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## CHAPTER 16

# Visual Agent Report



This chapter shows you how to configure and use Visual Agent Report, a desktop display of real time agent status information. The following topics are covered:

- What is Visual Agent Report?
- Configuring Visual Agent Report
- Using Visual Agent Report
- Troubleshooting Visual Agent Report

## What is Visual Agent Report?



Visual Agent Report, like Visual Queue Report, is a standalone, real time reporting window that can be launched from the server or from any workstation on the LAN. With Agent Report, workstation users can open windows that display the status of agents, in real time, from a user-defined list. For each agent selected, the display shows the time on call, on break, and at work.

## Configuring Visual Agent Report

This section shows you how to configure the server, ACD, and individual workstations to run VAD. VAD gathers real time agent status information from the ACD. On start-up, VAD registers with the TFB Workstation Server (on CTI Server) to obtain ACD agent information, exchanging data with the server via standard client-server TCP/IP sockets interface (Wsock32.dll). Note that the workstation must be configured to use TCP/IP with a fixed or dynamic IP address assigned (DHCP). Wsock32.dll must also be installed on each workstation. Make sure you have set up the workstation and installed Visual Agent Report as described in the APM Installation Guide before proceeding with configuration.

## CTI Server Configuration

Ensure that the following APM support programs are running on the CTI Server Taskbar:

-  TFB Workstation Server
-  TFB ACD Connect

The support programs above are launched automatically when the CTI Server window is opened. If any of the required buttons are missing from the Taskbar, close and restart the CTI Server window. If the buttons do not appear after restart, consult the troubleshooting guide in Chapter 2, "Configuring CTI Server" of the CTI Server Manual.

## Optional Configuration

To take advantage of *extended* Alarm features, agent PC's must be configured with the following options.

- **Soundblaster-compatible Sound Card**

The Alarm utility features the option to speak a .WAV file when an alarm is triggered. For this to work properly, the PC must be configured with a Soundblaster-compatible sound card and speakers.

- **Email**

The Alarm utility can send an email to a specified address when an Alarm is triggered. The PC must be configured to send email for this option to work properly.

Other *alarm* and display features will function properly with or without the above options installed.

**More Information** – See *PC documentation for more information on configuring PC audio and Email.*

## Using Visual Agent Report

Visual Agent Report is the companion product to Visual Queue Report. It's functionally similar to Queue Report, except that instead of displaying call center status by *split*, Agent Report shows information for *agents* registered in the ACD.

### Starting Agent Report

Double-click the Agent Report icon on your desktop.



TFB Agent WallBoard

If there is no shortcut defined, click the Windows **Start** menu, and select **Run**. In the Run dialog box, type, `\tfb\bin\taar.exe`

### The Visual Agent Report Window

#### Menu Bar

The main menu bar includes provisions for managing the agent list, customizing totals, and creating custom Profiles. Note that the **File** and **Edit** menus are not functional.

#### Agent Activity Window

Parameter labels —

The 'calculations' row —

Visual Agent Display											
File Agents Calculations Alarms Profiles Graphing Help											
Name	DN	Status	Time	Calls	Avg Tlk	Talk	Work	Break	Ready	Total	
Ozodko	5319	On Call	2:15	12	0:22	4:35	0:35	1:05	0:15	6:30	
J. Bond	5327	Break	3:15	22	0:13	4:50	0:40	1:05	0:25	7:00	
Lissijous Portnoy	5329	Vacant	2:15	12	0:22	4:35	0:35	1:05	0:15	6:30	
=====											
Calculations				46	0:18	4:40	0:36	1:05	0:18	6:40	

## Agent Report window elements

<u>Label</u>	<u>Description</u>
<b>NAME</b>	User-defined 8-character agent-name or title for display purposes.
<b>DN</b>	Agent's PBX line number
<b>STATUS</b>	Current work mode
<b>TIME</b>	Time
<b>CALLS</b>	The total number of calls handled by that agent this shift
<b>TALK</b>	Time on calls
<b>WORK</b>	Time at Work status
<b>BREAK</b>	Time at Work status
<b>LOGON</b>	Time logged on to ACD
<b>TOTAL</b>	A calculated parameter for all agents in the column. You can configure the Total for any given parameter to be a SUM, an AVERAGE, the HIGHEST, or the LOWEST of the values in the column.

## Customizing the Display

Agent Report gives you complete control over which agents are displayed, and how *Total* values are calculated. You can add and delete agents from the current display. You can have multiple VAD windows open at a time, with up to 24 agents in each window. You can configure the *Total* line to contain the Average, Highest value, Lowest value, or the Sum of the reporting set. You can also save all display and alarm parameters in 'Profile' files for reuse.

Agent Report windows are updated by the CTI Server every 10 seconds, so any changes you make to the display – adding or deleting an agent, changing Totals, and so on – will not take effect until the update occurs.

## Defining and Using VAD Profiles

Before building a customized list of agents to display, it's important to know how to save those settings to a disk file for reuse. The Profile is a file that contains all the current user-defined settings for the Agent Report – agent names and DN numbers, custom alarm settings, Totals definitions, and so on.

To save the current profile

- From the **Profiles** menu, select **Create**
- Enter a name for your Profile.

Your filename is *automatically* saved with an '.aap' extension in /tfb/bin. Note that when you load a Profile, the file name becomes the title of the display window, so consider making the name as descriptive as possible.

To load a profile

Click **Agent DNs** in the menu bar, and select **New Agent DN Report**. The default location for Profile files is '/tfb/bin'.

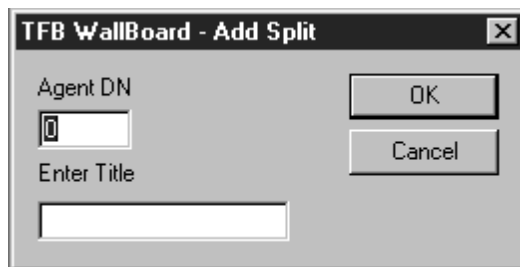
- Click **Load Profile**
- Enter the file name without an extension, or click the file name in the folder
- Click **Open**

## Adding and Deleting Agents from the Display

You can display from 1 to 24 agents in a single window.

### To add an agent to the Display

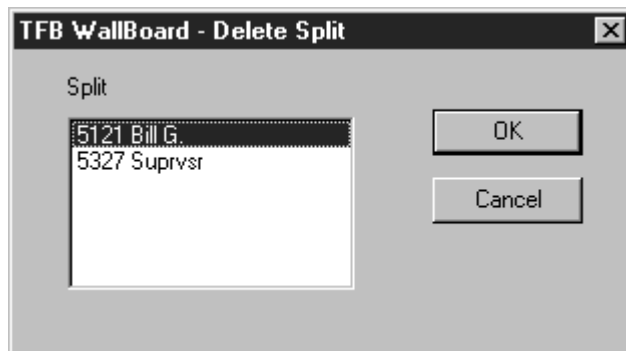
- Select **Add Agent DN** from the **Agent DNs** menu.
- Enter the name of the agent in **Enter Title**
- Enter the DN of the agent in **Agent DN** then click **OK**. The Agent DN *must* be the PBX line number for that agent's station.



Up to 8 characters can be displayed for each agent title.

### To delete an agent from the Display

- Click **Agent DNs | Delete Agent DN**. The dialog box lists all agents in the current window.
- Select the agent you want to delete, then click **OK**.



Note that you can delete an agent from any display only when two *or more* agents are listed.

## Customizing the ‘Calculations’ Row

A ‘calculation’ for any a particular parameter, is simply summary information for all agents in the list. When two or more agents are displayed in any window, ‘calculations’ are automatically shown in the bottom row.

Name	DN	Status	Time	Calls	Avg Tlk	Talk	Work	Break	Ready	Total
Ozodko	5319	On Call	2:15	12	0:22	4:35	0:35	1:05	0:15	6:30
J. Bond	5327	Break	3:15	22	0:13	4:50	0:40	1:05	0:25	7:00
Lissijous Portnoy	5329	Vacant	2:15	12	0:22	4:35	0:35	1:05	0:15	6:30
====										
Calculations				46	0:18	4:40	0:36	1:05	0:18	6:40

You can customize the way any or all of these totals are calculated by selecting **Totals** in the menu bar

A calculation doesn’t have to be a simple sum. You can configure it to be an average, a Low or a High. To customize the way that CALLS (ACD Calls), TALK, WORK, BREAK, and LOGON parameter are calculated in the bottom row, click **Calculations** in the menu bar. The Calculations dialog appears:

ACD Calls	Logon Time	Talk Time	Work Time	Break Time
<input type="radio"/> Average	<input checked="" type="radio"/> Average	<input checked="" type="radio"/> Average	<input checked="" type="radio"/> Average	<input checked="" type="radio"/> Average
<input type="radio"/> Lowest	<input type="radio"/> Lowest	<input type="radio"/> Lowest	<input type="radio"/> Lowest	<input type="radio"/> Lowest
<input type="radio"/> Highest	<input type="radio"/> Highest	<input type="radio"/> Highest	<input type="radio"/> Highest	<input type="radio"/> Highest
<input checked="" type="radio"/> Total				

Select the button for each parameter according to how you want it to be calculated in the display. Click **OK** to activate the new settings. Your calculations settings are automatically saved when you create a Profile.

### Calculation Methods for Visual Agent Report

**Total** – Total line displays the sum of the parameters for each agent (only for calls)

**Highest** – Total line displays the highest value of the parameter for all agents

**Lowest** – Total line displays the lowest value of the parameter for all agents

**Average** – Total line displays the average value of the parameter for all agents

## Troubleshooting Visual Agent Report

### VAD Error messages

#### “Cannot delete only agent DN” ERROR

You will see this message if you have only one agent row listed in the Wallboard and attempt to delete it. You can only **delete** if two or more agent rows are defined on the Wallboard. To change a single-agent display you must either,

- Open a new VAD window with the desired agent description then close the old window.
- OR-
- Add the new agent, and then delete the old agent.

#### “Agent DN already being reported” ERROR

You will see this error message when *adding* an agent DN that already exists in the current display. While VAD does allow duplicate agent names, it does not allow duplicate DNs. Make the DN unique, or add it to a different VAD window.

### Troubleshooting: Visual Agent Report

Problem	Solution
<p><b>Profiles</b> Can't find a Profile file that was previously created.</p>	<ol style="list-style-type: none"> <li>1. Make sure you are in the <code>tfb\bin</code> folder/directory.</li> <li>2. It's possible that the profile was saved in a directory other than the default. Use the Windows File Find feature to locate your profile by searching for <code>*.aap</code> files on the local hard drive.</li> </ol>



