatures, and images, is 25 MB.

To add an attachment to an email (DESKTOP and WEB)

1. When replying to an email, click the **Add attachment** icon. This icon displays as a paperclip.
2. Navigate to the file and click **Open**. You can select multiple files.
3. To remove an attachment, click the **X** button beside the attachment.

Inserting images in emails

You can insert images in emails using Ignite's Insert Image button, or can drag-and-drop or copy/paste images into email responses.

Inserting an image into an email embeds the image in the body of the email at the cursor point. Dragging and dropping an image adds the image as an attachment. Copying and pasting an image into an email embeds the image in the body of the email.

50 inserted images will be visible in Ignite email responses. After 50 the images will show as an X in Ignite, but will display to the recipient in full.

Note that, by default, the maximum file size for emails, including attachments, signatures, and images, is 25 MB.

To insert images in emails (DESKTOP and WEB)

1. When replying to an email, click the **Insert picture** icon.
2. Navigate to the image and click **Open**. You can select multiple files.
3. To remove an image from an email, select the image and press the **Delete** key.

Previewing, saving, and removing attachments

NOTE: Previewing and saving attachments are currently available in Ignite desktop only. The Ignite web client allows for downloading attachments only.

Agents can preview the following attachments on incoming emails: PDF, Word, Excel, and Windows Media files (.wma). Note that these applications are not included with Ignite and must be installed on the agent's desktop for previewing to function. Agents can also save attachments to their hard drives, and remove attachments from received emails.

The following procedures explain how to

- Preview PDF, Word, Excel, and Windows Media files attachments
- Save attachments
- Remove attachments

To preview an attachment (DESKTOP)

- In the **Preview** pane, click the attachment and select **Open**.
NOTE: If the list of attachments exceeds two lines, use the scroll bar to navigate attachments.

To save an attachment (DESKTOP)

1. In the **Preview** pane, click the attachment and select **Save**. If the list of attachments exceeds two lines, use the scroll bar to navigate attachments.
2. Browse to a save location and click **Save**.
NOTE: Save dialog options may vary depending on your operating system. If more information is required, please consult Microsoft Windows documentation.

To remove attachments (DESKTOP and WEB)

1. To remove an attachment, click the **X** button beside the attachment.
2. To remove all attachments, to the right of the attachments, click the **Remove All Attachments** button.

Transferring emails to internal and external destinations

Agents can transfer emails to both internal and external destinations. For example, agents in the Support queue receiving requests for account renewals can transfer these contacts to the Sales queue. Transfers include any email attachments.

Agents transfer emails internally to other agents and to queues. To receive transfers, devices must be enabled to handle the contact's media type.

Agents who are logged out, in DND, Offline (WEB), or whose presence is Unknown cannot receive transferred emails. Agents who are either in Busy/Make Busy or at their email Workload limit can receive transferred emails.

When agents transfer emails from their Inbox, the email retains any text entered. This enables agents receiving transferred mails to see and build on responses other agents have drafted.

Agents can also transfer emails to an external email address.

NOTE:

- You may only transfer contacts if you have the appropriate permissions.
- If you are transferring an email with drafted content, the To:, CC:, and BCC: fields will be cleared and replaced by the default addresses when another agent chooses to Reply or Reply All to the email.

The following explains how to

- Transfer emails to an agent or queue
- Transfer emails to an external address

To transfer an email to an agent or queue (DESKTOP)

1. In the **Folders** pane, click **Inbox**.
NOTE: To transfer directly from the queue, select the email from the queue and, in the Action bar, click 'Transfer'. Follow steps 4 onward.
2. In the **List** pane, select an email and, in the **Action** bar, click **Reply**.
3. In the **Action** bar, click **Transfer**.
4. Select the **Internal Transfer** radio button and select an agent or queue. Expand the device list if necessary. You can search for an internal transfer destination by typing the name of an agent or queue in the 'Search' field.
5. Click **Transfer**.

To transfer an email to an agent or queue (WEB)

1. To transfer from the Inbox, click **Inbox** and select an email or hover over the item avatar.
NOTE: To transfer directly from the queue, click 'Queues', select the email and click 'Transfer'. Follow steps 4 onward.
2. Click **Reply** and select either **Reply** or **Reply All**.
3. Click **Transfer**.
4. To transfer to an agent, in the **Transfer** window click **People**, type the name, ID, or email address of an agent and proceed to step 6.
5. To transfer to a queue, in the **Transfer** window click **Queues** and select a queue from the list. To search queues, type the name of the queue in the 'Search' field.
6. To transfer the email, select the name of the appropriate agent or queue.

To transfer an email to an external address (DESKTOP)

1. In the **Folders** pane, click **Inbox**.
NOTE: To transfer directly from the queue, select the email from the queue and, in the Action bar, click 'Transfer'. Follow steps 4 onward.
2. In the **List** pane, select an email and, in the **Action** bar, click **Reply**.
3. In the **Action** bar, click **Transfer**.
4. Select the **External Transfer** radio button and, in the **Transfer To:** field, type an email address. Separate multiple addresses with semi-colons.
NOTE: Invalid entries return an error message. Re-type a valid entry and click 'Transfer'.
5. Click **Transfer**.

To transfer an email to an external address (WEB)

1. Click **Inbox** and select an email.
NOTE: To transfer directly from the queue, select the email from the queue and click 'Transfer'. Follow steps 4 onward.
2. Click **Reply** and select either **Reply** or **Reply All**
3. Click **Transfer**.
4. In the **Transfer** window, click **People** and type an email address. Separate multiple addresses with semi-colons.
5. To transfer the email, select the appropriate email address(es).

Declining emails

Agents can decline offered emails, sending contacts back to the queue as the longest waiting.

NOTE: When an agent declines a contact, they are automatically put into Busy/Make Busy across all media capabilities. A System Make Busy and a requeue count is registered for the employee. For more information, see "Setting and removing Busy/Make Busy in Ignite" on page 349.

To decline an email (DESKTOP)

1. In the **Folders** pane, click **Inbox**.
2. In the **List** pane, select an email and, in the **Action** bar, click **Decline**.

To decline an email (WEB)

- Click **Inbox** and select an email or hover over the item avatar and click **Decline**.

Marking emails as No Reply and Junk

Occasionally emails requiring no reply, like an out of office message, and junk mail, like spam, reach queues and agents' Inboxes. Agents can mark these emails either as requiring no reply or as junk.

Agents can also junk emails directly from 'Failed' rather than attempting to reroute them.

Marking contacts as No Reply and Junk removes the contacts from Ignite. If the item is in queue or the Inbox, responses in progress are deleted.

NOTE:

- Multimedia contacts in queue tagged as Junk or No Reply from Interactive Visual Queue and Ignite are not included in queue Handled, Completed, and Offered counts.
- Agents may only Junk contacts if they have the appropriate permissions.

To mark an email as No Reply or Junk (DESKTOP)

1. In the **Folders** pane, either click **Inbox**, select the queue in which the email is waiting, or select a **Failed** folder.
2. In the **List** pane, select an email and, in the **Action** bar, click either **No Reply** or **Junk**.

To mark an email as No Reply or Junk from the Inbox (WEB)

- Click **Inbox** and select an email or hover over the item avatar and click either **No Reply** or **Junk**.

To mark an email as No Reply or Junk from the queue (WEB)

1. Click **Queues** and select an email queue.
2. Select an email or hover over the item avatar and click either **No Reply** or **Junk**.

Placing emails on hold and retrieving emails from hold

Agents may have to stop working on one email in order to work on other items. In these cases, agents can put the active email on hold. Contacts on hold are marked with a 'pause' icon.

Note that administrative configurations may limit how long contacts may be on hold before being requeued and a System Make Busy is registered for the employee. For information on this limit, contact your supervisor or system administrator.

The following procedures explain how to

- Place an email on hold
- Retrieve an email from hold

To place an email on hold (DESKTOP)

- When replying to an email, click the **Hold** button.

To place an email on hold (WEB)

- Click **Inbox** and select an email, or hover over the item avatar, and click **Hold**.

To retrieve an email from hold (DESKTOP)

1. In the **Folders** pane, click **Inbox** and, in the **List** pane, select the email on hold.
2. In the **Action** bar, click **Remove Hold**.

To retrieve an email from hold (WEB)

- Click **Inbox** and select an email on hold or hover over the item avatar and click **Remove Hold**.

Correcting spelling in email responses

Ignite provides automatic spell checking of email responses. Incorrectly spelled words are underlined in red and can be corrected via a right-click menu.

Ignite's spell check button is located in the formatting toolbar, along with additional formatting options. Ignite's spell checking function assists agents in sending polished responses to customers.

NOTE:

- Russian and Mandarin Chinese are not supported.
- Grammar checking is not supported.

The following explains how to

- Correct spelling in email responses
- Ignore flagged words
- Undo spell checking changes
- Change the dictionary's language

- Add words to your personal dictionary
- Clear additions to your personal dictionary
- Toggle spell checking on or off

To correct spelling in an email response

- Right-click an underlined word and select the correct spelling from the list provided.

To ignore flagged words

- Right-click an underlined word and select **Ignore**.

To undo spell checking changes

NOTE: This function reverts words to their original spelling. It does not clear additions made to the dictionary.

- In the Ignite formatting toolbar, click the **Undo** button.

To change the dictionary's language

- In the Ignite formatting toolbar, from the dictionary language drop-down list, select a language. See Figure 50.

NOTE: Ignite remembers this selection for future replies.

To add words to your personal dictionary

- Right-click an underlined word and select **Add to personal dictionary**.

To clear additions to your personal dictionary

NOTE: This option clears all additions to your personal dictionary.

1. In the Ignite formatting toolbar, click the **Delete Personal Dictionary** button. (See Figure 50.)
2. Either refresh the page or log out of Ignite and log back in for the changes to take effect.

To toggle spell checking on or off

- Click the **Spellcheck As You Type** button. (See Figure 50.)

NOTE: Ignite remembers this selection for future replies.

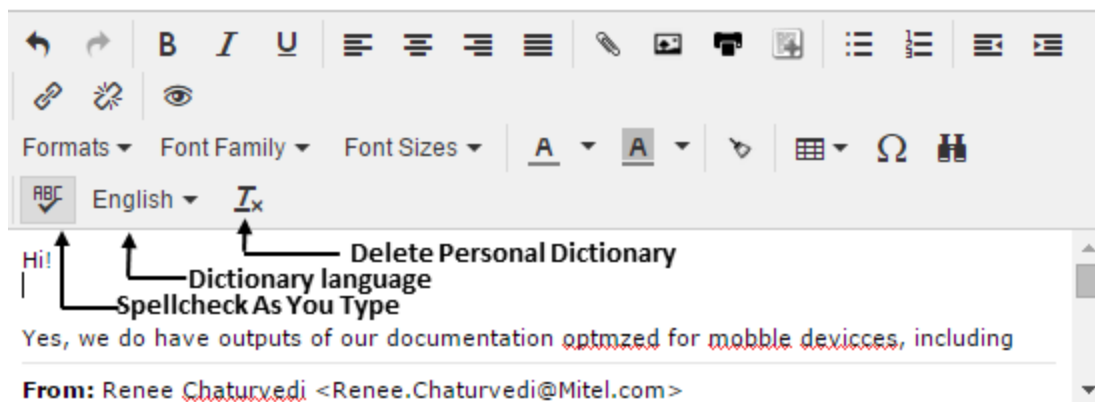


Figure 50: Spell check options

Applying reply templates to emails

Agents can apply reply templates to emails, providing standardized responses to common questions and requests. Once applied, responses can be edited as required.

The following procedures explain how to

- Apply reply templates to emails using predictive text
- Apply reply templates by browsing and selecting

To apply reply templates to emails using predictive text

1. When an email is in reply mode, place the cursor in the body of the email response.
2. On the formatting toolbar, click the **Reply Template** button.
3. In the **Reply Template** window, begin typing text that the template contains. Templates matching the text will display.
4. Select template text from the list provided.
5. To insert the text, in the **Reply Template** window, click the **check mark** icon. The text is inserted in the email, at the cursor point.
6. Optionally, delete the text from the window and repeat the above steps.

To apply reply templates by browsing and selecting

1. When an email is in reply mode, place the cursor in the body of the email response.
2. On the formatting toolbar, click the **Reply Template** button.
3. In the **Reply Template** window, click the **Browse Reply Templates** button. See Figure 51.
4. From the **Browse Reply Templates** window, select the template from the options listed.
5. To insert the text, in the **Reply Template** window, click the **check mark** icon. The text is inserted in the email, at the cursor point.
6. Optionally, delete the text from the window and repeat the above steps.

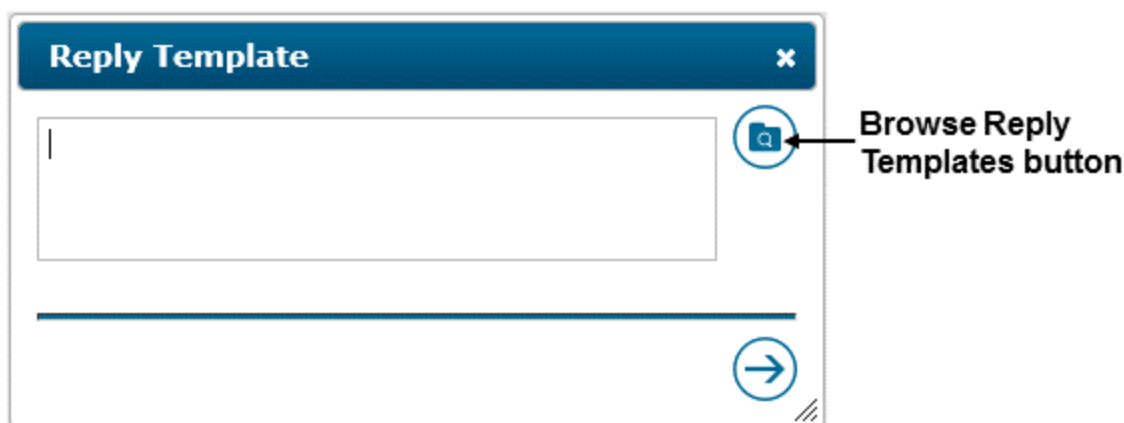


Figure 51: Browse Reply Templates button

Applying personalized signatures to emails

If allowed, agents can apply personalized signatures to emails. Personalized signatures can be created as templates, which can then be applied to email responses. For more information, see "Applying reply templates to emails" on page 370. Once applied, signatures can be edited as required. Agents can also cut-and-paste signatures into emails.

NOTE: Creating templates is an administrative configuration. For information on whether personalized signatures are allowed, contact your supervisor or system administrator.

Rerouting failed emails

If emails fail to route, they are stored in Ignite's Failed folder (DESKTOP) or in the History page under Failed (WEB). Ignite's Reroute button removes emails from these locations and attempts to transfer them back to the queue.

Agents may also mark these emails as Junk or forward the email. Forwarding emails from Failed does not remove the original copy from these locations. Forwards in progress are housed in the agent's personal Drafts folder (DESKTOP), in the Forward subfolder (DESKTOP) or in the Inbox (WEB). If you reroute an email that has existing forward drafts, the drafts will be deleted.

For information on handling bounced and oversized emails, see "Handling bounced emails" on page 372 and "Handling oversized emails" on page 372.

We recommend that agents and supervisors check Ignite frequently in order to reroute emails that failed to route.

NOTE:

- **DESKTOP** - Under Processed, supervisors may see all emails that failed to route. Agents may only see emails sent to the queues for which they answer.
- **WEB** - In History=>Failed, supervisors will see all emails that failed to route. Agents may only see emails sent to the queues for which they answer.
- While rerouting emails removes them from Failed immediately, there may be a delay before the emails are transferred back to the queue.
- Agents may only Junk contacts if they have the appropriate permissions.

To reroute emails in the Failed folder (DESKTOP)

1. In the **My Folders** view, expand the **Folders** pane.
2. In the **Folders** pane, select a **Failed** folder.
3. In the **List** pane, select an email and, in the **Action** bar, click **Reroute**. Alternatively, click **Junk** to mark the email as Junk and remove it from the Failed folder or click **Forward** to send the email to a recipient.

To reroute emails from Failed (WEB)

1. Click **History=>Failed**.
2. Select an email or hover over the item avatar and click either **Reroute**, **Junk**, or **Forward**. If you select 'Forward,' the contact is delivered to the Inbox where you can specify recipients.

Handling oversized emails

Depending on administrative settings, an error message displays if you attempt to send an email that exceeds the maximum message size. You can then edit the email to reduce its size and attempt to resend the email.

If administrative settings do not match the limits of your organization's mail server, you may not receive the error message. Subsequently, Ignite displays the following behavior:

DESKTOP - The email fails to send and displays in the Failed to Send subfolder (contained in the Failed folder), where it can be selected, edited to reduce its size, and re-sent. Failed to Send emails also display in the supervisor's Failed to Send folder, where they can optionally edit and resend them if the associated agent is inactive.

When there are items in the Failed to Send subfolder, the font color of this folder name, and of the parent Failed folder, display in red, followed by a number indicating how many active items currently reside in the folder.

WEB - The email fails to send and displays in the Inbox where it can be selected, edited to reduce its size, and re-sent. Items that fail to send are marked in red, with 'Send Failure' text. Supervisors can also view these items in History.

Handling bounced emails

Depending on administrative settings, you may be required to handle bounced emails. These are sent emails that failed to route due to out of office auto-responses, lack of space in the receiver's inbox, delays caused by the mail server, and invalid addresses.

If your system is configured to support bounced email detection, and you have one or more bounced emails pending, Ignite displays the following behavior:

DESKTOP - The number of bounced items displays beside your Auto Replies/Failed Delivery subfolder (contained in the Failed folder). The font color of this folder name, and of the parent Failed folder, displays in red. You can select an item and either Junk or forward it.

WEB - Bounced items display in the Inbox and are marked in red, with 'Auto-Reply' text. You can select an item and either Junk or forward it. Supervisors can also view these items in History.

Sending outbound emails

NOTE:

- Real-time and reporting statistics are not available for outbound email activity at this time. We recommend instead that agents put themselves into Busy/Make Busy, with an 'Outbound email' Reason Code applied, when drafting outbound emails. Make Busy reports and real-time queue statistics will then display time spent drafting outbound emails.
- If contact centers use preferred agent routing, we recommend that agents do not adjust case and ticket numbers in email subject lines. Removing or otherwise altering case and ticket numbers in subject lines can interfere with preferred agent routing.

DESKTOP - Outbound emails in progress are housed in the agent's personal Drafts folder, in the New Emails subfolder. This functionality is available to employees with email agents answering for queues. Agents can only send outbound emails from the email queues for which they answer.

WEB - Outbound emails in progress are housed in the Inbox, marked as 'Draft'.

By default, the maximum file size for emails, including attachments, signatures, and images, is 25 MB.

Queue signatures are automatically inserted in outbound emails, if signatures are configured for the queue. Queue signatures are inserted each time a queue is selected as the 'From' address.

If you are permitted to use personalized signatures in outbound emails, see "Applying personalized signatures to emails" on page 371.

Agents can perform common email functions when sending outbound emails, including inserting images, attachments, and applying reply templates to email drafts. See the appropriate topics in this guide for applicable procedures.

Outbound email functionality supports preferred agent routing, to enable ongoing conversations between agents and email recipients.

The following procedures explain how to

- Send outbound emails
- Discard outbound emails in progress
- Search for outbound emails

To send an outbound email (DESKTOP)

NOTE: Account codes are not supported for outbound emails.

1. In the **My Folders** view, expand the **Folders** pane.
2. In the **Action** bar, click **New Email**.
3. In the **Preview** pane, click **From...** and select an email queue.
NOTE: Queue signatures are inserted each time a queue is selected as the 'From' address.
4. Insert addresses in the **To:** field, and copy or blind-copy additional recipients by filling in the appropriate fields. Separate multiple addresses with semi-colons.
5. Type the email's contents and, in the **Action** bar, click **Send**. An icon displays over the Preview pane, indicating the email is being sent.
The email queue signature is inserted in the draft email.

To send an outbound email (WEB)

1. Click **Contacts**.
2. If the email destination is not a recent contact, type the email address in the **Search** field.
3. Hover over the appropriate address and click the **Email** icon. For emails to agents, a colored outline over the destination avatar indicates its availability.
4. Click **From...** and select an email queue.
NOTE: Queue signatures are inserted each time a queue is selected as the 'From' address. Agents are responsible for deleting non-applicable queue signatures from outbound email drafts.
5. Type the email's contents and click **Send**.
NOTE: If Contacts is open, click Contacts again to close the window and expose the desired controls.

To discard an outbound email in progress (DESKTOP)

1. In the **My Folders** view, expand the **Folders** pane.
2. In the **Folders** pane, click **Drafts**. If necessary, expand the **My Folders** folder first.
3. Expand the **Drafts** folder and select **New Emails**.
4. In the **List** pane, select the outbound email and, in the **Action** bar, click **Discard Draft**.
5. To search for an outbound email in the Drafts folder, see the procedure below.

To discard an outbound email in progress (WEB)

NOTE: If Contacts is open, click Contacts again to close the window and expose the desired controls.

- Click **Inbox** and select a draft or hover over the item avatar and click **Discard**.

To search for an outbound email in the Drafts folder (DESKTOP)

NOTE: The Drafts folder contains the agent's emails in progress. To search for sent outbound emails, search the Sent folder.

1. In the **My Folders** view, expand the **Folders** pane.
2. In the **Folders** pane, click **Drafts**. If necessary, expand the **My Folders** folder first.
3. Expand the **Drafts** folder and select **New Emails**.
4. If required, in the **Search** field, click the **x** button to clear the pane.
5. In the **Search** field, type keywords over the ghost text.
See "Searching Ignite" on page 340 for detailed search information and procedures.

To search for an outbound email (WEB)

1. Click **History** and select **Sent**.
2. In the search field, type keywords over the ghost text.
See "Performing keyword searches" on page 341 for detailed search information and procedures.

HANDLING CHATS IN IGNITE

Handling chats in Ignite mirrors common instant messaging applications, providing a familiar and user-friendly experience. Chat sessions are initiated by customers via your contact center's chat request page or corporate website.

Contacts are automatically sent to your Inbox if you are the longest idle agent, the preferred agent, or the agent with the highest skill level in your agent group, if your agent group uses skill levels. Agents can also pick chat contacts out of queue.

The following explains how to:

- Preview chat contacts
- Pick chat requests out of queues
- Join chat sessions
- Decline chat contacts
- Chat with customers
- Correct spelling in chat responses
- Apply reply templates to chat responses
- Place chat sessions on hold and retrieve chat sessions from hold
- Join the longest waiting active chat session (DESKTOP)
- Transfer chats
- Leave chat sessions
- Forward chat transcripts
- Remove Failed chat transcripts from Ignite

NOTE: DESKTOP - To complete the following procedures, you must be in Ignite's My Folder's View.

Previewing chat contacts

If administrative configurations permit, agents can preview contacts before picking them out of queue or handling them.

The following explains how to

- Preview chat contacts waiting in the Inbox
- Preview chats waiting in queue

To preview a chat contact in your Inbox (DESKTOP)

1. From the **Folders** pane, click **Inbox**.
2. From the **List** pane, select the chat contact to preview.
The chat contact displays in the Preview pane.

To preview a chat contact in your Inbox (WEB)

- Click **Inbox** and select a chat to preview.

To preview a chat contact waiting in queue (DESKTOP)

1. From the **Folders** pane, click a queue.
2. From the **List** pane, select the chat contact to preview.
The chat contact displays in the Preview pane.

To preview a chat contact waiting in queue (WEB)

1. Click **Queues** and select a queue.
2. Select a chat contact to preview.

Picking chat requests out of queue

Pick behavior occurs in the following ways: First, agents can pick contacts out of queue and send them to the Inbox. Once ringing in the Inbox, the contact can be handled. Second, agents can choose to pick and reply to a contact in one motion. Choosing to pick and reply sends the contact to the agent's Inbox and immediately opens the contact in reply mode.

Chat contacts picked out of queue ring in the Inbox until the contact is accepted. For more information on ringing behavior, see "Ringing states in Ignite" on page 355.

NOTE:

- Agents cannot pick or pick and reply to contacts from the queue if they are in Do Not Disturb.
- Agents may only pick or pick and reply to contacts from the queue if they have the appropriate permissions.

The following procedures explain how to

- Pick a chat request out of a queue
- Pick and automatically join a chat session

To pick a chat request out of a queue (DESKTOP)

1. From the **Folders** pane, select the queue from which a contact will be picked.
2. From the **List** pane, select a chat from the queue and, from the **Action** bar, click the **Pick** button.
The chat is transferred to your Inbox.
3. To handle the chat, select **Inbox** and, in the **List** pane, select the chat.
NOTE: Additional handling options display in the Action bar. For information on handling the chat, see the appropriate procedures in this section.

To pick a chat request out of a queue (WEB)

1. Click **Queues** and select a queue.
2. Select a contact or hover over the item avatar and click **Pick=>Pick**.
The chat is transferred to your Inbox.
3. To handle the chat, click **Inbox** and select the chat or hover over the item avatar.

To pick and automatically join a chat session (DESKTOP)

1. In the **Folders** pane, select the queue from which a chat will be picked.
2. In the **List** pane, select a chat from the queue and, from the **Action** bar, click the **Pick & Reply** button.
The chat is transferred to your Inbox.
3. In the **Preview** pane, agents can respond to the chat, transfer the chat to another destination, or put the chat session on hold.
NOTE: Additional handling options display in the Action bar. For information on handling the chat, see the appropriate procedures in this section.

To pick and automatically join a chat session (WEB)

1. Click **Queues** and select a queue.
2. Select a contact or hover over the item avatar and click **Pick=>Pick and Reply**.
The contact is transferred to your Inbox and opens in reply mode.

Joining chat sessions

When a chat session arrives in an agent's Inbox, agents can join the session and start responding to the contact.

Agents can join sessions via Ignite's toaster or UI.

To join a chat session (DESKTOP)

1. In the **Folders** pane, click **Inbox**.
2. In the **List** pane, select a chat session and, in the **Action** bar, click **Reply**.
3. In the **Preview** pane, agents can respond to the chat, transfer the chat to another destination, or put the chat session on hold.
NOTE: Additional handling options display in the Action bar. For information on handling the chat, see the appropriate procedures in this section.

To join a chat session (WEB)

- Click **Inbox** and select a chat session or hover over the item avatar and click **Accept**.

Declining chat contacts

Agents can decline a chat contact in their Inbox, sending the chat back to the queue where it retains its queue priority.

Agents can decline sessions via Ignite's toaster or UI.

NOTE: When an agent declines a contact, they are automatically put into Busy/Make Busy across all media capabilities. A System Make Busy and a requeue count is registered for the employee. For more information, see "Setting and removing Busy/Make Busy in Ignite" on page 349.

To decline a chat contact (DESKTOP)

1. In the **Folders** pane, click **Inbox**.
2. In the **List** pane, select a chat and, in the **Action** bar, click **Decline**.

To decline a chat contact (WEB)

- Click **Inbox** and select a chat or hover over the item avatar and click **Decline**.

Chatting with customers

After you join a chat session, Ignite goes into Reply mode and the Input pane appears, enabling you to chat with the customer.

Figure 52 presents the Input pane during a chat session.

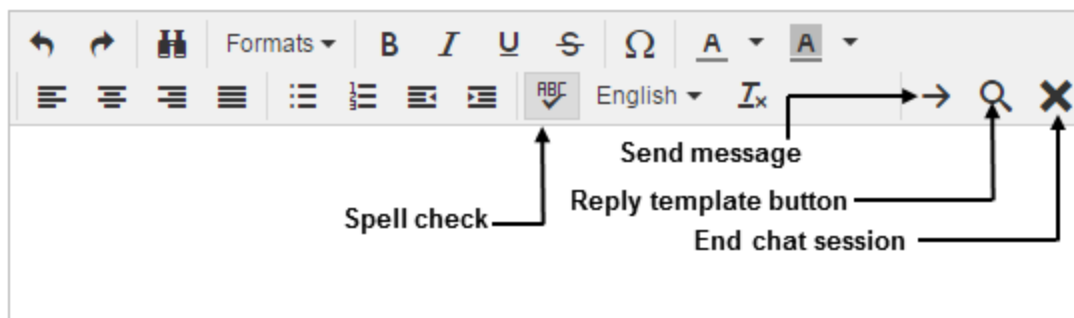


Figure 52: Chat Input pane

Ignite indicates to agents and customers that the other is typing a response. Ignite indicates that customers have sent a response in an active chat as follows:

- **DESKTOP** - When the Inbox is not in focus and a customer sends a message in an active chat, an orange indicator alerts agents and displays a number listing how many contacts are waiting for replies.
- **WEB** - When Ignite is not in focus, a notification indicates that the customer has entered a response. When Ignite is in focus but the active chat is not selected, an exclamation mark displays beside the contact and a notification displays. Clicking a notification takes you to the relevant contact.

NOTE: Internet Explorer does not pop notifications when Ignite is not in focus.

Ignite permits content to be copied and pasted from other sources and turns URLs into hyperlinks.

Ignite supports embedding content from Google Maps in chat sessions. However, this requires the use of embed maps URL, available from Google Maps, to embed a Google map, such as: `<iframe src="https://www.google.com/maps/embed?pb=!1m18!1m12!1m3!1d2804.500978803945!2d-75.90911198444678!3d45.3386984790996!2m3!1f0!2f0!3f0!3m2!1i1024!2i768!4f13.1!3m3!1m2!1s0x4cd1fff1517da8a9%3A0xe6bc8a721e90f2a5!2sMitel+Networks!5e0!3m2!1sen!2sus!4v1445531227487" width="600" height="450" frameborder="0" style="border:0" allowfullscreen"></iframe>`

Ignite also supports the 'Share' link from the following websites. Cutting and pasting URLs from the following sites embeds the content in a chat session.

- <https://twitter.com/>
- <http://www.slideshare.net>
- <https://soundcloud.com>
- <http://www.youtube.com>

If your message fails to send, a red icon displays beside the unsent message. To resend the message, you can copy and paste the message from your chat window or you can retype it.

To chat with a contact (DESKTOP and WEB)

- Type a message in the **Input** pane and either press **Enter** or click the **Send Message** button.

Correcting spelling in chat responses

Ignite provides automatic spell checking of chat responses. Incorrectly spelled words are underlined in red and can be corrected via a right-click menu.

Ignite's spell check button is located in the formatting toolbar, along with additional formatting options. Ignite's spell checking function assists agents in sending polished responses to customers.

NOTE:

- Russian and Mandarin Chinese are not supported.
- Grammar checking is not supported

The following explains how to

- Correct spelling in chat responses
- Ignore flagged words
- Undo spell checking changes
- Change the dictionary's language
- Add words to your personal dictionary
- Clear additions to your personal dictionary
- Toggle spell checking off or on

To correct spelling in a chat response

- Right-click an underlined word and select the correct spelling from the list provided.

To ignore flagged words

- Right-click an underlined word and select **Ignore**.

To undo spell checking changes

NOTE: This function reverts words to their original spelling. It does not clear additions made to the dictionary.

- In the Ignite formatting toolbar, click the **Undo** button.

To change the dictionary's language

- In the Ignite formatting toolbar, from the dictionary language drop-down list, select a language. (See Figure 53.)

NOTE: Ignite remembers this selection for future chat sessions.

To add words to your personal dictionary

- Right-click an underlined word and select **Add to personal dictionary**.

To clear additions to your personal dictionary

NOTE: This option clears all additions to your personal dictionary.

1. In the Ignite formatting toolbar, click the **Delete Personal Dictionary** button. (See Figure 53.)
2. Either refresh the page or log out of Ignite and log back in for the changes to take effect.

To toggle spell checking on or off

- Click the **Spellcheck As You Type** button. (See Figure 53.)
NOTE: Ignite remembers this selection for future chat sessions.

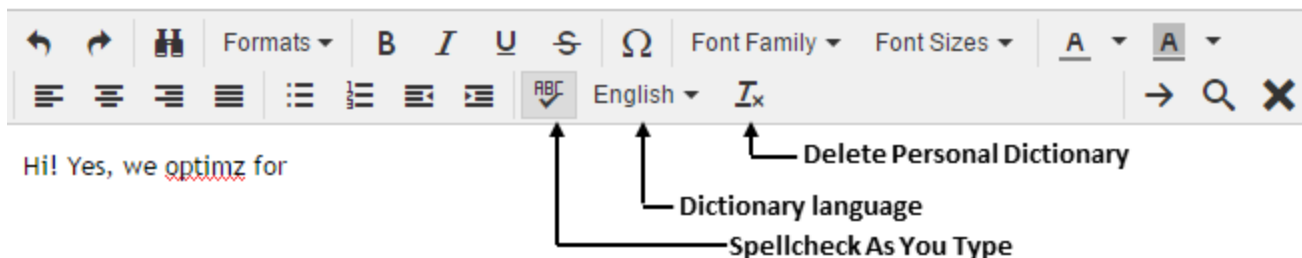


Figure 53: Spell check options in the Input pane

Applying reply templates to chat responses

Agents can apply templates to their chat responses, providing standardized responses to common questions and requests.

To apply a reply template to a chat response

- When a chat is in reply mode, place the cursor in the body of the chat response.
- Click the **Reply Template** button.
- Type the text that the template contains.
 Templates matching the text display.
- Select a template text from the list provided.
- Press **Enter**.
 Template mode changes back to Reply mode.
- Click **Reply** to send the message with the template.

Placing chat sessions on hold and retrieving chat sessions from hold

Agents may have to stop participating in one chat session in order to work on other items. In this case, agents can put the active chat session on hold. Contacts on hold are marked with a 'pause' icon.

Note that administrative configurations may limit how long contacts may be on hold before being requeued and a System Make Busy is registered for the employee. For information on this limit, contact your supervisor or system administrator.

The following procedures explain how to

- Place a chat session on hold
- Retrieve a chat session from hold

To place a chat session on hold (DESKTOP)

- When participating in a chat session, in the **Action** bar, click the **Hold** button.

To place a chat session on hold (WEB)

- Click **Inbox** and select the chat or hover over the item avatar and click **Hold**.

To retrieve a chat session from hold (DESKTOP)

NOTE: You can also retrieve a session from hold by sending a response.

1. Select your **Inbox** and, in the **List** pane, select the chat on hold.
2. In the **Action** bar, click **Remove Hold**.
The chat session becomes active again.

To retrieve a chat session from hold (WEB)

NOTE: You can also retrieve a session from hold by sending a response.

- Click **Inbox** and select a chat on hold or hover over the item avatar and click **Remove Hold**.

Joining the longest waiting active chat session (DESKTOP)

Agents can switch between active chat sessions according to how long they have been waiting for a response by using the 'Next Longest' button in the Action bar. The 'Next Longest' button applies to all active conversations in the agent's Inbox, directing agents to the chat session that has been open and unfinished the longest.

For example, an agent is handling three different chat sessions. Clicking 'Next Longest' highlights the active chat session to the chat session that has been waiting the longest for an agent response and switches that conversation back into the Active Contact pane.

When switching between active conversations, the chat session indicates that the agent is joining and leaving the chat session as appropriate.

To reply to the longest waiting chat session

1. In the **Folders** pane, select **Inbox**.
2. In the **List** pane, select an active chat.
An active chat is one that is no longer ringing and has been joined.
3. In the **Action** bar, click **Next Longest**.
The system takes you to the next longest waiting active chat session in the Inbox.

Transferring chats

Chat sessions can be transferred to other destinations within a contact center. For example, agents in the Support queue receiving enquiries about a product invoice can transfer these contacts to the Sales queue.

Agents transfer chat sessions to other agents and to queues. To receive transfers, devices must be enabled to handle the contact's media type.

Agents who are logged out, in DND, Offline (WEB), or whose presence is unknown cannot receive transferred chats. Agents who are either in Busy/Make Busy or at their chat Workload limit can receive transferred chats.

NOTE: You may only transfer contacts if you have the appropriate permissions.

To transfer a chat (DESKTOP)

1. In the **Folders** pane, click **Inbox**.
2. In the **List** pane, select a chat and, in the **Action** bar, click **Reply**.
3. In the **Action** bar, click **Transfer**.
4. Select an agent or a queue.
NOTE: You can search for a transfer destination by typing the name of an agent or queue in the Search field.
5. Click **Transfer**.

To transfer a chat (WEB)

1. Click **Inbox** and select a chat or hover over the item avatar and click **Accept**.
NOTE: To transfer directly from the queue, click 'Queues', select the chat or hover over the item avatar and click 'Transfer'. Follow steps 3 onward.
2. Select the chat or hover over the item avatar and click **Transfer**.
3. To transfer to an agent, in the **Transfer** window click **People**, type the name or ID of an agent and proceed to step 5.
4. To transfer to a queue, in the **Transfer** window click **Queues** and select a queue from the list. To search queues, type the name of the queue in the 'Search' field.
5. To transfer the chat, select the name of the appropriate person or queue.

Leaving chat sessions

When an agent is finished with a contact, the agent can end the chat session. When an agent leaves a chat session, a message is sent in the chat session stating that the session is complete.

To leave a chat session (DESKTOP AND WEB)

1. When participating in an active chat session, click the **End Your Session** button.
The End Your Session button displays as an X.
2. When prompted, click **Yes**.

Forwarding chat transcripts

You can forward chat transcripts to multiple parties as an email with additional recipients copied and blind-copied.

Forwards in progress are housed in the agent's personal Drafts folder (DESKTOP), in the Forward subfolder (DESKTOP) or in the Inbox (WEB).

The following procedures explain how to

- Forward a chat transcript
- Discard forwards in progress

To forward a chat transcript (DESKTOP)

1. In the **Folders** pane, select either **History**, **My History**, one of the **Handled** subfolders, or one of the **Failed** folders.
2. In the **List** pane, select a chat transcript and, in the **Action** bar, click **Forward**.
3. Insert addresses in the **To:** field, and copy or blind-copy additional recipients by filling in the appropriate fields. Separate multiple addresses with semi-colons.
4. Click **Send**. An icon displays over the Preview pane, indicating the transcript is being sent.
NOTE: If you attempt to forward a transcript and receive a warning that the email address is invalid, the queue that handled the chat may not have been configured for sending transcripts. Contact your supervisor or system administrator.

To forward a chat transcript (WEB)

1. Click **History** and, optionally, select a **Filter**.
2. Select a chat transcript or hover over the item avatar and click **Forward**.
3. Insert addresses in the **To:** field, and copy or blind-copy additional recipients by filling in the appropriate fields. Separate multiple addresses with semi-colons.
4. Click **Send**.

To discard a forward in progress (DESKTOP)

NOTE: You can also discard forwards in progress by clicking 'Discard Draft' in the Action bar instead of 'Send'.

1. In the **My Folders** view, expand the **Folders** pane.
2. In the **Folders** pane, click **Drafts**. If necessary, expand the **My Folders** folder first.
3. Expand the **Drafts** folder and select **Forward**.
4. In the **List** pane, select the transcript and, in the **Action** bar, click **Discard Draft**.

To discard a forward in progress (WEB)

- Click **Inbox** and either select the forward in progress or hover over the item avatar and click **Discard**.

Removing failed chat transcripts from Ignite

Occasionally, chat transcripts may route to 'Failed' in Ignite. You can remove these transcripts from Failed using Ignite's Junk and Forward buttons.

NOTE: Agents may only Junk contacts if they have the appropriate permissions.

To remove a failed chat transcript from Ignite (DESKTOP)

1. In the **Folders** pane, select a **Failed** folder.
2. In the **List** pane, select a chat transcript and, in the **Action** bar, click either **Junk** or **Forward**.

To remove a failed chat transcript from Ignite (WEB)

1. Click **History=>Failed**.
2. Select a chat transcript or hover over the item avatar and click either **Junk** or **Forward**.
If you select Forward, the contact is delivered to the Inbox where you can specify recipients.

HANDLING SMS IN IGNITE

Handling SMS in Ignite mirrors common instant messaging applications, providing a familiar and user-friendly experience.

SMS sessions are initiated by customers using contact information or, optionally, through the contact center's SMS request page or corporate website. SMS contacts are then routed to appropriate queues.

Contacts are automatically sent to your Inbox if you are the longest idle agent or the agent with the highest skill level in your agent group, if your agent group uses skill levels. Agents can also pick SMS contacts out of queue.

NOTE:

- SMS agent responses cannot contain more than 320 characters.
- Preferred agent routing is not supported.

The following explains how to:

- Preview SMS contacts
- Pick SMS contacts out of queues
- Join an SMS session
- Reply to SMS contacts
- Decline SMS contacts
- Correct spelling in SMS responses
- Apply reply templates to SMS responses
- Place SMS sessions on hold and retrieve SMS sessions from hold
- Join the longest waiting active SMS session (DESKTOP)
- Transfer SMS contacts
- End SMS sessions
- Forward SMS transcripts
- Remove Failed SMS transcripts from Ignite
- Mark SMS contacts as No Reply and Junk
- Send outbound SMS contacts

NOTE: DESKTOP - To complete the following procedures, you must be in Ignite's My Folder's View.

Previewing SMS contacts

If administrative configurations permit, agents can preview contacts before picking them out of queue or handling them.

The following explains how to

- Preview SMS contacts in the Inbox
- Preview SMS contacts in queue

To preview an SMS contact in the Inbox (DESKTOP)

1. From the **Folders** pane, click **Inbox**.
2. From the **List** pane, select the SMS contact to preview.
The SMS contact displays in the Preview pane.

To preview an SMS contact in the Inbox (WEB)

- Click **Inbox** and select an SMS to preview.

To preview an SMS contact in queue (DESKTOP)

1. From the **Folders** pane, click a queue.
2. From the **List** pane, select the SMS contact to preview.
The SMS contact displays in the Preview pane.

To preview an SMS contact in queue (WEB)

1. Click **Queues** and select a queue.
2. Select an SMS to preview.

Picking SMS contacts out of queue

Pick behavior occurs in the following ways:

First, agents can pick contacts out of queue and send them to the Inbox. Once ringing in the Inbox, the contact can be handled.

Second, agents can choose to pick and reply to a contact in one motion. Choosing to pick and reply sends the contact to the agent's Inbox and immediately opens the contact in reply mode.

SMS contacts picked out of queue ring in the Inbox until the contact is accepted. For more information on ringing behavior, see "Ringing states in Ignite" on page 355.

NOTE:

- Agents cannot pick or pick and reply to contacts from the queue if they are in Do Not Disturb.
- Agents may only pick or pick and reply to contacts from the queue if they have the appropriate permissions.

The following procedures explain how to

- Pick an SMS contact out of queue and handle the SMS
- Pick and automatically reply to an SMS

To pick an SMS out of queue and handle the SMS (DESKTOP)

1. From the **Folders** pane, select the queue from which a contact will be picked.
2. From the **List** pane, select an SMS contact from the queue and, from the **Action** bar, click the **Pick** button.
The SMS contact is transferred to your Inbox.
3. To handle the SMS contact, select **Inbox** and, in the **List** pane, select the SMS contact.
NOTE: Additional handling options display in the Action bar. For information on handling the SMS contact, see the appropriate procedures in this section.

To pick an SMS out of queue and handle the SMS (WEB)

1. Click **Queues** and select the appropriate queue.
2. Select a contact or hover over the item avatar and click **Pick=>Pick**.
The SMS is transferred to your Inbox.
3. To handle the SMS, click **Inbox** and select the SMS or hover over the item avatar.

To pick and automatically reply to an SMS (DESKTOP)

1. In the **Folders** pane, select the queue from which an SMS contact will be picked.
2. In the **List** pane, select an SMS contact from the queue and, from the **Action** bar, click the **Pick & Reply** button.
The SMS contact is transferred to your Inbox.
3. In the **Preview** pane, agents can respond to the SMS contact, transfer the SMS contact to another destination, or put the SMS contact on hold.
NOTE: Additional handling options display in the Action bar. For information on handling the SMS contact, see the appropriate procedures in this section.

To pick and automatically reply to an SMS (WEB)

1. Click **Queues** and select the appropriate queue.
2. Select a contact or hover over the item avatar and click **Pick=>Pick and Reply**.
The SMS is transferred to your Inbox and opens in reply mode.

Joining SMS sessions

When an SMS contact arrives in an agent's Inbox, agents can join the session and start responding to the contact.

Agents can join sessions via Ignite's toaster or UI.

To join an SMS session (DESKTOP)

1. In the **Folders** pane, click **Inbox**.
2. In the **List** pane, select an SMS contact and, in the **Action** bar, click **Reply**.
3. In the **Preview** pane, agents can respond to the SMS contact, transfer the SMS contact to another destination, or put the SMS session on hold.
NOTE: Additional handling options display in the Action bar. For information on handling the SMS contact, see the appropriate procedures in this section.

To join an SMS session (WEB)

- Click **Inbox** and select an SMS session or hover over the item avatar and click **Accept**.

Replying to SMS contacts

Once an SMS contact is in the Inbox, agents can reply to or otherwise handle it.

After you join an SMS session, Ignite goes into Reply mode and the Input pane displays, enabling you to reply to the contact. Send responses using the arrow button.

Declining SMS contacts

Agents can decline an offered SMS contact, sending the contact back to the queue where it retains its queue priority.

Agents can decline sessions via Ignite's toaster or UI.

NOTE: When an agent declines a contact, they are automatically put into Busy/Make Busy across all media capabilities. A System Make Busy and a requeue count is registered for the employee. For more information, see "Setting and removing Busy/Make Busy in Ignite" on page 349.

To decline an SMS contact (DESKTOP)

1. In the **Folders** pane, click **Inbox**.
2. In the **List** pane, select an SMS contact and, in the **Action** bar, click **Decline**.

To decline an SMS contact (WEB)

- Click **Inbox** and select an SMS contact or hover over the item avatar and click **Decline**.

Correcting spelling in SMS responses

Ignite provides automatic spell checking of SMS responses, assisting agents in sending polished, professional, and consistent content to customers. Incorrectly spelled words are underlined in red and can be corrected using a right-click menu.

The spell check button is located in the formatting toolbar, along with additional formatting options.

NOTE:

- Russian and Mandarin Chinese are not supported.
- Grammar checking is not supported.

The following explains how to

- Correct spelling in SMS responses
- Ignore flagged words
- Undo spell checking changes
- Change the dictionary's language
- Add words to your personal dictionary
- Clear additions to your personal dictionary
- Toggle spell checking on or off

To correct spelling in an SMS response

- Right-click an underlined word and select the correct spelling from the list provided.

To ignore flagged words

- Right-click an underlined word and select **Ignore**.

To undo spell checking changes

NOTE: This function reverts words to their original spelling. It does not clear additions made to the dictionary.

- In the Ignite formatting toolbar, click the **Undo** button.

To change the dictionary's language

- In the Ignite formatting toolbar, from the dictionary language drop-down list, select a language. See Figure 54.

NOTE: Ignite remembers this selection for future SMS sessions.

To add words to your personal dictionary

- Right-click an underlined word and select **Add to personal dictionary**.

To clear additions to your personal dictionary

NOTE: This option clears all additions to your personal dictionary.

1. In the Ignite formatting toolbar, click the **Delete Personal Dictionary** button. (See Figure 54.)
2. Either refresh the page or log out of Ignite and log back in for the changes to take effect.

To toggle spell checking on or off

- Click the **Spellcheck As You Type** button. (See Figure 54.)

NOTE: Ignite remembers this selection for future SMS sessions.

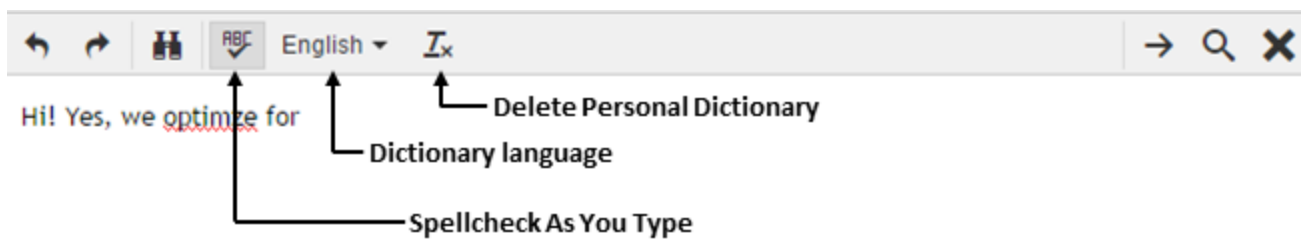


Figure 54: Spell check options in the Input pane

Applying reply templates to SMS responses

Agents can apply templates to their SMS responses, providing standardized responses to common questions and requests.

To apply a reply template to an SMS response

1. When an SMS contact is in reply mode, place the cursor in the body of the response.
2. Click the **Browse Reply Templates** button.
The Browse Reply Template button displays as a magnifying glass in the formatting toolbar.
3. Type the text that the template contains.
Templates matching the text display.
4. Select a template text from the list provided.
5. Press **Enter** and click **Insert Template**.
Template mode changes back to Reply mode.
6. Click **Send Message** to send the message with the template.

Placing SMS sessions on hold and retrieving SMS sessions from hold

At times, agents may have to stop participating in an SMS session in order to work on other items. In these cases, agents can put the active SMS session on hold. Contacts on hold are marked with a 'pause' icon.

Note that administrative configurations may limit how long contacts may be on hold before being requeued and a System Make Busy is registered for the employee. For information on this limit, contact your supervisor or system administrator.

The following procedures explain how to

- Place an SMS session on hold
- Retrieve an SMS from hold

To place an SMS session on hold (DESKTOP)

- When participating in an SMS session, click the **Hold** button.

To place an SMS session on hold (WEB)

- Click **Inbox** and select the SMS or hover over the item avatar and click **Hold**.

To retrieve an SMS session from hold (DESKTOP)

NOTE: You can also retrieve a session from hold by sending a response.

1. Select the **Inbox** and, in the **List** pane, select the SMS contact on hold.
2. In the **Action** bar, click **Remove hold**.

To retrieve an SMS session from hold (WEB)

NOTE: You can also retrieve a session from hold by sending a response.

- Click **Inbox** and select an SMS on hold or hover over the item avatar and click **Remove Hold**.

Joining the longest waiting active SMS session (DESKTOP)

Agents can switch between active SMS sessions according to how long the customer has been waiting for a response by using the 'Next Longest' button in the Action bar. The 'Next Longest' button applies to all active conversations in the agent's Inbox, directing agents to the SMS session that has been open and unfinished the longest.

For example, an agent is handling three different SMS sessions. Clicking 'Next Longest' highlights the active SMS session that has been waiting the longest for a response and switches that conversation back into the Active Contact pane.

When switching between active conversations, the SMS session indicates that the agent is joining and leaving the SMS session as appropriate.

To reply to the longest waiting active SMS session

1. In the **Folders** pane, select **Inbox**.
2. In the **List** pane, select an active SMS session.
An active SMS session is one that is no longer ringing and has been joined.
3. In the **Action** bar, click **Next Longest**.
The system takes you to the next longest waiting active SMS session in the Inbox.

Transferring SMS contacts

SMS contacts can be transferred to agents and queues. For example, agents in the Support queue receiving inquiries about a product invoice can transfer these contacts to the Sales queue. To receive transfers, devices must be enabled to handle the contact's media type.

Agents who are logged out, in DND, Offline (WEB), or whose presence is unknown cannot receive transferred SMS contacts. Agents who are either in Busy/Make Busy or at their SMS Workload limit can receive transferred SMS contacts.

NOTE: You may only transfer contacts if you have the appropriate permissions.

To transfer an SMS contact (DESKTOP)

1. In the **Folders** pane, click **Inbox**.
2. In the **List** pane, select an SMS contact and, in the **Action** bar, click **Reply**.
3. In the **Action** bar, click **Transfer**.
4. Select an agent or a queue.
NOTE: You can search for a transfer destination by typing the name of an agent or queue in the **Search** field.
5. Click **Transfer**.

To transfer an SMS contact (WEB)

1. Click **Inbox** and select an SMS contact or hover over the item avatar and click **Accept**.
NOTE: To transfer directly from the queue, click 'Queues', select the SMS or hover over the item avatar and click 'Transfer'. Follow steps 3 onward.
2. Select the SMS or hover over the item avatar and click **Transfer**.
3. To transfer to an agent, in the **Transfer** window click **People**, type the name or ID of an agent and proceed to step 5.
4. To transfer to a queue, in the **Transfer** window click **Queues** and select a queue from the list.
To search queues, type the name of the queue in the 'Search' field.
5. To transfer the SMS contact, select the name of the appropriate person or queue.

Ending SMS sessions

When an agent is finished handling a contact, the agent can end the SMS session.

To end an SMS session (DESKTOP and WEB)

1. When participating in an active SMS session, click the **End Your Session** button.
The 'End Your Session' button displays as an X.
2. When prompted, click **Yes**.

Forwarding SMS transcripts

You can forward SMS transcripts to multiple parties as an email with additional recipients copied and blind-copied.

Forwards in progress are housed in the agent's personal Drafts folder (DESKTOP), in the Forward subfolder (DESKTOP) or in the Inbox (WEB).

DESKTOP - You can only forward SMS transcripts from the My History folder and its Handled subfolder, from the History folder and its Handled subfolder, and from the Failed folders.

WEB - You can forward SMS transcripts from the History page.

The following procedures explain how to

- Forward an SMS transcript
- Discard forwards in progress

To forward an SMS transcript (DESKTOP)

1. In the **Folders** pane, select either **History**, **My History**, one of the **Handled** subfolders, or one of the **Failed** folders.
2. In the **List** pane, select an SMS transcript and, in the **Action** bar, click **Forward**.
3. Insert addresses in the **To:** field, and copy or blind-copy additional recipients by filling in the appropriate fields. Separate multiple addresses with semi-colons.
4. Click **Send**. An icon displays over the Preview pane, indicating the transcript is being sent.
NOTE: If you attempt to forward a transcript and receive a warning that the email address is invalid, the queue that handled the SMS contact may not have been configured for sending transcripts. Contact your supervisor or system administrator.

To forward an SMS transcript (WEB)

1. Click **History** and, optionally, select a **Filter**.
2. Select an SMS transcript or hover over the item and click **Forward**.
3. Insert addresses in the **To:** field, and copy or blind-copy additional recipients by filling in the appropriate fields. Separate multiple addresses with semi-colons.
4. Click **Send**.

To discard a forward in progress (DESKTOP)

NOTE: You can also discard forwards in progress by clicking 'Discard Draft' in the Action bar instead of 'Send'.

1. In the **My Folders** view, expand the **Folders** pane.
2. In the **Folders** pane, click **Drafts**. If necessary, expand the **My Folders** folder first.
3. Expand the **Drafts** folder and select **Forward**.
4. In the **List** pane, select the transcript and, in the **Action** bar, click **Discard Draft**.

To discard a forward in progress (WEB)

- Click **Inbox** and either select the forward in progress or hover over the item avatar and click **Discard**.

Removing failed SMS transcripts from Ignite

Occasionally, SMS transcripts may route to 'Failed' in Ignite. You can remove these transcripts using Ignite's Junk button.

NOTE: Agents may only Junk contacts if they have the appropriate permissions.

To remove a failed SMS transcript from Ignite (DESKTOP)

1. In the **Folders** pane, select a Failed folder.
2. In the **List** pane, select an SMS transcript and, in the **Action** bar, click either **Forward** or **Junk**.

To remove a failed SMS transcript from Ignite (WEB)

1. Click **History=>Failed**.
2. Select an SMS transcript or hover over the item avatar and click either **Junk** or **Forward**.
If you select 'Forward,' the contact is delivered to the Inbox where you can specify recipients.

Marking SMS contacts as No Reply and Junk

Occasionally, SMS contacts requiring no reply reach queues and agents' Inboxes. Agents can mark these SMS contacts either as requiring no reply or as junk.

Agents can also junk SMS contacts directly from 'Failed', rather than attempting to reroute them.

Marking contacts as No Reply and Junk removes the contacts from Ignite. If the item is in queue or the Inbox, responses in progress are deleted.

NOTE:

- Multimedia contacts in queue tagged as Junk or No Reply from Interactive Visual Queue and Ignite are not included in queue Handled, Completed, and Offered counts.
- Agents may only Junk contacts if they have the appropriate permissions.

To mark an SMS contact as No Reply or Junk (DESKTOP)

1. In the **Folders** pane, either click **Inbox**, select the queue in which the SMS message is waiting, or select a **Failed** folder.
2. In the **List** pane, select an SMS message and, in the **Action** bar, click either **No Reply** or **Junk**.

To mark an SMS contact as No Reply or Junk from the Inbox (WEB)

- Click **Inbox** and select an SMS contact or hover over the item avatar and click either **No Reply** or **Junk**.

To mark an SMS contact as No Reply or Junk from the queue (WEB)

1. Click **Queues** and select an SMS queue.
2. Select an SMS contact and click either **No Reply** or **Junk**.

Sending outbound SMS contacts

Agents can send outbound SMS contacts in Ignite. When an agent sends an outbound SMS contact, they may not be the agent who receives the customer response.

NOTE:

- Account codes are not supported for outbound SMS contacts.
- Real-time and reporting statistics are not available for outbound SMS activity. We recommend instead that agents put themselves into Busy/Make Busy, with an 'Outbound SMS' Reason Code applied, when drafting outbound SMS contacts. Make Busy reports and real-time queue statistics will then display time spent drafting outbound SMS contacts.

WEB - Outbound SMS contacts in progress are housed in the Inbox, marked as 'Draft'.

To send an outbound SMS contact (DESKTOP)

1. In the **My Folders** view, expand the **Folders** pane.
2. In the **Action** bar, click **New SMS**.
3. After **From**, select an SMS queue.
4. After **To**, type the recipient's number.
You can send the SMS contact to multiple recipients by separating the numbers with commas.
5. Type the SMS contact's contents and click **Send**.

To send an outbound SMS contact (WEB)

1. Click **Contacts**
2. If the destination is not a recent contact, type its name or number in the **Search** field.
3. Hover over the destination's avatar and click the **SMS** icon. For SMS contacts to agents, a colored outline over the destination avatar indicates its availability.
4. Under **From (queue)**, select an SMS queue.
NOTE: Queue signatures are inserted each time a queue is selected as the 'From' address. Agents are responsible for deleting non-applicable queue signatures from outbound SMS drafts.
5. Type the SMS contact's contents and click **Send**.
NOTE: If Contacts is open, click Contacts again to close the window and expose the desired controls.

To discard an outbound SMS contact in progress (WEB)

NOTE: If Contacts is open, click Contacts again to close the window and expose the desired controls.

- Click **Inbox** and select a draft or hover over the item avatar and click **Discard**.

HANDLING CALLS IN IGNITE

In addition to email, chat, and SMS handling, you can handle calls in Ignite.

MiCollab Client is recommended for performing more advanced call handling functions. For information on handling voice contacts with MiCollab Client, see the *MiContact Center User Guide*.

The following procedures explain how to

- View call information
- Pick calls out of queue
- Answer and end calls
- Make calls
- Perform in-call actions

To perform other call handling functions such as conferencing and supervised transfers, agents must use Contact Center Softphone, PhoneSet Manager, MiCollab, or a hard set. See the appropriate sections in the *MiContact Center User Guide* for more information on Contact Center Softphone and PhoneSet Manager.

DESKTOP - For important information on logging in and out of Ignite in conjunction with Contact Center Softphone, PhoneSet Manager, or hard sets, see "Logging in and out of Ignite (DESKTOP)" on page 306.

WEB – For important information on signing in and out of Ignite for voice agents, see "Signing into and out of Ignite (WEB)" on page 333.

NOTE:

- DESKTOP - Ignite provides call control for Inbound ACD contacts only. Agents must make outbound calls using Contact Center Softphone, PhoneSet Manager, or a hard set.
- DESKTOP - If your contact center focuses on voice contact handling, we recommend implementing the MiCollab Client and Ignite integration described in the *MiContact Center User Guide*.
- Ignite's phone functionality does not support multiple lines.
- Ignite's phone controls are not supported for External Hot Desking Agents.

Viewing call information

You can view basic call information in Ignite before picking a call out of queue or handling it from the Inbox. Note that information displayed may vary based on administrative configuration.

The following explains how to

- View information for calls in queue
- View information for calls in the Inbox

To view information for calls in queue (DESKTOP)

1. In the **Folders** pane, select a queue.
2. In the **List** pane, select a call.
Call information displays in the Preview pane.

To view information for calls in queue (WEB)

1. Click **Queues** and select the appropriate queue.
2. Select a call from the queue.

To view information for calls in the Inbox (DESKTOP)

1. In the **Folders** pane, click **Inbox**.
2. In the **List** pane, select a call.
Call information displays in the Preview pane.

To view information for calls in the Inbox (WEB)

- Click **Inbox** and select a call.

Picking calls out of queue

Agents can pick calls out of queue and send them to the Inbox. Once ringing in the Inbox, the call can be answered.

NOTE:

- Agents cannot pick or pick and reply to contacts from the queue if they are in Do Not Disturb.
- Agents may only pick or pick and reply to contacts from the queue if they have the appropriate permissions.

To pick a call from the queue (DESKTOP)

1. From the **Folders** pane, select the queue from which a call will be picked.
2. From the **List** pane, select a call from the queue and, from the **Action** bar, click the **Pick** button.
The call is transferred to your Inbox.
3. To answer the call, select **Inbox** and, in the **List** pane, select the call and click **Reply**.
NOTE: Additional handling options display in the Action bar. For more information, see the appropriate procedures in this section.

To pick a call from the queue (WEB)

1. Click **Queues** and select the appropriate queue.
2. Select a call from the queue or hover over the item avatar and click **Pick**.
The call is transferred to your Inbox.

Answering and ending calls

NOTE:

- You cannot explicitly decline a ringing call.
- DESKTOP - Agents can request help from other agents, as well as from supervisors. When you answer an incoming request for help, the Ignite toaster displays "Request Help Received" and the name of the person requesting help. Accepted requests are entered in Silent Monitor mode. Supervisors must use Contact Center Client or their hardset to escalate to Coach mode. For more information on silent monitoring, see the *MiContact Center User Guide*. For more information on the Request Help feature, see the appropriate section in this guide.

You can answer incoming calls from Ignite. Ignite displays a toaster for each incoming call and allows you to accept the call from the toaster.

When you answer a call, Ignite displays call information.

To answer a call (DESKTOP)

- In the Ignite toaster, click **Accept**.
Alternatively, select the call in the **List** pane and, in the **Action** bar, click **Reply**.

To answer a call (WEB)

- In the Ignite toaster, click **Accept**.
Alternatively, select the call or hover over the item avatar and click **Accept**.

You can end calls from Ignite.

To end a call (DESKTOP)

- In the **Action** bar, click **Hang Up**.

To end a call (WEB)

- Click **Inbox** and select a call or hover over the item avatar and click **Hang Up**.

Making calls

DESKTOP - We recommend you use MiCollab Client to make calls but you can optionally make calls using Contact Center Softphone or Contact Center PhoneSet Manager. This applies to internal or external destinations, or a dialable queue.

To make a call (WEB)

1. Click **Contacts**.
2. If the destination is not a recent contact, type its name or number in the **Search** field.
3. Hover over the destination's avatar and click **Call**. If applicable, hover over multiple Call avatars to select the appropriate dialable number. For calls to agents, a colored outline over the destination avatar indicates its availability.
NOTE: If Contacts is open, click Contacts again to close the window and expose the desired controls.

Performing in-call actions

While on active calls you can:

- Put calls on hold and retrieve calls from hold
- Tag calls with Account Codes.
- Tag calls with Classification Codes
- Transfer calls
- Request help from another agent or supervisor (DESKTOP)
- Contact agents before transferring calls and requesting help

Putting calls on hold and retrieving calls from hold

At times, agents may have to put a call on hold. Ignite displays a paused icon over calls on hold so they can be easily identified.

NOTE: Calls on hold may not be transferred until hold is removed.

The following explains how to

- Put a call on hold
- Retrieve a call from hold

To put a call on hold (DESKTOP)

1. In the **Folders** pane, click **Inbox**.
2. In the **List** pane, select the active call.
3. In the **Action** bar, click the **Hold** button.

To put a call on hold (WEB)

- Click **Inbox** and select a call, or hover over the item avatar, and click **Hold**.

To retrieve a call from hold (DESKTOP)

1. In the **Folders** pane, click **Inbox**.
2. In the **List** pane, select the call on hold.
3. In the **Action** bar, click **Remove Hold**.

To retrieve a call from hold (WEB)

- Click **Inbox** and select a call or hover over the item avatar and click **Remove Hold**.

Tagging calls with Classification Codes

Classification Codes are a type of Account Code but differ in the following ways:

- You can apply multiple Classification Codes to different, applicable sections of a call. All Classification Codes applied to a call are pegged with the full call duration, from the time the call arrives until the call ends. This includes transfer time, time calls were handled at other extensions, and Work Timer durations if 'Include queue work timer as part of handling time' is enabled on the queue. If the same code is entered twice, it is not double pegged in reporting statistics.
- Classification Codes can be 'forced', meaning the agent must enter a Classification Code either during the call or when in Work Timer to remain within compliance.

- Account Codes can only be entered during a call, but Classification Codes can be entered during or after a call (while in Work Timer). There are often scenarios within which you set single or multiple Account Codes during a call and then set a Classification Code when the call terminates.

NOTE: Classification Codes are supported when handling voice contacts only and can only be applied to ACD calls.

To tag a call with a Classification Code after a call ends (DESKTOP)

NOTE: During a call, apply Classification Codes as you would Account Codes, using the list of Account Codes in the 'Set Account Code' rolling panel in the Sidebar or in the 'History and Account Code' section of the Preview pane.

1. In the **Sidebar**, click the **Classify** button to open the **Classify** rolling panel. When the call ends, the Classify button displays (and flashes if forced Classification Codes are enabled) and Work Timer is activated.
2. Select the applicable Classification Code from the list that displays and click **Apply**.
NOTE: If you are handling more than one item in the Inbox, for example, one email and one call, and you apply a Classification Code during the call, it will be applied to the call regardless of which item is currently selected in the Inbox. If you apply a Classification Code after the call when in Work Timer, the voice contact stays in your Inbox and you must use the 'Classify' button in the Sidebar to apply a Classification Code to the voice contact.
3. If Work Timer has not been configured to automatically cancel after entering a Classification Code, cancel Work Timer by clicking the **Remove Work Timer** button in the **Sidebar**.
NOTE: Forced Classification Codes prevent canceling Work Timer until a Code is entered. Failing to enter a Classification Code before Work Timer expires or is removed by entering Busy/Make Busy or DND can result in a default Classification Code of '-1 Non-Compliant' applied automatically.

To tag a call with a Classification Code after a call ends (WEB)

NOTE: During a call, apply Classification Codes as you would Account Codes, but select 'Classification' in the Classify dialog window.

1. Click **Enter a Classification Code**.
2. Select a Classification Code. You can type the name or number of a Code in the **Search** field.
NOTE: If you enter a number in the search field, you can apply the Code by pressing 'Enter' when prompted.

Transferring calls

You can transfer calls to internal and external destinations. Internal transfer destinations include destinations programmed in the voice media server or in a cluster of voice media servers. External transfer destinations include dialable numbers not programmed in the voice media server or in the cluster of voice media servers. For example, agents in the Support queue receiving calls concerning account renewals can transfer these calls internally to the Sales queue, or agents can transfer calls externally to a supervisor's cell phone.

To receive transfers devices must be enabled to handle the contact's media type.

Agents who are logged out, in DND, Offline (WEB), or whose presence is Unknown cannot receive transferred calls, but the call can be transferred to their voicemail. Agents who are either in Busy/Make Busy or at their call Workload limit can receive transferred calls.

Call transfers in Ignite are always blind transfers. In blind transfers, there is no communication with transfer destinations before sending calls. Calls are transferred immediately and the system does not monitor the outcome.

To perform a supervised transfer, you must use MiCollab Client, Contact Center Softphone, or Contact Center PhoneSet Manager. See the *MiContact Center User Guide* for more information.

NOTE:

- You cannot transfer calls on hold. Hold must be removed before the call can be transferred.
- You may only transfer contacts if you have the appropriate permissions.

The following procedures explain how to

- Blind transfer calls to a voice-enabled employee or queue
- Blind transfer calls to a dialable number

NOTE: This option is only available with Click to Call. For more information, see "Contacting agents before transferring calls " on page 401.

To blind transfer a call to a voice-enabled employee or queue (DESKTOP)

1. When on a call, in the **Action** bar, click **Transfer**.
2. Select the **Internal Transfer** radio button and select a voice-enabled employee or queue. Expand the device list if necessary. You can search for an internal transfer destination by typing the name of a voice-enabled employee or queue in the 'Search' field.
3. Click **Transfer**.

To blind transfer a call to a voice-enabled employee or queue (WEB)

1. Click **Inbox** and select a call or hover over the item avatar and click **Accept**.
NOTE: To transfer directly from the queue, click 'Queues', select the call or hover over the item avatar and click 'Transfer'. Follow steps 3 onward.
2. Select the call or hover over the item avatar and click **Transfer**.
3. To transfer to an employee, in the **Transfer** window click **People**, type the employee's name or number and proceed to step 5.
4. To transfer to a queue, in the **Transfer** window click **Queues** and select a queue from the list. To search queues, type the name of the queue in the 'Search' field.
5. To transfer the call, select the name of the appropriate employee or queue. If applicable, hover over multiple Call avatars to select the appropriate dialable number. For agents with multiple dialable numbers, a colored outline over the destination avatar indicates its availability.

To blind transfer a call to a dialable number (DESKTOP)

1. When on a call, in the **Action** bar, click **Transfer**.
2. Select the **External Transfer** radio button and, in the **Transfer To:** field, type a dialable number. Enter this number as you would on a phone, including any digits required for outbound dialing.
NOTE: Invalid entries return an error message. Re-type a valid entry and click 'Transfer'.
3. Click **Transfer**.

To blind transfer a call to a dialable number (WEB)

1. Click **Inbox** and select a call or hover over the item avatar and click **Accept**.
NOTE: To transfer directly from the queue, click 'Queues', select the call or hover over the item avatar and click 'Transfer'. Follow steps 3 onward.
2. Select the call or hover over the item avatar and click **Transfer**.
3. Click **People** and type the number of the transfer destination.
4. To transfer the call, select the number. If applicable, hover over multiple Call avatars to select the appropriate dialable number. For agents with multiple dialable numbers, a colored outline over the destination avatar indicates its availability.

Requesting help (DESKTOP)

You can request help from other voice-enabled employees by clicking the Request Help button in the Sidebar. When the button is selected, you can enter either a valid DN in the free form text box or select an employee from a pre-populated list. The system dials the DN, and the employee is added to the call when they accept.

Employees who accept requests for help join the call in Silent Monitor mode and are not audible unless they escalate to Coach or Barge.

Help requests to queues or to external numbers are not supported.

The Request Help button is available as soon as a call is delivered to your Inbox. You can send multiple requests for help during a call, but you can only send one request at a time. Requests sent to employees in unavailable states fail.

The Request Help button is not available when a call is on hold.

To request help on a call

1. In the **Sidebar**, click the **Request Help** button.
 Ignite displays a list of voice-enabled employees and their ACD status.
2. In the **Request Help** window, do one of the following:
 - Select a voice-enabled employee from the list
 - In the text box, enter a voice-enabled employee's dialable number
 - In the Search box, type the name or dialable number of a voice-enabled employee
3. Click **Call**.
NOTE: You cannot cancel requests in progress. The Request Help button is disabled (turns gray) while the call is being established. Hover over the button with your mouse to view the connection status in a tool tip.
 - If the request is answered within 180 seconds, the Request Help button turns solid green to indicate success. The button stays green for as long as the other employee is on the call.
 - If the request for help is not answered within 180 seconds, the request times out and the Request Help button briefly flashes red (indicating failure) and then turns blue again. You can make another request for help as described in the above steps.

Contacting agents before transferring calls

You can choose to instant message (DESKTOP) or call other employees (DESKTOP and WEB) to alert them of an incoming transfer.

DESKTOP - The Click to Call option is not displayed when agents are in Do Not Disturb or absent from their agent groups.

While on a call, initiating Click to Call begins a consultation call with the agent. The original caller is put on hold until the end of the consultation call. When consulting with another agent, if the other agent hangs up first you must click Hang Up in Ignite to reconnect with the original call. If you are using a desk phone, you can hang up your extension and the original call will ring your extension to reconnect.

NOTE:

- If an agent has multiple phone numbers, Ignite supports the number associated with the employee voice agent.
- DESKTOP - Click to IM does not support group IM sessions.

To Click to Call or Click to IM (DESKTOP)

1. In the **Transfer** window, select an available agent.
2. Select **Click to IM** to initiate an IM session or select **Click to Call** to initiate a voice call. (See Figure 55.)

NOTE: The recipient's presence displays, advising of their availability to receive your call or instant message.

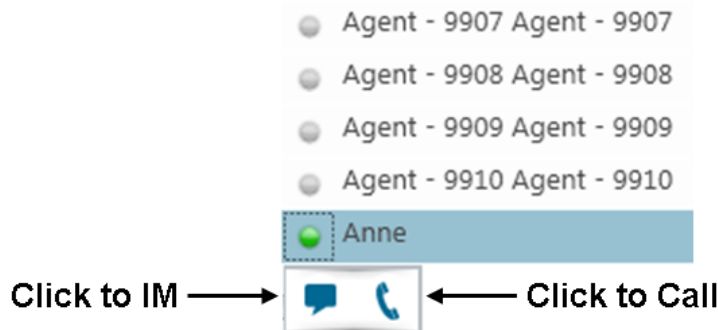


Figure 55: Click to IM and Click to Call

To Click to Call (WEB)

1. Click **Contacts**.
2. If the destination is not a recent contact, type its name or number in the **Search** field.
3. Hover over the destination's avatar and click **Call**.

Handling calls using the Active Call window (WEB)

When on a call, agents can use the Active Call window for basic call handling options.

For procedures on specific call handling actions supported in the Active Call window, see the appropriate sections of this guide.

For procedures on using Contacts to reach another person, see the appropriate sections of this guide.

To handle a call using the Active Call window

1. When on a call, click the **Phone** button.
2. Choose a call handling option.
3. To close the Active Call window, click the **Phone** button.

