Evolve Contact Wallboard

User Guide

Evolve IP® Guide

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1 Introduction

1.1 What is the ECS Wallboard?

The ECS Wallboard is a graphical wallboard application designed to be displayed on large monitors (may also be displayed on a variety of screens), which provides agents, supervisors and other contact center personnel with instant, colorful real-time Contact Center information. The information includes Business Process performance and activity details as well as current Agent activity details.

For Example:

- Answered Interactions
- Abandoned Interactions
- Waiting Interactions
- Available Agents
- Back Office Agents

The ECS Wallboard can also present a pie chart displaying available agents and their activities.

1.2 Audience

This document is targeted at contact center supervisors that are authorized to run and configure the ECS Wallboard Application.

1.3 General

Below are some general points that need to be considered when working with the ECS Wallboard application:

- The ECS Wallboard displays data per Business Process
- The ECS Wallboard application is installed and setup per workstation
- The ECS Wallboard that displays data for a certain BP can be launched simultaneously from different workstations (from any location – if you have the right privileges and requirements)
- For workstations that have more than one plasma screen, you can run two ECS Wallboard applications, which display different Business Process information
- The ECS Wallboard application has a default setting and layout. Changing the layout and how data is presented on the ECS Wallboard is a simple task.

2 Starting the ECS Wallboard

The ECS Wallboard application may be accessed and opened using the Application Portal.

1. Open your internet browser and enter the link (provided by your system administrator) in the URL address bar. The Application Portal page opens.
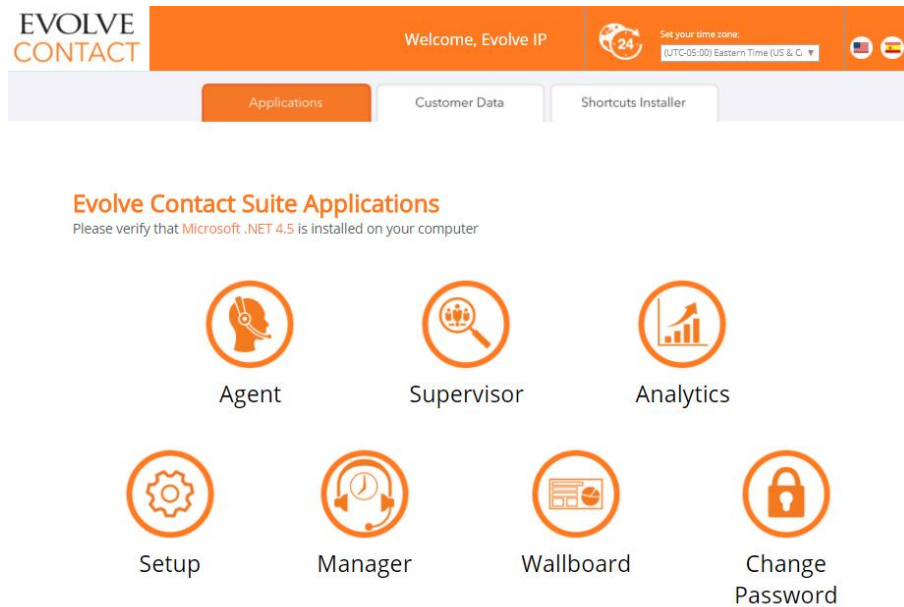
The Application Portal Page

2. If you are a first-time user, you will be required to change and confirm your password to log into the ECS Wallboard application. Click the Change Password icon to activate your account. The Change Password Window opens.
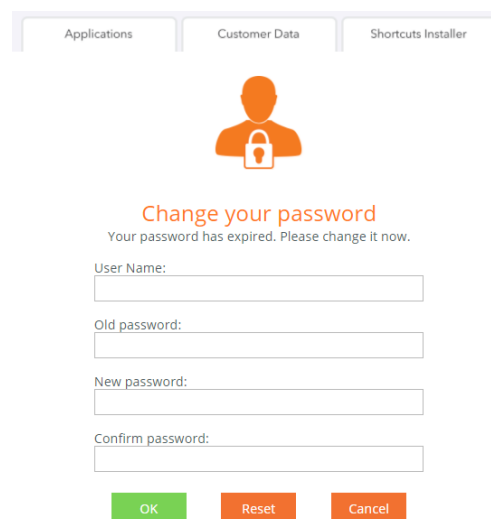
Change Password Window

3. Enter the original password (provided to you by your system administrator), enter a new password and then confirm the new password.

4. Click OK to save the new password. A message appears indicating that your password was

successfully changed. Click 'Close Window'.

5. Make sure that the **Time Zone** selection located at the upper right area of the Application Portal is set to your time zone.

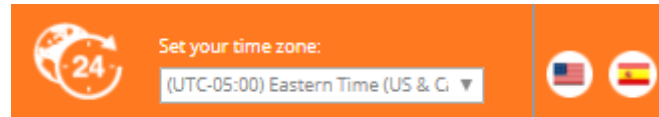*If you want to change it: click the **Time Zone** drop-down arrow and select the time zone in which the supervisor resides. This step is optional, as the supervisor may also select the relevant time zone via the Setup Application.

6. Click to launch the ECS Wallboard application. The Launching application window opens.
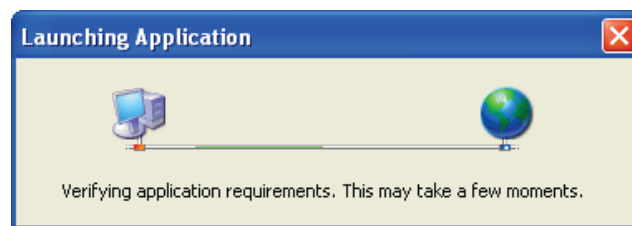
Launch Application Window.

7. If this is the first time you are starting the ECS Wallboard application or if the client version was updated, you will be requested to accept the software download.

8. Click **Run** to accept the software download. The ECS Wallboard application starts downloading.

9. After all the application requirements have been verified, the relevant authentication window opens, requiring you to enter a User name and Password. The application's 'Splash' screen also appears.

ECS Wallboard Splash Screen
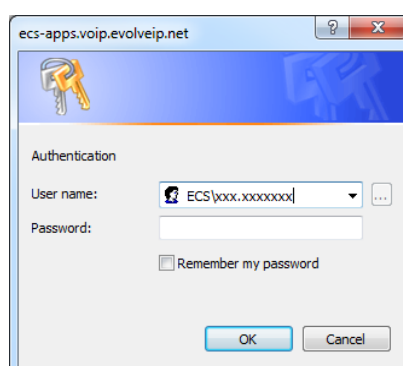
Authentication Dialog

10. Enter your user name and password and click OK. The application's 'Splash' screen appears and then the ECS Wallboard application opens.

11. Select the relevant Business Process from the drop-down list that appears and press the 'Launch' button.

3 ECS Wallboard Application Main View

The ECS Wallboard's main screen opens immediately after the splash screen appears. This section covers the different areas of the ECS Wallboard application screen.
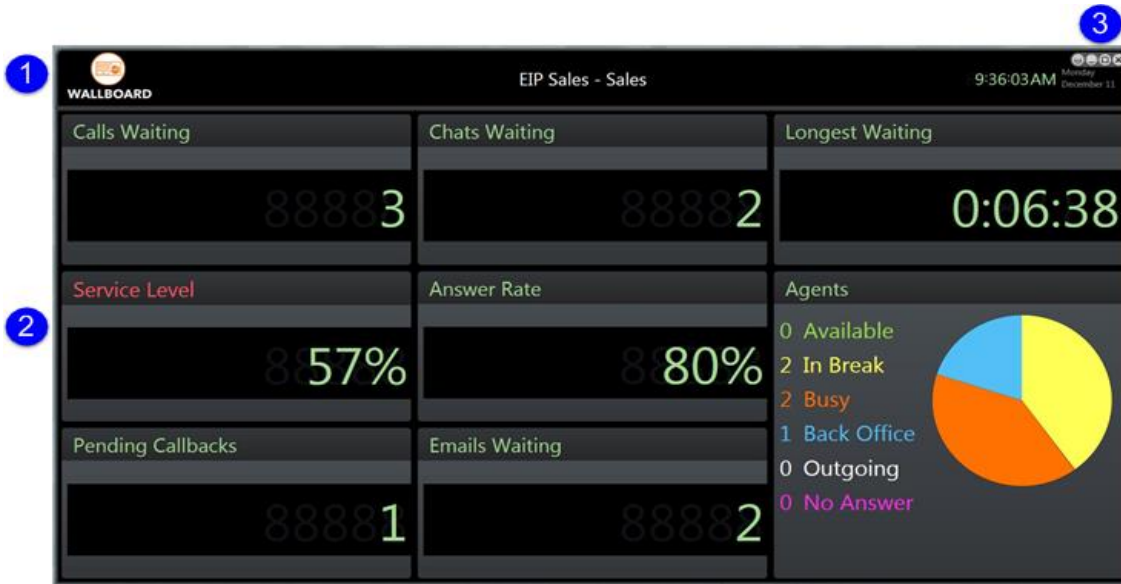
ECS Wallboard Application Main Screen

The ECS Wallboard is divided into the following areas:

1 Upper pane – This area provides general information such as, the organization's name and the business process for which the Wallboard provides live statistical information. The current date and time is also displayed in the upper right corner.
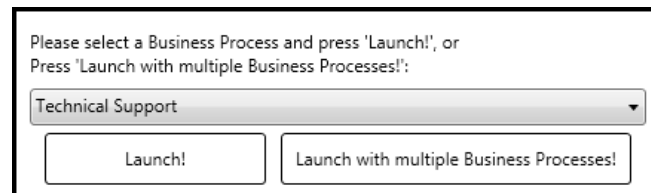
2 Lower pane – This area is by default divided into five sections and may even be divided into more, depending on the configuration settings in the Wallboard Setup Utility.

3 Toolbar – used to configure the ECS Wallboard's look and feel. The toolbar icons are in the top right corner of the Wallboard and represent the following actions:
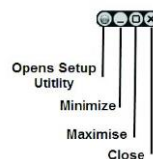
The table below lists the default items that appear when opening your Wallboard interface and provides a description for each item.

Item	Name	Description
1	Wallboard Details	The organization name and the business process, to which the Wallboard is assigned. This Business Process name can be modified using the Manager Application only.
2	Current Time and Date	Current time and date of the local computer, on which the Wallboard is running. The time and date language is defined by your local computer's regional settings

3	Abandoned	Number of abandoned interactions in a shift. Abandoned interactions are those disconnected by the customer, while waiting in the business process queue. Note: Interactions that were disconnected after reaching an agent are considered as handled.
4	Waiting	Number of interactions that are currently waiting in the business process queue.
5	Longest Waiting Time	Longest waiting time of incoming interactions: voice Interactions, chat interactions, as well as incoming e-mail and fax interactions, during a shift. Waiting interactions are those waiting in the agent queues.
6	Answered	Number of answered interactions in a Business Process shift. Answered interactions are those accepted by agents.
7	Agent Availability Pie Chart	The information is color-coded and is displayed in a pie chart. The following details are shown: Available agents, Agents on Break, Busy agents (i.e. agents that are handling an interaction), Back Office Agents - Agents occupied with back office activities and Handling Outgoing Calls

4 Working with the ECS Wallboard Setup Utility

Supervisors can customize the data available on the ECS Wallboard using the Setup Utility. The setup utility is made up of cells, whereby each cell represents a section (i.e. counter) on the Wallboard. The Wallboard and setup utility work simultaneously, this allows you to view the changes made in the utility window, on the ECS Wallboard immediately.

As the ECS Wallboard application is installed and setup per workstation, you may find that the layout is not sufficient to present all the necessary Business Process data, therefore, in such cases, you can use another workstation that will launch the Wallboard, but with a different layout (displaying different data).

Example:

- Supervisor A will install and setup the ECS Wallboard application on computer A for BP 'Sales' with the following data: 'Waiting', Abandoned and Answered interactions.

- Supervisor B will install and setup the ECS Wallboard application on computer B for BP 'Sales' with the following data: Available Agents, Unavailable Agents and Back Office Agents

Both computers will display information from the same BP (but different KPI's). This kind of setup allows you to flexibly change the look and feel of the ECS Wallboard, as well as display more data.

4.1 ECS Wallboard Utility Command Buttons

The following command buttons are found at the bottom of the setup utility window:

Command	Description
OK	Saves the changes made and closes the setup utility window
Cancel	Abandons the changes made and closes the setup utility window
Apply	Saves the changes made, but does not close the setup utility window
Reset	Resets the display to the default settings (the setup utility window does not close)

4.2 Starting the ECS Wallboard Setup Utility

The ECS Wallboard setup utility allows you to set the look and feel of an organization's Wallboard. You can move cells around the utility window by dragging and dropping them wherever you want in the window.

To start the Wallboard Setup utility:

1. Click setup icon in the ECS Wallboard Toolbar.

2. The ECS Wallboard utility window is displayed, showing the default counter settings.

Figure 8: ECS Wallboard Utility Window

4.3 Cell Layout and Content

4.3.1 Cell Layout

The way in which your ECS Wallboard is laid out depends on which column display settings you choose.

To arrange cell layout:

1. Click Column Display icon to setup and arrange how the columns are displayed within the window. The data is arranged in columns according to your selection from the drop-down list. The following column layout options exist:

- Two Columns – displays 2 columns of the same width

- Three Columns - displays 3 columns of the same width

- First Narrow - displays the 1st column narrower than the rest

- First Wide – displays the 1st column wider than the rest

- Middle Wide - displays the middle column wider than the rest

2. After you are satisfied with the way you have set up your columns, it is important that you look at the ECS Wallboard to make sure that the column setup chosen is displayed appropriately. As this is a real-time application, it is possible to do this without closing the utility window.

4.3.2 Cell Content

Each cell is broken down into three different areas:

- Editable Cell Heading – the heading entered here appears on the actual ECS Wallboard, indicating which Business Process is going to be set as a counter

- Business Process/Counter Name – select a counter that matches/relates to the cell heading, from the drop-down list

- Dimension Check Box – check this box if you want to select an interaction type

dimension from the drop-down list

- Dimension Drop-Down List – contains a list of all the interaction types available in the system

4.4 Adding Cells

You can add new cells to the layout by simply clicking the 'New' button. The newly inserted cells appear blank, requiring you to enter or select the relevant information.

To add a cell:

1. Click the **New** icon to add a new cell in the utility window. New cells appear without a cell heading. Be sure to enter a heading that relates to the KPI (Key Performance Indicator) being displayed (e.g. If you have chosen to display those interactions which were abandoned, then enter 'abandoned interactions' in the heading - the ECS Wallboard displays a count of ALL the interactions that were abandoned in the system). Headings may be entered using whichever language you prefer.

2. Click the **OK** icon to save the changes. The following window appears:
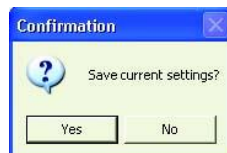
Save Current Settings- Confirmation Window

3. Click 'Yes', to confirm, and the utility window closes.

4. Click APPLY to save the changes, while the utility window remains open, allowing you to see the changes on the ECS Wallboard right away.

5. Click CANCEL to abandon the changes made. The following window appears:

Abandon Changes? – Confirmation Window

6. Click 'Yes', to confirm, and the utility window closes.

7. Click RESET to reset the data back to the default settings.

4.5 Editing Cells

Cells may be edited by simply clicking the header field and updating the title.

To edit a cell:

1. Click a cell heading or select a drop-down arrow to edit cell contents.

2. After making the relevant changes, click on the relevant command button to save your changes.

4.6 Moving Cells

Cells may be moved around by simply dragging and dropping them.

To move a cell:

1. Click and hold the mouse pointer on the cell you wish to drag and drop.

2. Move the mouse pointer over to the location you wish to drop the cell. You will see the file visibly "moving" on the screen to indicate where it is going.

3. Release the mouse pointer over the location in which you wish to drop the cell. The rest of the cells will shift around accordingly.

4.7 Removing Cells

Cells are removed by simply clicking the remove cell button at the top right corner of each cell.

To remove a cell:

1. Click X to remove a cell from the utility window.

2. After moving the cell, click on the relevant command button to save your changes.

4.8 Working with Dimensions

The Dimension attribute allows you to slice (breakdown) the data counter according to the interaction elements origin (incoming or outgoing) or interaction media type (e.g. telephony / chat /mail) e.g. you can differentiate between how many chat interactions were answered and how many telephony interactions were answered.

Only the Business Process counters that can be divided up and categorized according to an interaction type will appear with the Dimension check-box and drop-down list. For Example: Selecting – Business Process Busy Agents will not display the dimension options within the cell.
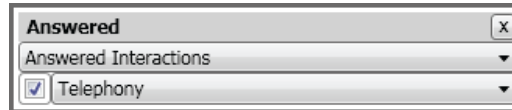
To add a dimension:

1. Check the Dimension check-box.

Dimension check-box

2. Select an interaction type from the Dimension drop-down list e.g. Telephony. At this point, the ECS Wallboard displays only those interactions of type Telephony that were answered in the system.

Interaction Type Selected in Dimension drop-down list

Scenario 1:
A Call Center handles interactions of the following media types: chat and voice (in a Sales Business Process queue) and you want to separate answered voice interactions from chat interactions, you would setup two cells that appear as follows:
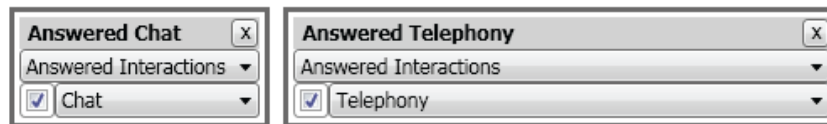
Scenario 2:
A Call Center handles interactions of the following origin types: transferred and incoming voice (in a Sales Business Process queue) and you want to separate the waiting interactions, which were transferred from those that were outgoing external, you would set up two cells that appear as follows
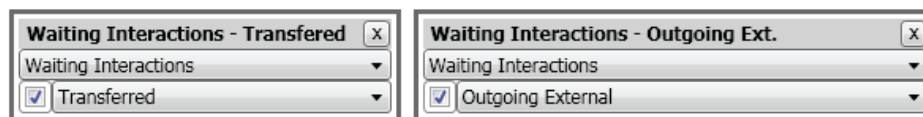
4.9 Inserting External Data

Out of the box counters and pie charts are provided, offering a wide range of information on the daily performance of Business Processes. Working with the User Data attribute allows you to display external information bytes on the ECS Wallboard e.g. employee of the month picture or organization news etc.

The User Data feature can be used to launch images, word files or even internet/intranet pages, by entering a URI address in the User Data cell. Each contact center can have its own customized User Data display, showing the relevant information.

To launch user data on the ECS Wallboard:

1. Click the Agent Data cell drop-down list.

2. Select User Data. Another row appears below User Data that reads: 'Enter URL Here'.
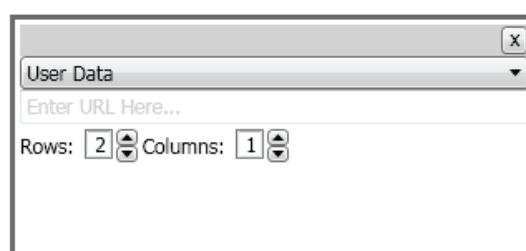
User Data Cell

3. Enter **http://** or **https://** in the URL field to launch data from the internet or intranet.

4. Enter **file://** or **C:** in the URL field to launch a file that exists locally on your computer.

5. Specify over how many rows and columns the image is to be displayed.
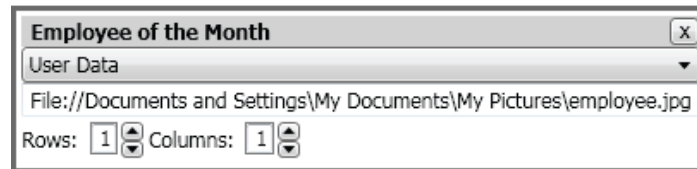
User Data Cell with specified URL

6. Enter a heading that relates to what is going to be displayed on the ECS Wallboard. For example:

A supervisor may decide to use the User Data feature to display an image of 'The Employee of the Month'. To do this, they enter a heading: 'Employee of the Month' and then enter a link to where an employee of the month image is saved. The image is displayed accordingly on the ECS Wallboard.

User Data displayed on ECS Wallboard

4.10 Working with Agent Data

By selecting Agent Data in the ECS Wallboard Setup Utility, the agent's data will be presented in a common pie chart on the actual ECS Wallboard. The Agents Pie chart takes the place of two cells on the ECS Wallboard.

The following information is displayed in the pie chart:

- Available agents
- Agents in break
- Busy agents (i.e., agents that are handling interaction(s))

- Agents occupied with back office activity

- Outgoing agents

- No Answer agents

The above information is color-coded.

Agents Data displayed on ECS Wallboard

5 ECS Wallboard Counters

Counters are used to store and display (via the ECS Wallboard and other applications) the number of times an event or process occurred (e.g. BP longest waiting time or BP answered interactions).

The table below lists the counter names available in the system. These counters appear throughout our applications, including the ECS Wallboard Setup Utility.

5.1 ECS Wallboard Counters

Counter Name	Definition
Abandoned Interactions	Total number of interactions disconnected (abandoned) by customers while in the queue, since the shift started.
Answered Interactions	Total number of interactions answered by agents since the shift started.
Average Agent Handling Time	The average agent handling time (includes wrap up time) of all the BP agents, since the shift started.
Total Agent Handling Time	The total amount of time an agent spent handling an interaction, since the shift started.
Total Waiting Time	The total amount of time an interaction waited in a BP queue since the shift started.
Total Answer Time	The total amount of time it took agents to answer an interaction, since the shift started.
Average Answer Time	The average time in took agents to answer an interaction, since the shift started.
Average Waiting Time	The average waiting time in a BP queue since the shift started.
Back Office Agents	The number of agents that are currently in Back Office mode.
Busy Agents	The number of agents that are currently busy (includes wrap up time). This includes: Agents that are handling BP interactions as well as wrap up, and agents that are handling BP conference and consult interactions.
Interactions Handled by Agent	Total number of interactions answered by agent and completed, including wrap-up time, since the shift started.
Interactions Handled in Business Process	Total number of Interactions that ended in the BP flow since the shift started, including interaction that were terminated by the system and interactions disconnected by the customer.
Agents on Break	The number of agents that are currently in break mode.
Longest Waiting Time	The longest waiting time for interaction, currently in the queue.
Logged In Agents	The number of agents that are currently logged-in. Offline agents are not considered logged in.

Total Interactions	Total number of interactions, which arrived in the BP since the shift started.
Waiting Interactions	Total number of interactions currently waiting in BP queue.
Treated Interactions Score	Those interactions (percentage) that were successfully handled out of all the interactions.
Total Requested Callback Interactions	Total number of Callback interactions requested since the shift started.
Abandoned Percentage	Total number (percentage) of interactions disconnected (abandoned) by customers while in the queue, since the shift started.
Answered Percentage	The percentage of interactions answered by agents since the shift started.
Available Agents	The number of agents that are currently available. This includes: Agents that are in ready mode, not busy or in a private interaction.
Private Agents	The total number of agents that are currently participating in a Private interaction, both initiated and answered.
Ended Interactions	Total number of interactions completed since the shift started including all interactions that were answered, abandoned and handled automatically by the BP.
No Answer Agents	The number of agents that are currently in a No answer mode. This may be due to a missed call (includes faults that caused the Agent Console connection to terminate). This mode is saved for 15 minutes then it moves to logged out.
Consult/Conference Agent	Total number of agents currently engaged in a conference or consult interaction.
In Process Interactions	Total number of Interactions, regardless to media type, currently processed by the BP Flow.
Internal Agents	The number of agents that are currently participating in an 'Outgoing Internal' Interaction. This includes: initiating, receiving or handling an outgoing internal interaction or consult\conference.
Total Transferred Out Internal	The total number of interactions transferred out of the BP to another BP, since the beginning of the shift. It includes Agent to BP and Agent to Channel, (performing a blind or attended transfer)
Overflow Interactions	Total number of interactions that triggered an overflow rule in the BP flow (if exists), since the shift started.
Handling Outgoing	Total number of agents currently handling Outgoing interactions without receiving incoming BP calls in parallel.
Unavailable Agents	Total number of agents currently unavailable, including agents, which are in: 'Break' mode, 'Internal outgoing' mode, Back Office - Administrative" mode

Total Transferred Out External	Total number of interactions which were transferred from the BP to an external destination, out of the contact center, since the shift started.
Callbacks Failed in Shift %	The percentage of fail ended callback interactions out of the total callback interaction records processed in the current shift.
Callbacks Failed in Shift	The number of fail ended callback interactions in the current shift.
Callbacks Requested in Shift	The number of callback interactions requested since the shift started.
Callbacks Succeeded in Shift	The number of callback interactions that reached the customer in the current shift.
Callbacks to Be Processed	The callback interactions that are waiting to be processed, including records that need to be redialed and records which have not been dialed yet.
Callbacks rescheduled in shift	The number of callback interactions that were rescheduled in the current shift.
Callback Average Handling Time	The average handling time for callback is counted from the time the agent accepted it, until it was disconnected (the average is not calculated per shift).
Callback Total Handling Time in shift	The accumulated handling time for callbacks is counted from the time the agent accepted it, until it was disconnected calculated per shift.
Callback Last Interaction Handling Time	Present the last callback handling time (counted from the time the agent accepted it, until it was disconnected).
Callbacks Processed in Shift	Total number of Callback records placed to the queue and processed during the current shift, regardless of the outcome. (Success, fail or redial).
Callbacks Purged in Shift	The number of interactions that were purged (a logical delete) since the beginning of the shift.
Callbacks Successful in Shift Percentage	The percentage of customers that received and answered the callback interaction out of the total callback interaction records processed in the current shift.

5.2 Combined Data Counters

There is a subset of available data counters that can display a summary of all combined Business Process metrics. The rest of the counters can only display metrics for individual Business Process.

Combined Business Process Counters:

- Abandoned Interactions
- Answered Interactions
- Callback Failed in Shift
- Callback Interactions Purged in Shift
- Callback Processed in Shift
- Callback Rescheduled in Shift
- Callback Succeeded in Shift
- Callback to be Processed
- Ended Interactions
- In Process Interactions
- Interactions Handled by Agents
- Interactions Handled in Business Process
- Longest Waiting Time
- Overflow Interactions

- Total Entered Interactions
- Total Requested Callback Interactions
- Total Transferred Out External

- Total Transferred Out Internal
- Waiting Deferrable Interactions
- Waiting Interactions

6 ECS Wallboard Alerts

Alerts may be defined for each counter. Alerts have two different severity levels:

- Warning
- Alert

Warnings and alerts are defined using the Setup Application – refer to the section 'Defining Monitoring Triggers' in the Setup User Guide.

When a counter alert is triggered in the ECS Wallboard, it's heading color changes according to its severity – yellow = warning and red = alert. Colored text appears instead of the regular green heading text.

Warning and Alert Triggered on ECS Wallboard