Information Manager

Solidus eCare

USER GUIDE

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1 Introduction

1.1 Overview of the Solidus eCare Application Suite

Welcome to the Solidus eCare application suite.

The Solidus eCare application suite is made up of nine core applications. These core applications are divided into three fundamental categories:

Agent Applications

The modules in this category are the focal point of the customer interaction center and therefore constitute our most extensive category.

1.1.1 Desktop Manager

- Desktop Manager Standard – provides agents access to voice/call related features including call control capabilities on the agent desktop.
- Desktop Manager Supervisor – extends the standard capability by enabling additional intrusion and monitoring capabilities.
- Desktop Manager DDE & COM – extends the Desktop Manager standard capability by enabling integration to external applications and databases. Typically used for screen-pop applications.
- Desktop Manager Messaging – extends the interactive capability between agents and within the business by facilitating internal messaging communication.
- Desktop Manager Directory - extends the Desktop Manager standard software module by enabling agents to locate personnel within an organization for on-line support or customer query confirmation/support.
- Desktop Manager Outbound – extends the Desktop Manager standard software module by enabling basic preview outbound voice calls to be placed. Also provides agents access to view scripts used to define outbound campaigns.
- Desktop Manager Web Agent – extends the Desktop Manager standard module by enabling the use of alternative media including chat and web collaboration.

- Desktop Manager E-mail Agent – extends the Desktop Manager standard module by enabling agents to interact with customers via E-mail. When used in conjunction with the Knowledge Base Manager, Auto-email response functionality is provided.

- Desktop Manager SMS Agent – extends the Desktop Manager standard module by enabling agents to interact with customers via SMS.

- Desktop Manager IP Agent – allows the agent the capability to make incoming and outgoing calls via the IP soft client in Desktop Manager thereby eliminating the need for agents to have a physical telephone.

- Desktop Manager IP Recording – allows the agent or supervisor the capability to record any IP calls from the IP soft client.

BluStar Agent

- BluStar Agent Standard – provides agents access to voice/call related features including call control capabilities on the agent desktop.

- BluStar Agent Supervisor – extends the standard capability by enabling additional intrusion and monitoring capabilities.

- BluStar Agent Integration – enables integration to external applications and databases. Typically used for screen-pop applications.

- BluStar Agent Messaging – extends the interactive capability between agents and within the business by facilitating internal messaging communication.

- BluStar Agent Directory - extends the BluStar Agent standard software module by enabling agents to locate personnel within an organization for on-line support or customer query confirmation/support.

- BluStar Agent E-mail Agent – extends the BluStar Agent standard module by enabling agents to interact with customers via E-mail. When used in conjunction with the Knowledge Base Manager, Auto-email response functionality is provided.

- BluStar Agent SMS Agent – extends BluStar Agent standard module by enabling agents to interact with customers via SMS.

- BluStar Agent IP Agent – allows the agent the capability to make incoming and outgoing calls via the IP soft client in BluStar Agent thereby eliminating the need for agents to have a physical telephone.

1.1.2 Phone Agent

This agent module is used for mobile agents, that is, Phone Agents that have access to only a phone device. Therefore, warehouse staff, security staff or agents with mobility, can be incorporated into the contact center.

1.2 Management Applications

The modules in this category provide centralized control and management of the invested contact center infrastructure.

1.2.1 Report Manager

Provides historical statistical reporting and information on all contact center activities.

1.2.2 Configuration Manager

Provides configuration management and the editing of contact center elements such as call flows, rules and guidelines.

1.2.3 Information Manager

Provides real time information on all contact center activities.

1.2.4 Knowledge Base Manager

Provides an authoring interface towards the knowledge bases. Knowledge bases are used with the Web-based self-help application (Virtual Agents) and auto E-mail response interaction.

1.3 Customer Self-service Applications

1.3.1 Script Manager

A fully integrated Interactive Voice Response (IVR) application that extends the routing intelligence and capability of Solidus eCare suite. Used to enable advanced customer access to database lookups and PIN code verifications, the primary use of Script Manager is to provide voice bound customers with self-service. Simultaneously, Script Manager is used to accurately identify the needs of the customer, prior to the customer being allocated to a Solidus eCare agent.

1.3.2 Virtual Agent

An interactive Web response application that automates customer self- service. The Virtual Agent resides on your website, resolves customer enquiries without agent intervention through the use of customized knowledge bases.

The context, nature and operational environment of the contact center shall determine the inclusion of the various applications listed above.

1.4 Overview of Information Manager

Information Manager provides real time status information about the service accesses, service groups, agent groups and agents of the contact center.

See the following summary:

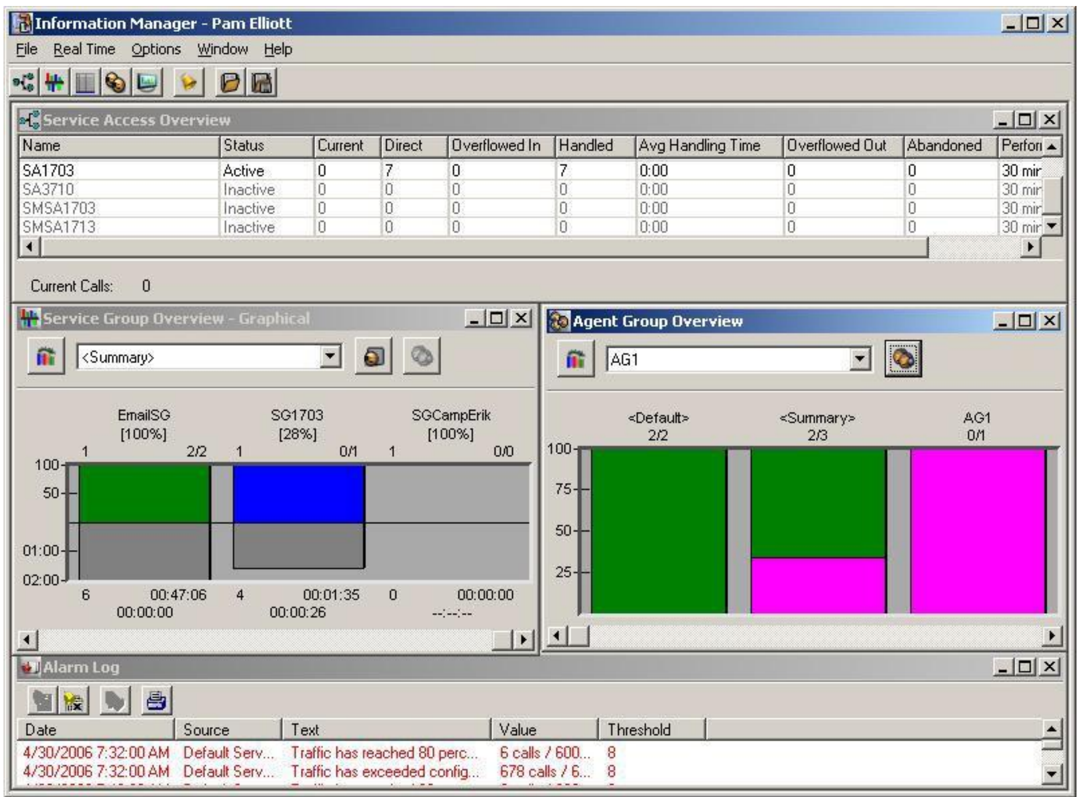
- Configure user preferences on how to view the current contact center services and staffing information;
- View real time information on service accesses, service groups, agent groups or agents;
- Produce text and real time messages for display on external wall displays.

1.5 Overview of the Main Window

The main window consists of the title bar, the main menu bar, the toolbar, and an application workspace.

Menus on the menu bar, as well as their associated toolbar buttons, will be available and operable only when the proper object, from the proper view pane, is selected. In the example below, all buttons are enabled for illustrative purposes only.

The default main window layout includes the **Service Access** window, **Service Group** window and **Agent Group** window. The **Alarm Log** window will be minimized and stays at the bottom of the workspace.



1.6 Calculation methods

The following tables contain information regarding the calculation methods for the values found in specific real time windows.

Service Access Overview Window

Value	Calculation Method
Average handling time for all service accesses	(Sum of handling times) / (Sum of calls distributed to all services accessed)

Service Group Overview Window

Value	Calculation Method
Estimated waiting time	Received from Event Service.
Percentage of busy agents	Number of busy agents divided by the total number of ready agents.
Percentage of busy others	Number of busy agents who currently servicing other service group or non-service calls or monitoring a chat session divided by the total number of ready agents.
Percentage of idle agents	Number of idle agents divided by the total number of ready agents.
Percentage of partially busy agents	Number of partially busy agents divided by the total number of ready agents.
Service level	Number of calls answered within specified minutes and seconds (service level time) / (Sum of Number of calls answered and Number of calls abandoned (in ring + queue).

Service Group Details Window

Value	Calculation Method
Abandoned rate	(Number of abandoned calls) / (Number of answered calls + abandoned calls)
Average handling time	(Sum of talk, on-hold and clerical time for all answered calls) / Number of calls answered
Average time abandoned	(Sum of queue time + ring time before abandoned) / (Number of calls abandoned in queue + Number of calls abandoned in ring)
Average wait time	(Sum of queue time, callback time, call setup time and ring time for all answered calls) / No. of calls answered
Estimated waiting time	Received from Event Service
Service level	Number of calls answered within specified threshold (service level time) / (Sum of Number of calls answered and Number of calls abandoned (in ring + queue) + Number of calls rejected).

Agent Group Overview Window

Value	Calculation Method
Percentage of agents handling non-service calls	Number of agents busy handling non-service calls divided by the total number of logged on agents in this agent group
Percentage of agents handling service calls	Number of agents busy handling service calls divided by the total number of logged on agents in this agent group.
Percentage of not ready agents	Number of agents marked as not ready divided by the total number of logged on agents in this agent group
Percentage of idle agents	Number of agents not handling a call divided by the total number of logged on agents in this agent group

1.7 Message Data Types

Below is a summary of available data types.

Abandoned Rate	The ratio of number of abandoned calls over the total service calls/sessions within a specified time period.
Average Handling Time	Average time in minutes and seconds for agents to handle service calls/sessions in this service group.
Average Abandoned Time	Average amount of time in minutes and seconds the call was waiting before the call was disconnected. This also includes media requests that were cancelled before routed to an agent.
Average Wait Time	Average time in minutes and seconds that service calls/sessions to this service group are waiting before being answered.
Current Date	Today's date.
Current Skill Choice	The current skill choice that has been included for agent selection by route manager.
Current Time	Current time.
Estimated Waiting Time	Indicates the system's best prediction of how long a session will remain in queue for the service group.
Longest Wait Time	Current longest time a caller has been waiting in queue for the selected service group.
Number of Abandoned Calls	Calls that get disconnected before being answered by an agent. The reason can be that the caller hangs up. This also includes media requests that were cancelled before routed to an agent.
Number of Answered Calls	Calls that are answered by agents serving this service group. When handling a media session, when the max number of configured media sessions for that agent has been reached, this number is included in this value.
Number of Busy Agents	Agents that are currently occupied with a Service call for this group. The agent is Busy when a Service call for this group has been presented to the agent, the agent has answered the call, the call has been placed on hold or the agent is involved in clerical activities after completing the call. For agents handling media sessions, when the max number of configured media sessions for an agent has been reached, that agent is included in this value. If the number of Busy Agents is lower than a pre-defined threshold, when calls are waiting in queue, this information is indicated in red
Number of Callbacks Accepted	Number of callback calls that are accepted by the caller.
Number of Callbacks Failed	Number of callback failed due to various reasons such as invalid callback number, time-out due to no answered, time-out due to busy.
Number of Calls Direct In	The number of calls that came directly to the group.
Number of Calls Overflowed In	The number of calls entering the group from another destination.

Number of Calls Overflowed Out	Calls that are overflowed to another destination due to different reasons such as either the estimate waiting time or the actual waiting time has been exceeded.
Number of Calls in Queue	Number of calls and media requests that are currently waiting in the delayed call queue for this service group. This number can trigger an alarm if exceeding a pre-defined threshold.
Number of Idle Agents	Agents that are able to receive a new Service call. The agent is idle and not handling any call/E-mail/SMS/chat/open media.
Number of Logged On Agents	Agents that have logged on.
Number of Not Ready Agents	Agents that have been unavailable marked by an agent or by the Contact Center system for voice calls and E-mail/SMS/chat/open media.
Number of Offered Calls	Calls initiated to the service group or overflowed in from another service group.
Number of Partially Busy Agents	Number of ready agents that are handling a session for this group, but can still receive additional sessions for this media type.
Number of Ready Agents	Agents that have been available marked. This includes agents that are available for either voice or media. If this value is lower than a pre-defined threshold, this information is indicated with red color.
Percent of Service Level	The percentage of Service calls that are answered within a specified time period. If the Service Level is less than the defined threshold as specified for the group, this information is indicated in red.
Service Group Name	Name of the service group.

2 Using Information Manager

2.1 Change Solidus eCare Systems

Note: This option is only available to Host Administrators.

To switch to another Solidus eCare system, you will need to know both the Solidus eCare server name you wish to connect to as well as the Web server name in order to logon.

1. On the **File** menu, click the **Change System** command. The **Change System** dialog box will appear.
2. Select the system you wish to switch to.
3. Click **OK**.

2.2 Save and Open Preferred Window Choices

After you have customized your screens to reflect the window choices and arrangements that you will be using the most, you may want to save those choices as your preferred windows. Your preferred choices will be displayed the next time you launch Information Manager. Note that your Real Time windows layout is associated with your Solidus eCare User ID.

The **Save Layout As** command on the **Options** menu saves the current presentation layout of your windows by saving the window size, position and window information in the database. Window information includes your specifically selected groups and agents in the order you last specified.

Once you have saved your Real Time windows with the display layout and information choices that you prefer, you can open them with this arrangement anytime you want by clicking the **Layouts** command on the **Options** menu and selecting the name of your desired layout. However, you cannot use the **Layouts** command until you have saved your preferred windows.

Note: Saving current window layout automatically can also be done if you select the **Save Layout Changes Automatically** check box on the **Preferences** dialog box.

2.3 Configure External Display Messaging

2.3.1 Overview

External Display Messaging allows you to create and send text messages, combined with real time information about the contact center to the **Virtual Wall Display** window, **Web Display** or to **Spectrum** display boards. For Spectrum boards, messages can be sent to a specific board or all boards that are connected to a PC. Boards are connected to a PC through a single serial communications port.

Messages and displays are defined through the **Wall Display Configuration** dialog box. The messages defined here may be displayed on the external Spectrum boards or the virtual wall display. Most properties for the messages are common to both displays such
as name, time range and text and data segments, certain properties on the **Messages** tab are only for the virtual wall display. There are also certain properties that are specific to the Spectrum boards. These properties are accessed through the **Spectrum Message Configuration** dialog box.

2.4 Configure General Settings

To display messages on your external wall device or Spectrum board, you first need to define messages. Messages are made of segments that contain text and data information.

After creating your messages, the next step would be to display the messages. For virtual wall displays, you need to define and set attributes associated with the rows where the messages will display.

2.4.1 Configure Messages

You can manipulate the display of messages through the **Wall Display Configuration** dialog box **Messages** tab. Use the **Add** or **Delete** buttons to create or remove a message. Messages are made of **text** and **data** segments.

In the **Message Information** section, you can change the name of the message and also indicate if the message is available for display. You can set the **Time Range** and also set specific display setting associated with a Virtual Display and with Spectrum boards, by clicking on the **Virtual Display** or **Spectrum** tabs.

At the bottom of the Messages tab, you can add or edit a segment to construct your message. You can also delete or edit a message from the **Messages** tab.

Add a new message

1 Open the **Messages** tab of the **Wall Display Configuration** dialog box.

2 On the **Messages** tab, in the **Messages** area, click **Add**. A default message name appears in the **Name** text box.

3 Edit the message name by clicking in the **Name** text box and entering a desired name.

4 Select **Enabled** if you wish the message to display.

5 Set a **Time Range** during which the message will display.

6 Set the display properties on the **Virtual Display** tab.
- OR -
If your display device is a Spectrum board, click the Spectrum tab to set the display properties.

7 Add **Text** and **Data** segments to the message. If your display device is a **Spectrum** board, you can add up to 64 segments per message.

8 Repeat step 6 to add additional segments to your message.

9 Use the sort buttons to indicate the order you wish your segments to display.

10 Click **OK**.

Delete a message

1 Open the **Messages** tab of the **Wall Display Configuration** dialog box.

2 On the **Messages** tab, select the message you wish to delete from the **Messages list** box.

3 Click **Delete**.

Display/enable a message

1 Open the **Messages** tab of the **Wall Display Configuration** dialog box.

2 On the **Messages** tab, in the **Messages list** box, select the message you wish to display.

3 In the **Message Information** section, click **Enabled**.

Edit a message name

1. Open the **Messages** tab of the **Wall Display Configuration** dialog box.
2. On the **Messages** tab, in the Messages list box, click the name of the message you wish to change. Information associated with this message appears in the Message Information section.
3. Click in the **Name** text box and change the message name. The new name will appear in the **Messages list** box.

Hide a message

1. Open the **Messages** tab of the **Wall Display Configuration** dialog box.
2. On the **Messages** tab, in the Messages list box, select the message you wish to hide.
3. Clear the **Enabled** checkbox. The message will be hidden from view.

   Note: Hidden messages will appear grayed in the Messages list box. You can still add segments to this message as well as assign this message to a row or Spectrum display. These messages however, will not appear on the display device.

Set the display color

1. Open the **Messages** tab of the **Wall Display Configuration** dialog box.
2. On the **Messages** tab, click the **Virtual Display** tab.
3. Click '...' next to the object you wish to assign a color to. The **Color** dialog box displays.
4. Select a color.
5. Click **OK**. The selected color appears next to the object.

Set the display mode

1. Open the **Messages** tab of the **Wall Display Configuration** dialog box.
2. On the Messages tab, click the **Virtual Display** tab.

3 Select the display mode from the **Mode** drop-down list. These options describe what text effect is applied as text is displayed on the **Virtual Wall Display**.

Please refer to the **Virtual Display** tab of the **Wall Display Configuration** dialog box for a complete listing of these options.

Set the display speed

1 Open the **Messages** tab of the **Wall Display Configuration** dialog box.

2 On the Messages tab, click the **Virtual Display** tab.

3 Use the Speed slider to set the speed that text will display.

Set the time a message displays

1 Open the **Messages** tab of the **Wall Display Configuration** dialog box.

2 On the **Messages** tab, in the **Message Information** section, use the spin controls in the **Time Range** section, to set when the message is to start by setting a value for **From**.

3 Use the spin controls to set when the message will stop by setting a value for **To**.

2.4.2 Configure segments

Add a data segment

1 Open the **Messages** tab of the **Wall Display Configuration** dialog box.

2 On the **Messages** tab, select the message that the segment is associated with.

3 Click **Add Data**. The **Add Data** dialog box appears.

4 Select the type of data and the group from the drop-down lists.

5 Click **OK**. The new data segment will appear in the Segments list box.

Add a text segment

1 Open the **Messages** tab of the **Wall Display Configuration** dialog box.

2 On the **Messages** tab, select the message that the segment is associated with.

3. Click **Add Text**. The **Add Text** dialog box appears.
4. In the **Message Text** field, enter the text you wish to appear for this segment.
5. Click **OK**. The new text segment will appear in the **Segments** list box.

Delete a segment

1. Open the **Messages** tab of the **Wall Display Configuration** dialog box.
2. On the **Messages** tab, select the message that the segment is associated with.
3. Select the data or text segment you wish to delete.
4. Click **Delete**.

Edit a data segment

1. Open the **Messages** tab of the **Wall Display Configuration** dialog box.
2. On the **Messages** tab, select the message that the segment is associated with.
3. Select the data segment you wish to modify.
4. Click **Edit**. The **Add Data** dialog box appears.
5. Change the type of data and the group from the drop-down lists.
6. Click **OK**. The changed data segment will appear in the Segments list box.

Edit text segment

1. Open the **Messages** tab of the **Wall Display Configuration** dialog box.
2. On the **Messages** tab, select the message that the segment is associated with.
3. Select the text segment you wish to edit.
4. Click **Edit**. The **Add Text** dialog box appears.
5. In the **Message Text** field, change the text.
6. Click **OK**. The modified text segment will appear in the **Segments** list box.

Set the order for segments to appear

1 Open the **Messages** tab of the **Wall Display Configuration** dialog box.

2 On the **Messages** tab, select the message that the segment is associated with.

3 Select the segment in the segments list box located at the bottom of the dialog box.

4 Click  or  to rearrange the segment in the list. The segment will display in the order listed, with the segment on top first on a message and the segment on bottom last on a message.

2.5 Configure rows

2.5.1 Overview

Each enabled row on a wall display is shown as a separate line in the Virtual Wall Display window. If you have already defined messages, configuring row information involves the following general steps:

1 Creating a row.

2 Enabling the row.

3 Assigning messages to the row.

4 Ordering the row on the display.

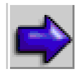
2.5.2 Open the Virtual Display tab

1 On the **Options** menu, click **Virtual Wall Display**.

2 The **Wall Display Configuration** dialog box will appear.

3 Click on the **Virtual Display** tab.

2.5.3 Assign a message to a row

1. Open the **Virtual Display** tab of the **Wall Display Configuration** dialog box.
2. From the **Virtual Display** tab, select the desired row.
3. Select a message from the **Available** list. You can select more than one message at a time.
4. Click  to move the selected messages to the **Selected** list box. You can also double-click a message to move it to the

   Selected list.

   Note: If you select a message that is disabled, this message will not display though it is assigned to the row.

2.5.4 Create a row

1. Open the **Virtual Display** tab of the **Wall Display Configuration** dialog box.
2. From the **Virtual** Display tab, click **Add**. A default row name appears in the **Name** text box.
3. Edit the row name by clicking in the **Name** text box and entering a desired name.
4. Select **Enabled** if you wish the row to display.
5. Select the font to use for this row by clicking on the font button. The current font name and size displays on this button.
6. **Assign Messages** to this row.
7. Sort the messages to indicate the order messages will display.
8. Click **OK**.

2.5.5 Delete a row

1. Open the **Virtual Display** tab of the **Wall Display Configuration** dialog box.
2. From the **Virtual Display** tab, in the **Rows** list box, select the row you wish to remove.

3 Click **Delete**. The row and its associated parameters are deleted.

2.5.6 Display a row on a display device

1 Open the **Virtual Display** tab of the **Wall Display Configuration** dialog box.

2 From the **Virtual Display** tab, in the **Rows** list box, select the row you wish to display.

3 In the **Row Information** section, click **Enabled**.

2.5.7 Edit a row name

1 Open the **Virtual Display** tab of the **Wall Display Configuration** dialog box.

2 From the **Virtual Display** tab, click the name of the row you wish to change. Information associated with this row appears in the **Row Information** section.

3 Click in the **Name** text box and change the row name. The new name will appear in the **Rows** list box.

2.5.8 Enable a row

1 Open the **Virtual Display** tab of the **Wall Display Configuration** dialog box.

2 From the **Virtual Display** tab, in the **Rows** list box, select the row you wish to display.

3 Select **Enabled** located in the **Row Information** section beside the **Name** text box.

2.5.9 Hide a row

1 Open the **Virtual Display** tab of the **Wall Display Configuration**

dialog box.

2 From the **Virtual Display** tab, in the **Rows** list box, select the row you wish to hide.

3 Clear the **Enabled** checkbox. The row will be hidden from view.

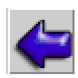
Note: Hidden rows will appear grayed in the Rows list box. You can still add messages to a disabled row though the row will not appear on the display device.

2.5.10 Remove a message from a row

1 Open the **Virtual Display** tab of the **Wall Display Configuration** dialog box.

2 From the **Virtual Display** tab, select the desired row.

3 Select a message from the **Selected** list in the **Messages** section. You can select more than one message at a time.

4 Click  to move the selected messages to the Available list box. You can also double-click a message to move it to the Available list.

2.5.11 Reorder rows

1 Open the **Virtual Display** tab of the **Wall Display Configuration** dialog box.

2 From the **Virtual Display** tab, select the row you wish to move.

3 Click **Move Up** or **Move Down** to move the row to the correct position.

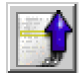
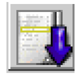
4 Repeat steps 2 - 3 until your rows are positioned correctly.

2.5.12 Order messages on a row

1 Open the **Virtual Display** tab of the **Wall Display Configuration** dialog box.

2. From the **Virtual Display** tab, select the row with the desired message.

3. Select a message in the **Selected** list box.

4. Click  or  to rearrange the messages in the **Selected** list. The messages will display in the order listed, with the message on top first and the message on bottom last.

2.5.13 Set the order for rows to appear

1. Open the **Virtual Display** tab of the **Wall Display Configuration** dialog box.

2. From the **Virtual Display** tab, select a row in the **Rows** list box.

3. Click **Move Up** or **Move Down** to rearrange the row in the **Rows** list. The **Rows** will display in the order listed, with the row on top first and the row on bottom last.

2.5.14 Specify a row font

1. Open the **Virtual Display** tab of the **Wall Display Configuration** dialog box.

2. From the **Virtual Display** tab, select the row you wish to configure from the **Rows** list box.

3. In the **Row Information** section, click the **Font** button. The **Font** dialog box appears.

4. Select the font settings.

5. Click **OK**. The Font name and Size will appear on the Font button.

2.6 Configure Spectrum boards

2.6.1 Overview Spectrum Boards

Spectrum display boards are connected to a PC through a single serial communications port (COM port). Spectrum board properties and messages are configured from the **Spectrum Tab** of the Wall Display Configuration dialog box. General message and display properties are defined through the **Spectrum** tab located on the Messages tab of the **Wall Display Configuration** dialog box. These properties include display mode, display position and display colors, and are specific to Spectrum boards.

Note: If a COM port and Spectrum boards have been defined, the messages will begin displaying automatically when Information Manager is started. When Information Manager is closed, the messages will be removed from all defined boards. The display of messages will also start and stop when the **Wall Display Configuration** dialog box is opened and closed. This will occur even if there are no changes to the defined messages or boards.

Below are limitations and calculations specific to Spectrum display boards.

Limitations

These limitations are only applied when a message is sent to a Spectrum board.

- The maximum number of messages displayed on a board is 32.
- The maximum number of data segments per message is 8.
- The maximum number of data segments per board is 64.
- The maximum length of a message is 80 characters. This includes text and data segments. If text will extend past the max length it will be truncated. If a data segment will extend past the max, it will be omitted. The space in between segments is included in the max length.

Segment Length Calculation

The length of data segments is determined by the maximum size of the data they may contain. For example, a data segment for a number of agents may contain a maximum value of 9999. The length of this segment will be considered 4 even if the segment is currently displaying the value 1. The lengths for data segments are as follows:

- Current Time: 8
- Current Date: 10
- Service Group Name: 20
- Waiting Times: 8
- Agent Counts: 4

- Average Times: 5
- Call Counts: 5
- Skill Choice: 1
- Percentages: 4

2.6.2 Open the Spectrum tab

1. On the **Options** menu, click **Virtual Wall Display**.
2. The **Wall Display Configuration** dialog box will appear.
3. Click on the **Spectrum** tab.

2.6.3 Pre-configure the boards

Pre-configure the boards

Prior to generating any messages, make sure that all Spectrum wall displays for the Solidus eCare have been configured. The following events are required for the configuration of Spectrum wall displays:

1. Use the Remote Control units that have been shipped with the wall displays to configure a unique physical address for each of the wall displays. This address will be stored internally within each wall display.
2. Use the **Spectrum** tab of the **Wall Display Configuration** dialog box to specify the COM port that the wall boards are connected to and add the wall boards that will be used by Solidus eCare mapping each defined board with the physical address stored within the board.

Configure the physical address of a wall display using the remote control

1. Make sure that the wall board is properly plugged in.
2. Press the **PROG** key. **PROG TXT FILE A** will appear on the wall board.

3 Press the **BACK** key until **SET ADDRESS** appears.

4 Press the **ADV** key. **SERIAL ADDRESS = 00** will appear.

5 Assign the address by pressing the corresponding number keys. For example: if the address for the wall board is 01, press 0 and 1 on the remote control.

6 Press the **RUN** key.

7 Press the **PROG** key.

Specify the COM port and define the boards

1 Open the **Spectrum** tab.

2 From the **Spectrum** tab, select the COM port that the boards are connected to by selecting a value in the **Port** drop-down list.

3 Select the **Baud Rate** for communicating with the boards. In most cases 9600 should be selected.

4 Add a new board by clicking **Add**.

5 Change the name if necessary in the **Name** field

6 Select a **Model**.

7 Enter the hex value that defines the board in the **Address** text field. This should be the same address configured using the remote control.

8 Enter some text into the **Test** field and press **Test**. The text should display on the wall board.

9 Repeat steps 5 – 9 for all boards connected to the PC.

Verify a connection to the Spectrum board

1 Open the **Spectrum** tab.

2 From the **Spectrum** tab, enter a test message in the **Test** field.

3 Click **Test**. This option is not available if the board **Port** setting has not been set. If the test message appears in the mode that you have selected (in the **Mode** drop-down list on the **Spectrum** tab located on the Messages tab of the Wall Display Configuration dialog box) on the wall display(s) that is connected to the communication port specified in the Communication **Port** list, connection is successful. If the test message does not appear on the wall display(s), check the connection.

4 Click **OK**. The test message will be removed from the wall display.

2.7 Message configurations

2.7.1 Add a display

1. Open the **Spectrum** tab.
2. From the **Spectrum** tab, click **Add**. A generic display name will appear in the **Name** field.
3. Optionally change the **Name** to a desired name.
4. Complete the settings in the Spectrum Display Information area.
5. Click **OK**.

2.7.2 Delete a display

1. Open the **Spectrum** tab.
2. From the **Spectrum** tab, in the **Spectrum Display** list box, select the display you wish to remove.
3. Click **Delete**. A dialog box will appear asking you to confirm that you want to delete the selected display.
4. Click **OK**. The selected display will be removed from the **Spectrum Display** list.

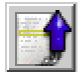
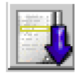
2.7.3 Displaying a message

1. Open the **Spectrum** tab.
2. From the **Spectrum** tab, if you have more than one display device, select the desired Spectrum board from the **Spectrum Displays** list.
3. Select one or more Messages from the **Available** list box.

Note: Messages are configured from the **Messages** tab.

4. Click  to move the selected messages to the **Selected** list box.

You can also double-click a message to move it to the **Selected** list.

5 Click  and  to order the Messages in the **Selected** list box.

6 Set display parameters and display colors from the **Spectrum** tab located on the Wall Display Configuration Messages tab**.**

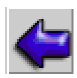
7 Click **OK**. The messages in the **Selected** list box will appear on the Spectrum board when the **Virtual Wall Display Configuration** dialog box is closed.

2.7.4 Removing a message

1 Open the **Spectrum** tab.

2 From the **Spectrum** tab, select the desired Spectrum Display.

3 Select one or more messages from the **Selected** list box.

4 Click  to move the selected messages to the **Available** list box and therefore off the display.

5 Click **OK**. The messages in the **Selected** list box will appear on the Spectrum board when the **Wall Display Configuration** dialog box is closed.

2.7.5 Set text colors

1 Open the **Wall Display Configuration** dialog box.

2 Click the **Messages** tab.

3 Click the **Spectrum** tab.

4 Select colors for text, data and alarms that will appear on the Spectrum board.

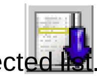
5 Click **OK**.

2.7.6 Spectrum - set order of messages to appear

1 Open the **Spectrum** tab of the **Wall Display Configuration** dialog box.

2 From the **Spectrum** tab, select the desired **Spectrum Display**.

3 Select a message in the **Selected** list box.

4 Click to rearrange the messages in the Selected list.  
The messages will display in the order listed, with the message on top first and the message on bottom last.

2.7.7 Specify a display mode and text position

1 Open the **Wall Display Configuration** dialog box.

2 Click the **Messages** tab.

3 Click the **Spectrum** tab.

4 Select a **Display Mode and Position** to indicate how the message will display.
Please refer to the **Spectrum** tab on the **Messages** tab of the **Wall Display Configuration** dialog box for a complete list of options.

5 Click **OK**.

2.8 Configure Virtual Wall Display Settings

2.8.1 Configure Virtual Wall Display

Messages and displays are defined through the **Wall Display Configuration** dialog box. Though most properties for messages are common to both the Virtual Wall Display and Spectrum boards, certain properties only apply to the Virtual Wall Display. These settings are found on the **Virtual Display** tab and include:

- Virtual Wall Display Color
- Virtual Wall Display Mode
- Virtual Wall Display Speed

2.8.2 Set the display color

1. Open the **Messages** tab of the **Wall Display Configuration** dialog box.
2. On the **Messages** tab, click the **Virtual Display** tab.
3. Click '...' next to the object you wish to assign a color to. The Color dialog box displays.
4. Select a color.
5. Click **OK**. The selected color appears next to the object.

2.8.3 Set the display mode

1. Open the **Messages** tab of the **Wall Display Configuration** dialog box.
2. On the **Messages** tab, click the **Virtual Display** tab.
3. Select the display mode from the **Mode** drop-down list.
   These options describe what text effect is applied as text is displayed on the **Virtual Wall Display**.

Please refer to the **Virtual Display** tab of the **Wall Display Configuration** dialog box for a complete listing of these options.

2.8.4 Set the display speed

1. Open the **Messages** tab of the **Wall Display Configuration** dialog box.
2. On the **Messages** tab, click the Virt**u**al **Display** tab.
3. Use the **Speed slider** to set the speed that text will display.

2.9 Web Wall Display

Messages sent to a Wall Display can also be sent to a Web Display or a Wall Display Gadget. By configuring a web server port using the **Wall Display Configuration** dialogue box, Information Manger accepts http connections on the specified port.

The Web Wall display can be customized by using a cascading stylesheet. To customize, copy the *\Sample Code\IM Samples\DefaultWebRoot* from the DVD to *[InstallDir]\Solidus eCare\Applications\bin* and rename it to webroot. Information Manager loads the files from the webroot directory at startup.

An example of a customized stylesheet is located in the *\Sample Code\IM Samples\CustomizedWebRoot* folder on the DVD. Copy the file *WebDisplay.css* to the webroot folder to view the customization.

The address to the server is http://[hostname/localhost]:[configured port]

Use Internet Explorer and enter the URL to start the Web Display.
Example: http://localhost:8181

It is also possible to use or customize a Windows sidebar gadget containing Wall Display information. The installation files for the gadget are located in *Sample Code\IM Samples\WindowsSidebarGadget*. See *readme.txt* located in the WindowsSidebarGadget folder for more information on how to install the SolidusIM.gadget file.

2.9.1 Add Namespace Reservation Rights

If the user has not logged in as an administrator on the PC where the Information Manager client that hosts the Web Wall Display is running, then namespace reservation rights need to be added to the account used.

For Windows Server 2008 R2 and Windows 7, the namespace reservation rights are granted by using the following command:

```
netsh http add urlacl url=http://+:8181/
user=DOMAIN\user
```

where `8181` is the port the user has opted to use for the web server, `DOMAIN` is the windows domain you're logged on to and `user` is the user account that one wishes to grant the rights to.

To grant namespace reservation rights when using Windows XP, use the httpcfg utility included in the Support Tools for WinXP.

Download the Support Tools from the following link:
http://www.microsoft.com/download/en/details.aspx?displayLang=en&id=18546

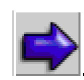
Use the following procedure:

1. Run the command: `httpcfg set urlacl /u http://+:8181/    /a D:(A;;GX;;;WD)`
2. Restart the computer

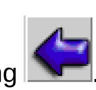
For instructions on how to grant namespace reservation rights for other operating system than those mentioned above, use the following link: http://msdn.microsoft.com/en-us/library/ms733768.aspx

2.10 Define Custom Summary Groups

2.10.1 Add a custom summary group

1. Open the **Custom Summary Groups** dialog box.
2. Click **Add** in the Custom Summary Groups area. If there is more than one media type defined on your system, the **New Custom Summary** dialog box appears. Otherwise, skip to step 5.
3. Select the media type associated with this group.
4. Click **OK**.
5. A default Summary Group name appears in the **Name** field. Click in the **Name** field to edit this name.
6. Select an available service group from the **Available** list box. You can select more than one name at a time.
7. Assign your selection to the summary group by clicking . The selected service groups are moved to the **Selected** list box. These groups will appear as members of your custom summary group.

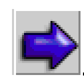
2.10.2 Delete a group from a custom summary group

1. Open the **Custom Summary Groups** dialog box.
2. Select the desired Summary Group in the **Custom Summary Groups** area. Information specific to the selected group appears in the **Custom Summary Group Information** area.
3. Select the service group you wish to remove from the **Selected** list box. You can select more than one name at a time.
4. Remove the selected group by clicking . The selected groups are moved to the **Available** list box. These groups will no longer appear as members of your custom summary group.

2.10.3 Delete a custom summary group

1. Open the **Custom Summary Groups** dialog box.
2. Select the Summary Group you wish to delete in the **Custom Summary Groups** area.
3. Click **Delete**.

2.10.4 Add service groups to a custom summary group

1. Open the **Custom Summary Groups** dialog box.
2. Select the desired Summary Group in the **Custom Summary Groups** area.
3. Select an available service group from the **Available** list box. You can select more than one name at a time.
4. Assign your selection to the summary group by clicking . The selected service groups are moved to the **Selected** list box. These groups will appear as members of your custom summary group.

2.11 Define User Preferences

2.11.1 Defining User Preferences

Define user-dependent preferences by opening the **Preferences** dialog box, and filling in all the necessary information in the General, Overview Windows, Alarms and Alarm Log areas. Since preferences selected in this dialog box affect the way that the system will interact with each individual user, it is important that such preferences be assigned in the beginning.

2.11.2 Open the Preferences dialog box

From the **Options** menu, select **Preferences**. The **Preferences** dialog box will appear.

2.11.3 Automatically save layout changes

This option automatically saves the current display layout when you exit Information Manager.

2.11.4 Save Filter Selection

This option automatically saves the filters from the Service Group Agent and Agent Group Agent windows as part of the layout.

2.11.5 Set number of Agent Group rows to display

This setting applies to the **Agent Group Overview** Window. You can indicate from one to three rows.

2.11.6 Set number of Service Group rows to display

This setting applies to the **Service Group Overview – Graphical** Window. You can indicate from one to three rows.

2.11.7 Set the overview windows chart style

Chart style applies to **Service Group Overview – Graphical** and **Agent Group Overview** Windows. The options include 3D, Flat, and Gradient

2.12 Alarm Settings

2.12.1 Enable a flashing alarm

1 Open the **Preferences** dialog box.

2 From the **Preferences** dialog box, select the **Flash Alarm Icon** option to cause a flashing alarm icon to appear in the toolbar when an alarm occurs. This icon will continue to flash until the alarm is cleared in the **Alarm Log**.

2.12.2 Disable a flashing alarm

1 Open the **Preferences** dialog box.

2 From the **Preferences** dialog box, clear the **Flash Alarm Icon** check box to disable the flashing alarm option.

2.12.3 Display an Agent Group name for Agent Group alarms

1 Open the **Preferences** dialog box.

2 From the **Preferences** dialog box, clear the **Display Agent Name for Agent Group Alarms** check box to cause an agent group name to appear in the **Alarm Log** when an agent group alarm occurs.

2.12.4 Display an Agent Name for Agent Group alarms

1 Open the **Preferences** dialog box.

2 From the **Preferences** dialog box, select the **Display Agent Name for Agent Group Alarms** option to cause an agent name to appear in the **Alarm Log** when an agent group alarm occurs. This option is not available if Agent Privacy is enabled.

2.12.5 Display Agent Name for Service Group alarms

1 Open the **Preferences** dialog box.

2 From the **Preferences** dialog box, select the **Display Agent Name for Service Group Alarms** option to cause an agent name to appear in the **Alarm Log** when a service group alarm occurs. This option is not available if Agent Privacy is enabled.

2.12.6 Display a Service Group name for Service Group alarms

1. Open the **Preferences** dialog box.
2. From the **Preferences** dialog box, clear the **Display Agent Name for Service Group Alarms** check box to cause a service group name to appear in the **Alarm Log** when a service group alarm occurs.

2.13 Perform Alarm Log Functions

2.13.1 Open the Alarm Log window

1. On the **Real Time** menu, click **Alarm Log**.

- OR -

Click  on the toolbar.

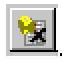
2. The **Alarm Log** window will appear.

2.13.2 Acknowledge an alarm message

1. Open the **Alarm Log** window.
2. In the **Alarm Log** window, select an alarm message. You can select more than one message at a time. The message(s) will be highlighted.
3. Click . The message will remain in the window but will no longer appear red.

2.13.3 Clear an alarm message

1. Open the **Alarm Log** window.
2. In the Alarm Log window, select an alarm message. You can select more than one message at a time. The message will be highlighted.

3 Click . The message will no longer appear in the Alarm Log window.

2.13.4 Print an Alarm log

1 Open the **Alarm Log** window.

2 Click . The entire alarm log will be printed; however, messages that have been cleared will not be printed.

2.14 Perform Layout functions

2.14.1 Display a custom layout

1 On the **Options** menu, click **Layouts**.

- OR -

Click  on the toolbar.

The Layouts dialog box will appear.

2 From the **Layouts** list box, select the layout you wish to display. The highlighted layout indicates the current layout.

3 Click **OK**. The main window will refresh to display the windows associated with the selected layout.

2.14.2 Save a new layout

1 On the **Options** menu, click **Save Layout As**. The **Save Layout As** dialog box will appear.

2 In the **Name** text box, enter a layout name.

3 Click **OK**.

2.14.3 Delete a layout

1 On the **Options** menu, click **Layouts**.

- OR -

Click  on the toolbar.

The **Layouts** dialog box will appear.

2 From the **Layouts** list box, select the layout you wish to delete.

3 Click **Delete**. The selected layout will be removed from the Layouts list box.

Note: The layout that is highlighted will become the current layout.

2.14.4 Save the current layout

On the **Options** menu, click **Save Current Layout**.

- OR -

Click  on the toolbar.

The displayed real time windows and positions will be saved to the current layout.

2.15 Display Real Time Information

2.15.1 Service Accesses

Display Service Accesses

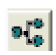
The **Service Access Overview** window displays the current status of all the service accesses that you can access. From the Service Access Overview window, you can:

- View all the service accesses that you are allowed to access;
- View the details of each service access. Such details include information such as the number of current/direct/overflowed in/handled/overflowed out/abandoned calls and the Average Handling Time;
- View the summary for all the service accesses that you are allowed to access;
- Sort the service accesses.

Open the Service Access Overview window

On the **Real Time** menu, click **Service Access Overview**.

- OR -

Click  on the toolbar.

The **Service Access Overview** window will appear.

2.15.2 Service Group

Display Service Group

The **Service Group Overview** window displays the current status of either all the service groups or specified service groups that you can access. There are two different display formats for Overviews:

- Graphical - displays the current service group status in the form of vertical stacked bar graphs
- Table - which displays detailed performance and status information for a specified service group
- From the Service Groups window, you can:
- Sort the service groups you want to display,
- Select a particular service group to view the agents currently serving that group,

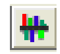
- View the group details for a selected service group.

Note: If Agent Privacy is activated, you will not be able to view any information regarding agents.

Open the Service Group Overview - Graphical window

On the **Real Time** menu, click **Service Group Overview** then **Graph**.

- OR -

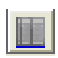
Click on the toolbar. 

The **Service Group Overview** - **Graphical** window displays.

Open Service Group Overview - Table window

On the **Real Time** menu, click **Service Group Overview** then **Table**.

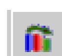
- OR -

Click  on the toolbar.

The **Service Group Overview - Table** window displays.

Open the Service Group Selection dialog box

1 Open the **Service Group Overview** window for **Graphical**, or **Table**.

2 Click  on the window toolbar.

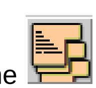
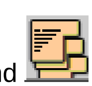
- OR -

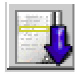
Right mouse click on a **Service Group** name or right click within the bar graph area, and select **Sort** on the shortcut menu.

The **Service Group Selection** dialog box appears.

Change the display order of service groups in the Service Group windows

1 Open the Service **Group Selection** dialog box.

2 In the **Service Group Selection** dialog box, use the  and  buttons to change the sort order of the **Service Groups**.

3 Select a **Service Group** in the **Displayed** list and use the  and  buttons to change the display order of the **Service Groups**.

4 Click **OK**.

Display Service Groups associated with a Summary group

From a Service Group Overview window (Graphical, or Table), double- click on a <Summary> group bar graph

- OR -

Select a Summary Group name from the drop-down list and click .

-OR-

Right mouse click on a summary group bar graph and select **Details** from the shortcut menu.

A Service Group Overview window (Graphical or Table) appears with the selected summary group name display in **<>** on the title bar and the service groups associated with the selected summary group visible.

Display Group Details

From a Service Group Overview window (Graphical, or Table), select a non-summary service group name from the drop-down list and click

. 

-OR-

Right mouse click on a non-summary group bar graph and select **Details** from the shortcut menu.

A **Service Group Details** window appears with the selected service group name displayed in **[ ]** on the title bar.

Display Service Group Agents

From a Service Group Overview window (Graphical, or Table), double- click on a non-summary service group bar graph

- OR -

Select a non-summary service group name from the drop-down list and click .

-OR-

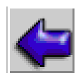
Right mouse click on a non-summary group bar graph and select **Agents** from the shortcut menu.

A **Service Group Agents** window appears with the selected service group name display in **[ ]** on the title bar.

Hide a service group from a Service Group Overview window

1 Open the **Service Group Selection** dialog box.

2 In the **Service Group Selection** dialog box, select the service group you wish to hide from the **Displayed** list box. You can select more than one service group.

3 Click  to move the selected service groups to the **Hidden** list box. These service groups will no longer appear in the **Service Group Overview** windows.

4 Click **OK**.

2.15.3 Agent Group

Display Agent Group

The **Agent Group** window displays:

- Current status of the agent groups that you can access, in the form of vertical stacked bar graphs.
- Name of the group, number of available agents and number of logged on agents for each group above each graph.
- Percentage of logged on agents that are busy handling an service call, handling another call or not handling any call.

From the Agent Group Overview window you can constantly monitor specific agent groups and access the current status of agents in a particular group.

Note: If Agent Privacy is activated, you will not be able to view any information regarding agents.

Open the Agent Group Overview window

On the **Real Time** menu, click **Agent Group Overview**.

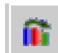
- OR -

Click  on the toolbar.

The **Agent Group Overview** window will appear.

Open the Agent Group Selection dialog box

1 Open the **Agent Group Overview** window.

2 Click  on the window toolbar.

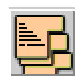
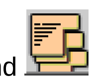
- OR -

Right mouse click on an **Agent Group** name or right click within the bar graph area, and select Sort on the shortcut menu.

3 The **Service Agent Selection** dialog box appears.

Change the display order of agent groups

1 Open the **Service Agent Selection** dialog box.

2 In the **Service Agent Selection** dialog box, use the  and  buttons to change the sort order of the Agent Groups.

3 Select an **Agent Group** in the **Displayed** list and use the  and  buttons to change the display order of the Agent Groups.

4 Click **OK**.

Display Agent Group Agents

From an **Agent Group Overview** window, double-click on a non-summary agent group bar graph

- OR -

Select a non-summary agent group name from the drop-down list and click

.

-OR-

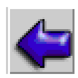
Right mouse click on a non-summary group bar graph and select **Agents** from the shortcut menu.

An **Agent Group Agents** window appears with the selected agent group name display in **[ ]** on the title bar.

Hide an Agent Group from the Agent Group Overview window

1 Open the **Service Agent Selection** dialog box.

2 In the **Service Agent Selection** dialog box, select the agent group you wish to hide from the **Displayed** list box. You can select more than one agent group.

3 Click  to move the selected agent groups to the **Hidden** list box. These agent groups will no longer appear in the **Agent Group Overview** window.

4 Click **OK**.

2.15.4 Campaigns

Display Campaign Overview

The **Campaign Overview** window displays:

- List of all running campaigns
- Name of the campaign, service group, total customers, number of customers called, number of customers not called, successful calls and unsuccessful calls.

Open the Agent Group Overview window

On the **Real Time** menu, click **Campaign Overview**.

- OR -

Click  on the toolbar.

The **Campaign Overview** window will appear.

Display Campaign Details

The **Campaign Details** window displays:

- Campaign configuration information: Campaign name, service group, status, and schedule
- Statistics for the campaign as a number and percentage: total customers, number called, number not called, number successful, number unsuccessful, unsuccessful calls with attempts remaining, unsuccessful calls with no attempts remaining, number of failed calls due to busy, number of failed calls due to no answer, number of failed calls due to other reasons

Open the Campaign Details Window

From the **Campaign Overview** window, double-click on a campaign

-OR-

Right mouse click on a campaign and select Campaign Details

From a **Service Group Overview Window**, right mouse click on a non-summary campaign group bar graph, select **Campaign Details** then the name of the campaign from the shortcut menu.

A **Campaign Details** window appears with the selected campaign name display in **[ ]** on the title bar.