

Tetherfi Desk Manager

User Guide



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1.0	Rakshith Shetty	07-April-2018	Abhiram Angiras	07-April-2018	Initial draft
1.1	<i>Rakesh M H</i>	<i>09/11/2018</i>			Exceeded AUX time notification alerts.
1.1	<i>Rakesh M H</i>	<i>22/11/2018</i>			Multiple Intercations.
1.1.07.15	<i>Yashawantha Sapalya</i>	<i>16/07/2019</i>			Team Management Session Management Reload Configuration Blinking Alerts Threshold Hold to Un-hold Aux Filter Enable /Disable status change Enable/Disable Broadcast/Notification Messages System File versions Navigation to OCM Displaying connection status User Details
1.1.08.08	<i>Yashawantha Sapalya</i>	<i>16/08/2019</i>			Enable/Disable alert notification in TDM Documentation on Page based user access in OCM

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1 Introduction

1.1 Scope of document

This is the systematic guide for users to manage the 'Tetherfi Desk manager' application.

Web based GUI (Graphical User Interface) application will be provided for accessing the Desk Manager application and will be deployed on the IIS web server provided by the Client.

1.2 Intended Audience

This user guide document is intended for the following audience:

- Supervisors
- IT team
- Project Manager
- Application implementation team
- Application maintenance team

1.3 Glossary

Term or Acronym	Definition or Description
TDM	Tetherfi Desk Manager
ACW	After Call Work
GUI	Graphical User Interface
ACD	Automatic Call Distribution

2 Overview

Tetherfi Desk Manager (TDM) is an application to monitor the agent's activities and status. TDM GUI will show the distribution of the agents in Available, ACD, AUX/ACW and Internal/Outbound call status which helps supervisor to keep track of all the team members easily. Supervisor also can change status of the agent and TDM generates the agent summary report for selected date range which helps to evaluate the performance.

3 Components

1. **Desk manager Service:** This is the service that keeps checking for the agent details from the TMAC_Proxy and passes it to the TDM web application. TDM web application communicates through this service.
2. **Desk Manager Application or GUI:** This is the web application that is used to display the list of agents and their details, to change the status and fetch agent summary report.

4 Architecture

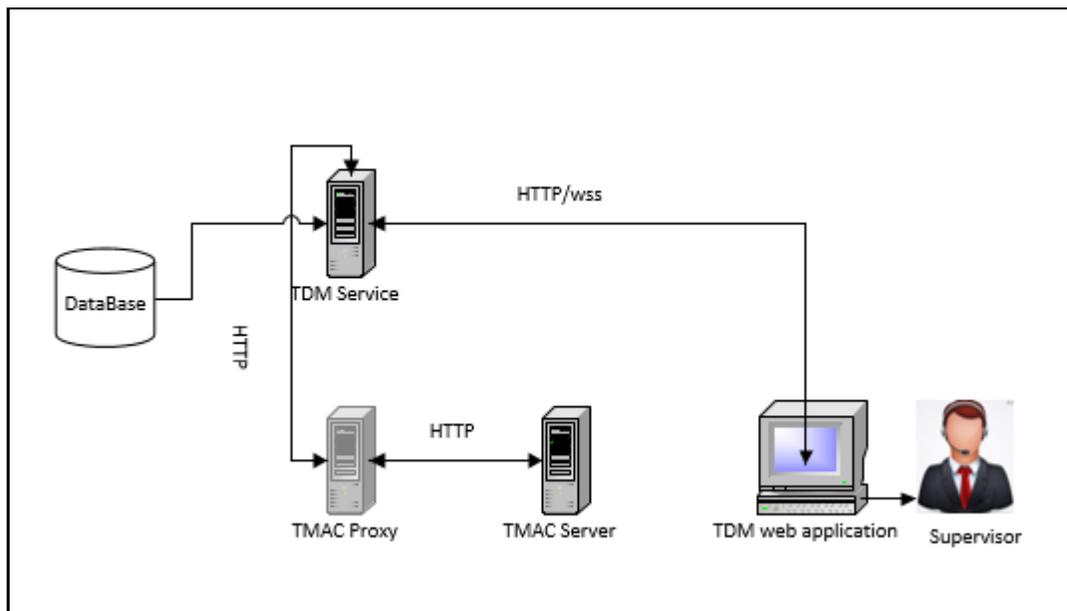


Figure 4.1

5 Accessing the Desk Manager application

Desk Manager is designed to be compatible with below web browser:

- Microsoft Internet Explorer (IE 10 or above)
- Google Chrome (Chrome version 43 or above)
- Firefox (version 41)
- Microsoft Internet Information Services (IIS version 7)

Tetherfi Desk Manager is standalone application. The procedure for accessing TDM is mentioned below.

The user must type the provided TDM link(<http://IP:PORT/DeskManger>) in the browser and press 'Enter' key, TDM will prompt user to enter his Windows username and password.

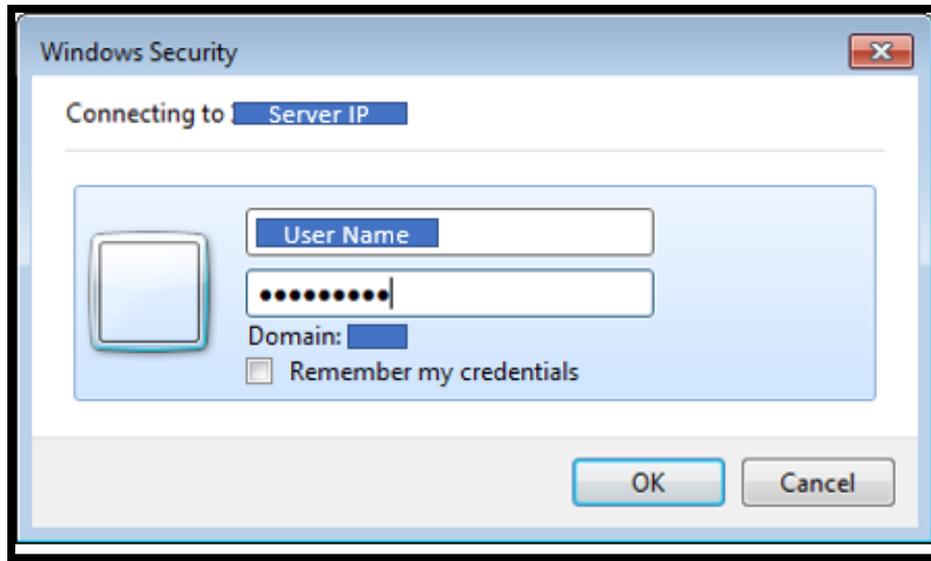


Fig. 5.1 Windows Security

After successful authentication, the below screen will be displayed.

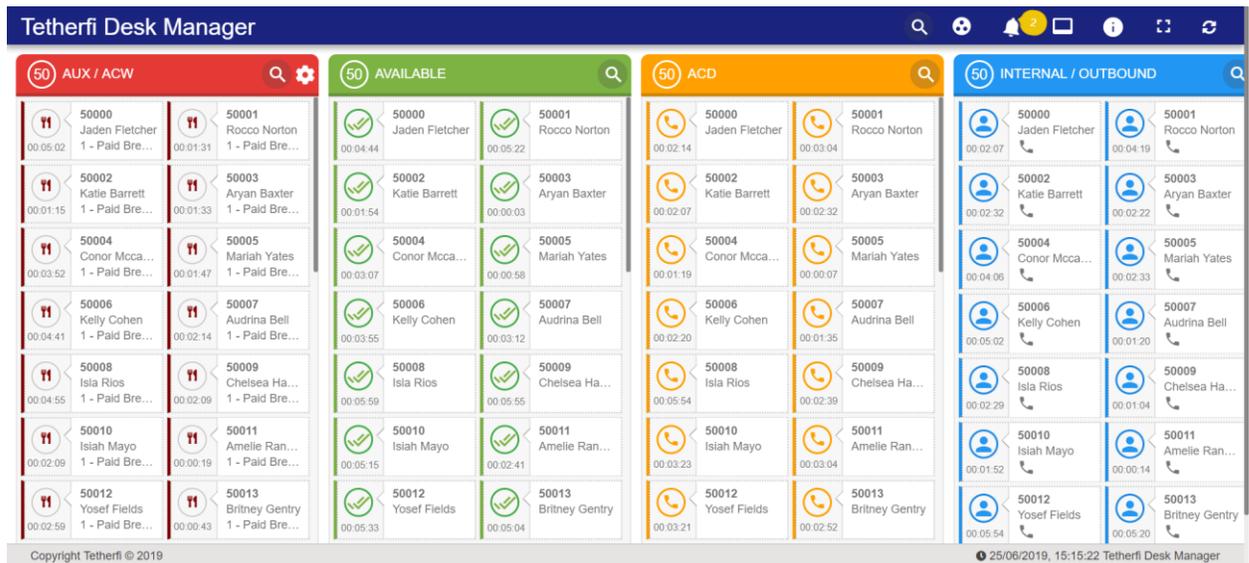


Fig. 5.2

TDM will have four tabs to list the agents who are in different state. Following are the status of the agent

Status	Description
AUX/ACW	Agent after call work and any break status
Available	Agents who are ready to answer calls
ACD	Agents who are on the call (Auto routed calls)
Internal/Outbound	Internal calls are between agents and outbound calls are made by agent to customer or agent.

Agent details include station ID used by the agent, agent name and current status of agent along with interval time. Interval time value indicates the time period in particular status and which keeps on running till the agent moves to other status.



Fig. 5.3

In ACD tab, third field indicates the queue name where the call got routed to agent.



Fig. 5.4

6 Multiple Interactions

When agent is on multiple calls, he/she will be shown in Internal/Outbound column with two instances of the same agent with different caller Id.

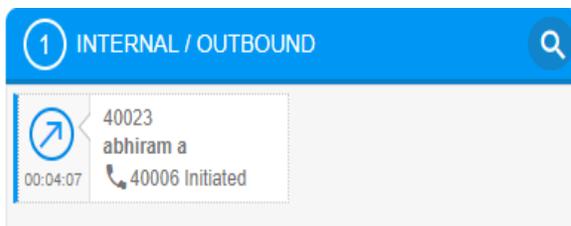


Fig. 6.1

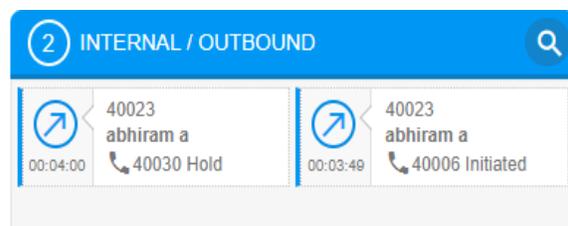


Fig. 6.2

When there are two interactions, the call status and call duration of that specific interaction is shown in the Desk Manager so that the supervisor can view that agent is on call or on hold state.

Fig. 6.1 shows when an agent is on a single call.

Fig. 6.2 shows when the same agent is in multiple calls and toggling between two calls.

7 TDM functions

Tetherfi Desk Manager (TDM) provides the following feature to the user:

1. Search
2. Team Selection
3. Wallboard Skills
4. Reload
5. Agent Selection
6. Aux Filter
7. Agent Profile
8. Agent Summary
9. Manual Status Change
10. Auto Status Change
11. Blinking Alerts
12. Threshold Un-hold
13. Alert Notification
14. Enable/Disable status change
15. Session Management

7.1 Search

Search feature helps Supervisor find any agent based on Agent name or Station ID or Lan Id.

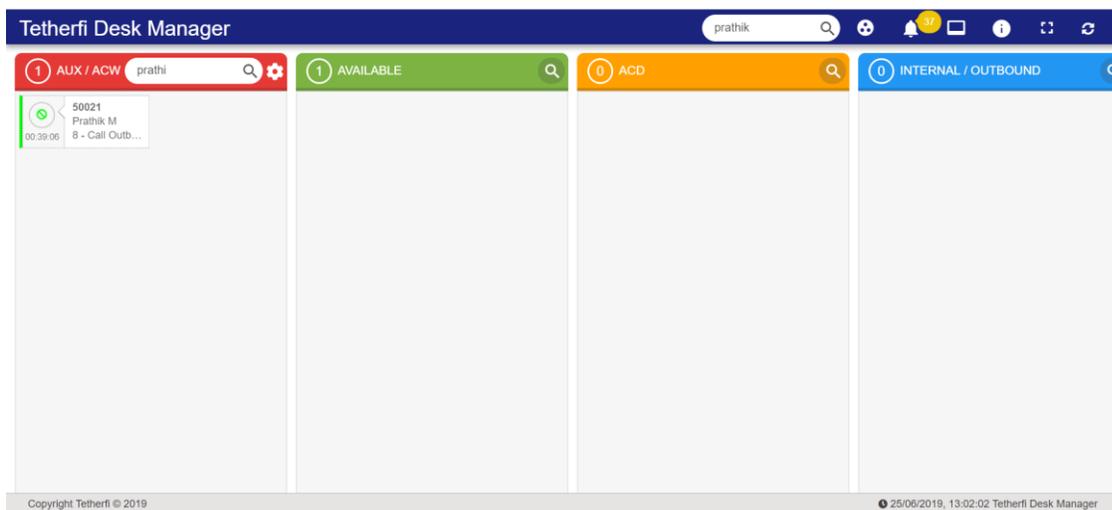


Fig. 7.1.1

7.2 Team Selection

If supervisor wants to see the agents of the particular team then go to the “select Team for Display” option and save the settings and now TDM UI will display the agents of that particular team. Please follow the below steps for team filtering.

To add/update agent and team click on [OCM Admin](#)

Click highlighted button as shown as below screen

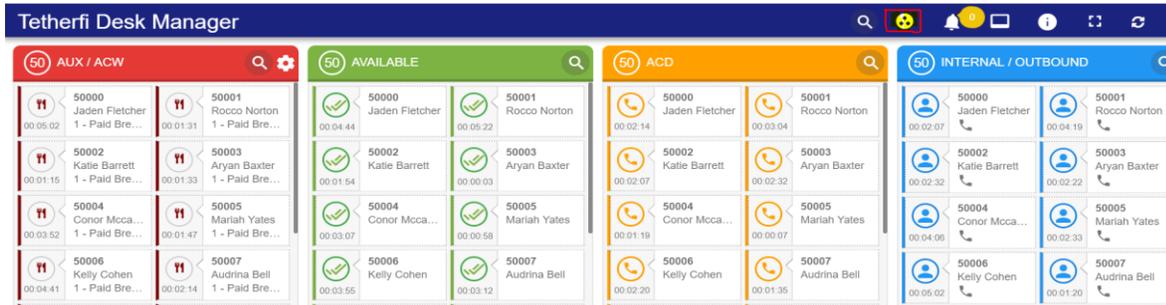


Fig. 7.2.1

Now Team list of logged in supervisor will get displayed in new window as shown as below Figure

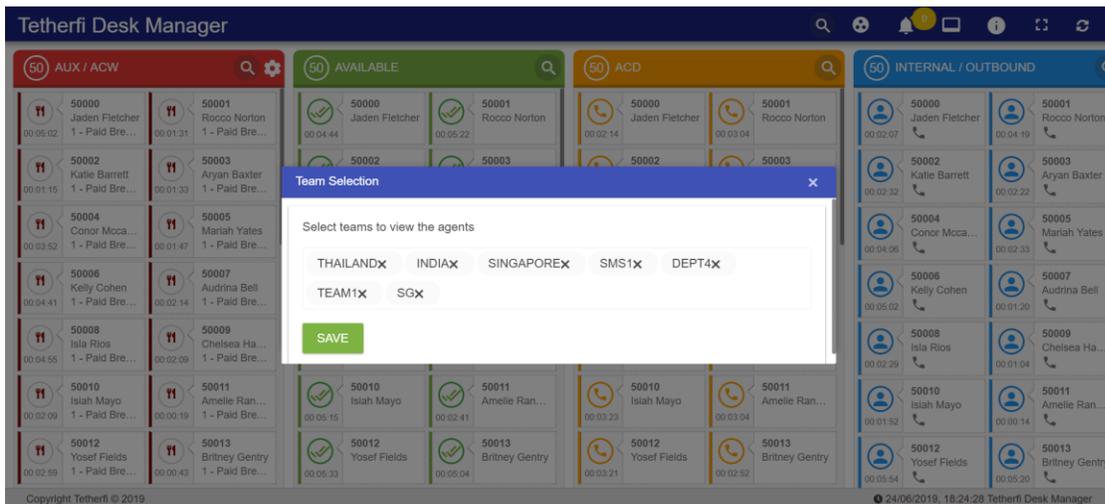


Fig. 7.2.2

To remove the teams click on close icon placed in front of each of the Team name and press **SAVE** button.

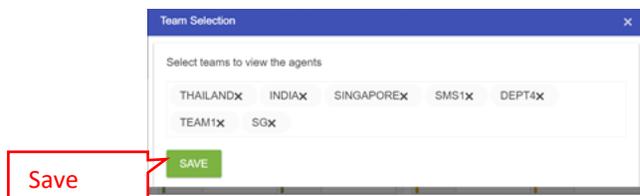


Fig. 7.2.3

7.3 Wallboard Skills

Wallboard skills helps to display all the skills available and number of agents who are staffed, available and Calls in Queue for all the skills.

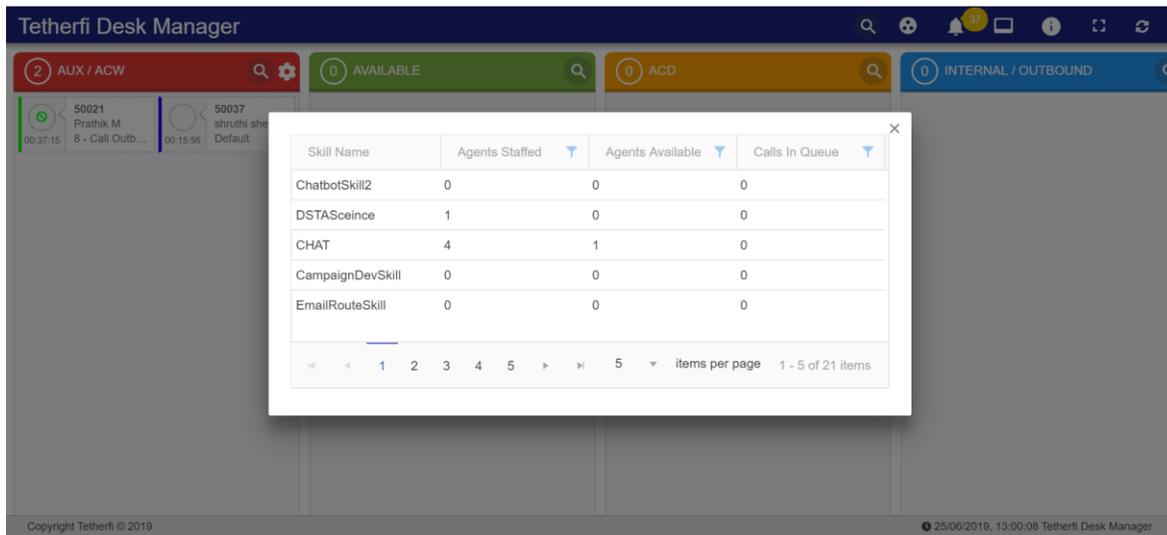


Fig. 7.3.1

7.4 Reload

System allows changing the threshold configuration without any downtime. If user did the json or OCM changes then user just need to Press “Reload” button from TDM UI as shown as in below fig 7.4.1.

So all the changes has been made will reloaded without system down time.



Fig. 7.4.1

7.5 Agent Selection

On click of an agent in any of the 4 grids, the selected agent will get highlighted and supervisors can monitor that particular agent. If supervisor clicks on another agent or same agent the highlight will be get removed from particular agent

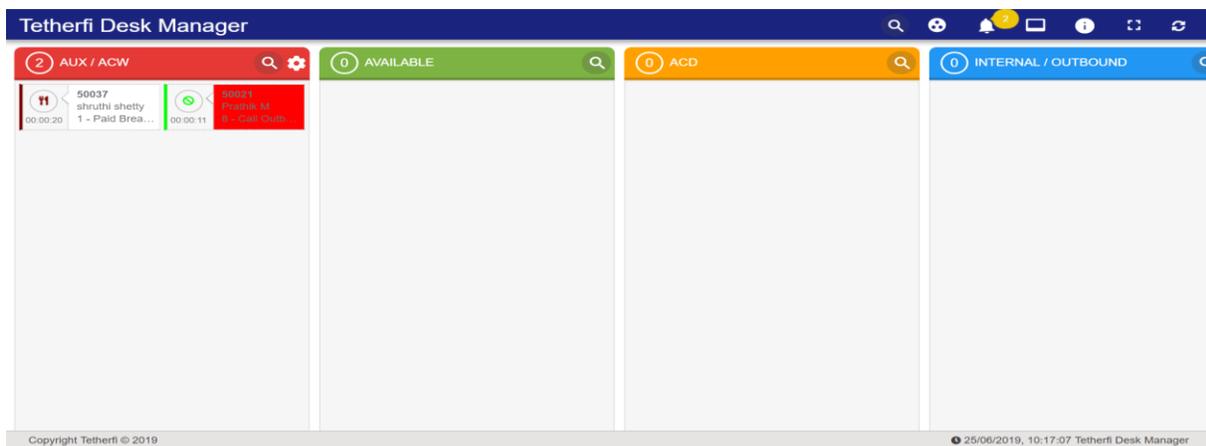


Fig. 7.5.1

7.6 Aux Filter

Filter based on AUX/ACW for the First column. User can apply the filter based on Aux Status and Time Spent. Click on the filter button in AUX/ACW grid and then select the filter option and press “**SUBMIT**” button to apply the filter. Press “**CLEAR**” button to clear the filter.

User can apply three types of filter to the AUX/ACW grid

- Filter by Aux/ACW

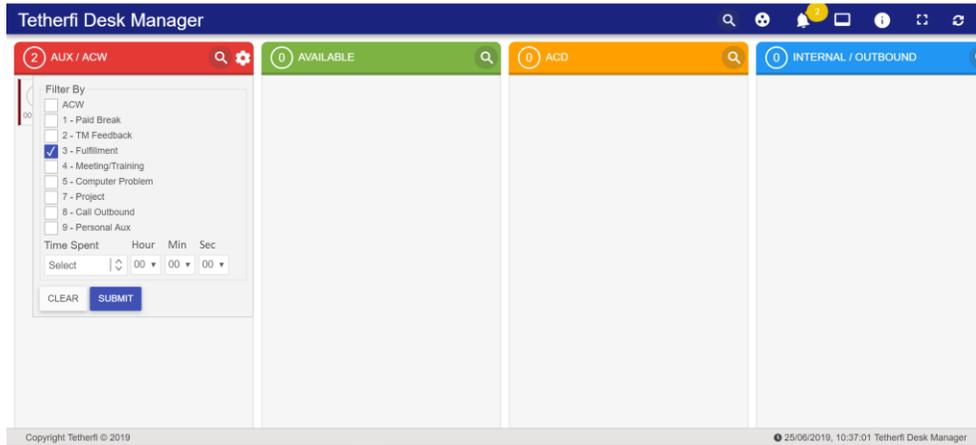


Fig. 7.6.1

- Filter by Time Spent

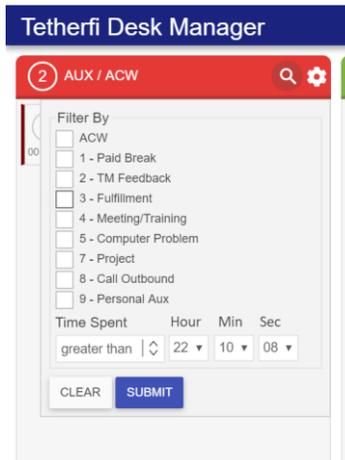


Fig. 7.6.2

- Filter by Aux/ACW status and Time Spent

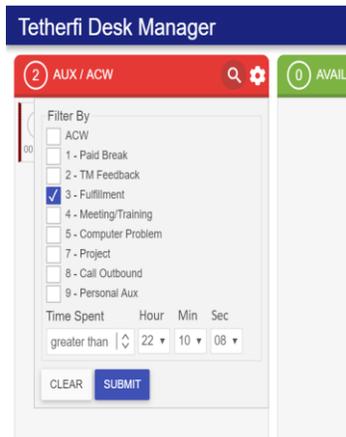


Fig. 7.6.3

7.7 Agent Profile

Agent profile feature is to display the agent details in TDM. User must right click on the agent whose information is needed and when user chooses the Agent profile option from list then below page is displayed.

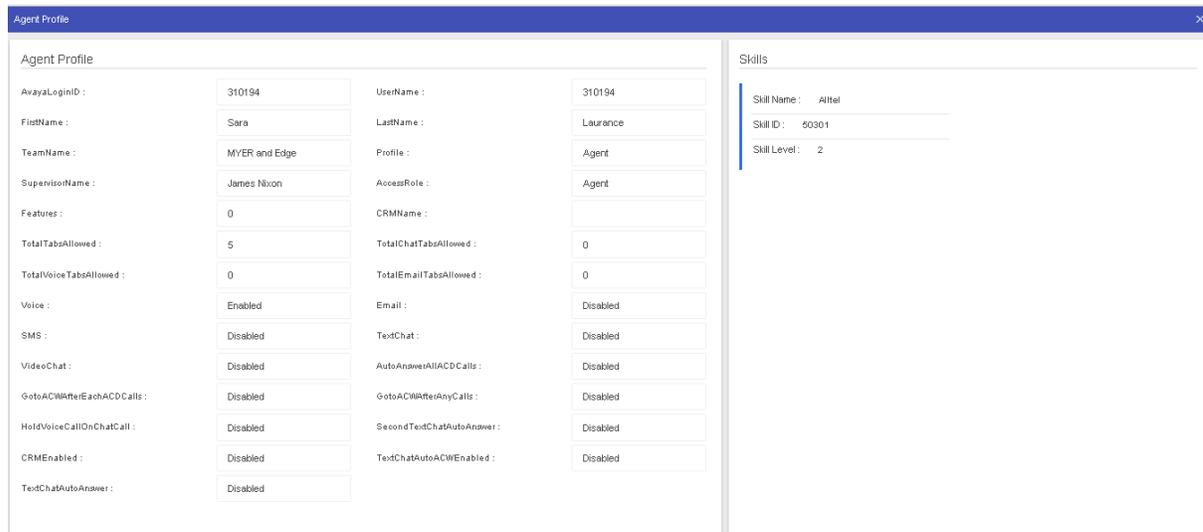


Fig. 7.7.1

Agent profile and skills are two sections in Agent profile page where Agent profile contains all the agent related details where in skills section provides the skills assigned to agent and details of each skill. Agent details fields and description are listed below:

Field	Description
AvayaLoginID	Login ID of the Agent
UserName	Lan ID of the Agent
FirstName	First name of the Agent
LastName	Last name of the Agent
TeamName	Agent team name
Profile	Agent or Supervisor

SupervisorName	Name of his/her the supervisor
AccessRole	The Access Roles being provided for agent
Features	Features provided to agent.
CRMName	To display the CRM Name
TotalTabsAllowed	Total number of tabs allowed to be opened at a time in TMAC
TotalVoiceTabsAllowed	Total number of Voice tabs allowed to be opened at a time in TMAC
TotalEmailTabsAllowed	Total number of Email tabs allowed to be opened at a time in TMAC
TotalChatTabsAllowed	Total number of Chat tabs allowed to be opened at a time in TMAC
Voice	Shows whether the Voice skill is applicable or not
Email	Shows whether the Email skill is applicable or not
SMS	Shows whether the SMS skill is applicable or not
TextChat	Shows whether the TextChat skill is applicable or not
VideoChat	Shows whether the Video Chat skill is applicable or not
AutoAnswerAllACDCalls	if enabled all ACD calls will be auto answered
GotoACWAfterEachACDCalls	If enabled after ACD calls agent goes to ACW state
GotoACWAfterAnyCalls	If enabled after every interaction agent goes to ACW state
HoldVoiceCallOnChatCall	If 'True' Voice Call will be on hold over Chat call
SecondTextChatAutoAnswer	If enabled second chat is auto answered when agent already in first chat
CRMEEnabled	To enable or disable the CRM
TextChatAutoACWEnabled	After chat handling agent goes to ACW state.

On the skills section of the Agent profile, each skill is identified with Skill Name, Skill ID and Skill Level. These are the skills assigned to that agent.

7.8 Agent Summary

Agent Summary report helps the supervisor to summarize the agent performance. When agent opts for the second option from the menu for the agent a date range pop up where user must choose date range within which agent performance is evaluated.

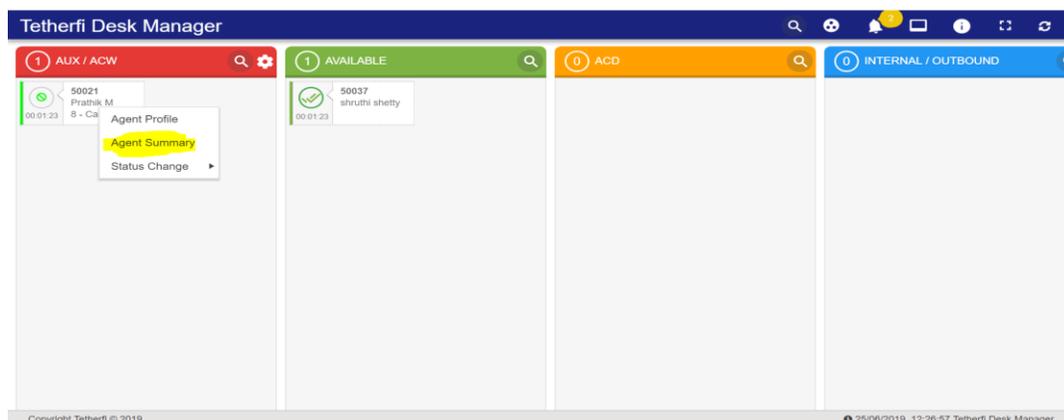


Fig. 7.8.1

The agent summary date range selection is configured in **GlobalVars.js** file as shown below. It will allow user to get agent summary data for only 15 days in from and to date picker. User can change these settings in **GlobalVars.js** and then reload the page using **ctrl+F5**

```
var maxDateRangeForSummary = "15";
```

Fig. 7.8.2

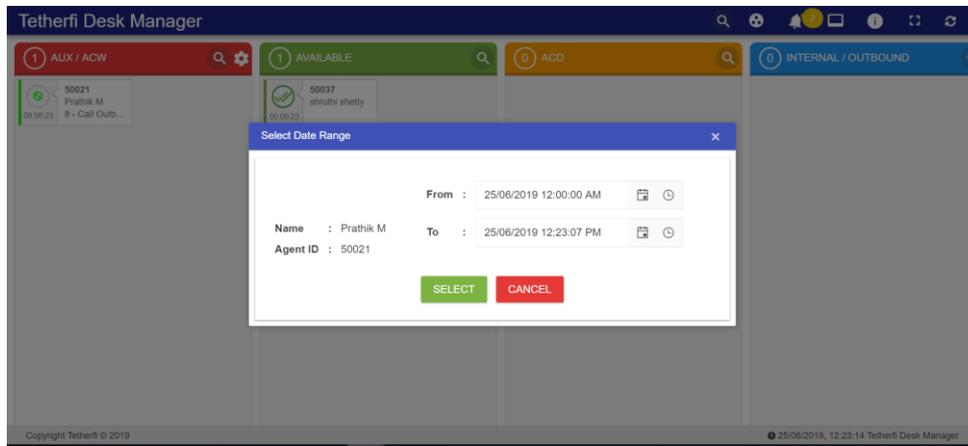


Fig. 7.8.3

When user clicks on the SELECT, Agent Summary page is displayed as shown below.

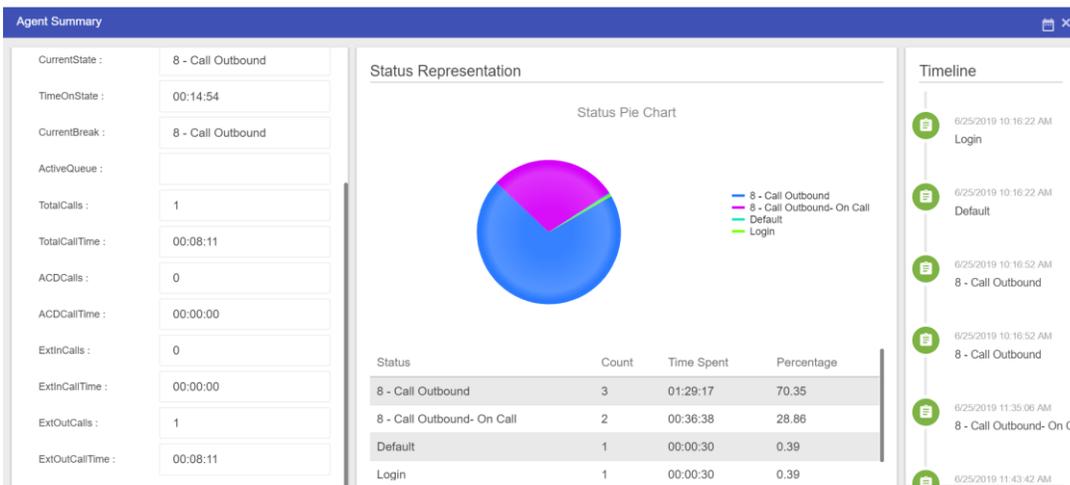


Fig. 7.8.4

Agent summary displays three-different set of details

1. Agent Details
2. Status Representation
3. Timeline

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Agent details tab gives the total call and login details for the selected date range. Fields of the Agent details section are listed below

Column	Description
ReportStartDateTime	Start date selected for agent summary
ReportEndDateTime	End date selected for agent summary
FirstLoginDateTime	First login time of agent
CurrentState	To display the status of agent
TimeOnState	Time spent in status.
CurrentBreak	Type of break
ActiveQueue	Queue name when agent on the call
TotalCalls	Total number of calls by the agents
TotalCallTime	Total time in Call
ACDCalls	Total ACD calls attended
ACDCallTime	ACD call time
ExtInCalls	Total internal Extension calls
ExtInCallTime	Internal extension call time
ExtOutCalls	Total External calls
ExtOutCallTime	Total time in External outbound calls

The second section contains graphical representation of Agent status details wherein different status are shown in pi-chart view and on user hover, shows the percentage of time spent in that state. List below the chart shows the status with number of times agent has changed to that status and total time in that status along with percentage value.

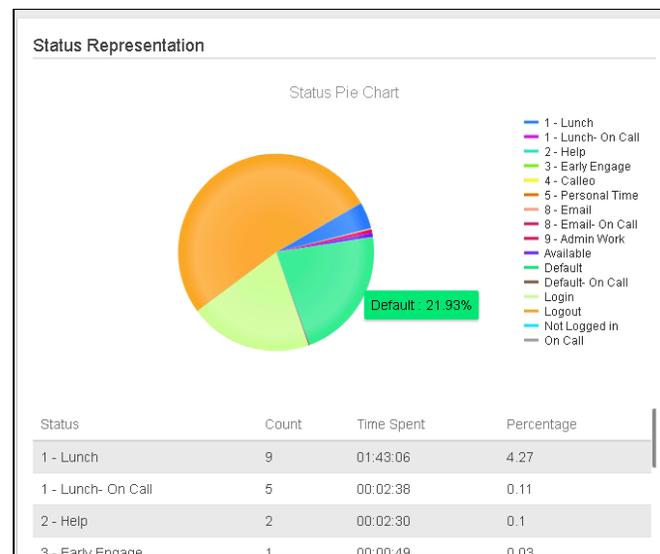


Fig 7.8.5

Third panel on the Agent Summary shows the timeline information. This information is change in state of agent with respect to the time. Timeline feature lists out the status for easier identification.

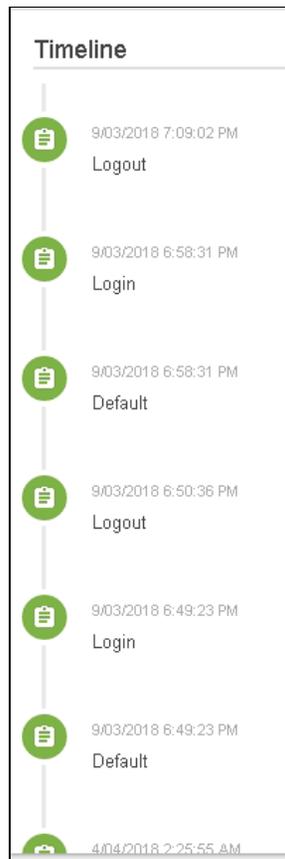


Fig 7.8.6

User can make use of the Date range option feature provided at right top corner to change the date range value as highlighted in below screen

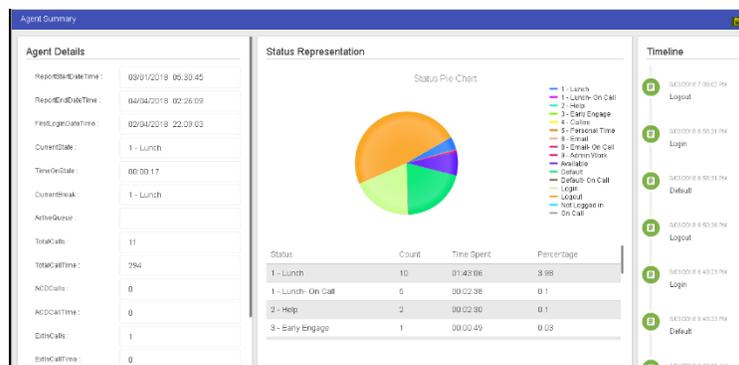


Fig 7.8.7

7.9 Manual Status Change

In this feature of TDM, supervisor can change the status of the agent. When user right clicks on the agent and chooses status change option, three status values are displayed namely available, break and logout. Below screen shows the 3 status change options

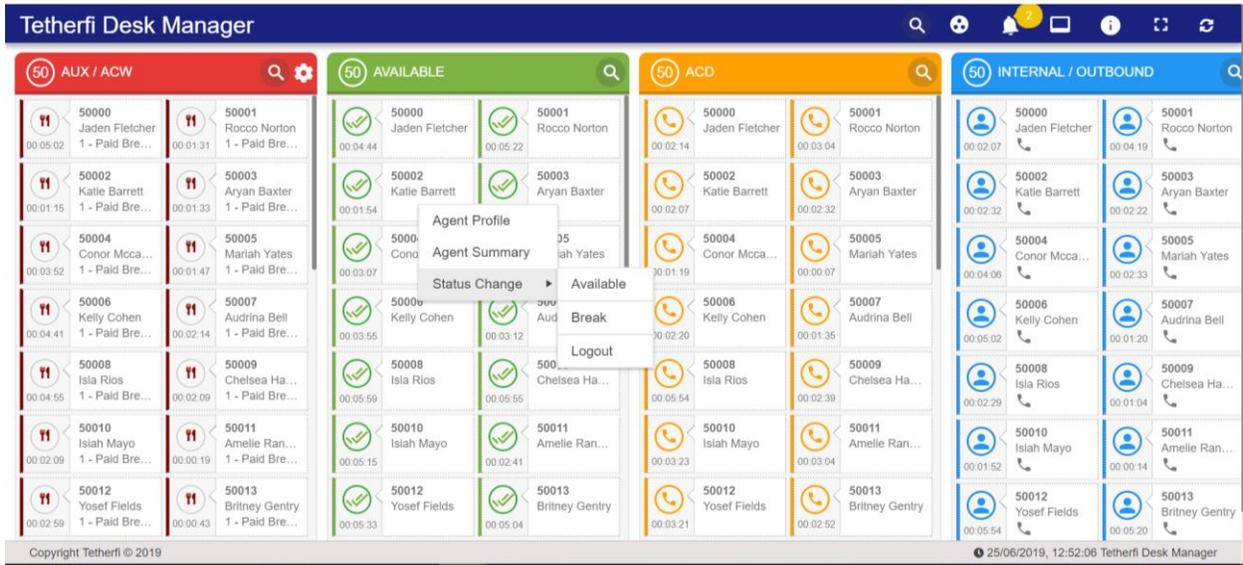


fig 7.9.1

When user selects 'Available' option, all available agents under Available tab of TDM as shown in below screen.



fig 7.9.2

And if agent status is changed from 'Available' to 'Break' then user gets pop up window to select the break status from drop down. Agent name, agent ID and station id of the agent are also displayed in the page and are read only.

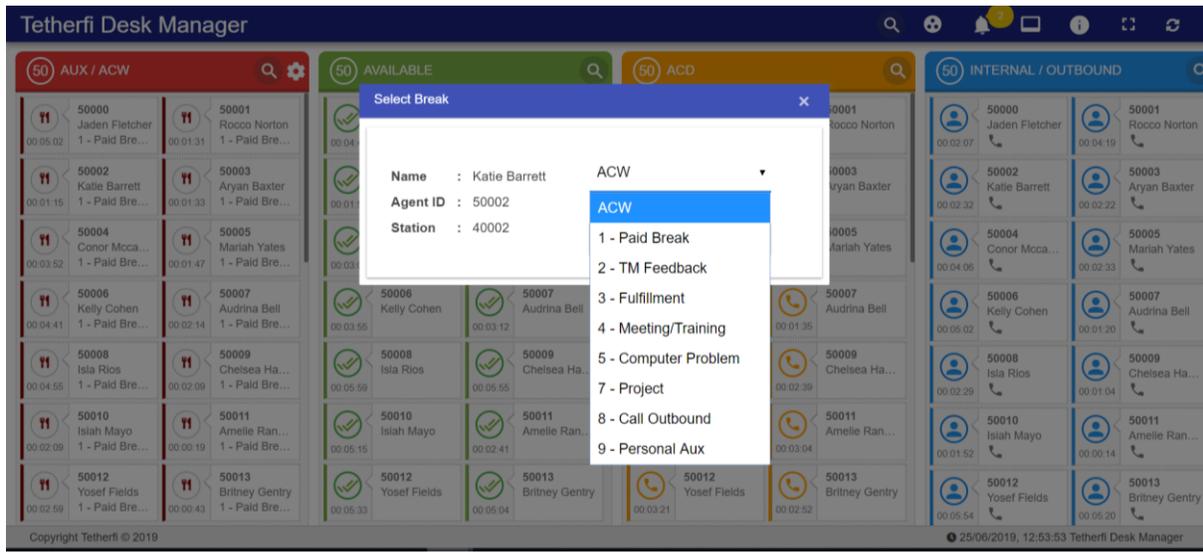


Fig 7.9.3

Status of the agent can be changed from ACW/AUX to Available by just dragging agent from AUX/ACW tab and dropping in Available tab.

Drag and drop action shown below



fig 7.9.4

After drag and drop, user gets confirmation pop up and selects 'ok' to change the status then agent is displayed under available state.

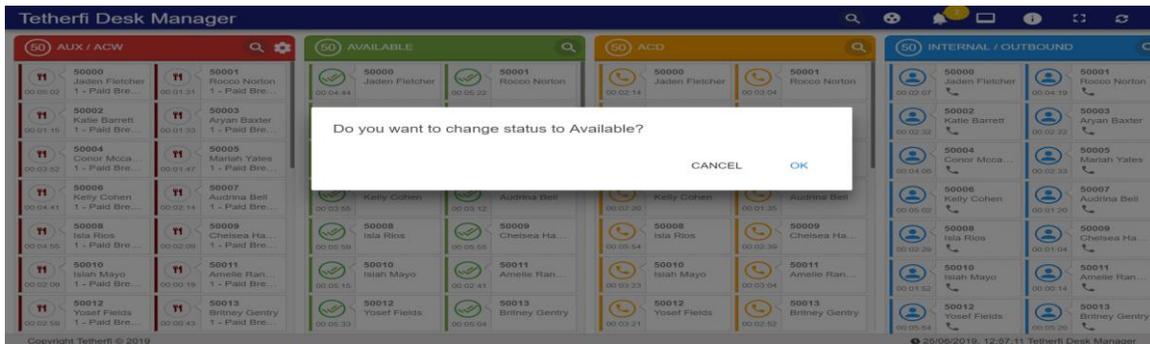


Fig 7.9.5

7.10 Auto Status change

Whenever the threshold settings has been configured and status change has been enabled for particular team for AUX then agents of that particular team will be monitored based on AUX threshold configuration .If agent spends more than configured threshold in particular AUX then that particular agent will be moved to available status automatically.

Click to [enable /disable status change](#)

In below figure the Agent node is blinking because it's about to reach the configured threshold for that particular Aux.

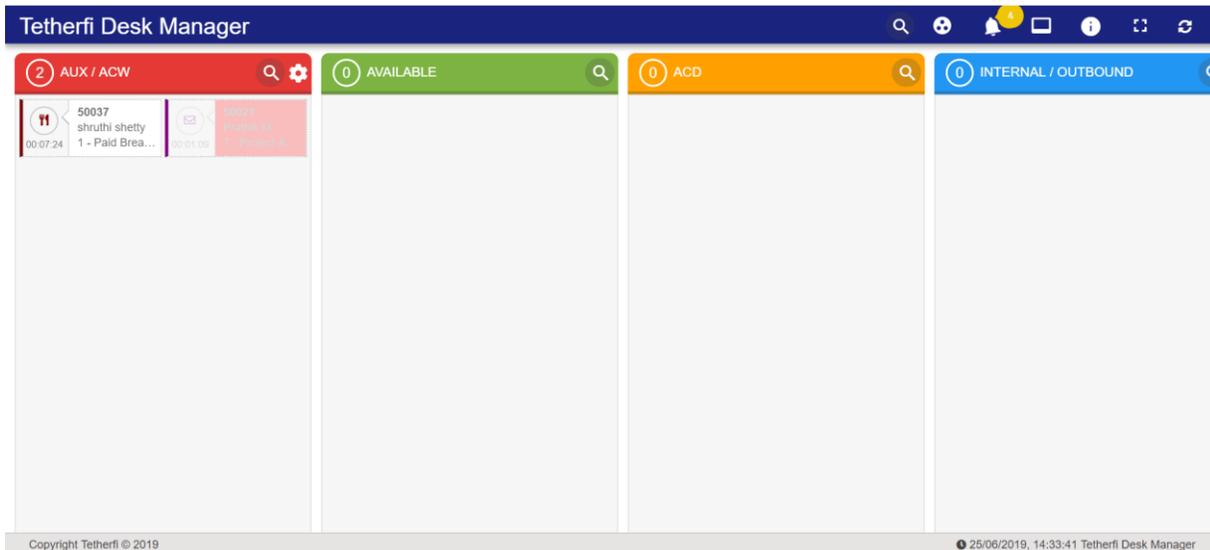


Fig 7.10.1

Alert Notification feature will help supervisor to receive a notification if an agent has exceeded his given AUX time. A pop up will be shown in the Desk Manager as shown as below.

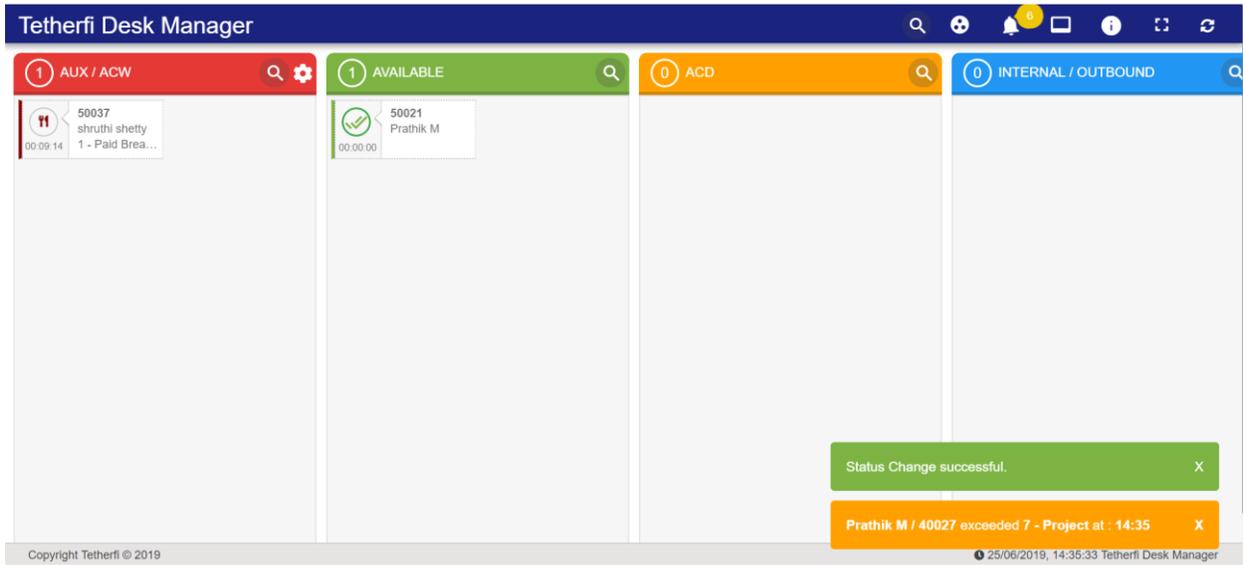


Fig 7.10.2

7.11 Blinking Alerts

Agent Node will blink once the agent has about cross the configured threshold for Aux/Events before configured seconds.

Suppose say if configured threshold for particular Aux is 60 seconds and blinking threshold is set as 10 seconds then once agents reaches 50 seconds in particular Aux/Event then blinking alerts will get started for agents who reached that particular threshold for Aux/Event and blinking will be effective till next 10 seconds.

Note: This feature will be effective only when threshold settings is configured and status change is enabled for particular Aux

Click the link to check the [enabling /disabling of status change in OCM](#)

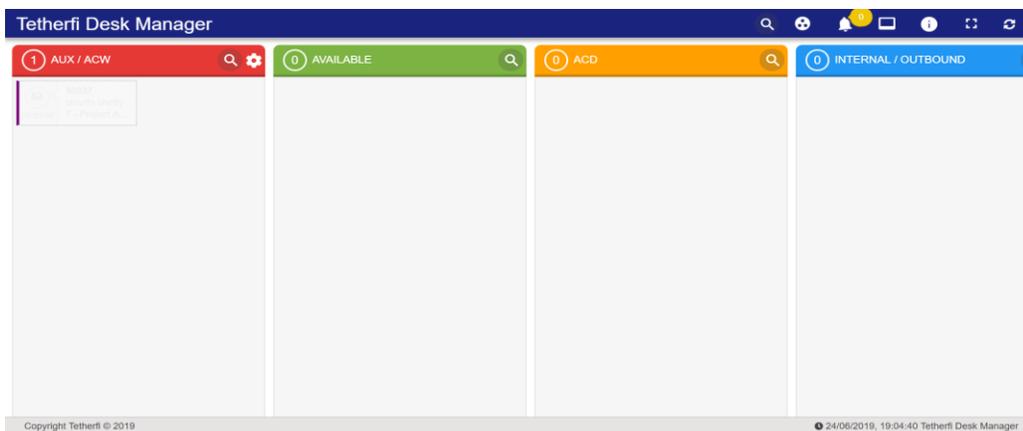


Fig. 7.11.1

7.12 Threshold Un-hold

When agents keep the customer on HOLD and when the agents cross the threshold the agent's call will be un-held. Threshold value for hold will be configured in OCM. On reaching the threshold we should set the ToAgentStatus parameter to Un Hold status.

Click [to enable /disable the hold to un-hold feature](#)

If Hold to un –hold feature is disabled, then this feature will not get applied to the Agents who are in Hold status.

If Hold to un –hold feature is enabled and when the agent reached the configured threshold then agent will be moved to reconnected status.

In below figure one agent is in Hold status

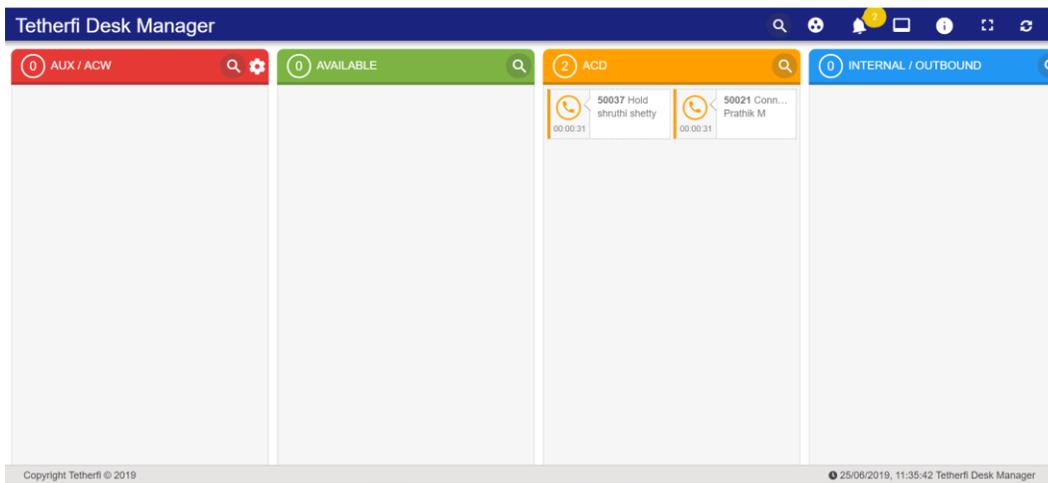


Fig. 7.12.1

Agent node will start blinking to indicate the particular agent will be un-held from hold

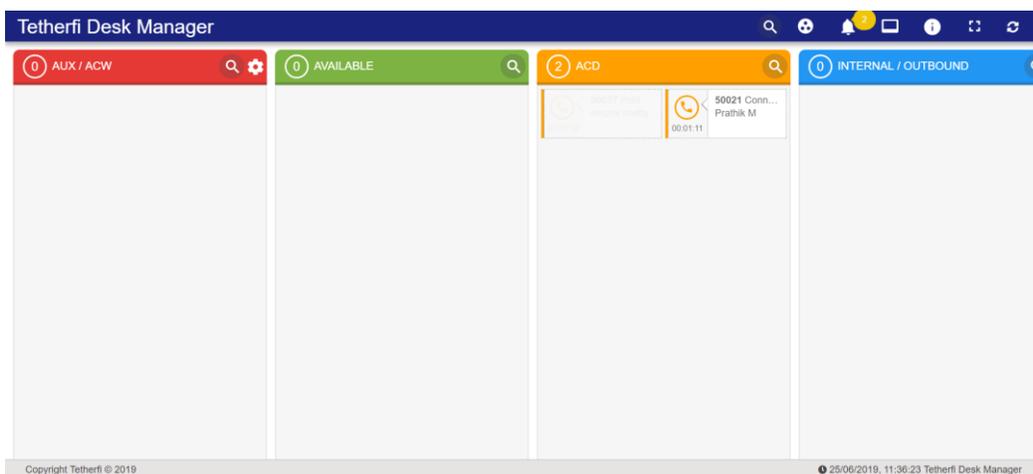


Fig. 7.12.2

Notification alert will be displayed when agent exceeded the configured Hold threshold

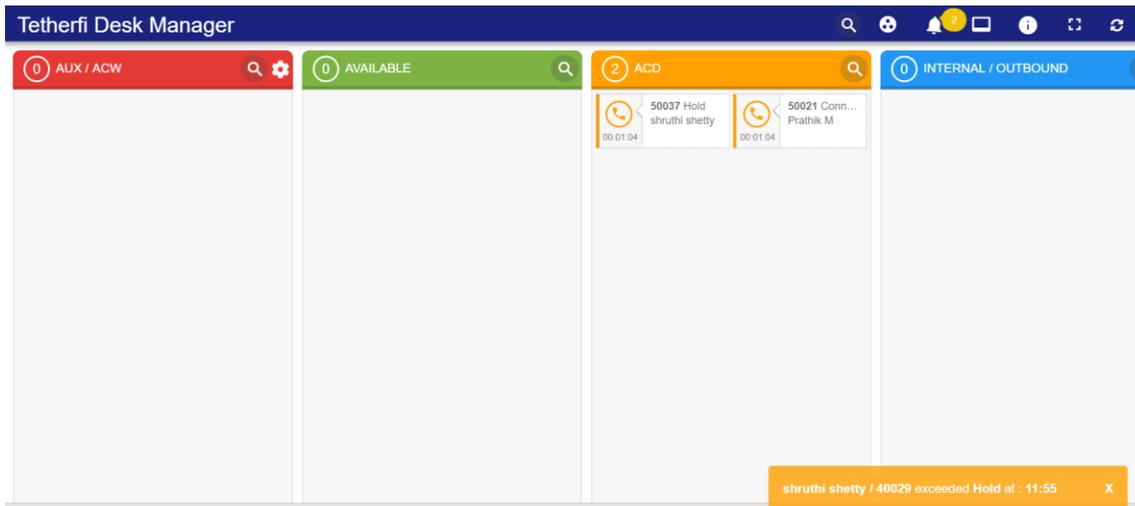


Fig. 7.12.3

Status will be auto changed to un-hold after configured threshold

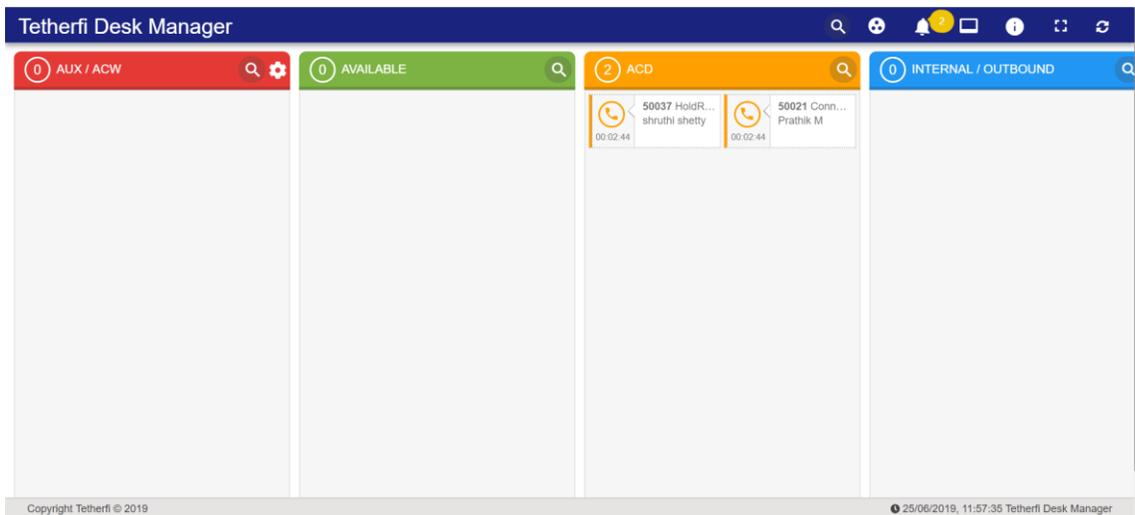


Fig. 7.12.4

7.13 Alert Notification

Alert Notification feature will help supervisor to receive a notification if an agent has exceeded his given AUX time. A pop up will be shown in the Desk Manager.

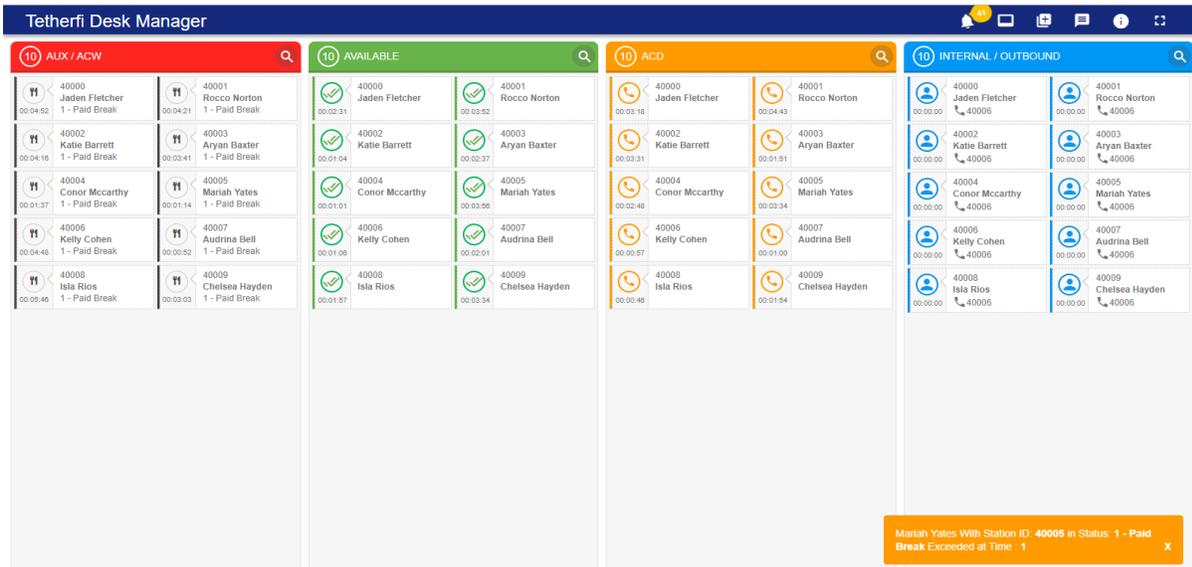


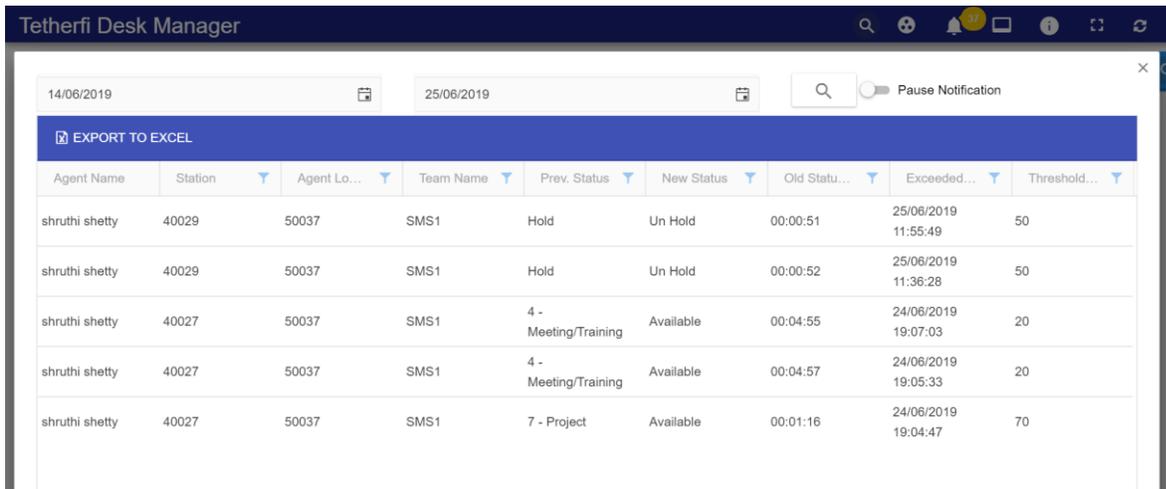
Fig. 7.13.1

The details of agent who have exceeded the given AUX will be saved. Click on the bell icon and a popup appears to view all the agents exceeded AUX time.

If the supervisor wants to view all the previous alerts triggered by the agents, he can disablestop the notifications from inserting to the window by selecting the 'Pause Notification' which will disablepause all the current alerts being notified inserting to the window and the supervisor should-can enter the intended date range for which he needs to view the previous alerts. On disabling the "Pause notification" all the alerts raised for the current day will be shown and the supervisor will be able to receive the alerts in the pop up. **The agent alert notification date range selection is configured in GlobalVars.js file as shown below.**

```
var maxDateRangeForAlerts = "25";
```

It will allow user to get alert notification summary data for only 25 days in from and to date picker. User can change these settings in **GlobalVars.js** file



Agent Name	Station	Agent Lo...	Team Name	Prev. Status	New Status	Old Statu...	Exceeded...	Threshold...
shruthi shetty	40029	50037	SMS1	Hold	Un Hold	00:00:51	25/06/2019 11:55:49	50
shruthi shetty	40029	50037	SMS1	Hold	Un Hold	00:00:52	25/06/2019 11:36:28	50
shruthi shetty	40027	50037	SMS1	4 - Meeting/Training	Available	00:04:55	24/06/2019 19:07:03	20
shruthi shetty	40027	50037	SMS1	4 - Meeting/Training	Available	00:04:57	24/06/2019 19:05:33	20
shruthi shetty	40027	50037	SMS1	7 - Project	Available	00:01:16	24/06/2019 19:04:47	70

Fig. 7.13.2

7.14 Enable/Disable Status Change

If the supervisor wants to disable and enable the auto blinking and status change of agents then supervisor needs to update the threshold settings in OCM. Please follow below steps

Login to OCM

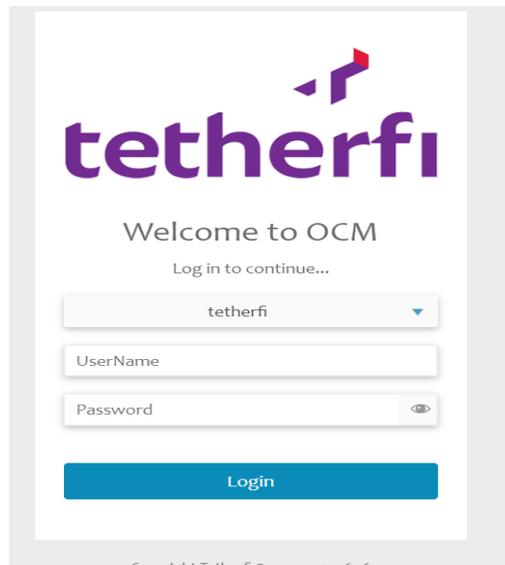


Fig. 7.14.1

Select **TDM Threshold Configuration** module from **OCM**

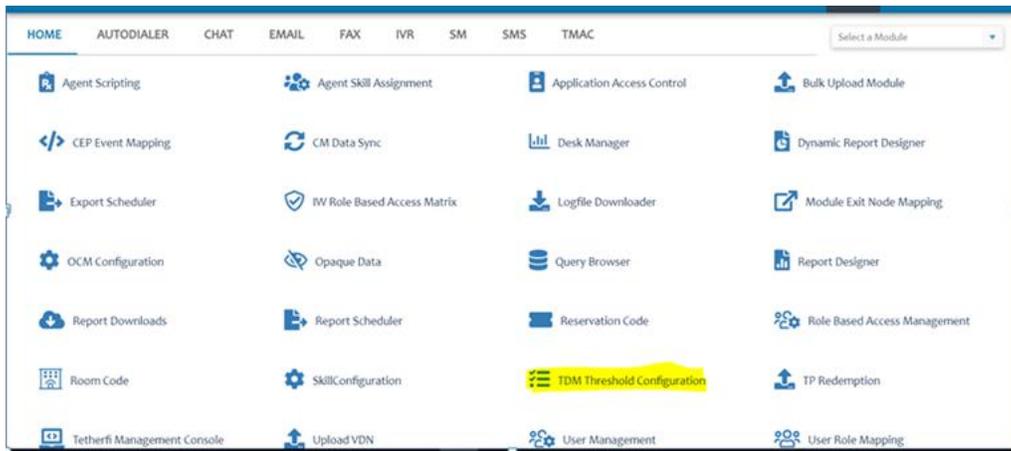
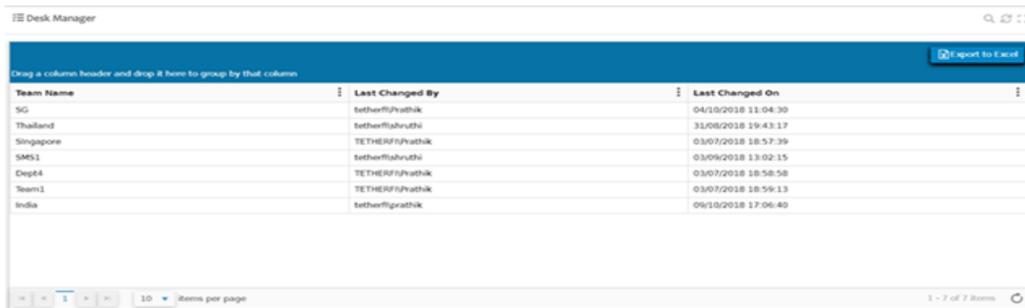


Fig. 7.14.2

Double click on the team for which threshold settings needs to be enabled /disabled.



ig. 7.14.3

Uncheck the 'Allow Status Change' checkbox to disable the status change and blinking alerts feature and vice versa.

Next press Save "changes" to save the changes made

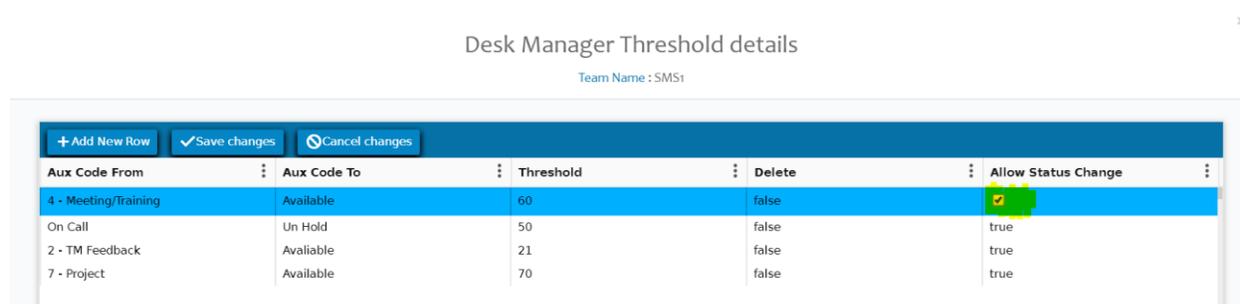


Fig. 7.14.4

Go to the TDM UI and press "Reload" button to load changes made in OCM. Now monitor the UI for status change/Blinking

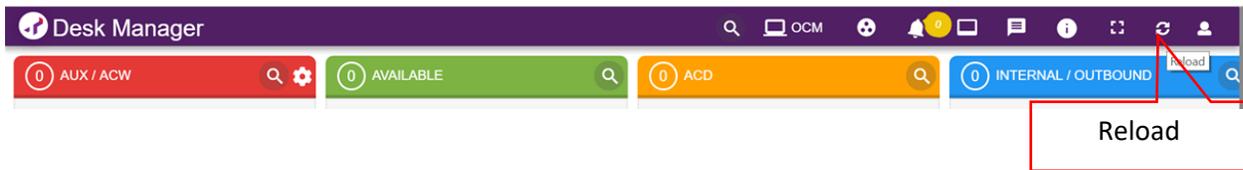


Fig. 7.14.5

7.15 Enable/Disable Alert Notification

If the supervisor wants to enable and disable the notification for threshold exceeded for aux/event then supervisor can enable/disable it using OCM threshold configuration settings. Follow the below steps

Login to OCM and Select **TDM Threshold Configuration** module from **OCM** as shown as [this](#) link.

If threshold settings are not available for the team then add new row using [Configure Teams and Threshold](#)

Click on the team row and then change the allow notification configuration for the selected aux/event by clicking the **Allow Notification** checkbox.

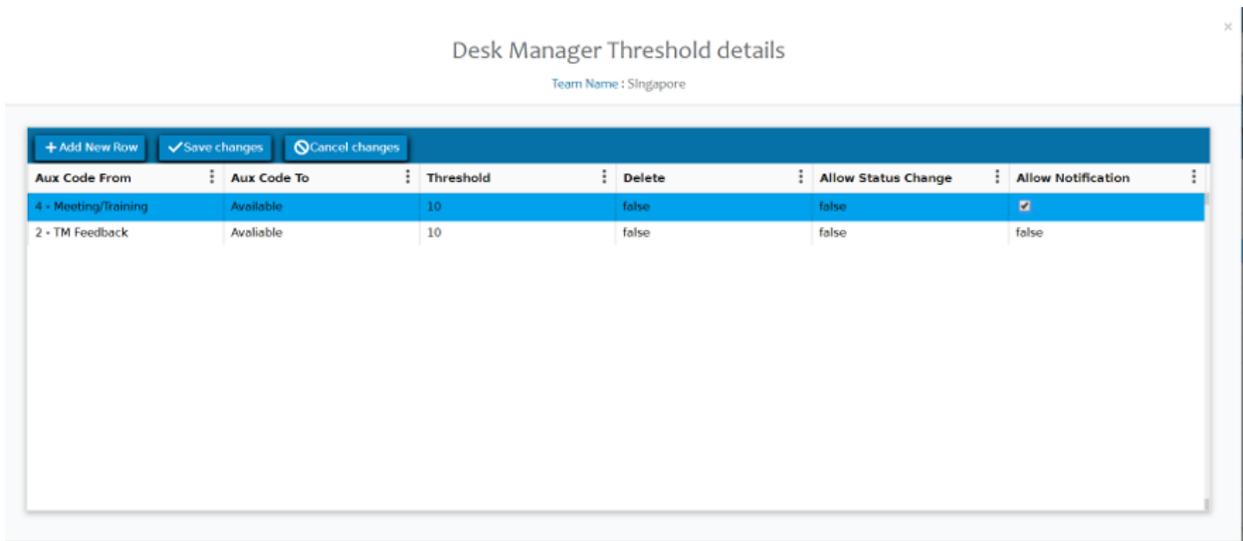


Fig. 7.15.1

Next press **Reload** button in TDM UI as shown as below

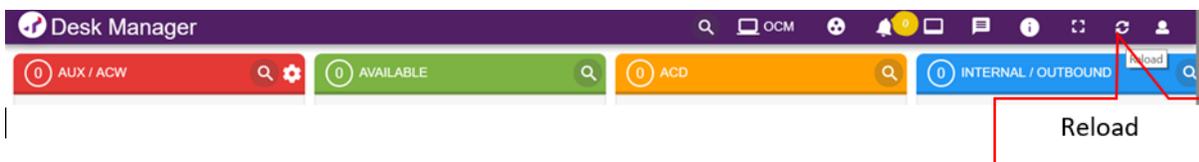


Fig. 7.15.2

7.16 Session management

If session handling is enabled in **GlobalVars.js** file of the TDM client then TDM will retain the user sessions for **Aux Filter** and **Team Selection**

Please update **enableSessionData = true** to enable to store session data else set **“false”** to disable it

Apply the **aux filter** or save **Team selection** changes and reload the page using ctrl+F5

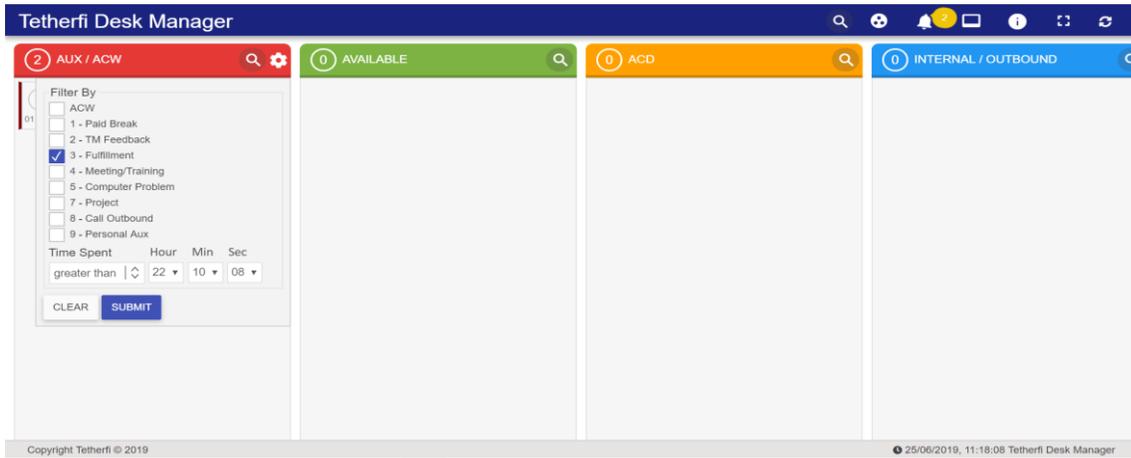


Fig. 7.16.1

Now old session will be shown in the TDM UI.

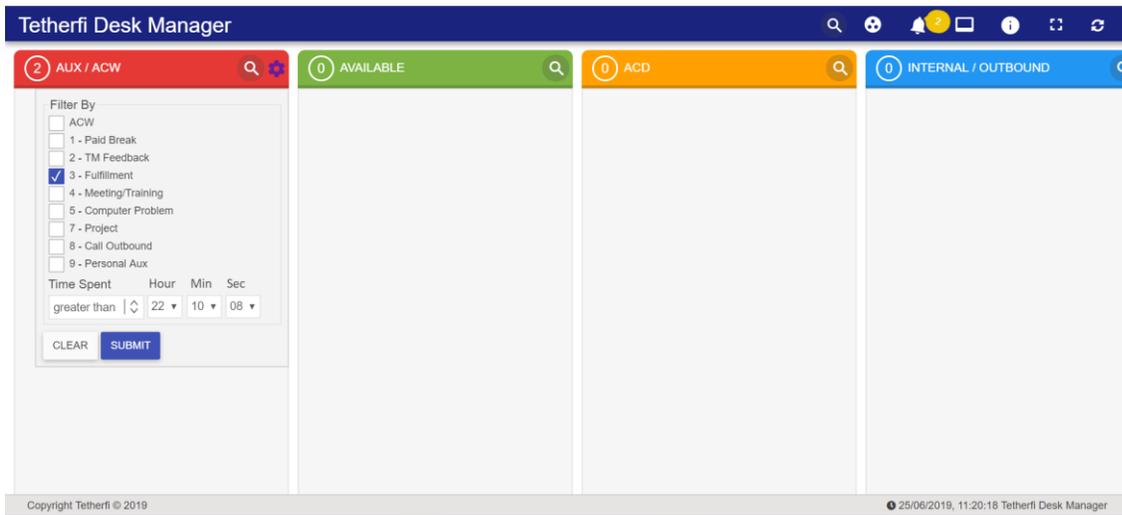


Fig. 7.16.2

7.17 System File Versions

Press bottom right corner **“?”** Icon to know the current file versions of TDM server and UI

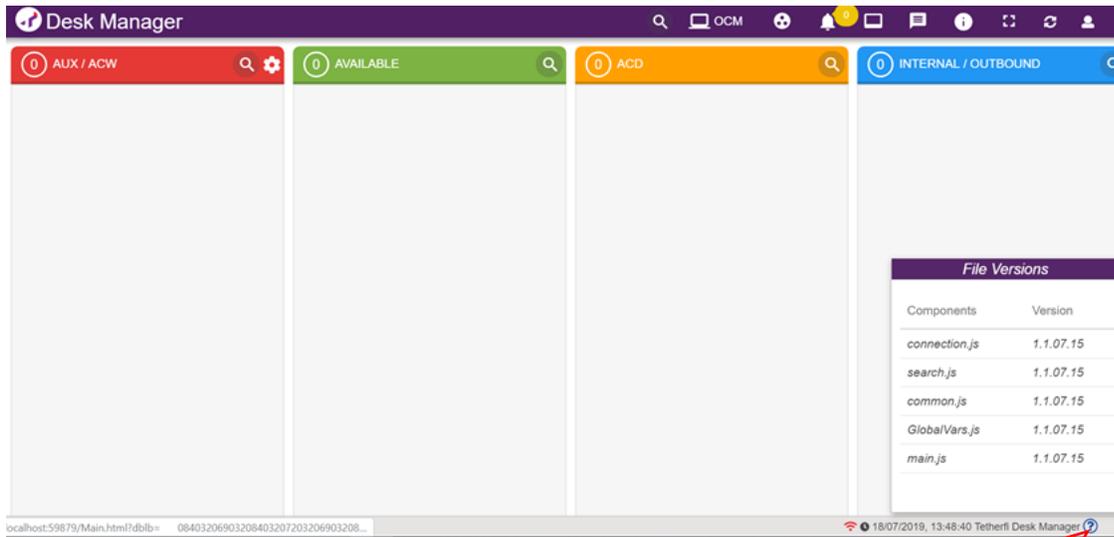


Fig. 7.17.1

System File Versions

7.18 Connection Status

Go to the footer of the TDM UI to check the connection status as show in below figure

If icon colour is green then TDM UI is connected to server

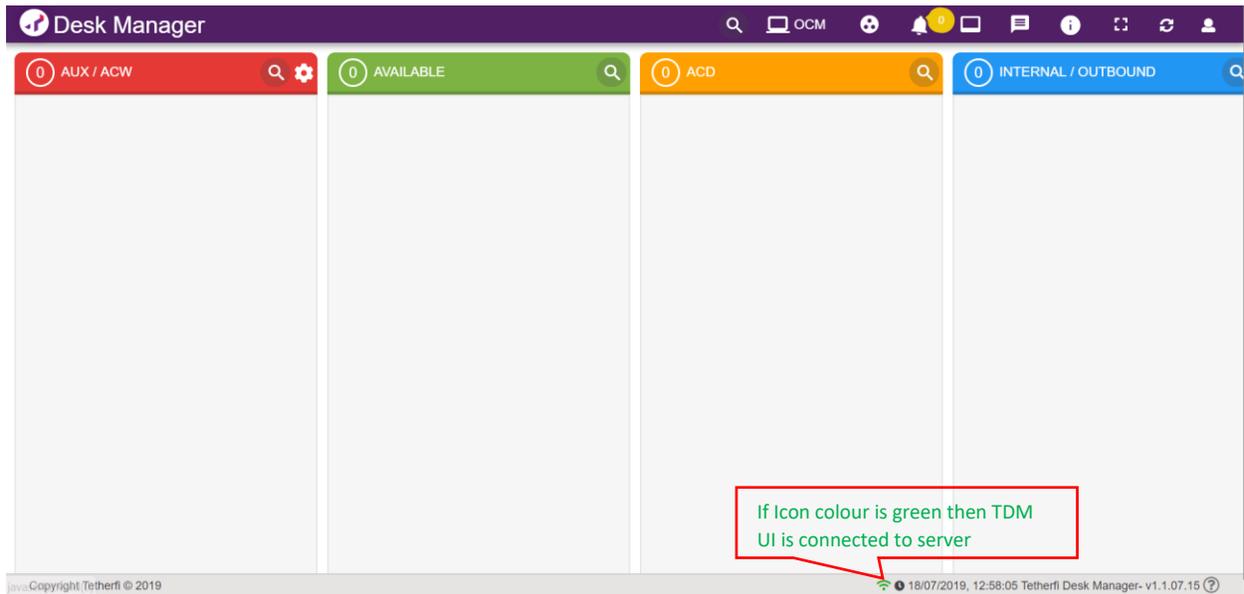


Fig. 7.18.1

If icon colour is red then TDM UI is not connected to server as shown in below figure

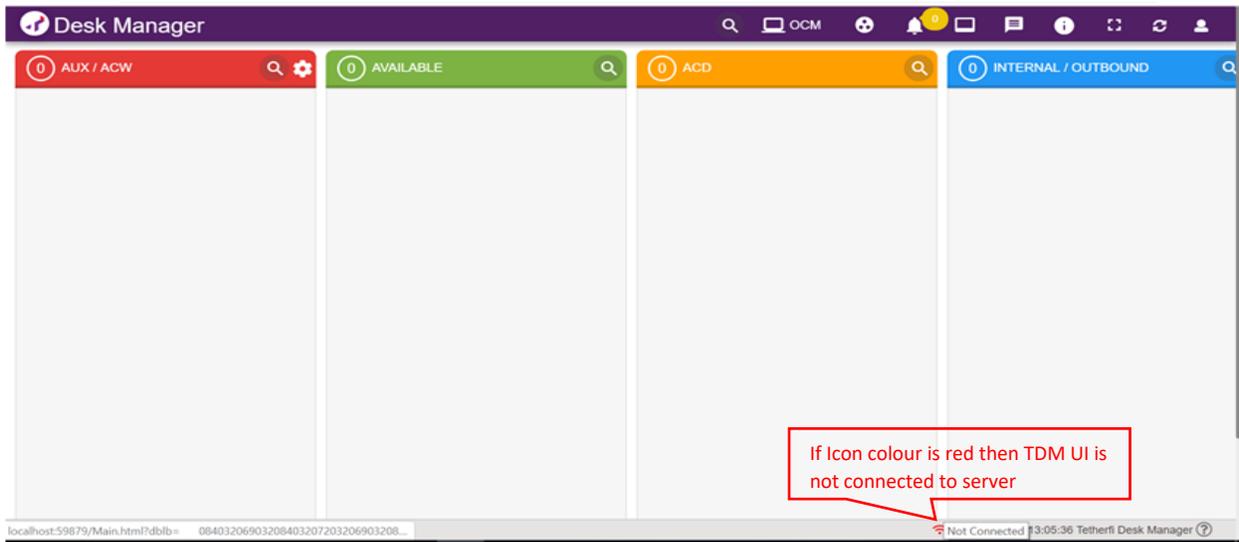


Fig. 7.18.2

7.19 User Details

Press the “**user**” icon from the top right corner of the application header to know the logged in user details as show as below fig 7.18.1

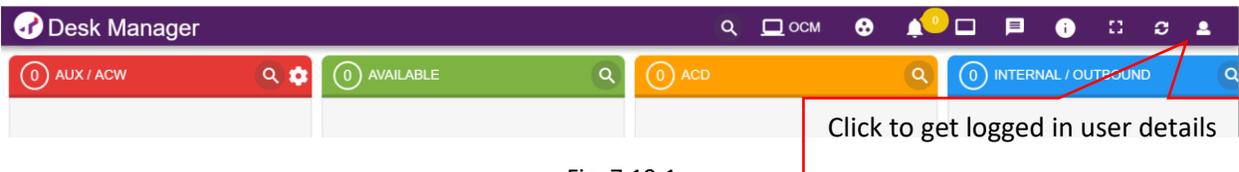


Fig. 7.19.1

7.20 Redirect to OCM

Press the “**OCM**” icon from the top of TDM UI to navigate to the OCM as shown as below fig 7.19.1



Fig. 7.20.1

Press “**YES**” to continue to login to OCM or ‘**NO**’ to cancel login to OCM

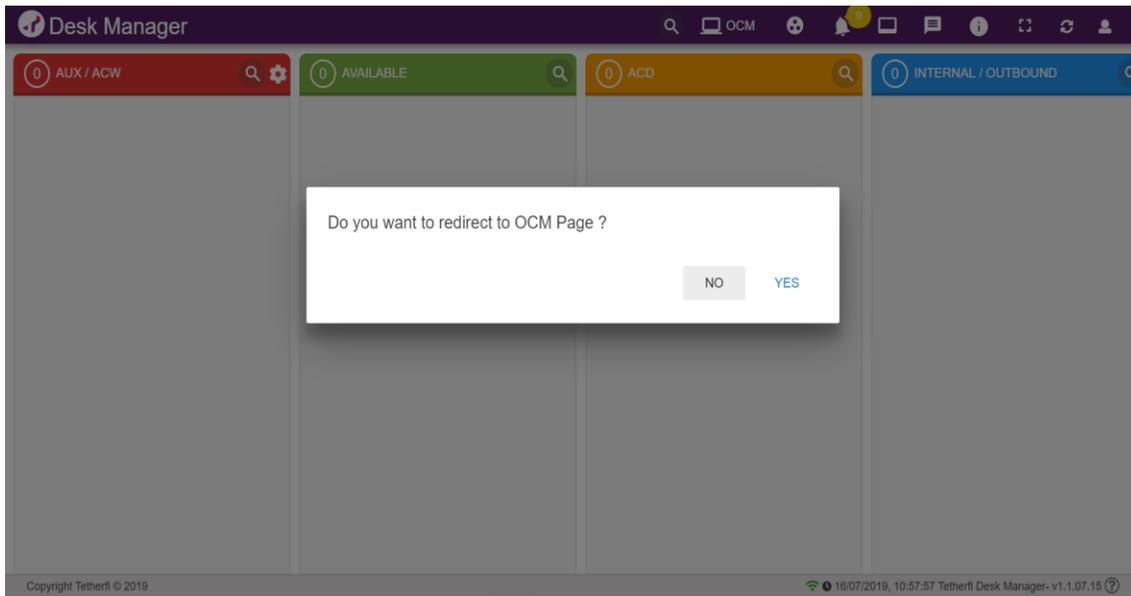


Fig. 7.20.2

7.21 Colour Codes

All the agents in AUX/ACW state are sorted based on the Maximum Time spend in AUX grid and shown in different colours and icons, the respective status and its colour codes are shown in the info dropdown as shown below in Fig. 7.20.1 .These details will be maintained sever and when client is connected to server the configured colour codes will downloaded to client window.



Fig. 7.21.1

8 OCM Reports

Follow the below steps to access the TDM reports

Login to OCM

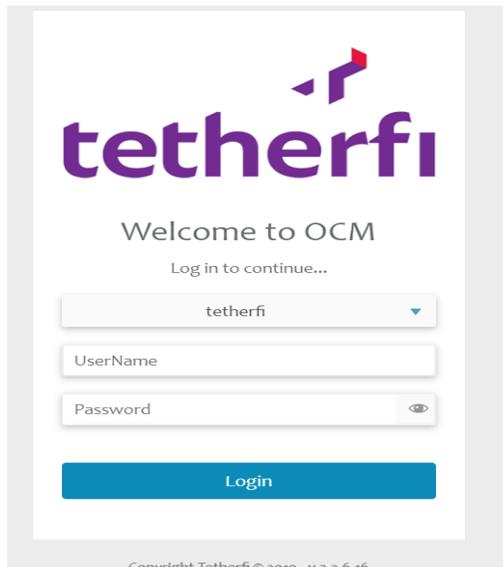


Fig 8.0.1

Go to “OCM Reports” option in top right corner as shown as below fig 8.0.2



Fig 8.0.2

Click on “**Show Advanced Search**” option for more search options in report selection as shown as below figure

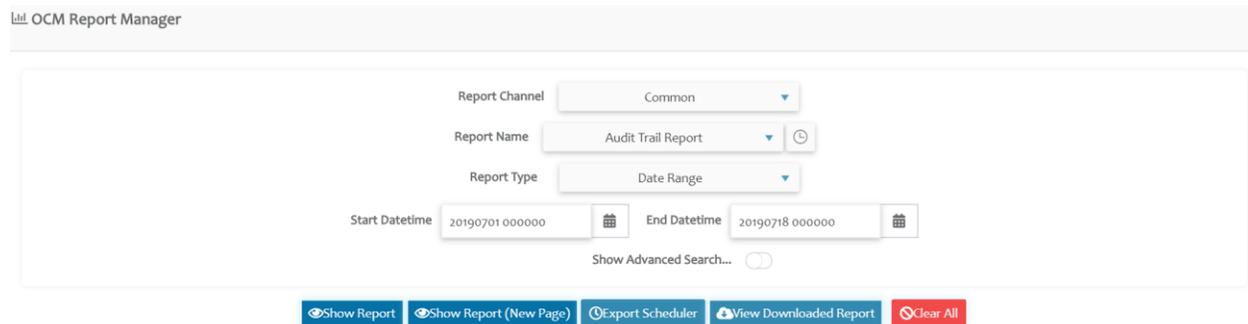


Fig 8.0.3

To search inside the individual report, click on **search** icon as shown as below figure

OCM Reports > Common > Audit Trail Report from 21-05-2019 00:00:00 to 18-07-2019 00:00:00

Search

Desk Manager

Drag a column header and drop it here to group by that column

Transaction	Function	User ID	Date Time	Old Values	New Values	Change Reason
Status Change [Success]	Desk Manager	TETHERFIyashawanth	22/05/2019 11:41:19	AgentId:50015 AgentName:Rakesh Gatty AgentStation:40029 AgentStatus:1 - Paid Break AUX 1 PreviousTimeSpent:	AgentId:50015 AgentName:Rakesh Gatty AgentStation:40029 AgentStatus:Available PreviousTimeSpent:00:06:03	Manual Action
Status Change [Success]	Desk Manager	TETHERFIyashawanth	22/05/2019 11:41:53	AgentId:50037 AgentName:shruthi shetty AgentStation:40002 AgentStatus:5 - Computer Problem AUX 5 PreviousTimeSpent:	AgentId:50037 AgentName:shruthi shetty AgentStation:40002 AgentStatus:Available PreviousTimeSpent:20:48:03	Manual Action
Status Change [Success]	Desk Manager	TETHERFIyashawanth	22/05/2019 17:33:55	AgentId:50037 AgentName:shruthi shetty AgentStation:40002 AgentStatus:Available PreviousTimeSpent:	AgentId:50037 AgentName:shruthi shetty AgentStation:40002 AgentStatus:1 - Paid Break PreviousTimeSpent:04:16:45	Manual Action

1 - 10 of 1158 items

Fig 8.0.4

User will get below search options when they clicks on search icon

Search

User ID

Transaction

Function

User ID

Date Time

Old Values

New Values

Change Reason

Is equal to

text to search...

Close Clear All Search

Fig 8.0.5

OCM report portal will have a facility to export the report into excel and csv.

OCM Reports > Common > OCM Threshold Report from 10-06-2019 00:00:00 to 18-07-2019 00:00:00

Search by Agent Name...

Export Page Export to Csv View Downloaded Reports Scheduled Reports

Drag a column header and drop it here to group by that column

Agent Name	Station ID	Agent Login Id	Team Name	Old Status	New Status	Old Status Time Spend	Notification Type	Threshold	Changed By
Prathik M	40027	50021	SMS1	7 - Project	Available	00:01:17	Threshold	70	System
Prathik M	40027	50021	SMS1	7 - Project	Available	00:01:19	Threshold	70	System
Prathik M	40027	50021	SMS1	7 - Project	Available	00:01:14	Threshold	70	System
Prathik M	40027	50021	SMS1	4 - Meeting/Training	Available	00:05:01	Threshold	20	System
Prathik M	40027	50021	SMS1	7 - Project	Available	00:01:12	Threshold	70	System
shruthi shetty	40029	50037	SMS1	Hold	Un Hold	00:00:51	Threshold	50	System
shruthi shetty	40029	50037	SMS1	Hold	Un Hold	00:00:52	Threshold	50	System
shruthi shetty	40027	50037	SMS1	4 - Meeting/Training	Available	00:04:55	Threshold	20	System
shruthi shetty	40027	50037	SMS1	4 - Meeting/Training	Available	00:04:57	Threshold	20	System
shruthi shetty	40027	50037	SMS1	7 - Project	Available	00:01:16	Threshold	70	System

10 items per page 1 - 10 of 326 items

Press this button to download the report

Figure 8.0.6

8.1 Audit Trail Report

The audit trail report will contains changes made in the system along with the user name and time stamp.

Report Channel is **“Common”**

Report Name **“Audit Trail Report”**

Select data range from **“Report Type”**

OCM Report Manager

Report Channel: Common

Report Name: Audit Trail Report

Report Type: Date Range

Start Datetime: 20190610 000000 End Datetime: 20190718 000000

Show Advanced Search...

Show Report Show Report (New Page) Export Scheduler View Downloaded Report Clear All

Fig 8.1.2

Click on **“Show Report”**

Transaction	Function	User ID	Date Time	Old Values	New Values	Change Reason
Update	SocialMediaUserProfileMapping	4	09/07/2019 12:41:43	Channel: CustomerOrgId:CIFAUTO51 ChannelIdentifier:4 CustomerChannelId:MIDAUTO31 UserId:Murali Active:True RegistrationMode:LINE AgentName: CreatedBy:Murali CreatedDateTime:27/06/2019 10:15:18 LastChangedBy: LastChangedOn: ModifyReason:	Channel: CustomerOrgId:CIFAUTO51 ChannelIdentifier:4 CustomerChannelId:MIDAUTO31 UserId:Murali Active:True RegistrationMode:LINE AgentName: CreatedBy:Murali CreatedDateTime:27/06/2019 10:15:18 LastChangedBy: LastChangedOn: ModifyReason: Channel: CustomerOrgId:CIFAUTO51 ChannelIdentifier:4	Registration

Fig 8.1.3

Report will show the agents who were moved to different ACW, AUX/HOLD either by System or Manually by Supervisor. Change reason are will be updated in Audit trial report for status change. If System changes it will be shown as automated action and if it is Human, it will be displayed as Manual action.

Transaction	Function	User ID	Date Time	Old Values	New Values	Change Reason
Status Change [Success]	Desk Manager	TETHERFIyashawanth	21/06/2019 13:51:43	AgentId:50037 AgentName:shruthi shetty AgentStation:40028 AgentStatus:Default PreviousTimeSpent:	AgentId:50037 AgentName:shruthi shetty AgentStation:40028 AgentStatus:5 - Computer Problem PreviousTimeSpent:00:20:32	Manual Action
Status Change [Success]	Desk Manager	System	21/06/2019 13:56:40	AgentId:50037 AgentName:shruthi shetty AgentStation:40028 AgentStatus:5 - Computer Problem PreviousTimeSpent:	AgentId:50037 AgentName:shruthi shetty AgentStation:40028 AgentStatus:Available PreviousTimeSpent:00:04:56	Automated Action
Status Change [Success]	Desk Manager	TETHERFIyashawanth	21/06/2019 14:07:10	AgentId:50021 AgentName:Prathik M AgentStation:40029 AgentStatus:Default PreviousTimeSpent:	AgentId:50021 AgentName:Prathik M AgentStation:40029 AgentStatus:8 - Call Outbound PreviousTimeSpent:00:00:02	Manual Action

Fig 8.1.4

Report portal will have ability to search options such as agent ID, function name and date & time.

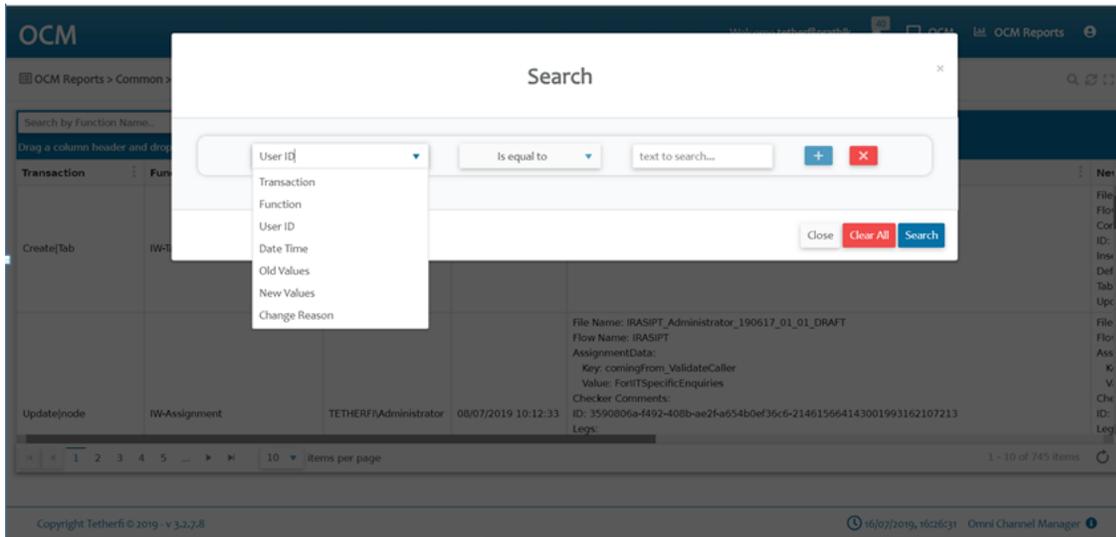


Fig 8.1.5

8.2 Timeline Report

The timeline report will contains report across states

Report Channel is **“Common”**

Report Name **“OCM TimeLine Report”**

Select data range selection from **“Report Type”**

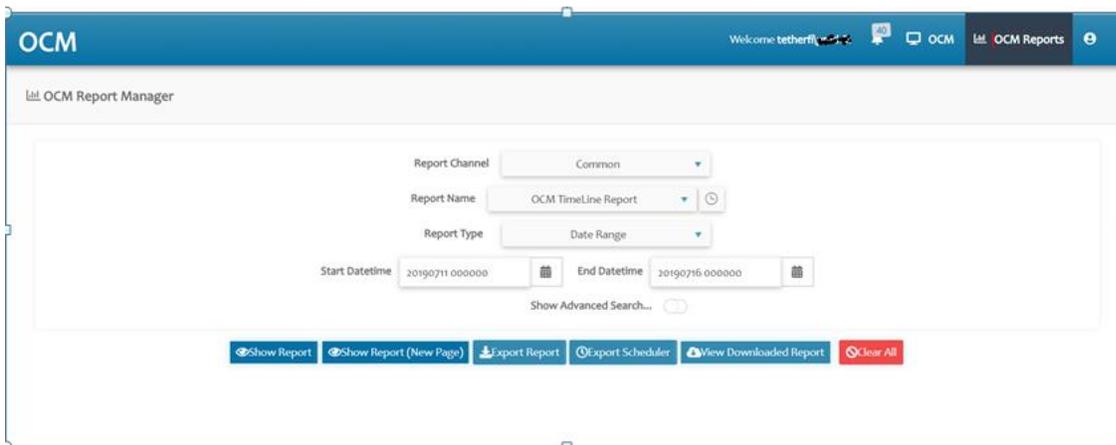


Fig 8.2.1

Click on any row on the list

OCM Reports > Common > OCM TimeLine Report from 01-07-2019 00:00:00 to 16-07-2019 00:00:00

Search by Agent ID... [Export Page] [Export to Csv] [View Downloaded Reports] [Scheduled Reports]

Drag a column header and drop it here to group by that column

Agent ID	Agent Name	Team Name	Supervisor Name
41001			NA
50011			NA
50034			NA
50052	Chatbot Dev	Team1	prakashd dsouza
50018	chirag r	SMS1	Prathik M
50020	Divya Prabhu	Team1	Ashwath Mabiyan
50094	kavya nayak	Team1	Ashwath Mabiyan
50029	Mainak Saha	India	NA
50014	poorvi rai	SMS1	Shreeraj Bhat
50021	Prathik M	SMS1	tetherfi Administrator

1 - 10 of 14 items

Fig 8.2.2

It will show all the timeline report of selected of agents as shown as below

OCM TimeLine Report
TimeLine Report for the Agent: 50021

Drag a column header and drop it here to group by that column

Agent Name	Station ID	Status	Status Type	TimeStamp
Prathik M	40029	Logout	Logout	15/07/2019 17:59:32
Prathik M	40029	Logout	Logout	15/07/2019 17:57:23
Prathik M	40029	Not Logged in	NONE	15/07/2019 17:57:23
Prathik M	40029	Available	MANUAL_IN	15/07/2019 17:53:13
Prathik M	40029	9 - Personal Aux	AUX	15/07/2019 17:53:05
Prathik M	40029	Available	MANUAL_IN	15/07/2019 17:53:04
Prathik M	40029	8 - Call Outbound	AUX	15/07/2019 17:52:56
Prathik M	40029	Available	MANUAL_IN	15/07/2019 17:52:52
Prathik M	40029	Available	MANUAL_IN	15/07/2019 17:52:51
Prathik M	40029	7 - Project	AUX	15/07/2019 17:52:48

1 - 10 of 239 items

Fig 8.2.3

8.3 Threshold Report

Report to see how many and which of the agents were forced auto in after the threshold

OCM Report Manager

Report Channel: Common

Report Name: OCM Threshold Report

Report Type: Date Range

Start Datetime: 20190708 000000 | End Datetime: 20190716 000000

Show Advanced Search...

[Show Report] [Show Report (New Page)] [Export Report] [Export Scheduler] [View Downloaded Report] [Clear All]

Fig 8.3.1

OCM Reports > Common > OCM Threshold Report from 08-07-2019 00:00:00 to 16-07-2019 00:00:00

Search by Agent Name...

Export Page | Export to Csv | View Downloaded Reports | Scheduled Reports

Drag a column header and drop it here to group by that column

Agent Name	Station ID	Agent Login Id	Team Name	Old Status	New Status	Old Status Time Spend	Notification Type	Threshold	Changed By
shruthi shetty	40028	50037	SMS1	7 - Project	Available	00:01:14	Threshold	70	System
shruthi shetty	40028	50037	SMS1	7 - Project	Available	00:01:14	Threshold	70	System
shruthi shetty	40028	50037	SMS1	7 - Project	Available	00:01:13	Threshold	70	System
shruthi shetty	40029	50037	SMS1	2 - TM Feedback	Available	00:01:24	Threshold	21	System
shruthi shetty	40029	50037	SMS1	2 - TM Feedback	Available	00:01:24	Threshold	21	System
shruthi shetty	40029	50037	SMS1	2 - TM Feedback	Available	00:01:19	Threshold	21	System
shruthi shetty	40029	50037	SMS1	2 - TM Feedback	Available	00:01:14	Threshold	21	System
shruthi shetty	40029	50037	SMS1	2 - TM Feedback	Available	00:01:14	Threshold	21	System
shruthi shetty	40029	50037	SMS1	2 - TM Feedback	Available	00:01:09	Threshold	21	System
shruthi shetty	40029	50037	SMS1	2 - TM Feedback	Available	00:01:04	Threshold	21	System
shruthi shetty	40029	50037	SMS1	2 - TM Feedback	Available	00:01:04	Threshold	21	System
shruthi shetty	40029	50037	SMS1	2 - TM Feedback	Available	00:00:59	Threshold	21	System

100 items per page | 1 - 100 of 190 items

Fig 8.3.2

9 OCM Admin

9.1 Page Based User Access

If the user wants to access any modules and change the edit, delete and other access details then user can go to the **User Management** module in OCM

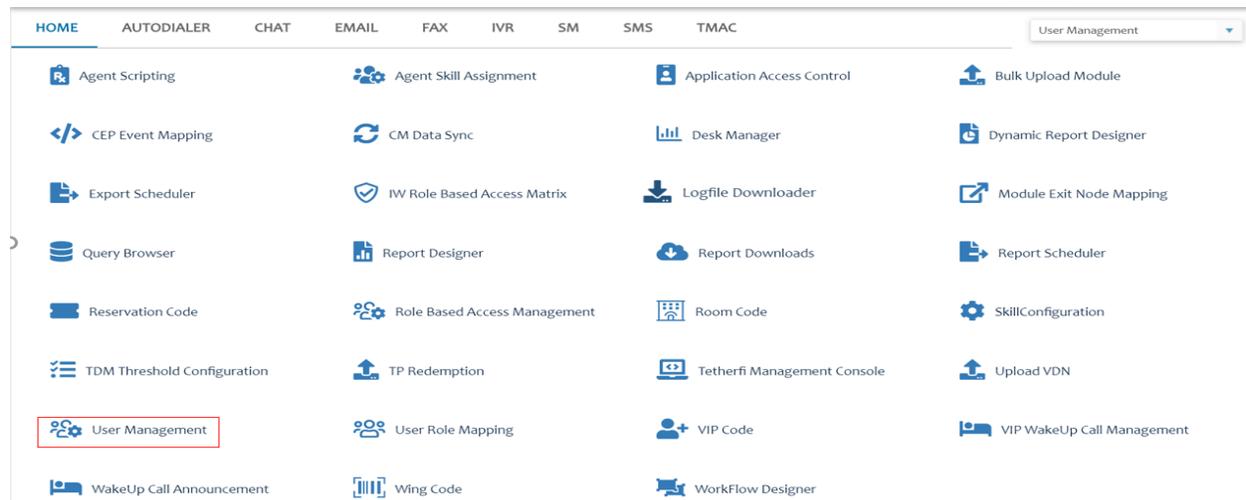


Fig 9.1.1

To Add new records, click on below **“Add New User Management Record”** button as show as below

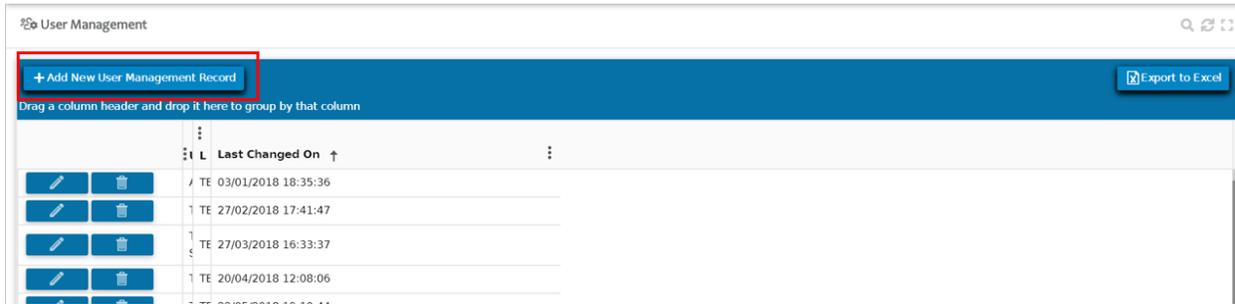


Fig 9.1.2

Once the new user has been added, next update the access details for the user. After updating the access details then press **“Save Changes”** button as show as below.

User needs to **Logout** and **Login** to the **OCM** for changes to get effected.

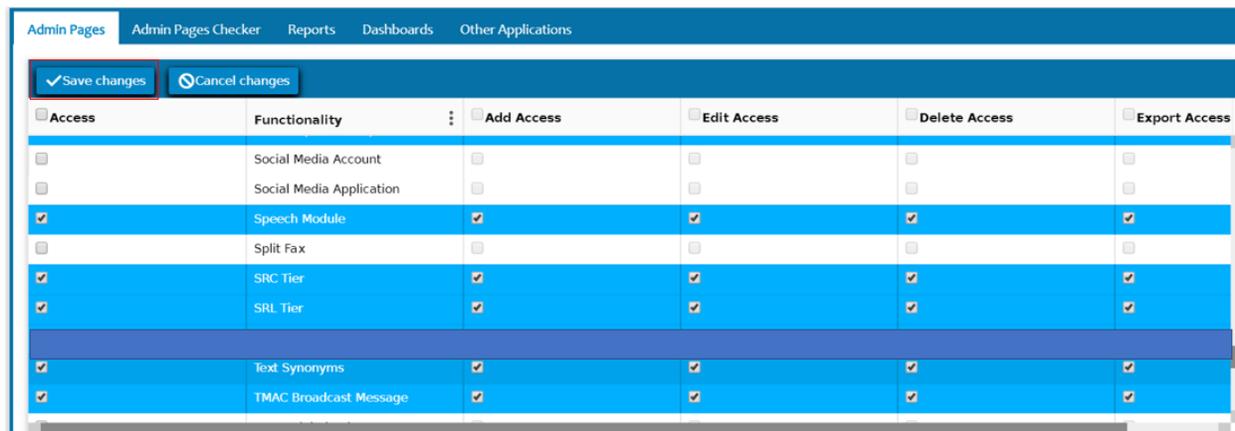


Fig 9.1.3

9.2 Add/Update Agents

Follow below steps to add agents into different teams

Select **“Agent Settings”** module in OCM as show as below

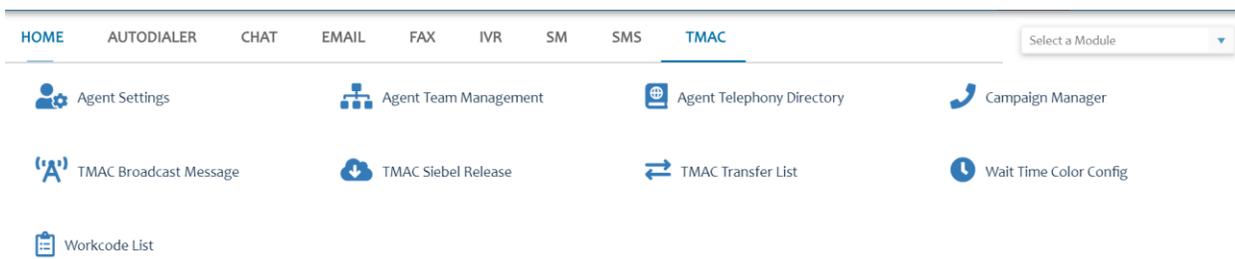


Fig 9.2.1

Follow below steps to add new agent

Select **“Add New Agent Settings Record”** and add the fields then select **“Save”** to save the changes

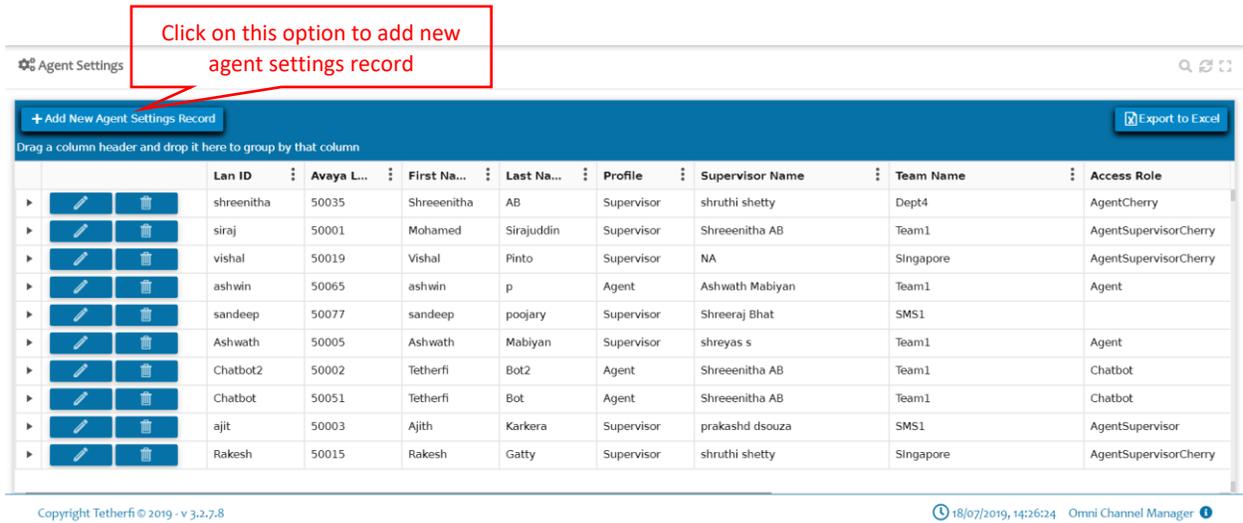


Fig 9.2.2

Once the information has been entered press " Save " to insert the record and **Cancel** to discard the changes

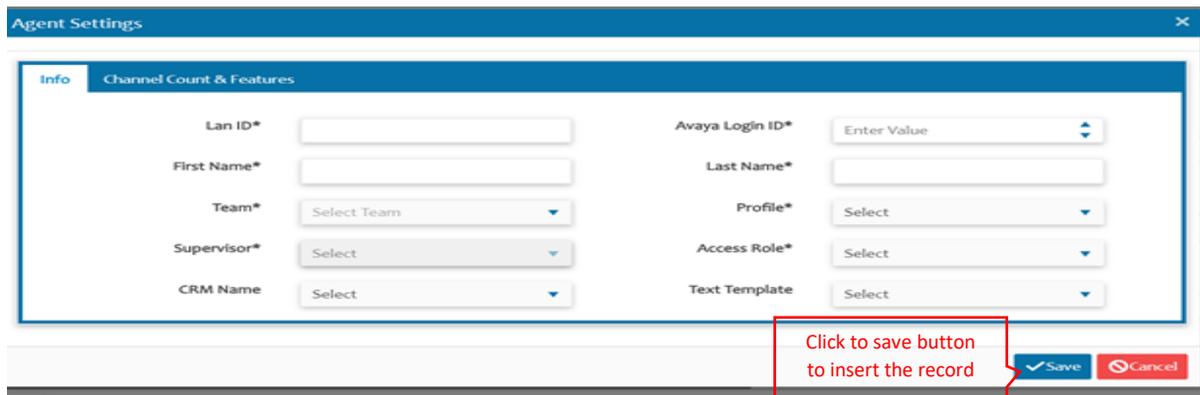


Fig 9.2.3

Follow below steps to update/Delete the agent records

Agent Settings

+ Add New Agent Settings Record Export to Excel

Drag a column header and drop it here to group by that column

	Lan ID	Avaya L...	First Na...	Last Na...	Profile	Supervisor Name	Team Name	Access Role
▶	shreenitha	50035	shreenitha	AB	Supervisor	shruthi shetty	Dept4	AgentCherry
▶	siraj	50001	Mohamed	Sirajuddin	Supervisor	Shreenitha AB	Team1	AgentSupervisorCherry
▶	vishal	50019	vishal	Pinto	Supervisor	NA	Singapore	AgentSupervisorCherry
▶	ashwin	50065	ashwin	p	Agent	Ashwath Mabiyan	Team1	Agent
▶	sandeep	50077	sandeep	poojary	Supervisor	Shreeraj Bhat	SMS1	
▶	ashwath	50005	Ashwath	Mabiyan	Supervisor	shreyas s	Team1	Agent
▶	Chatbot2	50002	Tetherfi	Bot2	Agent	Shreenitha AB	Team1	Chatbot
▶	Chatbot	50051	Tetherfi	Bot	Agent	Shreenitha AB	Team1	Chatbot
▶	ajit	50003	Ajith	Karkera	Supervisor	prakashd dsouza	SMS1	AgentSupervisor
▶	Rakesh	50015	Rakesh	Gatty	Supervisor	shruthi shetty	Singapore	AgentSupervisorCherry

Fig 9.2.4

9.3 Configure Teams and Threshold

Select **TDM Threshold Configuration** module from **OCM**

HOME AUTODIALER CHAT EMAIL FAX IVR SM SMS TMAC TDM Threshold Configura... ▼

Agent Scripting	Agent Skill Assignment	Application Access Control	Bulk Upload Module
CEP Event Mapping	CM Data Sync	Desk Manager	Dynamic Report Designer
Export Scheduler	IW Role Based Access Matrix	Logfile Downloader	Module Exit Node Mapping
OCM Configuration	Opaque Data	Query Browser	Report Designer
Report Downloads	Report Scheduler	Reservation Code	Role Based Access Management
Room Code	SkillConfiguration	TDM Threshold Configuration	TP Redemption

Fig. 9.3.1

Double click the team for which threshold settings needs to be configured.

TDM Threshold Configuration

Export to Excel

Drag a column header and drop it here to group by that column

Team Name	Last Changed By	Last Changed On
SG	TETHERFI Shruthi	17/07/2019 14:35:12
Thailand	tetherfi shruthi	31/08/2018 19:43:17
Singapore	TETHERFI Prathik	03/07/2018 18:57:39
SMS1	tetherfi shruthi	03/09/2018 13:02:15
Dept4	TETHERFI Prathik	03/07/2018 18:58:58
Team1	TETHERFI Prathik	03/07/2018 18:59:13
India	tetherfi prathik	09/10/2018 17:06:40

Figure 9.3.2

To add new configuration aux settings row click on “Add New Row” from menu option as show as below figure

Desk Manager Threshold details

Team Name : SMS1

Click this button to add new row

Aux Code From	Aux Code To	Threshold	Delete	Allow Status Change
4 - Meeting/Training	Available	60	false	true
On Call	Un Hold	50	false	true
2 - TM Feedback	Available	21	false	true
7 - Project	Available	70	false	true

Fig 9.3.3

To update the existing settings then select the individual row and update it column by column as shown as below and Click on “Save Changes” to update the changes

Desk Manager Threshold details

Team Name : Team1

Click this button to save

Aux Code From	Aux Code To	Threshold	Delete	Allow Status Change
ACW	Available	60	false	false
computer	Available	30	false	false
On Call	Un Hold	50	<input type="checkbox"/>	false

Fig 9.3.4

9.4 Agent Team Management

Follow the below steps to add/update team details

Select “Agent Team Management” module from OCM

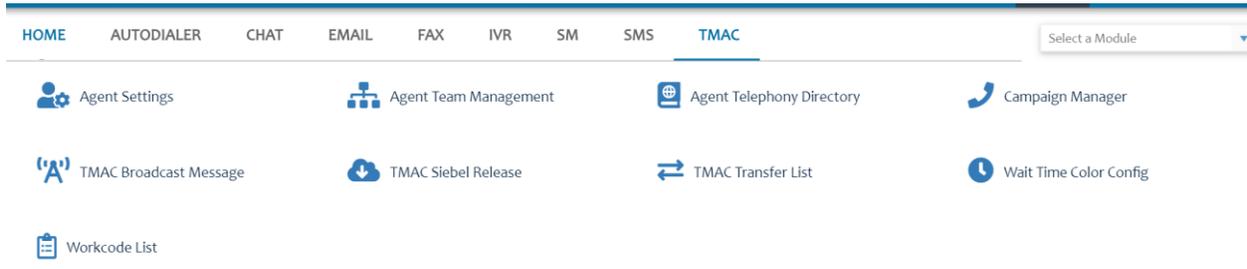


Fig 9.4.1

Use the “Add new agent Team management Record” to add new Agent Team

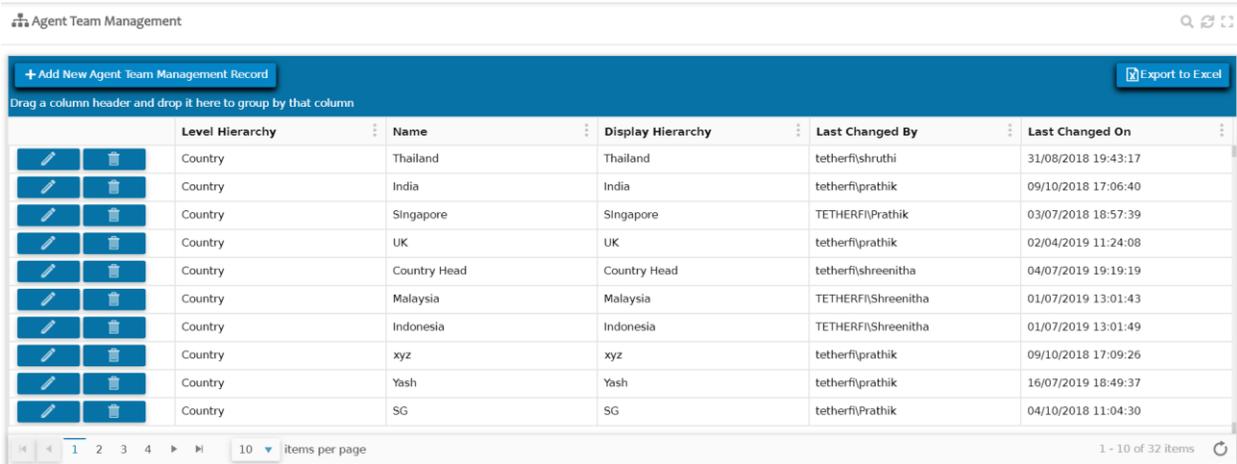


Fig 9.4.2

Enter team name and press “Save”

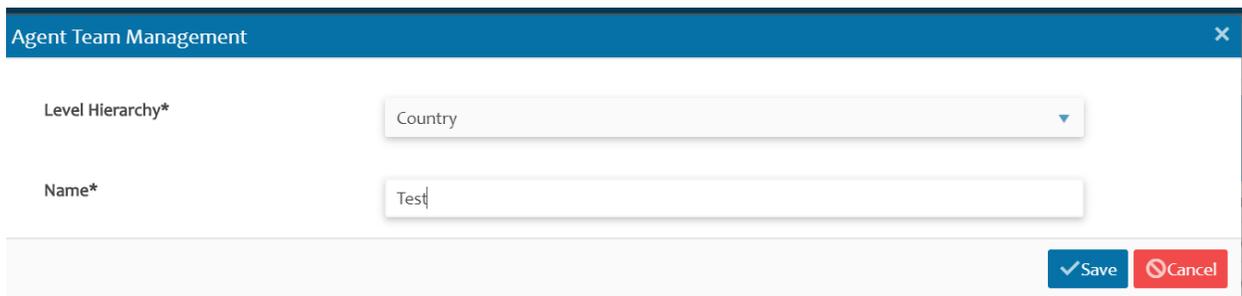


Fig 9.4.3

Similarly, user can use the option to add/delete agent team records

Agent Team Management

+ Add New Agent Team Management Record Export to Excel

Drag a column header and drop it here to group by that column

Level Hierarchy	Name	Display Hierarchy	Last Changed By	Last Changed On
	Country Thailand	Thailand	tetherfi shruthi	31/08/2018 19:43:17
	Country India	India	tetherfi prathik	09/10/2018 17:06:40
	Country Singapore	Singapore	TETHERFI Prathik	03/07/2018 18:57:39
	Country UK	UK	tetherfi prathik	02/04/2019 11:24:08
	Country Country Head	Country Head	tetherfi shreenitha	04/07/2019 19:19:19
	Country Malaysia	Malaysia	TETHERFI Shreenitha	01/07/2019 13:01:43
	Country Indonesia	Indonesia	TETHERFI Shreenitha	01/07/2019 13:01:49
	Country xyz	xyz	tetherfi prathik	09/10/2018 17:09:26
	Country Yash	Yash	tetherfi prathik	16/07/2019 18:49:37
	Country SG	SG	TETHERFI Shruthi	17/07/2019 14:35:12

10 items per page 1 - 10 of 32 items

Copyright Tetherfi © 2019 - v 3.2.7.8 18/07/2019, 14:47:23 Omni Channel Manager

Fig 9.4.4