

INTERACTIVE INTELLIGENCE®

·VONEXUS·

MICROSOFT®-BASED BUSINESS COMMUNICATIONS

An Interactive Intelligence Company

Interaction Supervisor

User Guide

Customer Interaction Center®
Enterprise Interaction Center®

Version 2.4

Last Updated 11/15/2005

Abstract

Interaction Supervisor is a client-side application that Contact Center Supervisors use to view statistics and to be alerted when statistics reach predetermined performance levels. This publication explains how to use Interaction Supervisor to monitor the activity of agents, workgroups, telephony hardware, and other objects in real-time.

Table of Contents

| | |
|---|----------|
| Interaction Supervisor User Guide | 1 |
| Table of Contents | 2 |
| Introduction..... | 5 |
| Audience | 5 |
| Organization of Material | 5 |
| Copyright and Trademark Information | 6 |
| Interaction Center Platform Statement..... | 6 |
| Overview | 7 |
| Views..... | 8 |
| Workspace..... | 9 |
| Plug-in Architecture..... | 10 |
| Plug-in modules extend functionality..... | 10 |
| View, menu, and toolbar integration | 10 |
| Automatic software updates | 11 |
| Supports a switchover environment | 11 |
| Software, hardware and access right requirements..... | 12 |
| Versions of Windows Supported..... | 12 |
| Processor and RAM Requirements | 12 |
| Minimum Disk Space requirements..... | 12 |
| Other requirements | 12 |
| Required access rights | 13 |
| IC server license file (license.dat)..... | 13 |
| Station licenses..... | 13 |
| Recommended access rights | 15 |
| Right to view workgroups and workgroup queues | 15 |
| Allow alerts to send emails or trigger a handler | 15 |
| Allow Supervisor Message Creation..... | 15 |
| Display rights assigned to you | 17 |
| Procedures..... | 18 |
| Install Interaction Supervisor | 19 |
| Start Interaction Supervisor..... | 22 |
| Command line parameters..... | 23 |
| Modify a Shortcut | 24 |
| Access help topics, web pages, and version info | 25 |
| Open the default help topic..... | 26 |
| Display help for a statistic..... | 26 |
| Display help for the object that has focus | 26 |
| Toggle display of large graphics in a help topic..... | 26 |
| Display help about a dialog..... | 26 |
| Access online resources | 27 |
| Display version and system information | 27 |
| Open a printable version of the help system | 27 |
| Manage Views..... | 29 |
| Add a view to the workspace..... | 30 |
| Change the caption selection..... | 31 |
| Add or remove statistics from a tabular view | 32 |
| Rename a view | 33 |
| Use Queue Monitor Controls | 34 |
| Add custom columns to a Queue Monitor Control | 40 |
| Remove custom columns from a Queue Monitor Control..... | 41 |
| Coach an Interaction..... | 42 |
| Switch between floating, docked, or tabbed pages | 43 |
| Display view on a tab page | 44 |
| Display view in a floating window | 46 |
| Display view as a docked window | 47 |
| Use Dock button to toggle view state and position..... | 48 |
| Anchor a docked view to another position | 49 |
| Close a View | 50 |
| Display views in Full Screen mode | 51 |
| Display views in Slide Show mode | 52 |
| Manage Graphs | 53 |
| Rendered Data | 53 |

| | |
|---|-----|
| Caption Bar | 53 |
| Legend | 54 |
| Graph view context menu commands | 55 |
| Open the Graph Configuration dialog | 56 |
| Add or remove statistics from a graph view..... | 57 |
| Change the graph type | 58 |
| Change Group by Criteria..... | 59 |
| Modify the period of a line graph..... | 60 |
| Toggle display of Axis Labels..... | 61 |
| Position legend text | 62 |
| Toggle display of values in legends..... | 63 |
| Manage Alerts..... | 64 |
| Add an Alert | 65 |
| Add Multiple Alerts..... | 66 |
| Add a Time in Status Alert | 67 |
| Edit Time in Status Alerts..... | 68 |
| Change the color of an alert icon..... | 69 |
| Edit an Alert..... | 70 |
| Remove an Alert..... | 71 |
| View Active Alerts | 72 |
| Manage all alerts at once..... | 73 |
| Manage Toolbars..... | 74 |
| Show / Hide toolbars..... | 74 |
| Add custom toolbar..... | 74 |
| Drag and Drop toolbar buttons | 74 |
| Change an Agent's workgroup activation | 75 |
| Send Messages to Interaction Client users | 76 |
| Compose a new Supervisor message | 78 |
| Reuse a previously sent message..... | 79 |
| Remove a saved message..... | 80 |
| Exit Supervisor | 81 |
| User Interface Options | 82 |
| Commands | 82 |
| Dialogs | 84 |
| Active Alerts dialog | 85 |
| Columns in the List Control | 85 |
| Red (Warning) Indicator and Count..... | 86 |
| Yellow (Critical) Indicator and Count..... | 86 |
| Green (Normal) Indicator and Count..... | 86 |
| Gray (Neutral) Indicator and Count..... | 86 |
| Context Menu Commands..... | 86 |
| Add Custom Column dialog..... | 87 |
| Add Multiple Alerts dialog..... | 88 |
| Add / Remove Queue Columns dialog | 89 |
| Alert Properties dialog..... | 91 |
| Range page | 92 |
| Display page | 93 |
| Sound page..... | 94 |
| Email page | 96 |
| Supervisor Message page | 98 |
| Custom Handler page | 100 |
| Change Caption Selection dialog | 101 |
| Change Station dialog | 102 |
| Create Supervisor Message dialog..... | 103 |
| Custom Toolbar Name dialog..... | 105 |
| Edit Alerts dialog | 106 |
| Filter Settings dialog..... | 108 |
| Graph Configuration dialog | 109 |
| General page | 109 |
| Title page..... | 110 |
| Axes page..... | 111 |
| Legend page | 111 |
| Interaction Supervisor Login dialog | 113 |
| Manage Agent Activations dialog..... | 114 |
| Manage Alerts dialog | 116 |
| Manage Custom Columns dialog..... | 119 |

| | |
|--|-----|
| New View dialog | 120 |
| Plug-in Information dialog..... | 121 |
| Recipients dialog | 122 |
| Rename View dialog | 123 |
| Statistic Selection dialog..... | 124 |
| Supplemental Category Tabs | 124 |
| View Supervisor Messages dialog..... | 126 |
| Toolbar Options dialog | 128 |
| Toolbar Options dialog (Buttons page)..... | 130 |
| Tray Icon..... | 131 |
| Glossary | 132 |
| Change Log..... | 135 |

Introduction

Interaction Supervisor is a tool for monitoring Interaction Center agents, workgroups, queues, lines, and stations. It is the IC's real-time performance monitoring system. This client-side application displays workgroup and queue statistics, and sends notifications when statistics reach predetermined performance levels. Contact Center Supervisors use Interaction Supervisor to view graphs and tables that consolidate statistics from multiple workgroups.

Although the Interaction Client provides limited user, workgroup and queue monitoring capabilities, Interaction Supervisor is more powerful and summarizes additional operational statistics. It allows a user to:

- Monitor single workgroups
- Monitor multiple workgroups
- Set alerts to inform of events triggered by statistical changes
- View real-time statistics in graphs and consolidated tables

Audience

Interaction Supervisor is designed to satisfy the advanced monitoring requirements of supervisors, managers, and executives who need to quickly examine real-time operational information across their contact centers. General familiarity with Microsoft Windows and with the IC platform is assumed. This publication explains how to set alerts and view real-time statistics and graphs in Interaction Supervisor. It provides general help for working with the application. Other help modules explain the features of [plug-in extensions](#) (p. 10).

Organization of Material

This publication is organized into sections that should be read in order. However, the material is hyperlinked to allow non-linear navigation.

1. This *introduction* describes the program, its documentation and copyrights.
2. The [Overview](#) (p. 7) explains what Interaction Supervisor can do for you.
3. [Procedures](#) (p. 18) explain how to install and start Supervisor, manage views, graphs, alerts, toolbars, and other features of the program.
4. The [User Interface](#) (p. 82) section covers dialogs and configurable options in the program.
5. The [Glossary](#) (p. 132) explains special terms used in this documentation.
6. The [Change Log](#) (p. 135) explains "what's new" in this release.

The online help version of this document merges [plug-in](#) (p. 10) module helps at runtime. This adds additional help topics to the table of contents pane on the left side of the display.

Copyright and Trademark Information

©1994 – 2005 Interactive Intelligence Inc./ Vonexus Inc. All rights reserved. Vonexus is a wholly-owned subsidiary of Interactive Intelligence Inc. Interactive Intelligence®, Interaction Center Platform®, Communité®, Enterprise Interaction Center®, Interactive Intelligence Customer Interaction Center®, e-FAQ®, e-FAQ Knowledge Manager, Interaction Dialer®, Interaction Director®, Interaction Marquee, Interaction Recorder®, Interaction SIP Proxy, Interaction Supervisor, Interaction Tracker, Mobilité®, Vocalité®, Interaction Administrator®, Interaction Attendant®, Interaction Client®, Interaction Designer®, Interaction Fax Viewer, Interaction FAQ, Interaction Melder, Interaction Screen Recorder, Interaction Scripter®, Interaction Server, Wireless Interaction Client, InteractiveLease®, and the "Spirograph" logo design® are all trademarks or registered trademarks of Interactive Intelligence Inc.

Other brand and/or product names referenced in this document are the trademarks or registered trademarks of their respective companies.

Interactive Intelligence Inc.
7601 Interactive Way
Indianapolis, Indiana 46278
Telephone/Fax (317) 872-3000
www.ININ.com

Vonexus
7601 Interactive Way
Indianapolis, Indiana 46278
Telephone/Fax (888) 817-5904
www.vonexus.com

DISCLAIMER

Interactive Intelligence (Interactive) has no responsibility under warranty, indemnification or otherwise, for modification or customization of any Interactive software by Interactive, Customer or any third party even if such customization and/or modification is done using Interactive tools, training or methods documented by Interactive.

Interaction Center Platform Statement

This document describes Interaction Center (IC) features that may not be available in your IC product. Several products are based on the IC platform, and some features are disabled in some products. Several products are based on the IC platform:

- Customer Interaction Center (CIC)
- Enterprise Interaction Center (EIC)
- Communité

While all of these products share a common feature set, this document is intended for use with all IC products, and some of the described features may not be available in your product.

How do I know if I have a documented feature?

Here are some indications that the documented feature is not available in your version:

- The menu, menu item, or button that accesses the feature appears grayed-out.
- One or more options or fields in a dialog box appear grayed-out.
- The feature is not selectable from a list of options.

If you have questions about feature availability, contact your vendor regarding the feature set available in your version of this product.

Overview

Interaction Supervisor is a standalone monitoring application for IC. It satisfies the monitoring requirements of contact center supervisors, managers, and executives who need to view operational information across the contact center in real time.





Think of Interaction Supervisor as a container application that displays [views](#) (p. 8) of data. Supervisor itself does not acquire data. Instead, [plug-in](#) (p. 10) modules supply data and views to Supervisor so that it can graph, display, and alert on statistical data from various IC subsystems. Once you know how to use Supervisor's graphical user interface, you can quickly manage information provided by any plug-in module in the system.

Supervisor consists of a main window with a title, menu, and one or more dockable toolbars. The main window contains one workspace and any number of configurable views. Each plug-in adds one or more views that display a general class of statistics. You can customize a view to include or exclude data items, and set alerts that notify of events triggered by statistical changes. Graphical views can be customized to meet personal monitoring requirements. Since Supervisor is event-driven, its information is always up-to-date.

Supervisor makes it easy to analyze statistics across reporting periods and data types. Using the workgroup plug-in for example, you can compare, contrast, and consolidate information for agents and workgroups. Likewise, an optional plug-in for Interaction Dialer reports agent activity across campaigns, workflows and sites.

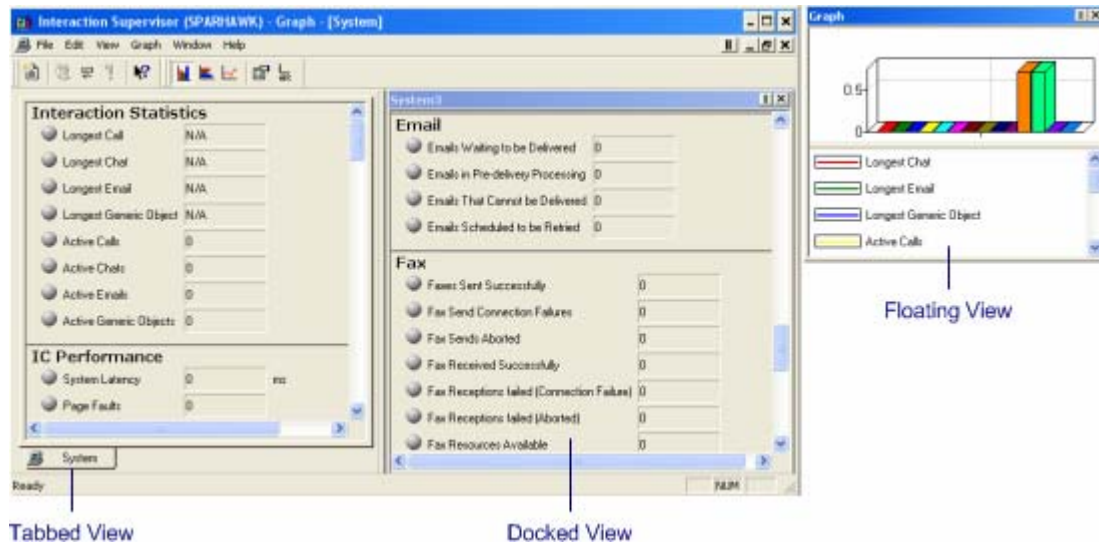
Interaction Supervisor is a standard IC component. In its default configuration, it provides a System plug-in that monitors IC system performance and status. The System plug-in is included at no charge, and does not require a license. Additional plug-in modules may be licensed to monitor workgroups, Interaction Dialer, Interaction Director, etc.

Related Topics

-  [Views](#) (p. 8)
-  [Workspace](#) (p. 9)
-  [Plug-in Architecture](#) (p. 10)
-  [Software, hardware, and access right requirements](#) (p. 12)

Views

A *view* is a window that displays data. Information can be displayed in columns, or rendered as a graph. Views can be positioned anywhere on the screen, or docked within Supervisor's *workspace*.



Each view can be displayed in one of three ways:

- as a *floating* window that you can position anywhere on the screen.
- as a *docked* window that is anchored to the top, left, bottom, or right edge of the workspace.
- as a *tab* page.

Supervisor displays any combination of floating, docked, or tabbed views at once. It provides extensive control over the display and positioning of view windows. Individual views can be resized, scrolled, moved, docked, tabbed, or floated. You can tile, cascade, and arrange window icons for all views at once.

Window settings are stored so that users don't have to customize the display each time Interaction Supervisor is restarted. At startup, Interaction Supervisor reopens views in the mode and position used in the previous session.

Practical Limitations

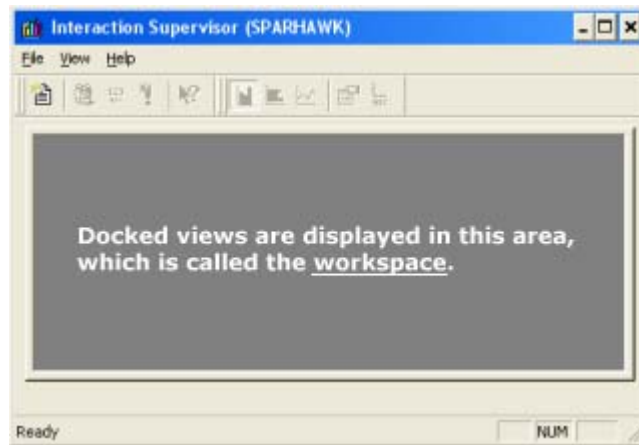
Interaction Supervisor does not limit the number of items that a user can attempt to monitor. Consequently, it is possible to degrade its performance or lock the application by overwhelming it with items to monitor. For example, if all statistics for 300 workgroups are selected, Supervisor will lock up or perform slowly, since its overview views are designed to compare no more than a couple dozen agents/workgroups. In practical terms, you can avoid performance issues by limiting displays to approximately 25 workgroups at a time. If performance lags, try selecting fewer items to monitor.

Related Topics

 [Manage Views](#) (p. 29)

Workspace

When views are docked or displayed as tab pages, they appear within Supervisor's main window, which is called the *workspace*.



- The workspace can be displayed [full-screen](#) (p. 51) mode, so that toolbars, menus, and window borders do not appear.
- Tabbed pages can be displayed in [slide show](#) (p. 52) mode, which cycles between views every 5 seconds.

Related Topics

-  [Manage Views](#) (p. 29)

Plug-in Architecture

Interaction Supervisor is a container that docks, displays, and manages views of data. Views are added by to Supervisor in modules (DLLs) that extend its monitoring capability in some way. For example, the plug-in for Interaction Dialer (SupDialerA.dll) enhances Supervisor to display information about outbound campaigns and workflows.

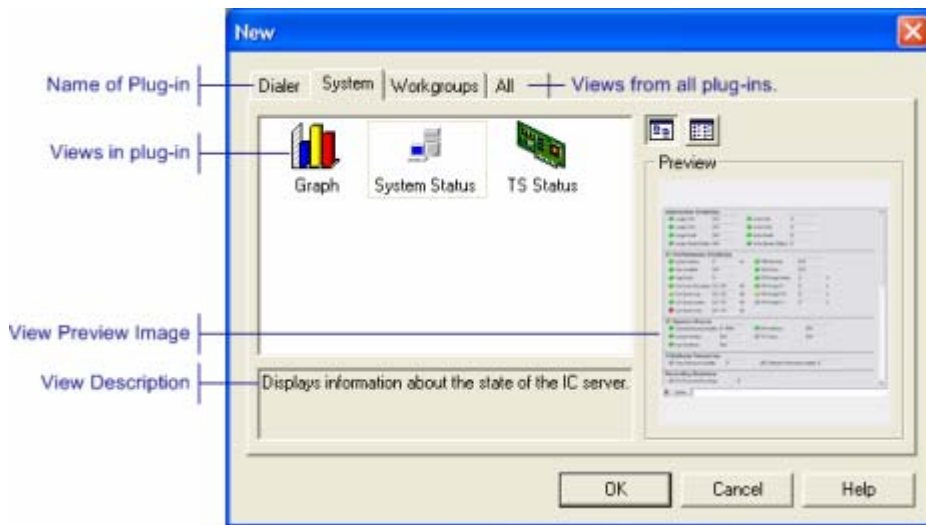
Plug-in modules extend functionality

At startup, the Interaction Supervisor executable (SupervisorA.exe) looks in its own directory for extension DLLs, and attempts to load them. It locates DLL filenames that begin with "Sup" which indicates that the file is a Supervisor plug-in. The DLL may have an "A" or "AD" suffix to indicate its build type (A = *ANSI Release*, AD= *ANSI Debug*). The ".DLL" file extension indicates that the file is a *dynamic link library*.

View, menu, and toolbar integration

Supervisor will accept any number of plug-ins. A plug-in may define its own menus to merge into the main application menu, and may also export one or more toolbars. When a plug-in is loaded, it describes itself to Supervisor in a standard way that facilitates seamless integration with the user interface. Each plug-in passes Supervisor its name, the name of each view, a short description of each view, icons, preview images, and other elements that Supervisor needs to integrate its functionality.

The dialog below demonstrates integration of three plug-in modules (Dialer, System, and Workgroups). This dialog adds a new view to the workspace. As you can see, the dialog displays a tab for each loaded plug-in, and offers icons and preview images for the selected view.

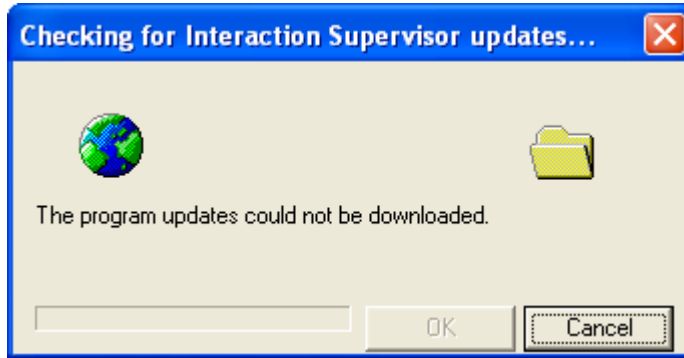


Plug-ins also customize toolbars and menu options. However, Supervisor provides standard commands that minimize the need to add extra GUI controls. For example, its *Add/Remove Statistics* command changes the statistics displayed in a view. When that command is invoked, the plug-in displays a custom dialog that lists choices that are appropriate for the view. The functionality difference is seamless, and the command is the same for all plug-ins. Menu and toolbar integration can be summarized as follows:

- Supervisor supports additional menu and toolbar items as needed. The functionality of built-in commands varies between views to accommodate different kinds of data.
- *Menus* are merged dynamically and present appropriate commands for the active view. In general, a plug-in adds a single menu item for each of its views. When the view is active, its menu appears in Supervisor's menu bar. Plug-ins may also add items to built-in menus. For example, a plug-in might add a command to the Edit menu.
- *Toolbars* are completely separate from views. A plug-in may define any number of toolbars, regardless of the number of views it contains.

Automatic software updates

Once Interaction Supervisor is installed, new and updated plug-ins are automatically installed on client PCs by the IC's Auto-Updater subsystem. Auto-Updater applies automatic updates to client PCs to add functionality and to apply hot fixes. As a result, Interaction Supervisor is self-updating once it is installed.



To view and use plug-ins, [access rights](#) (p. 13) must be assigned to your station.

Supports a switchover environment

Supervisor watches for Switchover notifications. If you install Interaction Supervisor in a switchover environment, it will automatically restart and connect to a backup server if the primary IC server fails. There is no need to manually restart Interaction Supervisor after a switchover. Alerts switchover too, since the Alert server replicates all alerts to the backup server. After a switchover, Users will continue to receive visual, audio and email Alerts.

Software, hardware and access right requirements

This section specifies which Windows versions are supported, and recommended processor, RAM, and disk space requirements. It also discusses rights that must be assigned to you in Interaction Administrator in order to use Interaction Supervisor to its full potential.

Client workstations running IC and Interaction Supervisor require the following software and hardware components:

Versions of Windows Supported

- NT Workstation 4.0
- NT Server 4.0
- Windows 2000 Professional
- Windows 2000 Server
- Windows XP

Processor and RAM Requirements

- Windows 98 SE, Pentium 166MHz with 64MB RAM
- Windows ME, Pentium 166MHz with 64MB RAM
- Windows NT, PII 300MHz with 64MB RAM
- Windows 2000 Professional/ME, Pentium 166MHz with 64MB RAM (PII 400MHz with 128MB RAM recommended)
- Windows 2000 Server, Pentium 166MHz with 128MB RAM
- Windows XP, Pentium II 266MHz with 256MB RAM

Minimum Disk Space requirements

Additional disk space may be required for logging purposes:

- 30MB network install
- 40MB local install

Other requirements

- Network interface card
- Video support of 800 x 600 resolution with 2MB video memory (minimum)
- Mouse
- CD-ROM (if installing the Interaction Supervisor from a CD)
- Sound card and speakers (recommended)

Required access rights

At startup, Supervisor detects plug-in files and loads them automatically—if you have all needed access rights. Access to a plug-in is controlled by the license file on the IC server and by assignment of a license to your station in Interaction Administrator. Supervisor enforces licenses on a per-workstation basis. The IC's AdminServer subsystem determines the number of licenses that are available.

IC server license file (license.dat)

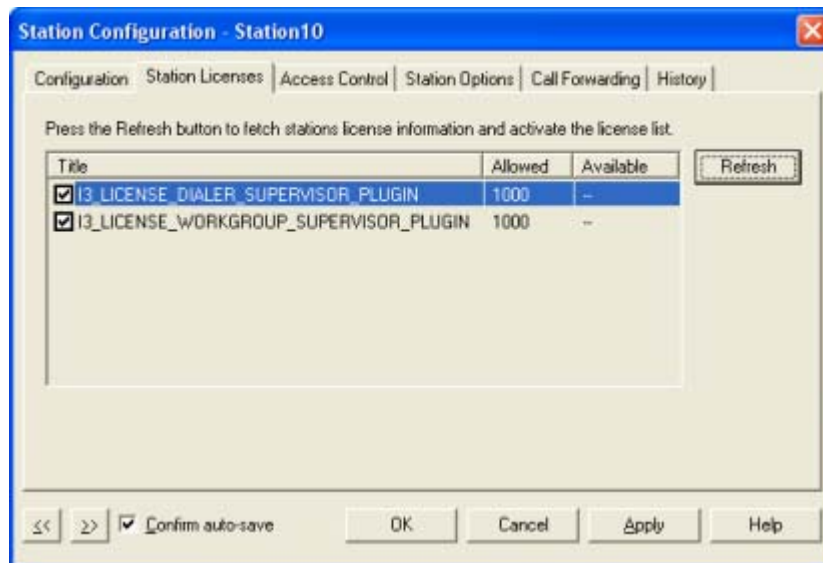
When your company purchases rights to use a plug-in, the license file on the IC server (license.dat) is updated to report availability of the plug-in, and to set the maximum number of station licenses that can be assigned. The IC system administrator is responsible for managing licenses on the server, and may also be the person responsible for assigning a license to your station.

For background information concerning the license installation process, refer to the *Licensing Overview* document, in the *Technical Reference Documents* section of the IC documentation library. Additional information is available online at <http://www.inin.com/license>.

Station licenses

Your station must be granted the right to access the plug-in. This right is assigned in Interaction Administrator by your IC administrator or other authority. The procedure is as follows:

1. Start Interaction Administrator.
2. Expand the *Server* container.
3. Expand the *Stations Space* container. Then click on the *Stations* container.
4. Double-click a station in the list view to open its property sheet.
5. Place a checkmark next to the station licenses you want to assign. In the example below, Station10 has been granted the right to access the Dialer plug-in and the Workgroup plug-in.



6. Press *OK* to close the property sheet.
7. Repeat steps 4-6 to assign rights to other stations as needed.
8. Close Interaction Administrator when you are finished.

Enforcement of Licenses

Interaction Supervisor enforces licensing on a per Workstation basis. The Admin Server subsystem determines the number of licenses that are available; Interaction Administrator assigns Supervisor licenses to workstations. If a Workstation does not have a license, Supervisor will display a message stating that a license is required to run supervisor on the current workstation.

In some cases, Supervisor can run a plug-in but not with its base supervisory functionality enabled. If Supervisor detects that it has been started with no Supervisor license enabled, it does not exit. Instead, it runs licensed plug-ins. If no plug-ins are licensed and base Supervisor functionality is not licensed, Supervisor displays a dialog to that effect and exits.

How Supervisor reacts when licensing is changed on the server

Supervisor reacts when licensing of plug-ins or views is changed on the IC server. Each plug-in queries for license information when it is opened or when the New dialog is displayed.

The New dialog and plug-in dialogs are updated when they are opened. For example, if the New dialog is open and the licensing is changed, changes in licensing won't be reflected until the New dialog is reopened.

Views, on the other hand, cache license information. Consequently, views are not updated until Supervisor is restarted. If a license is removed, the user does not lose configured views until Supervisor is restarted.

Related Topics

- [Plug-in Architecture](#) (p. 10)
- [Recommended Access Rights](#) (p. 15)
- [Display rights assigned to you](#) (p. 17)

Recommended access rights

Additional permissions must be granted in Interaction Administrator before users can access some Interaction Supervisor features.

Right to view workgroups and workgroup queues

To access workgroup statistics, a user must have permission to *View Workgroups* and *View Workgroup Queues*.

1. Start Interaction Administrator if it is not already running.
2. Expand the *People* container.
3. Expand the *Users* container.
4. Double-click a user entry in the list view to open its property sheet.
5. Click on the *Access Control* tab. Then select *User Rights* in the list on the left.
6. Select *View Workgroup* from the *Category* drop list.
7. Assign individual workgroups to the user.
8. Select *View Workgroup Queue* from the *Category* drop list.
9. Assign individual workgroup queues to the user.
10. Press *OK* to close the property sheet.
11. Repeat steps 4-10 to assign permissions to other users as needed.
12. Close Interaction Administrator when you are finished.

Allow alerts to send emails or trigger a handler

To set up alerts that send Email or trigger a handler, the user must be granted permission to *Allow Handler Trigger Alerts*.

1. Start Interaction Administrator if it is not already running.
2. Expand the *People* container.
3. Expand the *Users* container.
4. Double-click a user entry in the list view to open its property sheet.
5. Click on the *Security* tab. Then select *User Rights* in the list on the left.
6. Place a checkmark next to *Allow Handler Trigger Alerts*.
7. Press *OK* to close the property sheet.
8. Repeat steps 4-7 to assign rights to other users as needed.
9. Close Interaction Administrator when you are finished.

When you set up an email alert you may notice fields on the Custom Handler tab have been modified. In Interaction Supervisor, an email alert is considered a custom alert where the customization is already provided. Administrators can prevent users from setting up these email alerts by disabling the Interaction Administrator "Allow Handler Trigger Alerts" User Right. This user right is the same permission that allows users to use custom alert handlers.

Allow Supervisor Message Creation

To send Supervisor Messages, the "Allow Supervisor Message Creation" user right must be granted in Interaction Administrator. This right allows a Supervisor user to create messages and send them to Interaction Client users. For details, see [Send Messages to Interaction Client users](#) (p. 76). To assign this right, follow these steps:

1. Open Interaction Administrator.
2. Select the *Users* container.
3. Open properties for a User by double-clicking an entry in the list view, or press Enter to open the currently selected User.
4. Click on the *Security* tab.
5. Select "*User Rights 2*".
6. Check "Allow Supervisor Message Creation".
7. Press *OK* to close the property sheet. Repeat steps 3-7 for other users who need this right.
8. When you are finished, close Interaction Administrator by selecting *Exit* from the *File* menu.

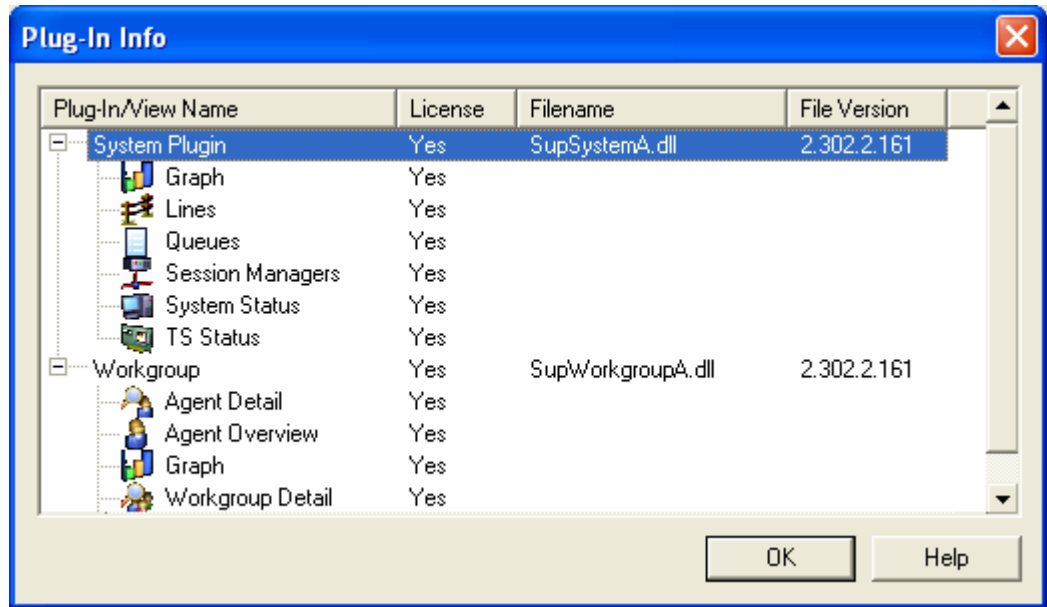
Related Topics

-  [Plug-in Architecture](#) (p. 10)
-  [Required Access Rights](#) (p. 13)
-  [Display rights assigned to you](#) (p. 17)

Display rights assigned to you

To find out which plug-ins you have rights to use, follow these steps:

1. Start Interaction Supervisor if it is not already running.
2. Pull down the *Help* menu and select *Plug-In Info*. This dialog lists rights assigned to you in Interaction Administrator. In the example below, the station has the right to use the System plug-in, but cannot use the Workstation plug-in.



In this release, access to individual views cannot be restricted. If you have rights to the plug-in, you may access all of its views. More granular control over view access may be provided in a future release.

3. Press *OK* to dismiss the dialog.

Related Topics

- [Required access rights](#) (p. 13)
- [Recommended access rights](#) (p. 15)
- [Plug-in Information dialog](#) (p. 121)

Procedures

This section explains how to perform common tasks in Interaction Supervisor. The major procedures are listed below:

- [Install Interaction Supervisor](#) (p. 19) explains how to install Supervisor client software on agent PCs.
- [Start Interaction Supervisor](#) (p. 22) covers command-line parameters, call-flow configuration switches, and shortcuts used to run the program.
- [Access help topics, web pages and version information](#) (p. 25) explains how to obtain information about the program, statistics, your operating environment, and printable versions of help files.
- [Manage Views](#) (p. 29) explains how to create, customize, and display views in the workspace.
- [Manage Graphs](#) (p. 53) explains how to create and monitor line graphs and bar charts.
- [Manage Alerts](#) (p. 64) explains how to set alerts that inform you of events triggered by statistical changes.
- [Manage Toolbars](#) (p. 74) explains how to customize the appearance of toolbars.
- [Change an agent's workgroup activation](#) (p. 75) explains how to manage which workgroups an agent will receive calls for.
- [Exit Supervisor](#) (p. 81) explains how to close the program safely.

Install Interaction Supervisor

This procedure explains how to install Interaction Supervisor on a client PC. You can run setup from your IC server or directly from xIC Product CD Disc 1.

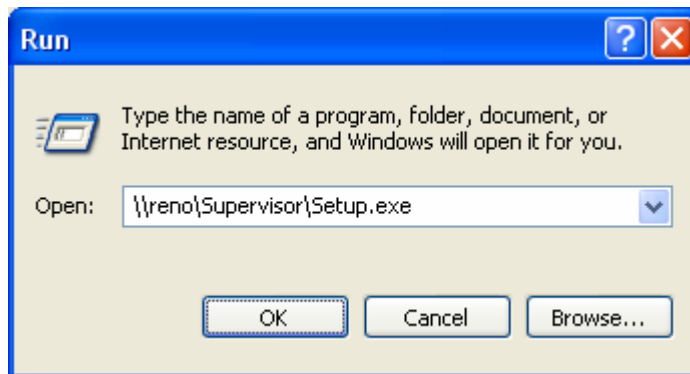
Interaction Supervisor does not require Interaction Client to be installed as a prerequisite.

To install Supervisor from CDROM:

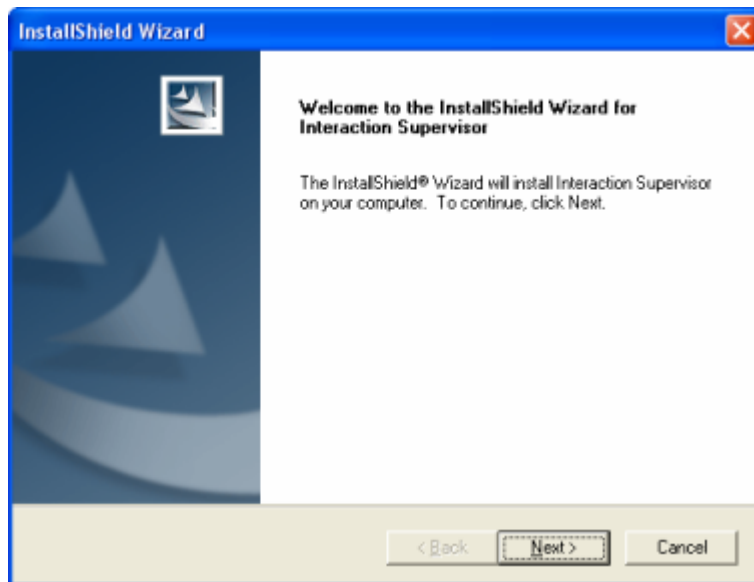
1. If you have the *xIC Product CD Disc 1*, insert it into the agent's CD-ROM reader. Wait a few seconds for the "autorun" program to start. If you do not have the CD-ROM, proceed to step 3.
2. Press the *Client Workstation* button. When the list of *Optional Installs* appears, click on the *Interaction Supervisor* hyperlink. This runs *setup.exe* from the \Supervisor directory on the CD-ROM. Skip to step 5 now.

To install Supervisor from your IC Server:

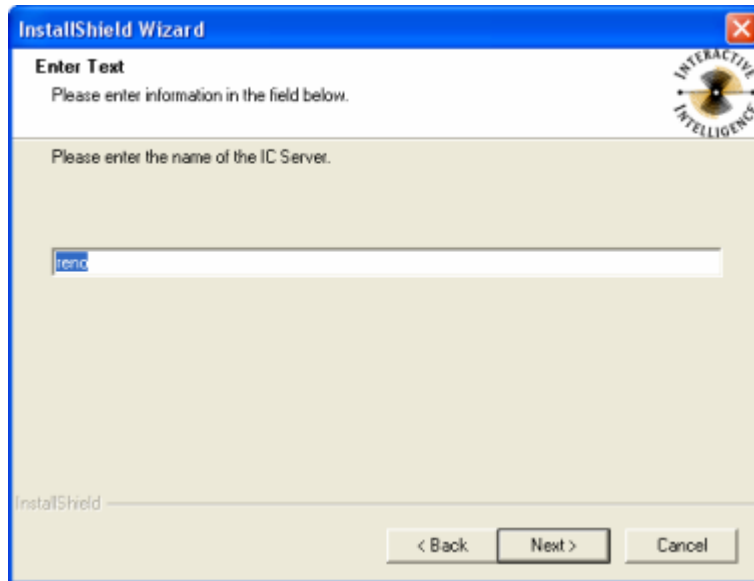
3. Press the *Start* button and select *Run*.



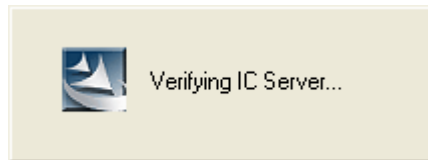
4. Type \\servername\Supervisor\Setup.exe in the *Open* field, replacing *servername* with the name of your IC server. Press *OK* and wait a few seconds for setup to initialize. A welcome screen will appear.



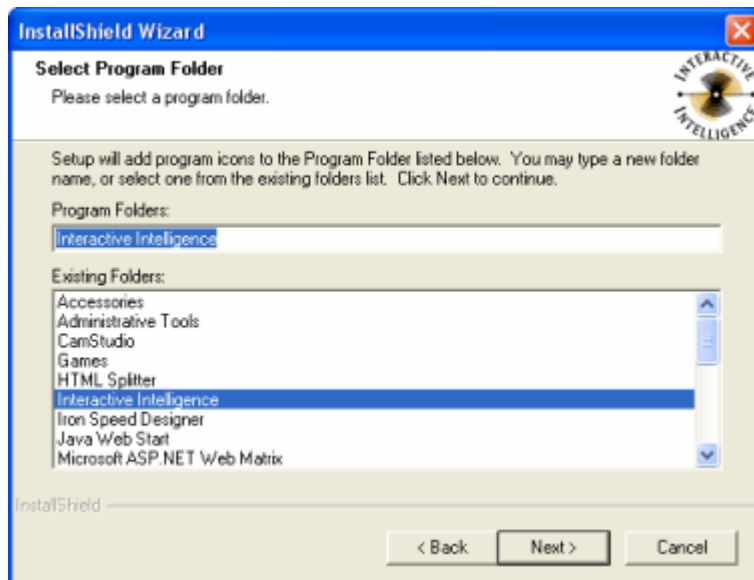
5. Press *Next* to proceed past the welcome screen. When the *Server Name* screen appears, confirm that the name of your server is entered correctly. This is the IC server that Supervisor will obtain statistics from. Press *Next* to proceed.



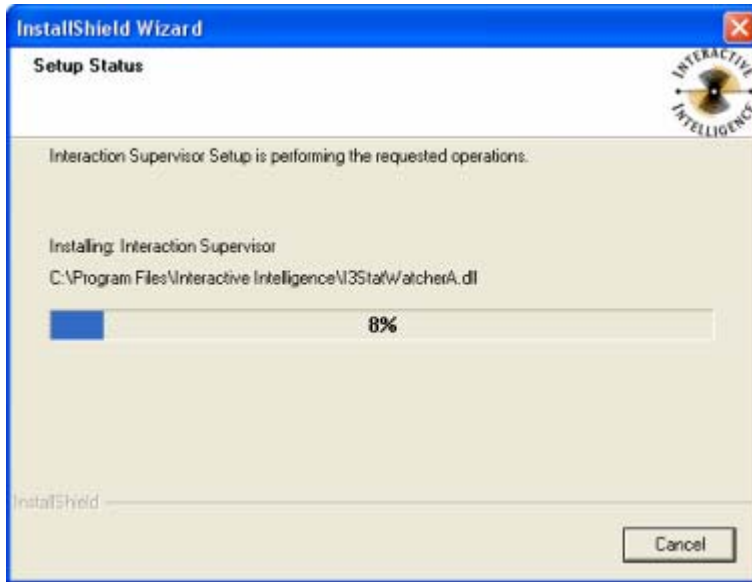
6. Wait a few seconds for setup to verify the IC server.



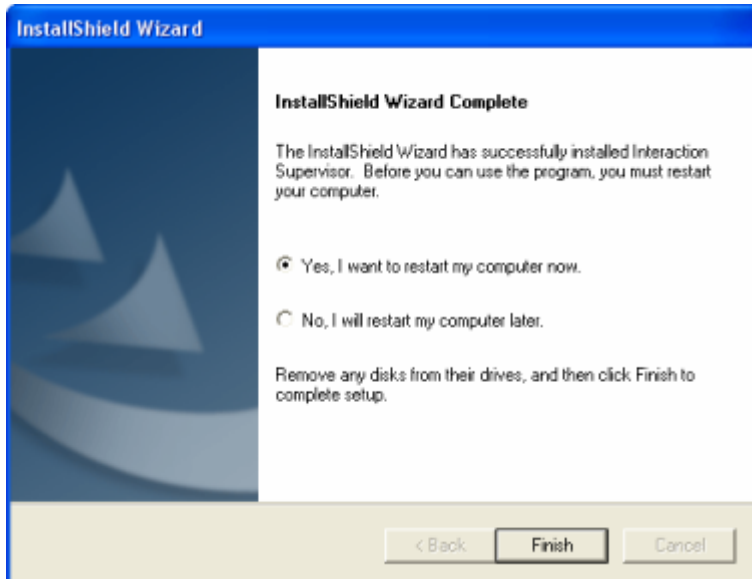
7. When the *Setup Program Folder* screen appears, press *Next* to accept Interactive Intelligence as the target folder. You can optionally enter a different folder name.



8. Wait until setup finishes copying files to your hard drive.



9. Close other running programs, and then press *Finish* to reboot your machine.



Once your machine is restarted, you can launch Interaction Supervisor by pressing the *Start* button, selecting *All Programs*, *Interactive Intelligence* and then *Interaction Supervisor*. This shortcut can be modified to add optional command line parameters. See [Start Interaction Supervisor](#) (p. 22) for more information.

To use licensed [plug-ins](#) (p. 10), access rights must be granted to your station. For details, see [Required Access Rights](#) (p. 13), [Recommended Access Rights](#) (p. 15), and [Display rights assigned to you](#) (p. 17).

Related Topics

-  [Start Interaction Supervisor](#) (p. 22)
-  [Product Concepts](#) (p. 7)

Start Interaction Supervisor

Once you have installed Interaction Supervisor, you can follow these steps to start the program:

1. Press the *Start* button.
2. Select *All Programs*, *Interactive Intelligence*, and then *Interaction Supervisor*. After a few seconds, its splash screen will appear.
3. The default shortcut does not pass any ID and password information to Supervisor. If you specified a different server name during installation, Supervisor will display a "login failed" alert. Press OK to dismiss this message if it appears.

You can specify user and password information in the shortcut used to start Interaction Supervisor. See [command line parameters](#) (p. 23) for details.

By default, Supervisor uses the name of your computer as the station name. If your computer name does not match the station name defined in Interaction Administrator, license authentication will fail unless you start Supervisor using the `/w` command line parameter to specify the station name.

If Supervisor is running on the same station as Interaction Client or another IC application, the station used in Supervisor must match the station used in Interaction Client.

If Interaction Client and Supervisor are running on the same machine, and Interaction Client is running from a remote dynamic station, then Interaction Client must be started before Interaction Supervisor. That restriction will be lifted in a future release.

4. If a [Login dialog](#) (p. 113) appears, enter a valid IC username and password. Then specify a configuration type (inbound, outbound, operator, or All). Press *OK*. If authentication fails, Supervisor redisplay the Login dialog, so that you can correct a typing error or login using a different ID.

Command line parameters

Interaction Supervisor supports optional command line parameters that you can use when starting Interaction Supervisor. These parameters are typically added to a shortcut. Command-line switches are not case-sensitive.

| Parameter | Parameter Description |
|--------------|---|
| /n | /n=<server name>. This parameter specifies the IC Server to which you point Interaction Supervisor. You can also specify an IP address (like 204.180.46.8). |
| /u | /u =<user name>. This parameter allows you to start Interaction Supervisor logged in as a different user than the one specified when Interaction Supervisor was installed. You might use the /U=<user_name> parameter if several people use a computer at different times during the day. Specifying the user allows the current user to receive his or her personal interactions in addition to the interactions that are placed on the computer's station queue. |
| /p | /p=<password>. This password is specified in Interaction Administrator. |
| /w | <p>/w=<station name>. By default, Supervisor uses the name of your computer as the station name. If your computer name does not match the station name defined in Interaction Administrator, license authentication will fail. To prevent this, start Supervisor using /w to specify the station name.</p> <p>If Supervisor is running on the same station as Interaction Client or another IC application, the station used in Supervisor must match the station used in Interaction Client.</p> <p>If Interaction Client and Supervisor are running on the same machine, and Interaction Client is running from a remote dynamic station, then Interaction Client must be started before Interaction Supervisor. That restriction will be lifted in a future release.</p> |
| /DONT_UPDATE | Skips the process of checking the Auto Updater configuration for potential updates. |
| /LOGIN | Opens the login dialog with station and server parameters filled in. |
| /ICONS | /ICONS=<directory where icons are>. This parameter specifies the local directory where your status icons are installed. Use this parameter to properly display status icons in your Supervisor pages. |
| /NOSPLASH | /NOSPLASH. This parameter ignores or suppresses the splash screen that is normally displayed during start-up. However, this parameter is usually only used for debugging purposes. Check with your administrator before using this parameter. |

Example Shortcut

```
"C:\Program Files\Interactive Intelligence\SupervisorA.exe" /u=user1 /p=password /w=station1 /n=ICServer1
```

Related Topics

 [Modify a Shortcut](#) (p. 24)

Modify a Shortcut

To modify the shortcut used to start Interaction Supervisor, follow these steps:

1. Press the *Start* button.
2. Select *All Programs*, *Interactive Intelligence*, and then right-click *Interaction Supervisor* to open its context menu.
3. Select *Properties* from the context menu.
4. Modify the *Target* statement to add *Notifier*, *user*, and *password* arguments.
5. Press OK. The next time you start Interaction Supervisor using this shortcut, it will connect to the specified server automatically.

Related Topics

-  [Command-line parameters](#) (p. 23)

Access help topics, web pages, and version info

The *Help* menu provides access to help topics, web resources, and displays version information about Supervisor and your computing environment. Online help is available for Supervisor and for each plug-in. The following procedures explain how to access online help topics:

- [Open the default help topic](#) (p. 26)
- [Display help for a statistic](#) (p. 26)
- [Display help for the object that has focus](#) (p. 26)
- [Toggle display of large graphics in a help topic](#) (p. 26)
- [Display help about a dialog](#) (p. 26)
- [Browse related web pages](#) (p. 27)
- [Display version and system information](#) (p. 27)
- [Open a printable version of the help system](#) (p. 27)


Open the default help topic

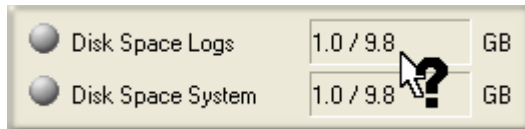
To open the help system at its default topic, follow these steps:

1. Press the *Start* button.
2. Select All Programs > Interactive Intelligence > Online Documentation > Interaction Supervisor.

At runtime, help systems for each plug-in are merged with the main help for Interaction Supervisor. The table of contents on the left side of the help window displays an integrated list of topics from all help systems.

Display help for a statistic

1. To display help for a statistic, press the Help toolbar button (). This puts Supervisor in "What's This" help mode. The cursor changes to a help icon, to indicate that you can click on something to open a help topic.
2. Position the cursor above a statistic and press the left mouse button.





If help is available for the item clicked on, a help topic is displayed. Otherwise no help is displayed.

Display help for the object that has focus

To display help for the window or dialog that has focus, press F1. If specific help for that object is not available then the default help topic is displayed instead.

Toggle display of large graphics in a help topic

Buttons in the page header allow you to hide large graphics in a help topic to view more text in the help window at one time. This feature is available only in the online help version of this publication. It is not available in printable versions.

1. To hide large graphics in the current topic, press the **Hide Large Graphics** button ().
2. To redisplay all graphics, press the **Show Large Graphics** button ().

Display help about a dialog

Some dialogs provide a help button that opens a topic describing options on the dialog box. That help topic may be linked to higher-level procedures. Look for "Related Topics" at the bottom of the help page.

Related Topics

 [User Interface Options](#) (p. 82)

 [Dialogs](#) (p. 84)

Access online resources

1. To access online resources in your web browser, pull down the *Help* menu and select *About Supervisor...*
2. Press the Contact ININ... button. A popup menu will appear.
3. Choose one of the following options from the popup menu:
 - **Home**—opens the Interactive Intelligence web site using the default web browser installed on your computer.
 - **Support**—opens the Support section of the Interactive Intelligence web site. An ID and password is required to access this section of the site.
 - **Community**—Takes you to the home page of the *Interactive Intelligence Interactive Community*. This free and public online service is devoted to the sharing of ideas and information regarding Interactive Intelligence software. Opinions expressed on the Interactive Community are not those of Interactive Intelligence, and Interactive Intelligence accepts no legal responsibility for their veracity or nature.
 - **Feedback**—displays a web form that you can use to provide feedback about Interactive Intelligence products. You can rate your overall satisfaction, suggest an enhancement, or report a bug from this page.

Display version and system information

Collectively, these options provide information that may be useful in a technical support situation. However, you do not need to understand these items of data in order to use Interaction Supervisor.

1. For general information about your computing environment, pull down the Help menu and select *About Supervisor...*
2. Then press *IC Info* for information about your IC server. The version number of IC is also the version of Interaction Supervisor.
3. For information about Internet Protocol, press IP Configuration. When you are finished, press *Close*.
4. For information about your computer system, press the *System Info* button. This opens the *System Information* dialog.
5. When you are finished, dismiss the dialog by pressing the *Close* button.
6. Press *OK* to close the *About IC* dialog.

Open a printable version of the help system

A printable version of each online help system is provided in Adobe Portable Document Format (PDF). To open "Acrobat" files, you need Adobe® Reader®—free software that views or prints PDF files. The latest version of this software can be downloaded from <http://www.adobe.com>. Once Reader is installed, you can access a printable version of each help system as follows:

1. Open Supervisor's default help topic, which is a cover page that lists the document title, date when last updated, etc.



2. Click on the hyperlink titled "Printable Version". If the help system is a compiled HTML Help file, the PDF file will open in Acrobat Reader. If the help system is a WebHelp document, the PDF file will open in your web browser. (To return to the cover page, press the browser's "Back" button.)
3. Once the PDF file is open, you can print it or save a copy to your hard drive.
4. To access the printable versions of a plug-in help module, click in the tree view to open the cover page for the plug-in. As mentioned earlier, helps for plug-in modules are merged into Supervisor's help system at runtime, so these cover pages are lower in the tree.
5. Repeat steps 2-3 to save or print the file. Repeat steps 4-5 as needed for other plug-in helps.

Manage Views


The procedures in this section explain how to create, customize, and position views.

A *view* is a window that displays data. View windows can be positioned anywhere on the screen, or docked within Supervisor's *workspace*. Views display information in columns, or render graphs.

- [Add a view to the workspace](#) (p. 30)
- [Change the caption selection](#) (p. 31)
- [Add or remove statistics from a tabular view](#) (p. 32)
- [Rename a view](#) (p. 33)
- [Use Queue Monitor Controls](#) (p. 34)
- [Switch between floating, docked, or tabbed pages](#) (p. 43)
 - [Display view on a tab page](#) (p. 44)
 - [Display view in a floating window](#) (p. 46)
 - [Display view as a docked window](#) (p. 47)
 - [Use Dock button to toggle view state and position](#) (p. 48)
 - [Anchor a docked view to another position](#) (p. 49)
- [Close a view](#) (p. 50)
- [Display views in Full Screen mode](#) (p. 51)
- [Display views in Slide Show mode](#) (p. 52)

Add a view to the workspace

To monitor statistics, you must add a new view to the workspace. The *New View* command opens a dialog that displays available views. Follow these steps to create a new view:

1. Issue the *New View* command using one of the following methods:
 - Press the *New* button () on the toolbar, or...
 - Press *CTRL + N*, or...
 - Pull down the *File* menu and select *New...*
2. When the [New View](#) (p. 120) dialog appears, click on the tab that represents the plug-in module you want to use. Or click on the All tab to display a list of views from all plug-ins.
3. Select the view to add by clicking its name or icon.
4. Press *OK* to proceed. Depending upon the view selected, you may be prompted to select data items and properties to display before the new view is added to the workspace. For more information, refer to help topics for the plug-in module.

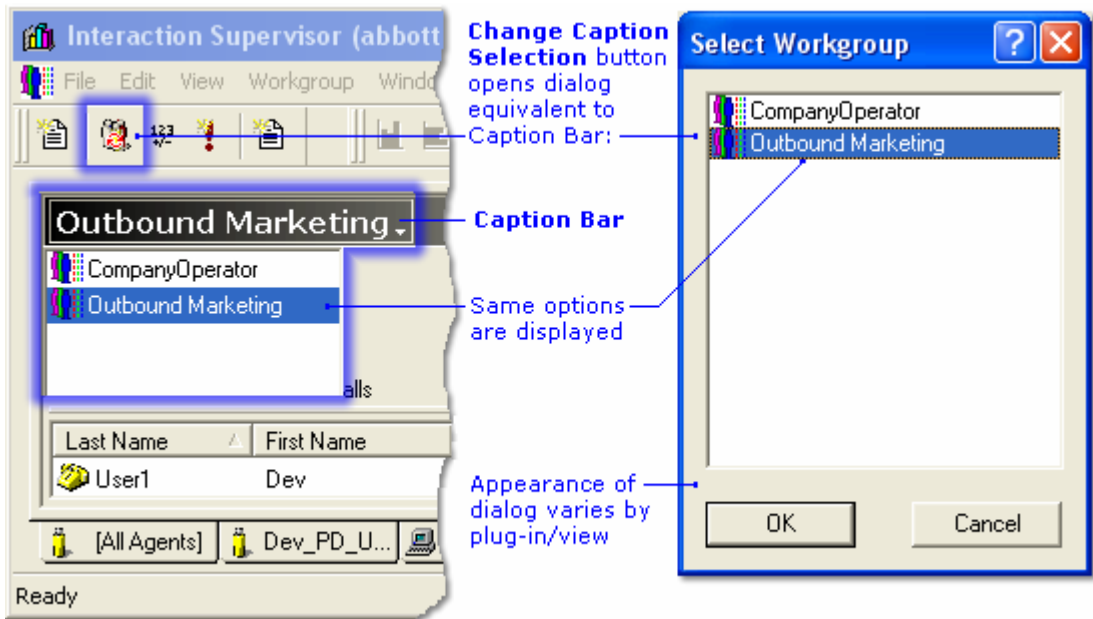
Related Topics

-  [Manage Views](#) (p. 29)

Change the caption selection

Changing the caption selection updates the view to display statistics for a different item, such as a workgroup, workflow, agent, etc. Your choice of selections depends upon the plug-in and view.

There are several ways to change the caption selection. Some views provide **caption bars** that change the item displayed. Caption bars are similar to pull-down menus in that they allow one item to be selected from a list.



To display statistics for a different item follow these steps:

1. Make a different selection from the caption bar, if the view provides one. Or...
2. Press the *Change Caption Selection* toolbar button (🔴), or by select *Change [item name]* from the custom menu for the view. For example, the menu selection for a Workgroup view is *Change Workgroup*, while the menu selection for a Dialer view is *Change Workflow*. The name of the option varies by plug-in and view. Fortunately, the menu choice makes sense within the context of a view.
3. A dialog will appear to list available selections. Select an item. Then press *OK* to dismiss the dialog.

Note—the criteria that you can select varies by plug-in and view. Once a selection is made, Supervisor changes the title of the caption bar where applicable.


Regardless of the method used to invoke the [Change Caption Selection command](#) (p. 82), a different set of data is selected for display. Changing the caption selection does not change the statistics displayed—only their values and the item that they apply to.

Related Topics

- [Manage Views](#) (p. 29)
- [Change Caption Selection dialog](#) (p. 101)

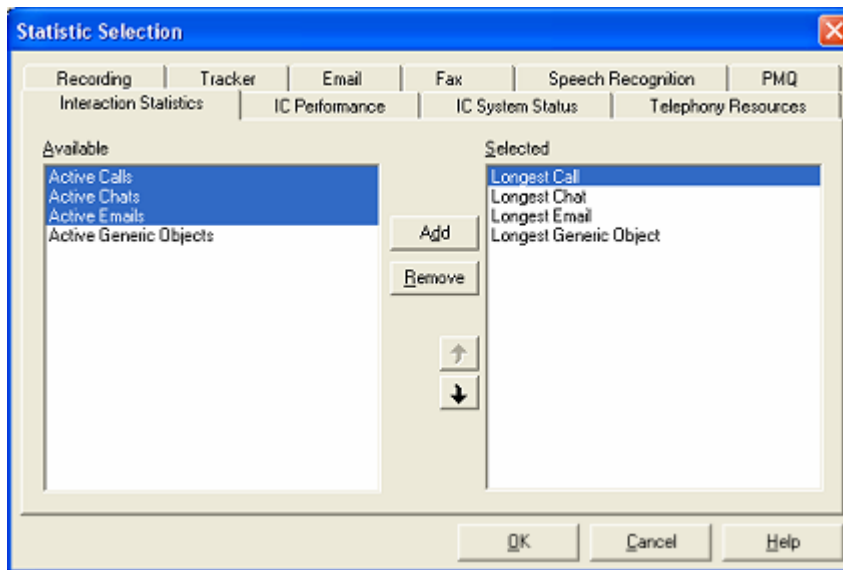
Add or remove statistics from a tabular view

Supervisor provides granular control over the statistics displayed in the view that you are monitoring. To change the statistics displayed in a tabular view:

1. Press the *Add / Remove Statistics* () toolbar button, or...
2. Select *Add / Remove Statistics* from a pull down menu, or...
3. Right-click in a loaded view, and select *Add / Remove Statistics* from a context menu, or...
4. [Add a new view](#) (p. 30) that requires selection criteria to be specified before it is displayed.

Statistic Selection dialogs

Regardless of the method used, a *Statistic Selection* dialog appears so that you can select statistics to include or exclude from the view. The appearance of this dialog differs for each plug-in and view, since it is customized for the data that the view manages.






In general, *Statistic Selection* dialogs have several features in common:

- They provide two lists—one that displays data items selected for display in the view, and another that list items that you can add to the view.
 - You can press an *Add* button to move selected items from the *Available* list to the list of items selected for display.
 - Conversely, you can press a *Remove* button to moves selected items to the *Available* list. This prevents them from appearing in the view.
 - *Up* and *Down* buttons change the order of items in the *Selected* list, and control the display order of items in the view.
- If the view provides statistics for multiple view categories, controls may appear on tab pages.

Since the functionality and appearance of a *Statistic Selection* dialog is provided by the plug-in and not by Supervisor, you may need to press the *Help* button to obtain specific information about the current dialog.

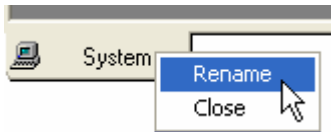
Related Topics

-  [Add or remove statistics from a graph view](#) (p. 57)
-  [Statistic Selection dialog](#) (p. 124)
-  [Manage Views](#) (p. 29)

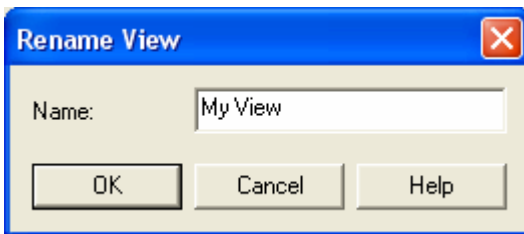
Rename a view

Once you have added a view to the workspace, you can rename the view to distinguish it from other views.

1. Click anywhere in the view to select it.
2. Choose *Rename* from the *File* menu. Alternately, if the view is displayed on a tab, you can right-click the tab to select the *Rename* command from a context menu. Either method opens the [Rename View](#) (p. 123) dialog.



3. Type a new name in the *Name* field. Press *OK*.



4. If another view has the same name, Interaction Supervisor displays an alert. Once you dismiss the alert, you are prompted to rename again.

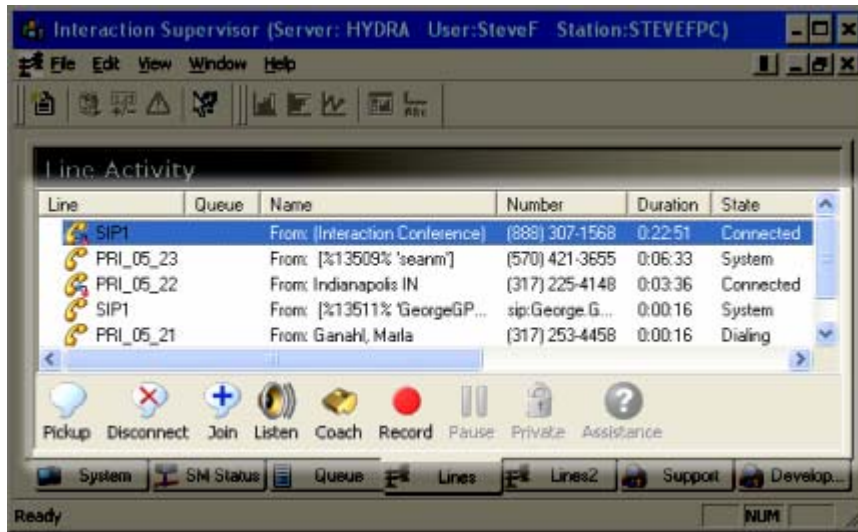


5. When a unique view name is supplied, Interaction Supervisor displays the new name on the view's tab page.

Related Topics

-  [Manage Views](#) (p. 29)

Use Queue Monitor Controls



The Queue Monitor control.

Queue Monitor controls appear on views that display information about lines or queues. These controls provide details about interactions and may allow supervisory actions to be performed on a selected item. For example, the Queue Monitor control for a Lines view allows a supervisor to select a line, and then listen, record the conversation, join a conference, etc.



Conference calls are displayed as an expandable list.

Queue Monitor controls are efficient and can theoretically load 10,000 queue items in less than 1 second. In practice, network latency slows the process down somewhat. Queue Monitor controls can sort 10,000 items in less than 1 second, and can display them with little noticeable delay or flicker. The speed and performance of Queue Monitor controls is limited only by the cache to which the control is connected.

Default Columns

The columns below are available in Queue Monitor controls by default. You can also [add custom columns](#) (p. 40).

Call Id

A system-assigned number that uniquely identifies the interaction object.


Duration

Length of time that the interaction has been in effect.

Line

Name of the line that this interaction is on. In some views the name is prefixed by an icon that indicates the state of the object (see below).

Listen

 A speaker icon appears in this column if Supervisor is monitoring the Interaction.

Name

Descriptive name of the interaction.

Number

Telephone number of an interaction member.

Queue

The icon in this column indicates the general state of the queue object. For more information about states, see the description of the *State* column later in this topic.

C
a
l
l

C
a
l
l
b
a
c
k

C
h
a
t

E
m
a
i
l

G
e
n
e
r
i
c
O
b
j
e
c
t


I
n
s
t
a
n
t
Q
u
e

D
i
s
c
o
n
n
e
c
t
e
d



st
io
n

Record

 A red circle icon appears in this column if Supervisor is recording the Interaction.

State

This column indicates the *state* of the interaction—the current condition of an interaction in a queue. The states that may appear by default in the State column are:

| | |
|----------------------------------|--|
| Dialing | Seen for outbound calls. IC dials the outbound proceeding interaction. |
| Disconnected | Seen for both outbound calls and inbound interactions. The interaction is no longer active. |
| Manual Dialing | Seen for outbound calls. A telephone handset has been picked up and a dial tone is being generated. Calling from the handset will act the same as calling from the Client when call analysis has not been enabled in Interaction Client. Calling from the handset when call analysis has been enabled, will show outgoing calls as Connected and will continue to ring until the call is answered. |
| Alerting | Seen for inbound interactions. An Interaction Client user is notified that he or she has an incoming interaction. |
| Connected | Seen for both outbound calls and inbound interactions. The interaction is connected to a user or a station. If call analysis is not enabled, Connected means the same as Proceeding. |
| Held | Seen for both outbound and inbound interactions. The interaction is on hold. |
| Ring No Answer | Seen for inbound calls. The call was sent to an agent who did not pick up the call. The call timed out, and the caller is being presented with prompts to determine how he or she wants Interaction Client to proceed with the call (send to voicemail, try another extension, etc.). |
| Voice Mail | The caller is leaving a voicemail message. |
| Parked | The interaction is waiting on a User, Workgroup, or Station queue. |
| System | The interaction is interacting with handlers or other components of the IC system. |
| Disconnected (Local Disconnect) | Seen for both outbound and inbound interactions. The interaction was disconnected locally and is no longer active. |
| Disconnected (Remote Disconnect) | Seen for both outbound and inbound interactions. The interaction was disconnected by the remote party and is no longer active. |
| Proceeding | Seen for outbound calls. The interaction proceeds through the outside telephone network and is waiting to be answered. Proceeding is used if an Interaction Client user has enabled call analysis. Calls Proceeding eventually time out if the call is not answered. |
| Offering | Seen for inbound interactions. IC places the |

| | |
|---|--|
| | interaction in a queue, but the interaction is not alerting. IC determines if the called party is available to take the interaction. |
| Operator Escape | The user presses zero to reach an operator from any queue. |
| ACD – Alerting: [Agent’s Name] | Seen for inbound calls. IC places the call into a queue, and sends it to an available agent. |
| ACD – Assigned: [Agent’s Name] | Seen for inbound calls. IC placed a call into a queue, sent it to an available agent, and the agent picked up the call. |
| ACD – Wait Agent | Seen for inbound calls. IC placed a call into a queue, but all agents were busy and IC was unable to alert an agent. |
| ACD – Wait Agent - > Last Attempted: [Agent’s Name] | Seen for inbound calls. IC placed a call into a queue, sent it to an available agent, but the agent did not pick up the call and IC placed it back into the queue. |
| Queue Timeout | Seen for inbound calls. The call waits in a timeout queue and times out. The caller is being presented with prompts to determine how he or she wants Interaction Client to proceed with the call (send to voicemail, try another extension, etc.). |
| Multi-Site | Seen on the Lines page for inbound calls. The call is in a multi-site state. |
| Queue Email Alerting: [Agent’s Name] | Seen for inbound email interactions. IC places the email into a queue, and sends it to an available agent. |
| Queue Email Connected: [Agent’s Name] | Seen for inbound email interactions. IC placed an email into a queue, sent it to an available agent, and the agent picked up the email. |
| Queue Email Not Answered: [Agent’s Name] | Seen for inbound email interactions. IC placed an email into a queue, sent it to an available agent, but the agent did not pick up the call and IC placed it back into the queue. |
| Generic Object Waiting | Seen for inbound interactions. IC sends a generic object to a user queue, but the user is unavailable or not logged in. |
| Pending Disconnect | If the system administrator or application developer modifies or customizes a Disconnected state strings, this state will appear before the Disconnected state. For example, an administrator or developer may modify a handler to direct IC to send a caller to an IVR survey before disconnecting. |
| Remote Transfer | IC sends an interaction to a user whose status is set to Available, Forward, and IC is forwarding the interaction based on the user’s call coverage settings. |
| One Number Follow-Me | IC sends an interaction to a user whose status is set to Follow Me, and IC is routing the interaction based on the user’s Follow Me settings. |

Station

The station queue where the call is currently located.

User

Name of the user who initiated the interaction.

Sort Columns

To change the sort order, click on a column heading to sort by that column. The last two previously sorted columns are used as sub sorts.

Resize Column Width

To resize a column, drag the edge of a column heading left or right to narrow or widen the column.

Rearrange Columns

To change the order of columns, drag and drop a column heading to a new location.

Actions (Pickup, Disconnect, Join, Listen, Record, Pause, Private, Assistance)

Queue Monitor controls support the call control actions below (if the view allows them). These actions apply to the item that is selected in the Queue Monitor control. Supervisor checks with Client Services to ensure that the station is valid prior to enabling call controls. If a station is invalid, call control buttons are disabled.

The call control buttons (Pickup, Disconnect, etc.) on the lines and queues pages do not change state until you click on an item.

Pickup

Picks up an interaction from the queue.

Disconnect

Disconnects the selected interaction.

Join

This option creates a conference call between the agent, the customer, and you. Both the agent and the customer can hear your side of the conversation.

Listen

Listens in on an interaction, such as a caller leaving a voicemail message, a conversation between two parties, or a conference call. This button is disabled if the interaction is not in a state in which this action can be performed. The parties being listened to are not aware that someone is listening to the interaction.

Coach

Click this button to add yourself to an agent's call, in a mode that allows you to speak to the agent without being heard by the customer. This enables you to provide advice to the agent without the customer knowing that you are assisting on the call. The agent can hear your side of the conversation, but the customer cannot.

The Coach feature is especially helpful to supervisors who are training new agents, monitoring employee customer service performance, or simply providing assistance with a customer call.

Record

Records the selected interaction.

Pause

Controls a recording session by pausing or un-pausing recording. This button is disabled (shaded) if the interaction is not in a state in which this action can be performed.





Private

Prevents other users from recording or listening to a conversation. This button appears shaded if the interaction is not in a state in which this action can be performed. It is also disabled if the user does not have security rights to use this feature.

Assistance

Sends a help request to the Supervisor. Pressing this button opens a dialog box that prompts for a description of the problem.

Related Topics

-  [Add custom columns to a Queue Monitor Control](#) (p. 40)
-  [Remove custom columns from a Queue Monitor Control](#) (p. 41)
-  [Coach an Interaction](#) (p. 42)
-  [Manage Views](#) (p. 29)





Add custom columns to a Queue Monitor Control

1. To add custom columns to a Queue Monitor control, right-click in the control and then select "Columns..." from the context menu. This opens the [Add / Remove Queue Columns dialog](#) (p. 89).
2. Press the *Custom Columns* button.
3. When the [Manage Custom Columns dialog](#) (p. 119) appears, press the *Add* button.
4. When the [Add Custom Column dialog](#) (p. 87) appears, enter a descriptive name for the attribute in the Display Name field. The name entered here will appear as the name of the column when it is displayed in a [Queue Monitor control](#) (p. 34).
5. Use the *Attribute Name* drop list to select a predefined object attribute, or type the name of a custom attribute.
6. If you selected a predefined attribute, the *Type* field is completed automatically. If you entered the name of a custom attribute, then use the *Type* field to identify its data type. *Type* can be String, Boolean (Yes/No), Boolean (Check/X), Duration, or Time Stamp. The Queue Monitor control will display the value of the attribute in a format that is consistent with its data type:
 - *String* data is displayed as string data.
 - *Boolean (Yes/No)* is displayed as "Yes" or "No" in the column.
 - *Boolean (Check/X)* is displayed as a checkbox or X icon in the column.
 - *Duration* uses the attribute as a start time and increments every second.
 - *Time Stamp* displays the Date/Time indicated by the attribute.
7. Press *OK* to close the *Add Custom Column* dialog.
8. Press *OK* to close the *Manage Custom Columns* dialog, or press *Add* to define another column.
9. Finally, tell the system to display the custom columns, by selecting them in the *Available* list (of the *Add / Remove Queue Columns dialog*), and pressing *Add* to move them to the *Selected* columns list.

Tip—you can change the display order of columns by using Up/Down arrows to move selections in the Selected columns list.

10. Press *OK* to close the [Add / Remove Queue Columns dialog](#) (p. 89).





Related Topics

-  [Remove custom columns from a Queue Monitor Control](#) (p. 41)
-  [Coach an Interaction](#) (p. 42)
-  [Use Queue Monitor Controls](#) (p. 34)
-  [Manage Views](#) (p. 29)

Remove custom columns from a Queue Monitor Control

1. To remove custom columns from a Queue Monitor control, right-click in the control and then select "Columns..." from the context menu.
2. When the [Add / Remove Queue Columns](#) (p. 89) dialog appears, press the *Custom Columns* button.
3. When the [Manage Custom Columns](#) (p. 119) dialog appears, select the attribute that you want to remove in the Custom Columns list.
4. Press the *Remove* button.
5. Press *OK* to close the *Manage Custom Columns* dialog.
5. Press *OK* to close the *Add / Remove Queue Columns* dialog. The custom column will no longer appear in the view.

Related Topics

-  [Add custom columns to a Queue Monitor Control](#) (p. 40)
-  [Coach an Interaction](#) (p. 42)
-  [Use Queue Monitor Controls](#) (p. 34)
-  [Manage Views](#) (p. 29)

Coach an Interaction





Queue Monitor controls provide a *Coach* button that enables a Supervisor to speak to an Agent without being overheard by the customer. Supervisors can provide advice to an Agent without the customer knowing that anyone is assisting with the interaction. The Agent can hear the Supervisor's side of the conversation, but the customer cannot.

This feature is especially helpful to supervisors who are training new Agents, monitoring employee customer service performance, or simply providing assistance with a customer call.

To coach an agent on an interaction:

1. Select the interaction you want to join and click the *Coach* button. You are now connected to the Agent's interaction, enabling you to provide advice to the agent without the other party knowing you are assisting on the interaction. The agent can hear your side of the interaction, but the other party cannot.
2. When you are finished, press the *Coach* button a second time. It works like a toggle switch.

Related Topics

-  [Add custom columns to a Queue Monitor Control](#) (p. 40)
-  [Remove custom columns from a Queue Monitor Control](#) (p. 41)
-  [Use Queue Monitor Controls](#) (p. 34)
-  [Manage Views](#) (p. 29)

Switch between floating, docked, or tabbed pages

Views can be displayed on tabbed pages, as floating windows, or as windows docked around the workspace.

- [Display view as a tab page](#) (p. 44)
- [Display view as a floating window](#) (p. 46)
- [Display view as a docked window](#) (p. 47)
- [Use Dock button to toggle view state and position](#) (p. 48)
- [Anchor a docked view to another position](#) (p. 49)

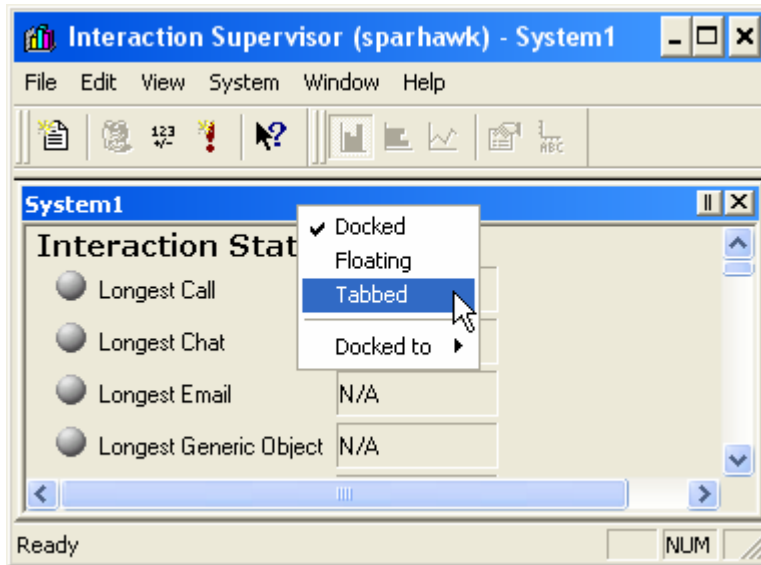
Related Topics

- [Manage Views](#) (p. 29)

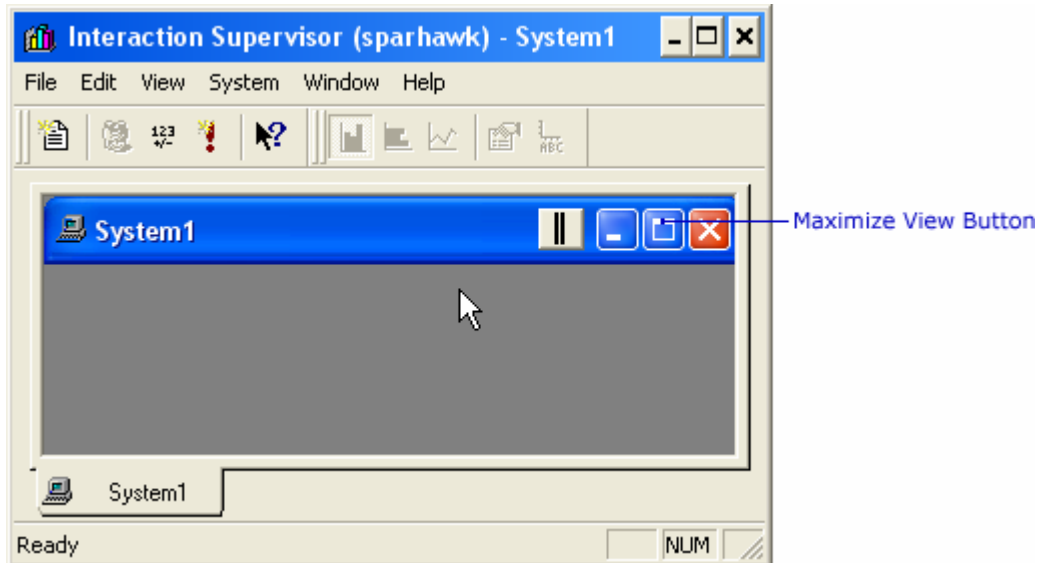
Display view on a tab page

To convert a floating or docked view to a tab, follow these steps:

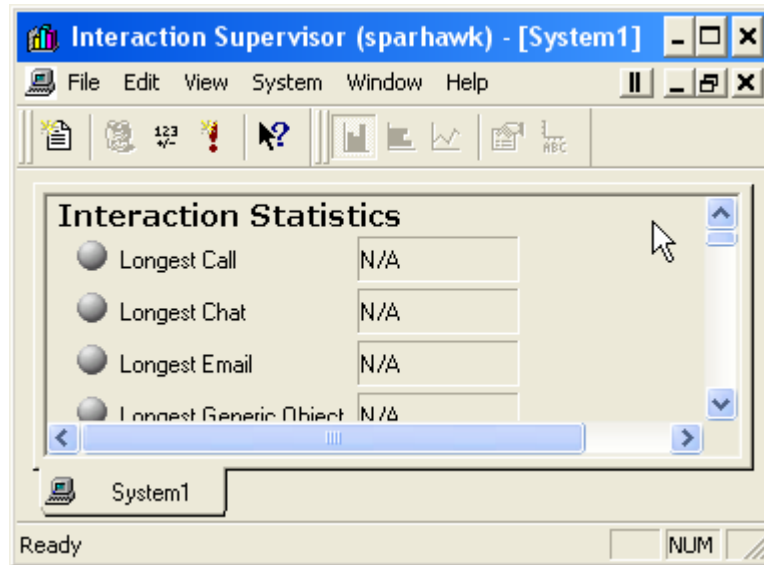
1. Right-click on the view's title bar, and then select *Tabbed* from the context menu.



2. If the view "floats" within the tab page workspace as shown below, press the *Maximize View* button. Do not maximize Supervisor's main window.



3. This expanded view fills the tab page as shown below.



Supervisor does not allow multiple views to appear on one tab. When you click on a tab, its view window becomes the active view in the workspace. If the view is not maximized, the tab page may look odd. The solution is to maximize the view to fill the tab page.

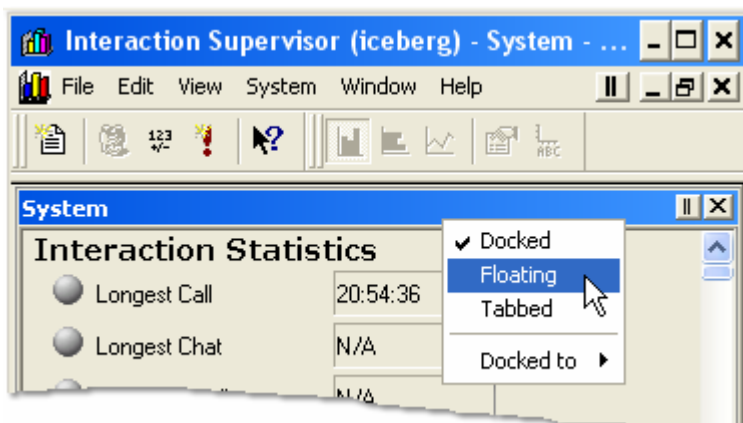
Related Topics

 [Manage Views](#) (p. 29)

Display view in a floating window

Floating views can be positioned anywhere on the screen and are not constrained to the Supervisor window. Follow these steps to float a view:

1. Select the view that you wish to float.
2. If the view does not have a title bar, press the dock button or use one of the Window menu commands to redisplay the view with a title bar.
3. Right-click on the view's title bar to open its context menu.
4. Select *Floating* from the menu.



5. Drag the floating window anywhere you like. Resize as needed.

An alternate way to float a docked view is to drag and drop it by the title bar to a new position outside of the Supervisor window.

Related Topics

-  [Manage Views](#) (p. 29)

Display view as a docked window

If a view is floating or tabbed, you can dock it using drag and drop techniques or context menu commands.

Dock a view by dragging and dropping

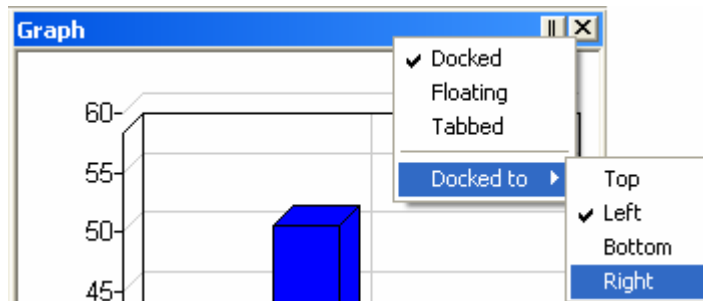
If the view has a title bar, you can dock using a drag and drop technique.

1. Drag it by the title bar to position it above Supervisor's window. As you drag the window, a rectangle will appear to indicate where the view will dock when you release the mouse button.
2. Release the mouse button.

Dock a view using the context menu

If the view has a title bar, it can be docked by issuing a context menu command.

1. Right-click the title bar to open its context menu.
2. Select *Docked* from the menu. Once the view is docked, you can use the "Docked to" command to anchor it to one side of the workspace.




3. Right-click the title bar again to reopen the context menu.
4. Choose Top, Left, Bottom, or Right.

Related Topics

 [Manage Views](#) (p. 29)

Use Dock button to toggle view state and position

The *Dock* button () changes the view state of windows in the workspace and repositions docked windows. This button is in a view's title bar. It toggles the current view between docked and tab views. If the view is a floating window, it is converted to a tab view. Subsequent button presses toggle the view between docked and tabbed states. As a view becomes docked, it is cyclically "docked to" the left, bottom, or right edge of the display. Depending upon your point of view, this is handy or slightly disconcerting, since it moves the view to a new location on the screen.

1. Click on a view to make it the active view.
2. Press the Dock button to change the view state to docked or tabbed. If the view was just docked, it was anchored to the next edge of the display (left, bottom, or right).
3. If the window is not in the state or position that you want, press Dock button again until the view has the position and window state that you want.

Related Topics

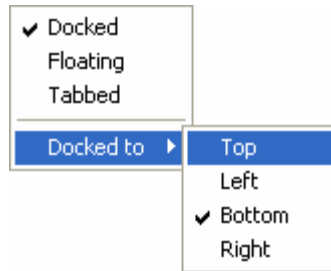
 [Manage Views](#) (p. 29)

Anchor a docked view to another position

Docked views are anchored to the top, left, right, or bottom of the Supervisor's window—relative to one another, and outside of the workspace. In other words, if you dock a window to the top of the window, and another view is also docked to the top, one view will be positioned below the other.

There are several ways to change the position of a docked window:

1. You can press the [Dock button](#) (p. 48) to toggle the view state of a window. When it changes a view to a docked state, the view is anchored to its next relative position—left, bottom, or right.
2. You can right-click on a view's title bar to open a context menu. Choose *Docked to* and then choose the anchor (*Top*, *Left*, *Bottom*, or *Right*).



3. You can *drag-and-drop* a docked window to dock it to the top, left, bottom, or right. To do so, position the mouse on the title bar. Press and hold the left mouse button while dragging the mouse to a new position. A rectangle will appear to indicate the new location of the window. When you release the mouse button, the view will be docked to the new location.

If you drag a docked window to the workspace, or outside of Supervisor's main window, the view becomes floating.

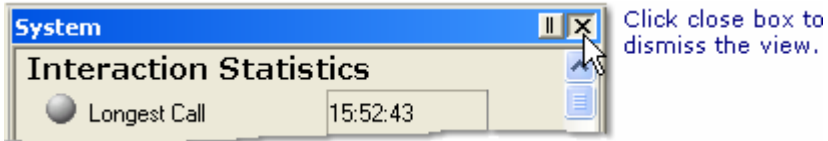
Related Topics

 [Manage Views](#) (p. 29)

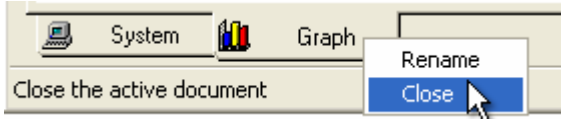
Close a View

There are several ways to close a view:

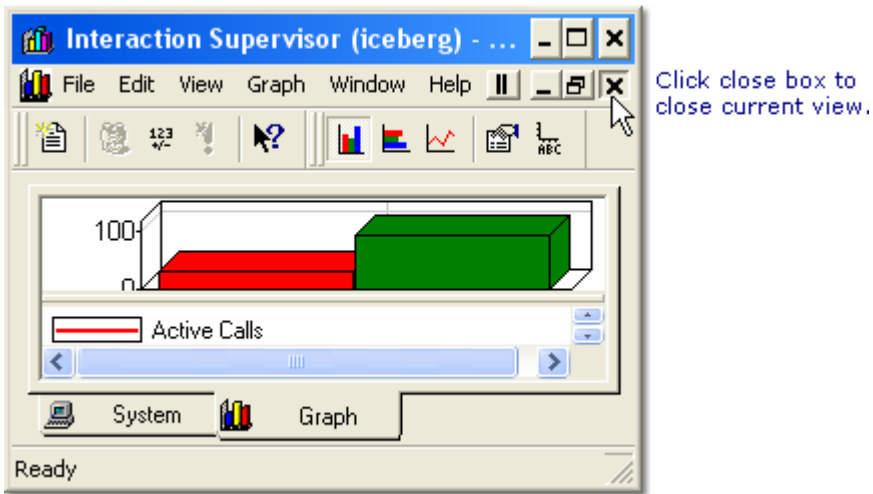
1. If the view offers a close button, press that to dismiss the view.



2. You can right-click a tabbed view and choose *Close* from a context menu:



3. You can close the current view by pulling down the *File* menu and selecting *Close*, or by clicking the close box for a multiple document interface window, as shown below.



Related Topics

-  [Manage Views](#) (p. 29)


Display views in Full Screen mode

When views are displayed in full-screen mode, the workspace is maximized to fill the entire screen. Toolbars, menus, and other non-essential controls are hidden in this mode, which is well suited for overhead displays and general monitoring.

- To enter full-screen mode, press the F11 key or select *Full Screen* from the *View* menu.
- To exit full-screen mode, press F11 again, or press the *Close Full Screen* button in the floating topmost window that appears in the top left corner of the screen.



Related Topics

-  [Slide Show Mode](#) (p. 52)
-  [Manage Views](#) (p. 29)

Display views in Slide Show mode

Slide Show mode cycles to the next tabbed view every 5 seconds. This mode makes it easy to monitor multiple views using an overhead monitor or kiosk. Before placing Supervisor in this mode, set the display mode of views to [tabbed](#) (p. 44). To do this, right-click on a view's title bar, and select *tabbed* from the context menu.

Related Topics

-  [Full Screen Mode](#) (p. 51)
-  [Manage Views](#) (p. 29)

Manage Graphs

Interaction Supervisor supports views that graph statistics in real-time. Graphical views are updated automatically when the value of a statistic changes. Once a graph view is [added](#) (p. 30) to the workspace, statistics are rendered as **bar graphs** or **line charts**.

- *bar graphs* display bars whose lengths are proportional to the value of a statistic. Bar graphs compare similar items (e.g. agent performance, etc.)
- *line charts* plot the value of a statistic over time. Line charts indicate trends and provide a record of activity.

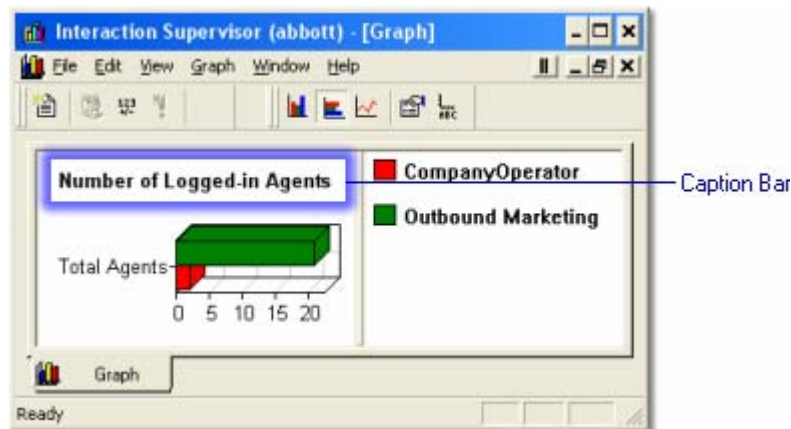
You can customize a graph by selecting commands from its right-click context menu, or by using the [Graph Configuration](#) (p. 109) dialog to update many aspects of a graph at once. In general, graph commands apply to three component parts of a graph:

Rendered Data



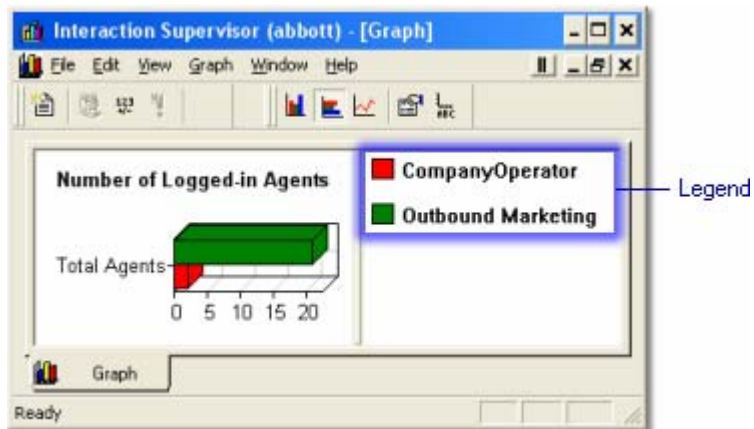
The graph itself displays a visual rendering of data. This can be a line chart, horizontal bar chart, or vertical bar chart.

Caption Bar



Most graphs provide a default caption bar. The [Graph Configuration](#) (p. 56) dialog allows you to define a custom caption.

Legend



The legend correlates color-coded bars and lines with statistics.

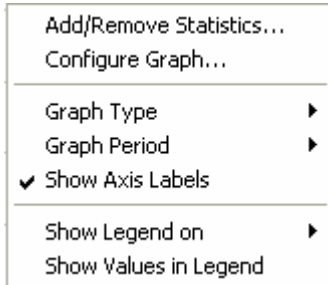
Graph-Related Procedures

- [Graph view context menu commands](#) (p. 55)
- [Open the Graph Configuration dialog](#) (p. 56)
- [Add or remove statistics from a graph view](#) (p. 57)
- [Change the graph type](#) (p. 58)
- [Change Group by Criteria](#) (p. 59)
- [Modify the period of a line graph](#) (p. 60)
- [Toggle display of Axis Labels](#) (p. 61)
- [Position legend text](#) (p. 62)
- [Toggle display of values in legends](#) (p. 63)

Graph view context menu commands

Graph views provide a context menu that places frequently-used commands at your fingertips. These commands add or remove statistics, render the graph as a line, vertical or horizontal bar graph, and change the appearance and layout of legends, labels, and other items.

1. Right-click in the graph view to open its context menu.



2. Select a command from the list. The list of commands varies by plug-in and view.

Related Topics

 [Manage Graphs](#) (p. 53)

Open the Graph Configuration dialog

The [Graph Configuration dialog](#) (p. 109) configures most aspects of a graph, including its type, grouping, period, colors, title, axes, and legends. This dialog puts many options at your fingertips and is convenient to use.


1. To open the dialog, right-click in a graph view and then select *Configure Graph* from the context menu, or...
2. Pull down the view's custom menu and select *Configure Graph*.
3. When the dialog appears, press the *Help* button for information about the specific options that you can configure.

Related Topics

 [Graph Configuration dialog](#) (p. 109)

 [Manage Graphs](#) (p. 53)

Add or remove statistics from a graph view

1. To modify the set of statistics displayed by a graph, invoke the *Add/Remove Statistics* command as follows:
 - Click the *Add / Remove Statistic(s)* button () , or...
 - Pull down the custom menu for the view. Then select *Add/Remove Statistic(s)*, or...
 - Right-click anywhere in the graph and choose *Add/Remove Statistics* from the menu that appears.
2. The dialog or wizard that appears next is specific to the plug-in and view. The general idea is to select one or more statistics to display in the graph. You may be asked to select additional criteria (workflow, campaign, etc), in addition to statistics. For more information, refer to the discussion of the graph view in the help module for the plug-in.
3. When you close the selection dialog, Supervisor will update the display within a few seconds.

Related Topics

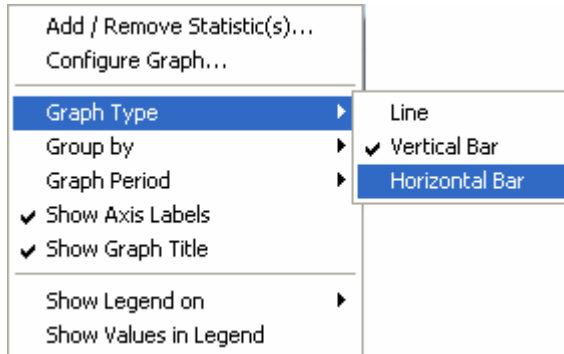
-  [Manage Graphs](#) (p. 53)

Change the graph type

Interaction Supervisor makes it easy to switch between line and bar graphs. There are several ways to do this:

Context menu method

1. Right-click in a graph view and choose *Graph Type* from the context menu.



2. Choose Line, Vertical Bar, or Horizontal Bar.

Pull-down menu

The same menu is available in Supervisor's menu bar:

1. Pull down the menu added by the view (e.g. Workgroup, System, Dialer, etc.) and select *Graph Type*.
2. Choose Line, Vertical Bar, or Horizontal Bar.

Toolbar Options

To change graph type by pressing toolbar buttons:

1. Click anywhere in the graph to give it focus.
2. Press one of the following toolbar buttons:



Vertical Bar Graph



Horizontal Bar Graph



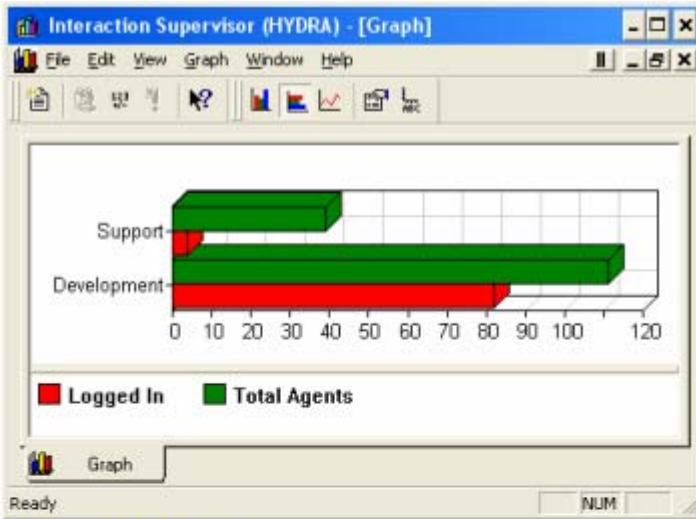
Line Graph

Related Topics

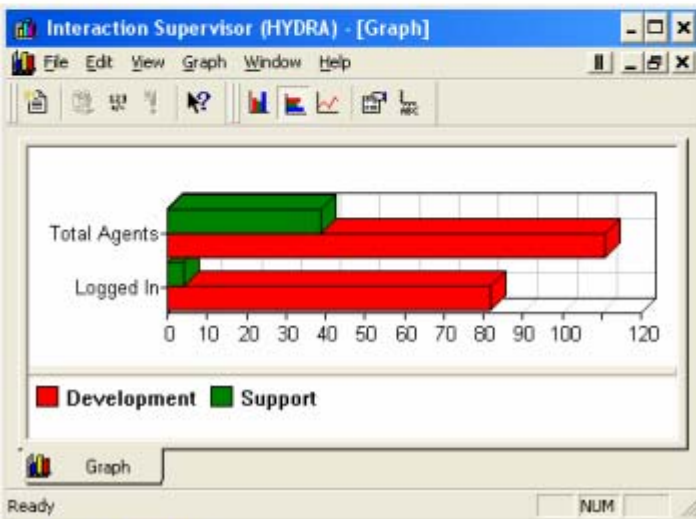
-  [Manage Graphs](#) (p. 53)

Change Group by Criteria

The *Group by* menu command changes the grouping of statistics in some way. For example, you might group by workgroups or statistics. The figure below shows the same graph, grouped by Workgroup, and grouped by Statistic:



Group by Workgroup



Group by Statistic

Related Topics

[Manage Graphs](#) (p. 53)

Modify the period of a line graph

Line graphs plot values over time. Changing the period of a line graph selects statistics for a specific time period:

1. Right-click anywhere in the graph and choose *Graph Period* from the context menu, or pull down the plug-in menu and choose *Graph Period*.

Tip—if the *Graph Period* command is disabled, you can enable it by changing the graph type to a line graph.

2. Select a period of time to graph. (e.g. 5 minutes, 30 minutes, 4 hours, 8 hours, etc.)
3. Wait for Supervisor to update the display. This may take a few seconds, depending upon the scope of data that it must select.

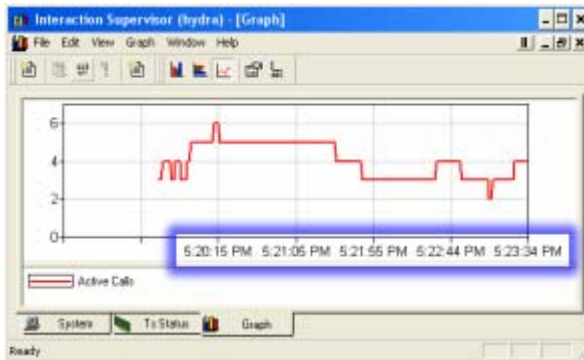
Related Topics

-  [Manage Graphs](#) (p. 53)

Toggle display of Axis Labels

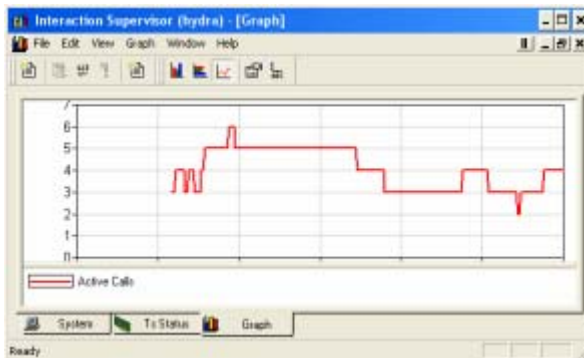
The *Show Axis Labels* command toggles the display of axis labels on or off. You may view axis labels to enhance information shown on your graph, or you may remove them to unclutter the display.

1. To toggle axis labels on or off, use one of the following methods to issue the *Show Axis Labels* command:
 - Pull down the custom menu for the view and select *Show Axis Labels*, or...
 - Right-click anywhere in the view. Then select *Show Axis Labels* from the context menu.



Axis labels on

2. A checkmark appears in the menu to indicate whether or not Axis labels are currently displayed. Issue the command again to toggle the display state.



Axis labels off

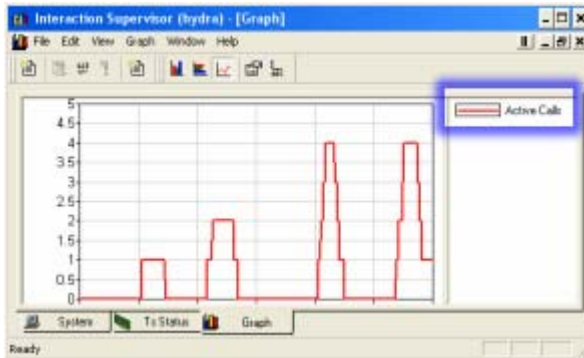
Related Topics

-  [Manage Graphs](#) (p. 53)

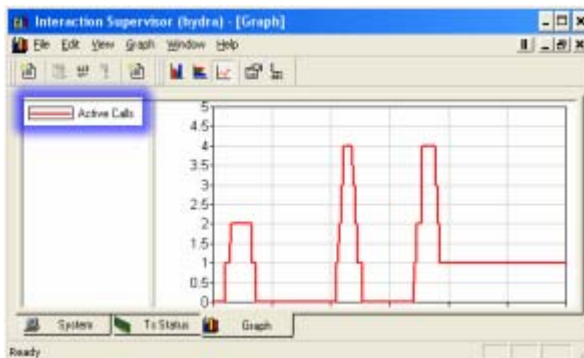
Position legend text

You can move the graph's legend to the left, bottom, or right side of the graph.

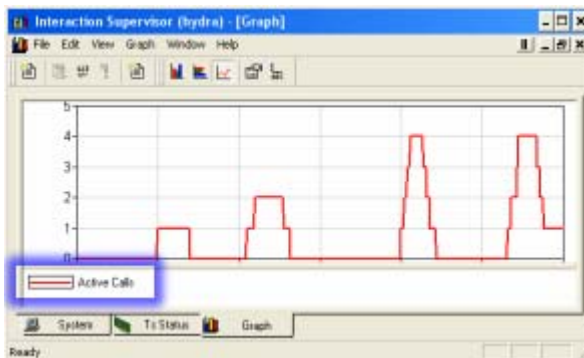
1. Right-click anywhere in the graph and choose *Show Legend on >* from the context menu, or pull down the view's custom menu and select *Show Legend on*.
2. Choose to display the legend on the bottom of the graph, or to the right of the graph.



Legend on right



Legend on left



Legend on bottom

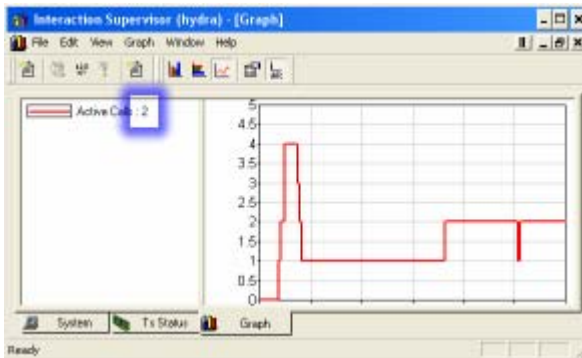
Related Topics

-  [Manage Graphs](#) (p. 53)

Toggle display of values in legends

You can display the current value of each statistic in the graph's legend. The Show Values in Legend command toggles display of values on or off.

1. Right-click anywhere in the graph and choose *Show Values in Legend* from the context menu. Or choose *Show Values in Legend* from the custom menu for the view.



When Show Values is on, the value of each statistic appears next to its legend.

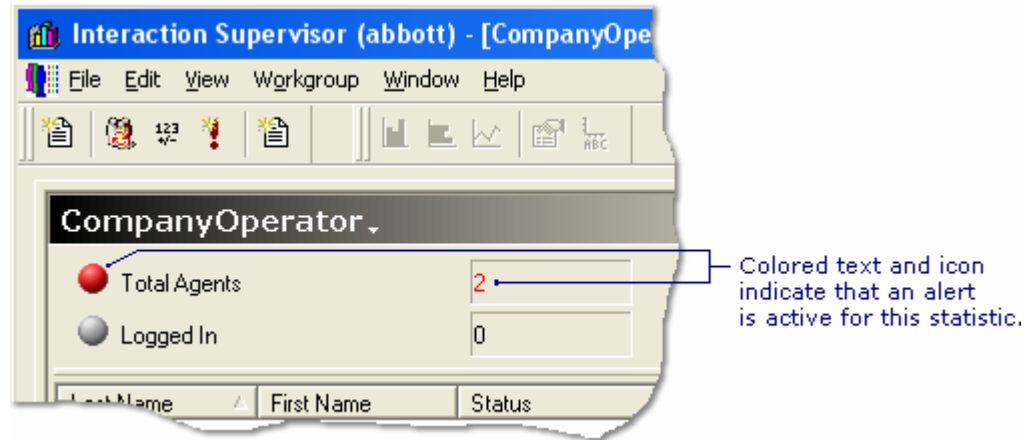
2. Repeat to toggle the display on or off.

Related Topics

-  [Manage Graphs](#) (p. 53)



Manage Alerts

An *alert* notifies when a statistic is in or out of a user-defined range, based on the value of a statistic or condition on the IC Server. When an alert becomes active, it can play a sound, change the color of text or an icon, send an Email, or initiate a handler.



In the example above, the current value of the "Total Agents" statistic is within a range of a values specified by an alert. The alert is configured to paint the icon and text red when it is active. It could just as easily send an email, play a sound, or invoke a handler. You can set as many alerts as you like, including multiple alerts for the same statistic. An alert can provide any combination of available notifications.

Related Procedures

-  [Add an Alert](#) (p. 65)
-  [Add Multiple Alerts](#) (p. 66)
-  [Add a Time in Status Alert](#) (p. 67)
-  [Edit Time in Status Alerts](#) (p. 68)
-  [Change the color of an alert icon](#) (p. 69)
-  [Edit an Alert](#) (p. 70)
-  [Remove an Alert](#) (p. 71)
-  [View Active Alerts](#) (p. 72)
-  [Manage all Alerts at once](#) (p. 73)

Add an Alert

This procedure explains how to add an alert that notifies you when a statistic is in or out of a chosen range, based on statistical items or values on the IC Server. An active alert can change the color of the display, play a wave file, display an icon in your system tray, send electronic mail, or invoke a handler.

1. Right-click a statistical item in a view. Then choose *Edit Alerts...* from the context menu that appears.

Tip—can optionally choose *Edit Alerts* from the pull-down menu for the View. The name of the menu varies depending upon the plug-in and view that is active.

2. Use the [Edit Alerts dialog](#) (p. 106) to select a statistic. This dialog displays different options in accordance with data items used by the active view.
3. Once you have selected a statistic, press the *Add Range* button. This opens the [Alert Properties dialog](#) (p. 91) , so that you can define a range of "From" and "To" values for the statistic, and notification details.
4. Complete the *Alert Properties* dialog by selecting a range of values for the alert, the manner in which the alert will notify (by changing colors in the display, playing a sound, sending an Email, or invoking a handler).
5. Press *OK* to put the new alert into effect.
6. Press *Close* to dismiss the Edit Alerts dialog.

Related Topics

-  [Manage Alerts](#) (p. 64)

Add Multiple Alerts

This procedure explains how to add multiple new alerts at one time by selecting one *statistic* and several *items* (workgroups, workflows, campaigns, sites, agents, etc.) to monitor.

An alert that notifies you when a statistic is in or out of a chosen range, based on statistical items or values on the IC Server. An active alert can change the color of the display, play a wave file, display an icon in your system tray, send electronic mail, or invoke a handler.

The *Add Multiple Alerts* command is not supported in all views. If a view supports it, you can add multiple alerts as follows:

1. Right-click in the view and select *Add Multiple Alerts* from the view's context menu, or select *Add Multiple Alerts* from the view's custom menu. The name of the pull down menu varies depending upon the plug-in and view that is active.
2. When the [Add Multiple Alerts dialog](#) (p. 88) appears, select a statistic and items to alert on. The appearance of this dialog varies so that you can select items that are appropriate for the plug-in and view. Regardless of GUI differences, your job is to select multiple *items* (workgroup, workflow, campaign, agent, etc.) and one *statistic* to alert on.

For example, the Dialer plug-in prompts you to select a combination of workflow, campaign, site, and agent items, in addition to statistic. Conversely, setting multiple alerts for a Workgroup Detail view is a simple matter of selecting workgroup items and one statistic. If this sounds complicated, don't worry. When the dialog is viewed in context, these on-screen options make sense.

3. Next, press the *Add Range* button. It opens the [Alert Properties dialog](#) (p. 91) , so that you can define a range of "From" and "To" values for the statistic, and notification details.
4. Complete the *Alert Properties* dialog by selecting a range of values for the alert, the manner in which the alert will notify (by changing colors in the display, playing a sound, sending an Email, or invoking a handler).
5. Press *OK* to put the new alert into effect. Interaction Supervisor displays a message that indicates the number of new alerts added.
6. Press *OK* to dismiss this message.
7. Press *Close* to dismiss the Edit Alerts dialog.

Related Topics

-  [Manage Alerts](#) (p. 64)

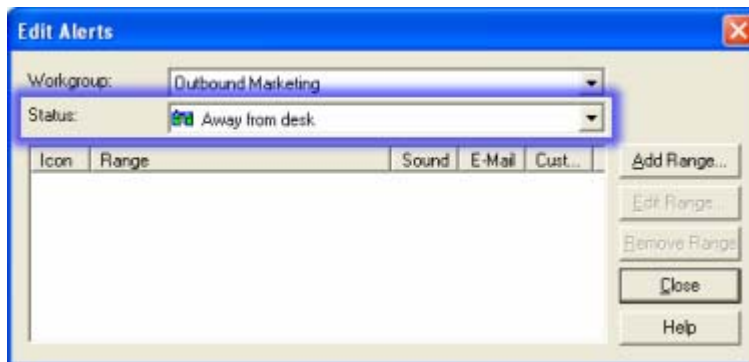
Add a Time in Status Alert

Alerts of this type notify when an agent is in a particular status for more than a specified duration. Time in status alerts are like regular alerts, except that they examine an agent's status (Available, At Lunch, etc.) instead of a workgroup or queue statistic. Time in status alerts are available in views that provide a member list. Follow these steps to set a time in status alert:

1. Right-click a member row and select *Time in Status Alerts...*



2. Select a status to base the alert on.



3. Press the Add Range button. It opens the [Alert Properties dialog](#) (p. 91), so that you can define a range and notification details.
4. Complete the *Alert Properties* dialog by selecting a range of minutes for the alert, the manner in which the alert will notify (by changing colors in the display, playing a sound, sending an Email, or invoking a handler).
5. Press *OK* to dismiss the Alert Properties dialog.
6. Press *Close* to dismiss the Edit Alerts dialog.

Related Topics

- [Edit Time in Status Alerts](#) (p. 68)
- [Manage Alerts](#) (p. 64)

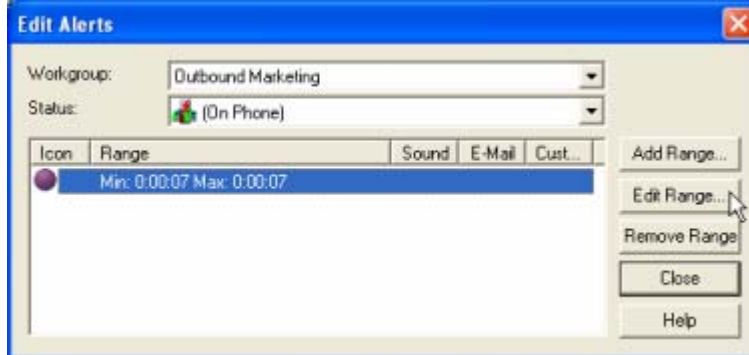
Edit Time in Status Alerts

Follow these steps to edit an agent's "time in status" alerts:

1. Right-click a member detail row and select *Time in Status Alerts...*



2. When the *Edit Alerts* dialog appears, select the alert you want to edit. Then press the *Edit Range* button.



3. Use the [Alert Properties dialog](#) (p. 91) to modify the range of minutes for the alert, the manner in which the alert will notify (by changing colors in the display, playing a sound, sending an Email, or invoking a handler).
4. Press *OK* to dismiss the Alert Properties dialog.
5. Press *Close* to dismiss the Edit Alerts dialog.

Related Topics

- [Add Time in Status Alerts](#) (p. 67)
- [Manage Alerts](#) (p. 64)

Change the color of an alert icon

This procedure explains how to change the color of the alert icon displayed when an alert is active.

1. Right-click the statistic whose alert icon you want to change. Then choose *Edit Alerts* from the context menu. The [Edit Alerts](#) (p. 106) dialog box opens.
2. Highlight the alert whose icon you want to change and click the Edit Range... button.
3. Click the *Icon* pull-down menu and choose the new icon you want to use for this alert.
4. Press the *OK* button to close the [Alert Properties](#) (p. 91) dialog.
5. Press the *Close* button to dismiss the Edit Alerts dialog.

Related Topics

-  [Manage Alerts](#) (p. 64)

Edit an Alert

Editing an alert allows you to change the values watched for a statistic, the icon that appears when the alert is active, and the notification that occurs.

This procedure sets up an alert that operates on a statistic. To set an alert based upon agent status, see [Add a Time in Status Alert](#) (p. 67) and [Edit a Time in Status Alert](#) (p. 68).

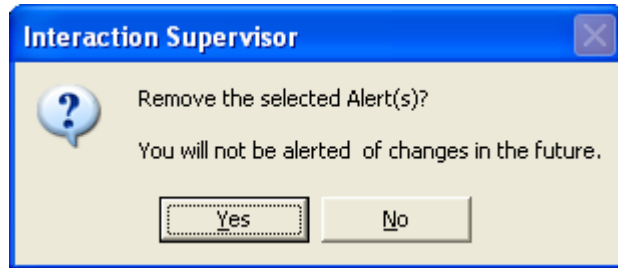
1. Open the [Edit Alerts](#) (p. 106) dialog using one of the following methods:
 - Right-click a statistical item in a view. Then choose *Edit Alerts...* from the context menu that appears, or...
 - Pull down the *View* menu and select *Active Alerts* (or double-click the Supervisor tray icon). Right-click on the alert you want to change and then choose *Edit Alert* from the context menu.
2. When the [Edit Alerts](#) (p. 106) dialog appears, select an alert range. Then press the *Edit Range* button to open the [Alert Properties dialog](#) (p. 91).
3. Use the [Alert Properties dialog](#) (p. 91) to change the range of values watched for the alert, or to define the manner in which the alert will notify (by changing colors in the display, playing a sound, sending an Email, or invoking a handler).
4. Press *OK* to close the *Alert Properties* dialog.
5. Press *Close* to dismiss the *Edit Alerts* dialog.
6. Press *Close* to dismiss the *Active Alerts* dialog (if it is open).

Related Topics

-  [Manage Alerts](#) (p. 64)

Remove an Alert

1. To remove an alert, double-click the tray icon to display the [Active Alerts](#) (p. 85) dialog.
2. Select the alerts that you want to remove by Ctrl-clicking entries in the list.
3. Right-click in the list to display its context menu. Choose Remove Alerts(s).
4. Press Yes to confirm that you want to remove the selected alerts.



Related Topics

-  [Manage Alerts](#) (p. 64)

View Active Alerts

To display the status of active alerts, open the [Active Alerts](#) (p. 85) dialog. It displays the current value of each alert statistic, the time when the alert occurred, and other information. There are several ways to open this dialog:

1. Pull down the *View* menu and select *Active Alerts*, or...
2. Right-click the system [tray icon](#) (p. 131) and select *Show Active Alerts* from a context menu, or...
3. Double-click the alert icon in your system tray.

Related Topics

 [Manage Alerts](#) (p. 64)

Manage all alerts at once



The Manage Alerts dialog makes it easy to manage all alerts in one place. Its purpose is to help users administrate their alerts. Users can view alerts they have set up, edit, and remove alerts.

Alerts can also be listed by category. There are two special categories. "[All Alerts]" shows all alerts regardless of category. "[Overview]" shows totals by category and grand totals. The dialog also provides a Look For feature that allows alerts listed for the category to be filtered down to only those containing a matching search string.

To open this dialog, select *Manage Alerts* from the *View* menu. You can filter the list of alerts to display a subset, or view categorical lists. For details, see [Manage Alerts dialog](#) (p. 116).

Related Topics

[Manage Alerts dialog](#) (p. 116)

[Manage Alerts](#) (p. 64)

Manage Toolbars

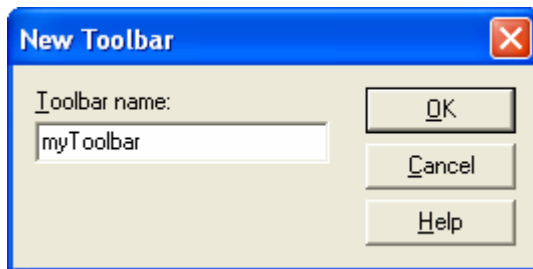
Interaction Supervisor supports docking toolbars, and allows toolbars to be customized. Users can choose which toolbars to display, create a new toolbar, and control toolbar options. All toolbars are customizable, including toolbars added by a plug-in.

Show / Hide toolbars

1. To customize the appearance of toolbars, select *Toolbars* from the *View* menu. This opens the [Toolbar Options](#) (p. 128) dialog.
2. To add or remove toolbars from the display, click on the [Toolbars tab](#) (p. 128) of the Toolbar Options dialog. Place a checkbox next to the names of toolbars that you want to display. Uncheck items in the Toolbar list that you do not wish to see.
3. Use the checkboxes to display tool tips and to apply a borderless "cool" look to toolbar buttons.

Add custom toolbar

1. To create a custom toolbar that you can position anywhere on the screen, click on the [Toolbars tab](#) (p. 128).
2. Press New.
3. Type a short descriptive name and press *OK*.



4. To add buttons to a custom toolbar, select the [Toolbar Buttons tab](#) (p. 130). Then drag and drop toolbar icons to your custom toolbar.

Drag and Drop toolbar buttons

1. To copy buttons from one toolbar to another, select the [Buttons tab](#) (p. 130).
2. Then select a toolbar in the list to display its buttons.
3. Drag and drop buttons to copy them to another toolbar.

Related Topics

-  [Toolbar Options dialog](#) (p. 128)

Change an Agent's workgroup activation

Workgroup activation allows an agent to be a member of multiple workgroups, while at the same time allowing the supervisor to specify the workgroup queues for which he or she will take calls.

1. Add a view that supports a member list of agents. For example, the Workgroup plug-in provides a Workgroup Detail view that lists agents.
2. Right-click on the row for the agent whose workgroup membership you want to manage. Then select *Manage User...* from the context menu.
3. Use the [Manage Agent Activations](#) (p. 114) dialog to see which workgroups the user is activated on, and to change activation settings as needed. This dialog lists the workgroups that an agent belongs to, and allows the agent to be set as active or inactive within each workgroup.

If a padlock icon appears next to the workgroup name and the name is grayed out, this indicates that the right to activate or deactivate members of the workgroup has not been assigned to you in Interaction Administrator. See [Recommended Access rights](#) (p. 15).

4. To activate the agent for a workgroup, select it in the *Member of* list on the left. Then press the *Add* button. This moves the workgroup to the *Activated on* list, so that the agent will receive calls for that workgroup.
5. To deactivate the agent from a workgroup, select it in the *Activated on* list on the right. Then press the *Remove* button. This moves the workgroup to the *Member of* list, preventing the agent from receiving calls for that group.
6. When you are finished, press *OK* to close the dialog.

Related Topics

-  [Manage Agent Activations dialog](#) (p. 114)

Send Messages to Interaction Client users

Supervisor Messages

Interaction Supervisor can send messages to Interaction Client users. Administrators can send a one-time informational message, or use an [alert](#) (p. 98) to automatically trigger messages based on any real-time statistic that Supervisor can monitor. For example, an Administrator might configure an alert to send a message when there are too many calls in queue, or when a queue's wait time is too long.

This *client messaging* feature helps IC Administrators keep users and workgroups informed. When messages are sent, the Administrator can control the manner in which a message is displayed in the client; either as a pop-up or as a scrolling notification along the bottom edge of the client window.

Required Right

The ability to send messages from Supervisor is governed by an IC user right. Supervisor users who have been granted the [Allow Supervisor Message Creation](#) (p. 15) user right in Interaction Administrator can create messages and send them to Interaction Client users. (See list of supported clients below.)

When the user does not have "Allow Supervisor Message Creation" right, the *Create Message* command is disabled in the toolbar and *File* menu. The *View Messages* command remains available, but pushbuttons for adding, removing, or editing messages are disabled. Similarly, all options on the [Supervisor Message](#) (p. 98) tab of the *Edit Alert* dialog are disabled.

Supported Clients

| | |
|------------------------------------|--|
| Interaction Client Win32 Edition | Client messaging is <u>not supported</u> . |
| Interaction Client .NET Edition | Client messaging is supported. |
| Interaction Client Outlook Edition | Client messaging is supported. |
| Interaction Client Web Edition | Client messaging is supported. However, all messages are displayed as pop-ups. |

Messages can be sent to individual users, or to a single workgroup or to multiple workgroups. Messages are created using the [Create Supervisor Message](#) (p. 103) dialog. Saved messages are managed in the [View Supervisor Messages](#) (p. 126) dialog. To view sent messages, pull down the *View* menu and select *Supervisor Messages*.

Since Supervisor messages are not Emails, they are not processed by Email servers. Instead, messages are held on the IC server until they expire or are manually removed. When a message is composed, the sender selects a preferred display method. Messages can be displayed as ticker-tape notifications along the bottom of the Client interface, or as pop-ups. As you might expect, message presentation varies slightly between clients editions. For details, please consult the online help for the client you use.

Notification Messages

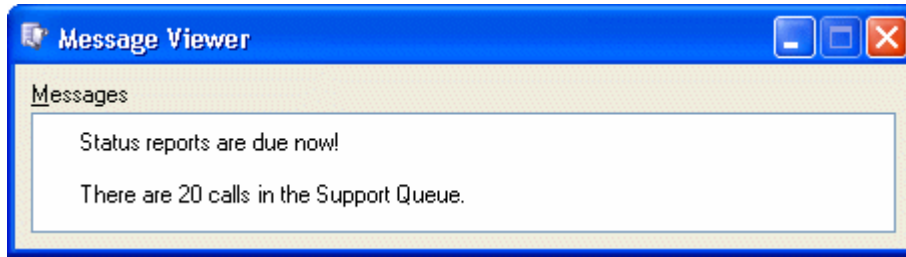
In general, notification messages look like stock tickers when they are displayed at the bottom of the Interaction Client window.



Messages move into the notification area by rotating in from the bottom while the current message rotates out the top. To allow time for the user to read the message, there is a pause of several seconds between the time the message is fully rotated in and the time it begins cycling to the next message.

Pop-Ups

When the pop-up option is selected, messages are displayed in a secondary window.



Related Procedures


- [Compose a new Supervisor message](#) (p. 78)
- [Reuse a previously sent message](#) (p. 79)
- [Remove a saved message](#) (p. 80)

Related Topics

- 🔗 [Allow Supervisor Message Creation](#) (p. 15)
- 🔗 [Create Supervisor Message dialog](#) (p. 103)
- 🔗 [View Supervisor Messages dialog](#) (p. 126)
- 🔗 [Supervisor Alert Message Page](#) (p. 98)

Compose a new Supervisor message

To compose a new Supervisor message, follow these steps:

1. Pull down the *File* menu and select *Create Message*, or press the  toolbar button. The [Create Supervisor Message](#) (p. 103) dialog will appear.


Tip—you can also create new messages when the [View Supervisor Messages](#) (p. 126) dialog is open, by pressing the New button.

2. To select one or more recipients for the message, press the *To* button. Use the [Recipients](#) (p. 122) dialog to select Users and/or Workgroups. When you are finished, press OK to close the Recipients dialog.
3. By default, the message will be sent as a notification that scrolls across the bottom of the client window. To display the message in a message box, check *Send as Desktop Pop-up*.
4. Optionally use the *Expire Message After* options to automatically remove the message after a specified period of time. Messages will be held on the server until the expiration timer expires, after which they are deleted. Messages that do not expire are saved on the server until they are manually [removed](#) (p. 80).
5. Optionally select a sound to play when the message arrives.
6. Optionally select an icon for the message.
7. Optionally include a URL with the message.
8. Press *Send* to transmit the message.

Related Topics

-  [Send Messages to Interaction Client users](#) (p. 76)


Reuse a previously sent message

1. Interaction Supervisor automatically saves sent messages on the IC server. To edit and reuse a saved message, press the  toolbar button, or pull down the *View* menu and select *Supervisor Messages*. The [View Supervisor Messages](#) (p. 126) dialog will appear.
2. Select a message in the list.
3. Press *Edit* to open the message in the [Create Supervisor Message](#) (p. 103) dialog.
4. Edit delivery options and/or to change the destination.
5. Press *Send*.
6. Repeat steps 2-5 to edit other messages as needed.
7. When you are finished, press OK to close the *View Supervisor Messages* dialog.

Related Topics

-  [Send Messages to Interaction Client users](#) (p. 76)

Remove a saved message

1. Interaction Supervisor stores all messages on the server until they expire or until you manually delete them. To remove a message, press the  toolbar button, or pull down the *View* menu and select *Supervisor Messages*. The [View Supervisor Messages](#) (p. 126) dialog will appear.
2. Select a message to remove.
3. Press *the Remove* button. When a message is removed from this list, it is removed from the recipient's client also.
4. Repeat steps 2-4 to remove other messages as needed.
5. When you are finished, press OK to close the *View Supervisor Messages* dialog.

Related Topics

-  [Send Messages to Interaction Client users](#) (p. 76)

Exit Supervisor

The Exit command terminates Interaction Supervisor. The workspace (including alerts) is automatically saved. When the program is restarted, views, graphs and alerts are restored.

1. Pull down the File menu and select Exit, or...
2. Right-click the tray icon to display its context menu. Choose Exit Supervisor, or...
3. Close Interaction Supervisor's main window by pressing the close box.

Tech Support Note: In extremely rare cases, the registry key that Supervisor uses to store session configuration data can become corrupt. When this happens, Supervisor generates an Application Error when it is closed, followed by the "Interaction Process Restarting" dialog. Supervisor restarts normally, but without displaying custom views, alerts, and other user-specific defaults.

The workaround is to delete the server key that stores the current configuration. That will allow Supervisor to save user information to the registry. To remove the key, stop Supervisor, and then use a registry editor to delete:








```
HKEY_CURRENT_USER\Software\Interactive Intelligence\Interaction Supervisor\IC2.3\<Server>
```

User Interface Options

This section describes [commands](#) (p. 82) that Interaction Supervisor supports and options that you can configure in [dialogs](#) (p. 84). Links to related procedures are provided where applicable.

Commands

Commands are invoked using toolbars and menus. The table below lists each command, its toolbar equivalent, menu item, and procedure that describes its function, where applicable. In the list below, [plug-in] is a moniker for the name of the plug-in specific menu displayed when a view has focus.

| Command | Icon | Menu Option | Description / Related Procedure |
|--|---|---|--|
| About | - | Help > About Supervisor | Display version and system information (p. 27). |
| Active Alerts | - | View > Active Alerts | Displays information about active alerts (p. 72). |
| Add Multiple Alerts | - | [plug-in] > Add Multiple Alerts | The Add Multiple Alerts (p. 66) command is not supported in all views. It allows you to define multiple alerts at one time by selecting one statistic and several workgroups to monitor. |
| Add/Remove Statistics |  | [plug-in] > Add / Remove Statistic(s)... | Add or remove statistics (p. 32) from the view you are monitoring. |
| Arrange Icons | - | Window > Arrange Icons | Arranges minimized windows in the workspace. |
| Cascade | - | Window > Cascade | Cascades view window in the workspace. |
| Change Station | - | File > Change Station | Use a different workstation (p. 102). |
| Change Caption Selection |  | Press Caption Bar control in a view or [plug-in] > Change [item name] menu option | Changes the caption selection (p. 31) for the current view. This changes the criteria used to select data for the view. |
| Close (view) | - | File > Close | Closes a view (p. 50). |
| Configure Graph... |  | [plug-in] > Configure Graph | Opens the Graph Configuration (p. 109) dialog, so that you can modify major aspects of a graph, such as its type, grouping, period, colors, title, axes, and legends. |
| Contents | - | Help > Contents | Displays help system contents tab. |
| Copy | - | Edit > Copy | Copies selected text to the clipboard. |
| Create Message |  | File > Create Message | Composes a new Supervisor Message (p. 76) for delivery to Interaction Client users. |
| Cut | - | Edit > Cut | Cuts selected text to the clipboard. |
| Display Help for a Statistic or visual control |  | Help > What's This? | Puts Supervisor in "What's This" help mode. The cursor changes to a help icon, to indicate that you can click on a visual control to open the help topic that explains it. This is commonly used to display help for a statistic (p. 26). See access help topics, web pages, and version info (p. 25) for information about the Help menu. |
| Display Vertical Bar Graph |  | [plug-in] > Graph Type > Vertical Bar | Changes the graph type (p. 58) to a vertical bar graph. |
| Display Vertical Bar Graph |  | [plug-in] > Graph Type > Horizontal Bar | Changes the graph type (p. 58) to a horizontal bar graph. |

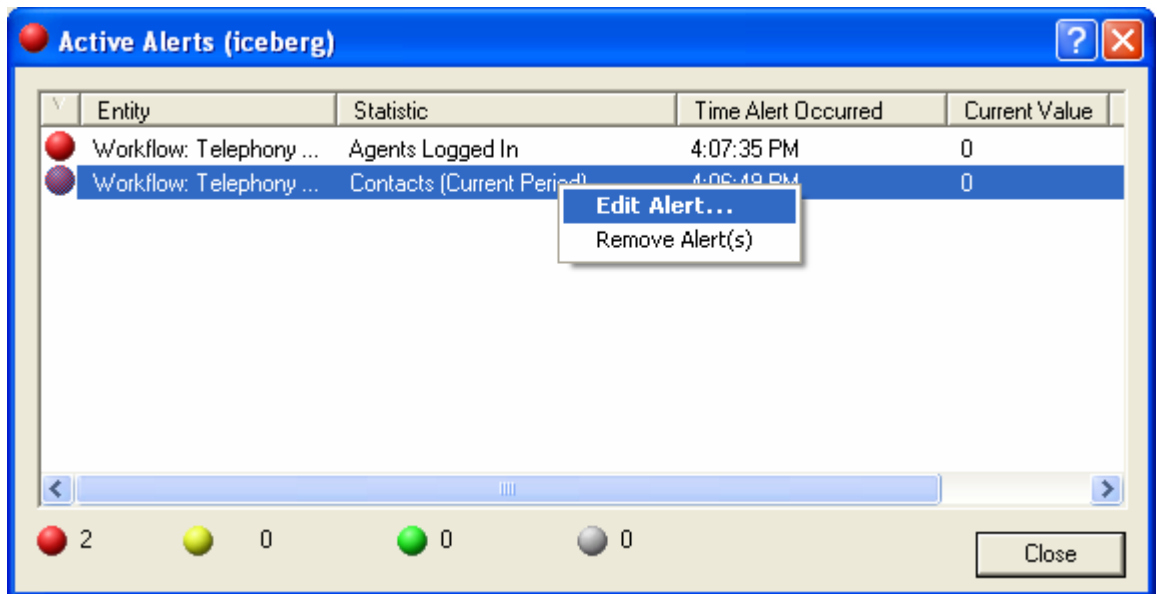
| | | | |
|----------------------------|---|--|---|
| Display Vertical Bar Graph |  | [plug-in] > Graph Type > Line | Changes the graph type (p. 58) to a line graph. |
| Edit Alerts |  | [plug-in] > Edit Alerts... | Opens the Edit Alerts dialog (p. 106) so that you can manage alerts (p. 64). |
| Exit | - | File > Exit | Exit Supervisor (p. 81). |
| Full Screen | - | View > Full Screen | Display views in Full Screen mode (p. 51). |
| Graph Period | - | [plug-in] > Graph Period | Selects the time period for a line graph to plot. See modify the period of a line graph (p. 60). |
| Index | - | Help > Index | Displays help system index tab. |
| New (view) |  | File > New | Adds a view (p. 30) to the workspace. |
| Paste | - | Edit > Paste | Pastes contents of clipboard to control that has focus. |
| Plug-in Info | - | Help > Plug-in Info... | Displays plug-in rights assigned to you (p. 17). |
| Rename (view) | - | File > Rename | Renames a view (p. 33). |
| Search | - | Help > Search | Displays help system search tab. |
| Show Axis Labels | - | [plug-in] > Show Axis Labels | Toggles the display of axis labels (p. 61) on or off. |
| Show Legend on | - | [plug-in] > Show Legend on > Left/Bottom/Right | Positions legend text (p. 62) on the left, right, or bottom side of the graph view. |
| Show Legend Values |  | [plug-in] > Show Values in Legend | Toggles the display of values in the legend of a graph. |
| Slide Show | - | View > Slide Show | Display views in Slide Show mode (p. 52). |
| Status Bar | - | View > Status Bar | Toggles display of the status bar on or off. |
| Tile | - | Window > Tile | Tiles view windows in the workspace. |
| Toolbars | - | View > Toolbars | Manage Toolbars (p. 74). |
| Undo | - | Edit > Undo | Reverts the last undoable operation. |
| View Supervisor Messages |  | View > Supervisor Messages | Opens the View Supervisor Messages (p. 126) dialog, so that you can add, edit, or remove Supervisor messages. |

Dialogs

This section discusses configurable options in dialogs.

- [Active Alerts](#) (p. 85) dialog
- [Add Custom Column](#) (p. 87) dialog
- [Add Multiple Alerts dialog](#) (p. 88)
- [Add / Remove Queue Columns](#) (p. 89) dialog
- [Alert Properties](#) (p. 91) dialog
- [Change Caption Selection](#) (p. 101) dialog
- [Change Station dialog](#) (p. 102)
- [Create Supervisor Message](#) (p. 103) dialog
- [Custom Toolbar Name](#) (p. 105) dialog
- [Edit Alerts](#) (p. 106) dialog
- [Filter Settings](#) (p. 108) dialog
- [Graph Configuration](#) (p. 109) dialog
- [Interaction Supervisor Login](#) (p. 113) dialog
- [Manage Agent Activations](#) (p. 114) dialog
- [Manage Alerts dialog](#) (p. 116)
- [Manage Custom Columns](#) (p. 119) dialog
- [New View](#) (p. 120) dialog
- [Plug-in Information](#) (p. 121) dialog
- [Recipients](#) (p. 122) dialog
- [Rename View](#) (p. 123) dialog
- [Statistic Selection](#) (p. 124) dialog
- [View Supervisor Messages](#) (p. 126) dialog
- [Toolbar Options](#) (p. 128) dialog
- [Tray Icon](#) (p. 131)

Active Alerts dialog



The *Active Alerts* dialog box displays the status of the current alerts you have set. It displays the name of the plug-in and view, the statistic examined by each alert, the time when the alert occurred, the current value of the statistic, and its event ID.

Columns in the List Control

The list control displays about the plug-in and view (entity), the statistic examined by the alert, the time the alert occurred, the current value of the statistic, and its event ID. If you right-click a row in the list, a context menu appears, providing the option to [edit](#) (p. 70) or [remove](#) (p. 71) the selected alert.

Entity column

This column indicates which plug-in and view the alert is manage by.

Statistic column

The statistic that this alert notifies about.

Time Alert Occurred column

The time when the alert was triggered.

Current Value column

The current value of the statistic.

Event ID column

The event ID number of the alert. An event ID is unique number that identifies the alert event. It is similar to a Call ID for telephone calls. This number is significant only if a problem occurs and you are asked by a support representative to identify the alert event for diagnostic purposes.

Color Coded Icons

The color coded icons at the bottom of the dialog indicate the number of alerts that are active for a particular color—not the number of alerts that are set for each color. In general, Red is assigned to warnings, Yellow is assigned to Critical errors, Green is assigned to Normal conditions, and Gray indicates Neutral.

Close Button

Closes the Active Alerts dialog.

Red (Warning) Indicator and Count

The red warning icon indicates the number of warnings that are active.

Yellow (Critical) Indicator and Count

The yellow icon indicates the number of critical alerts that are active.

Green (Normal) Indicator and Count

The green icon indicates the number of normal alerts that are active.

Gray (Neutral) Indicator and Count

The gray icon indicates the number of neutral alerts that are active.

Context Menu Commands

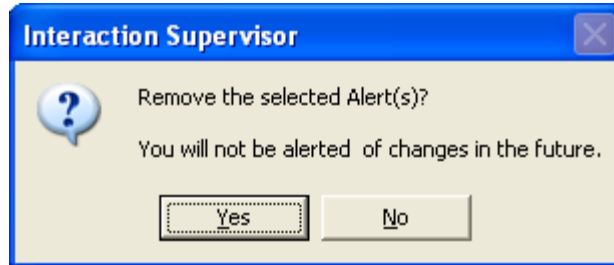
If you right-click an item in the list, a context menu appears that contains these commands:

Edit Alert...

Opens the [Edit Alerts](#) (p. 106) dialog. See [Edit an Alert](#) (p. 70) for details.

Remove Alert(s)

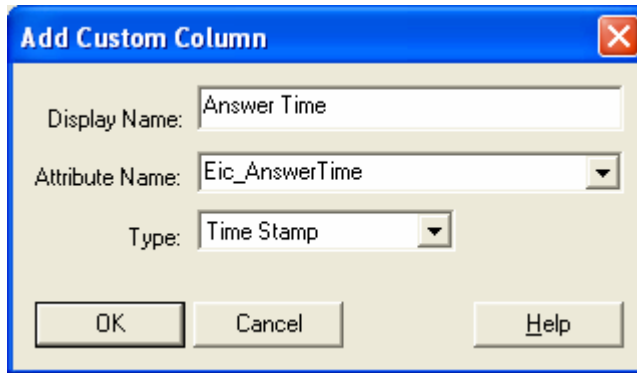
Prompts to remove alerts that you have selected in the list. If you confirm the operation by selecting Yes, all selected alerts are removed.



Related Topics

 [Manage Alerts](#) (p. 64)

Add Custom Column dialog



This dialog appears when the Add button is pressed from the [Manage Custom Columns](#) (p. 119) dialog. It defines a custom contact column that can be displayed by a [Queue Monitor control](#) (p. 34).

Display Name

The descriptive name entered here will appear as the name of the column when it is displayed in a [Queue Monitor control](#) (p. 34).

Attribute Name

Use this drop list to select a predefined object attribute, or type the name of a custom attribute. If you type the name of a custom attribute, you must specify its data type in the Type Field.

Type

This field identifies the data type of the attribute, which can be String, Boolean (Yes/No), Boolean (Check/X), Duration, or Time Stamp. If you select a predefined attribute in the Attribute Name list, this information is selected automatically. If you typed the name of a custom attribute, you must make a selection from this list.

The Queue Monitor control will display the value of the attribute in a format that is consistent with its data type:

- *String* data is displayed as string data.
- *Boolean (Yes/No)* is displayed as "Yes" or "No" in the column.
- *Boolean (Check/X)* is displayed as a checkbox or X icon in the column.
- *Duration* uses the attribute as a start time and increments every second.
- *Time Stamp* displays the Date/Time indicated by the attribute.

OK button

Closes the dialog and applies changes made.

Cancel button

Discards changes and closes the dialog.

Help button

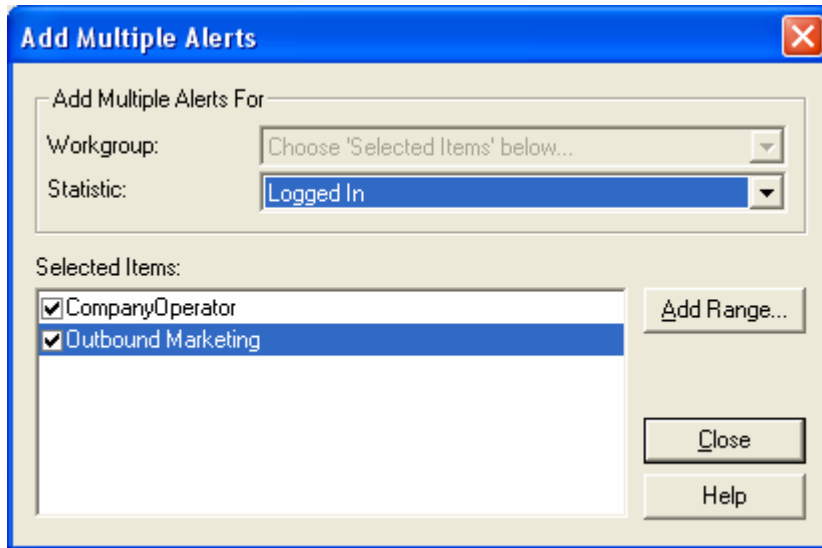
Opens this help topic.

Related Topics

 [Use Queue Monitor Controls](#) (p. 34)

 [Add custom columns to a Queue Monitor Control](#) (p. 40)

Add Multiple Alerts dialog



This dialog is used to add multiple new alerts at one time by selecting one *statistic* and several *items* to monitor. The appearance of this dialog varies so that you can select items that are appropriate for the plug-in and view. Regardless of GUI differences, your job is to select multiple *items* (workgroup, workflow, campaign, agent, etc.) and one *statistic* to alert on.

An alert that notifies you when a statistic is in or out of a chosen range, based on statistical items or values on the IC Server. An active alert can change the color of the display, play a wave file, display an icon in your system tray, send electronic mail, or invoke a handler.

Add "Multiple Alerts For" frame

The options in this frame select the type of item that the statistic notifies about. The options in this frame vary so that you can select items that are appropriate for the plug-in and view. Select an item *type* (workgroup, workflow, campaign, agent, etc.) in this frame to enable selection of individual items (workgroups, workflows, campaigns, agents, etc.).

Selected Items list

This control lists items that you can select to monitor. Depending upon the item type, the names of workgroups, workflows, campaigns, agents, etc. are listed. Check the items that you wish to set alerts on.

Add Range button

Opens the [Alert Properties dialog](#) (p. 91), so that you can define a range of "From" and "To" values for the statistic, and notification details. To complete the *Alert Properties* dialog, select a range of values for the alert, and the manner in which the alert will notify (by changing colors in the display, playing a sound, sending an Email, or invoking a handler).

Close button

Press this button to dismiss the *Add Multiple Alerts* dialog.

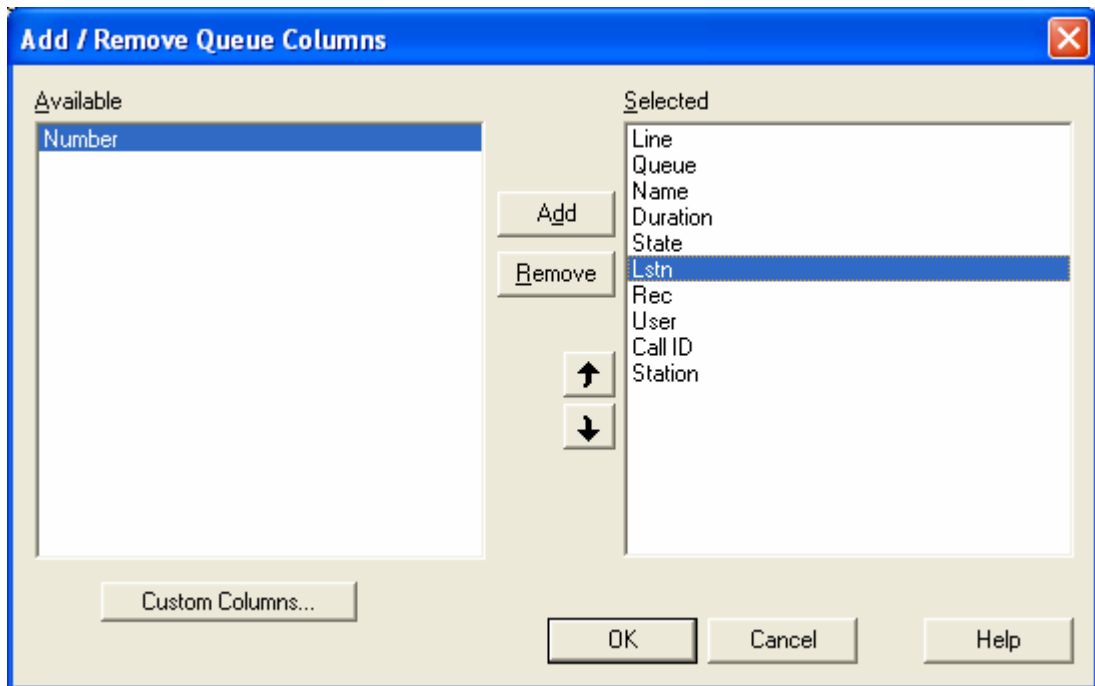
Help button

Opens this help topic.

Related Topics

-  [Add Multiple Alerts](#) (p. 66)
-  [Manage Alerts](#) (p. 64)

Add / Remove Queue Columns dialog



This dialog adds, removes, and reorders columns displayed in a [Queue Monitor control](#) (p. 34). It appears when a user right-clicks in a [Queue Monitor control](#) (p. 34) , and selects "Columns..." from the context menu.

Available list

This list contains the names of columns that can be added to the list of columns selected for display. To display a column, select it in the Available list, press *Add*, and then press *OK* to close the dialog.

Selected list

This columns in this list will appear in the Queue Monitor control once the *OK* button is pressed. The left-to-right display order of columns is determined by the Up/Down order of entries in this list. Columns can be reordered using *Up/Down* buttons.

Up/Down buttons

These buttons reorder items in the Selected list, which sets the display order of columns in the Queue Monitor control.

Custom Columns button

Press this button if you want to add or remove custom columns to the Available columns list. It opens the [Manage Custom Columns dialog](#) (p. 119).

OK button

Closes the dialog and applies changes.

Cancel button

Closes the dialog without applying changes.

Help button

Opens this help topic.

Related Topics

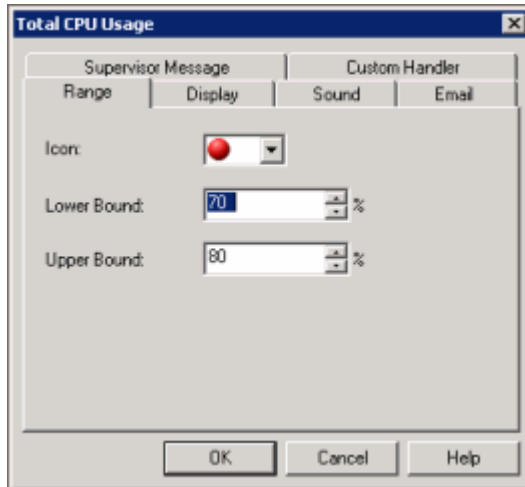
 [Add custom columns to a Queue Monitor Control](#) (p. 40)

 [Use Queue Monitor Controls](#) (p. 34)

Alert Properties dialog

The *Alert Properties* dialog sets a range of values for the alert, and defines the manner in which the alert will notify (by changing colors in the display, playing a sound, sending an Email, or invoking a handler).



The dialog title is the name of the statistic selected in the [Edit Alerts](#) (p. 106) dialog.



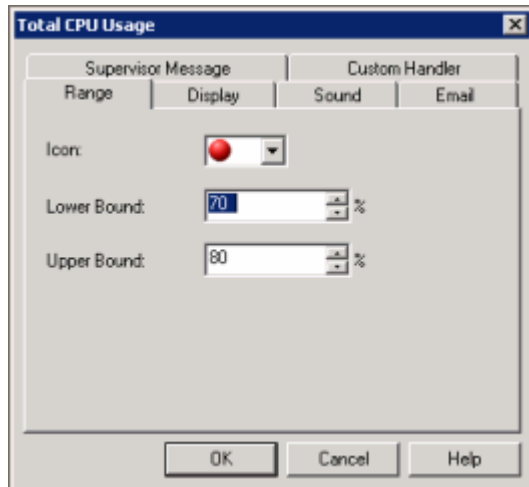
To configure the alert, set options on each tab page as needed. If you configure more than one notification type (e.g.: Email and sound, for example), both notifications are triggered when the alert is active.

- The [Range](#) (p. 92) page defines upper and lower bounds for the alert, and sets the icon used to indicate that the alert is active.
- The [Display](#) (p. 93) page sets the appearance of text when the alert is active.
- The [Sound](#) (p. 94) page sets wave audio sounds to play when the value of the statistic enters or exits the range, or is within range.
- The [Email](#) (p. 96) page defines recipients of Email notifications sent when the value of the statistic enters or exits the range, or when the value of a statistic changes.
- The [Supervisor Message](#) (p. 98) page defines Supervisor messages that can be sent by an Alert.
- The [Custom Handler](#) (p. 100) page sets options used to invoke a handler.

Related Topics

-  [Alert Properties Dialog](#) (p. 91)
-  [Manage Alerts](#) (p. 64)

Range page



Options on this page establish "from" and "to" boundaries for the alert, and the icon color to display when the alert is active.

Icon

Selects a colored icon to display when the alert appears.

Lower Bound

Sets the lower boundary to include in the alert range. For example, if you set an alert to notify you when the total agents available to take ACD calls falls between 10 to 50, the lower bound would be 10.

Upper Bound

Sets the upper boundary to include in the alert range. For example, if you set an alert to notify you when the total agents available to take ACD calls falls between 10 to 50, the upper bound would be 50.

OK button

Closes the dialog and puts alert properties into effect.

Cancel button

Closes the dialog without setting alert properties.

Help button

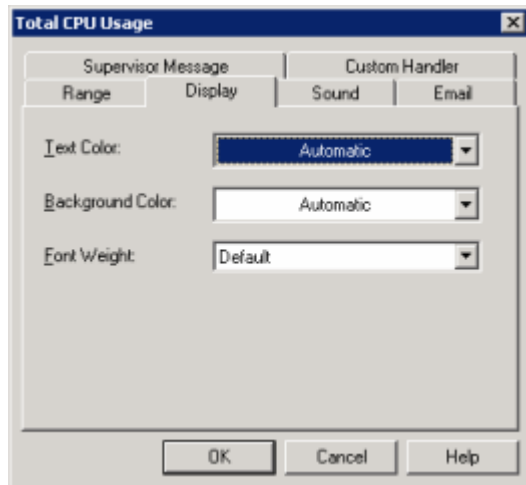
Opens this help topic.

Related Topics

 [Alert Properties Dialog](#) (p. 91)

 [Manage Alerts](#) (p. 64)

Display page



Options on this page control the appearance of statistic text when the alert is active.

Text Color

Sets the foreground color to display when the alert is active. The default color is *Automatic*, meaning that the Windows' foreground text color will be used.

Background Color

Sets the background color to display when the alert is active. The default color is *Automatic*, meaning that the Windows' background text color will be used.

Font Weight

Sets the font weight to *Bold*, *Default*, or *Normal*, to control the appearance of text when the alert is active.

OK button

Closes the dialog and puts alert properties into effect.

Cancel button

Closes the dialog without setting alert properties.

Help button

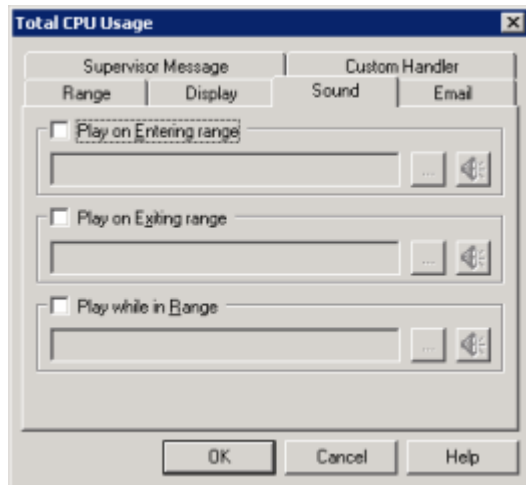
Opens this help topic.

Related Topics

 [Alert Properties Dialog](#) (p. 91)

 [Manage Alerts](#) (p. 64)

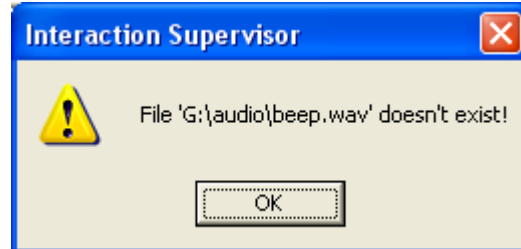
Sound page



Options on this page set wave audio sounds to play when the value of the statistic enters or exits the range, or is within range.

Play on Entering Range checkbox

Check this box to specify the path and filename of a wave audio file to play when the value of the statistic *enters* the range defined for the alert. You can type a fully qualified path directly into the field, or press the ... button to select a wave audio file using a File Open dialog. The adjacent "speaker" button previews the selected wave file. If you type an invalid entry in the field, Supervisor will display a message when it validates the entry:



Play on Exiting Range checkbox

Check this box to specify the path and filename of a wave audio file to play when the value of the statistic *exits* the range defined for the alert. You can type a fully qualified path directly into the field, or press the ... button to select a wave audio file using a File Open dialog. The adjacent "speaker" button previews the selected wave file.

Play while in Range checkbox

Check this box to specify the path and filename of a wave audio file to play when the value of the statistic is *within* the range defined for the alert. You can type a fully qualified path directly into the field, or press the ... button to select a wave audio file using a File Open dialog. The adjacent "speaker" button previews the selected sound file.

Use this feature with care, since the audio file will play repeatedly while the alert is active.

OK button

Closes the dialog and puts alert properties into effect.

Cancel button

Closes the dialog without setting alert properties.

Help button

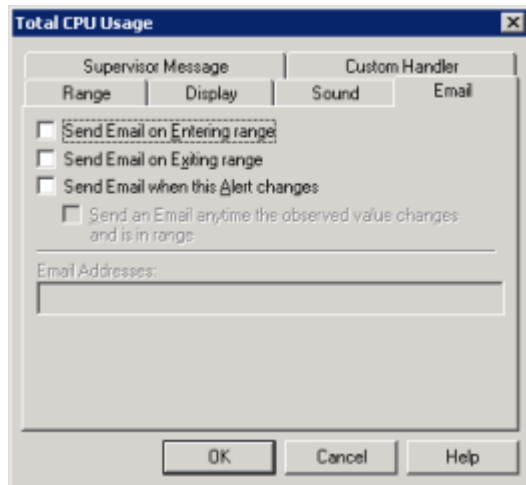
Opens this help topic.

Related Topics

 [Alert Properties Dialog](#) (p. 91)

 [Manage Alerts](#) (p. 64)

Email page



Options on this page send Email messages when the value of the statistic enters or exits the range, or when the value of a statistic changes.

To set up email alerts, you must have permission granted by your administrator. See [allow alerts to send emails or trigger a handler](#) (p. 15). Since it is possible to create an Email alert that does not provide an Email address, the underlying handler will not fire if the Email address is left blank. In releases before IC 2.4, no address checking was performed, which could cause an assertion in PostOfficeServer.

Send Email on Entering Range checkbox

Check this box to send an Email when the value of the statistic *enters* the range defined for the alert.

Send Email on Exiting Range checkbox

Check this box to send an Email when the value of the statistic *exits* the range defined for the alert.

Send Email when this Alert Changes checkbox

Sends an Email when anything defined for the alert changes, including changes to the icon, range, sound, notification selections, or specified values within the alert.

Send an Email anytime the observed value changes and is in range

Sends an Email every time that a value within the range of the alert changes. Use this option carefully, since it can potentially generate many messages.

Email Addresses

This field prompts for Email addresses. To send email notifications to multiple email addresses, separate each email address by a comma.

OK button

Closes the dialog and puts alert properties into effect.

Cancel button

Closes the dialog without setting alert properties.

Help button

Opens this help topic.

When you set up an email notification, you may notice that fields on the Custom Handler tab have been modified. In Interaction Supervisor, an email notification is considered a

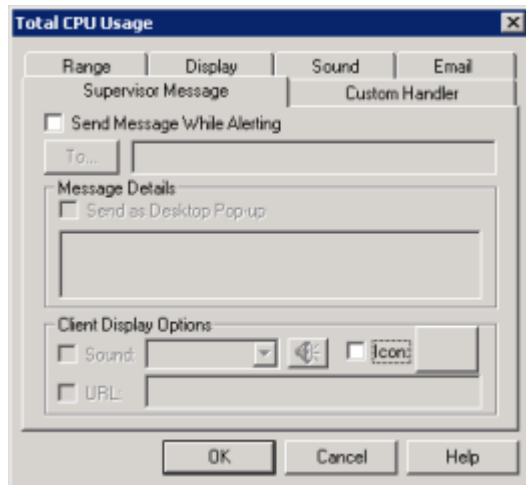
custom alert where the customization is already provided. Therefore, when an email notification is defined, Interaction Supervisor automatically completes information on the Custom Handler tab. However, setting up custom alerts won't have any effect on an email notification (i.e. an email notification is a custom alert handler, but a custom alert handler is not necessarily an email notification).

Related Topics

 [Alert Properties Dialog](#) (p. 91)

 [Manage Alerts](#) (p. 64)

Supervisor Message page



This page configures an alert to send a Supervisor message to an IC Client user. The message will be sent while the alert is in range, rather than "on entering range" or "on exiting range". The dialog is similar to the *Create Supervisor Message* dialog, with the exception that there is no expiration field.

Send Message While Alerting checkbox

When this option is checked, controls on this dialog that configure a Supervisor message are enabled. When you uncheck this box, the message part of the alert is removed without removing the entire alert. and the alert will stop sending messages. The alert will hold the message text and other options, so that you can turn it back on later by re-checking this option.

To... button

Press this button to select destination user(s). The names of selected IC users will appear in the read-only field to the right of the button.

Message details frame

Send as Desktop Pop-up

This option determines whether or not the message will be displayed in a pop-up message box, or in the client notification area at the bottom of the client window. Checking this option displays the message in its own pop-up window.

Message Text

This box prompts for the text of the message that will be sent in response to the Alert.

Client Display Options frame

Sound checkbox

Check this box to play a sound when the message arrives.

Sound File drop list

When this drop list is enabled, you can choose a sound to play.

Speaker button

Plays the selected sound.

Icon checkbox

Check this box to associate an icon with the message.




Icon browse button

Push this button to browse for icon (.ico) files. The selected icon will appear on the button face.

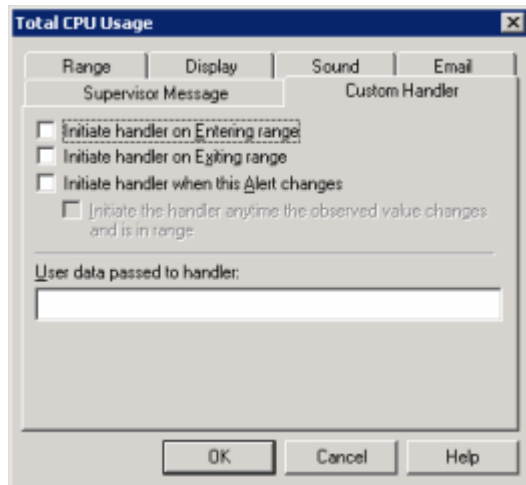
URL Checkbox

Check this box when you want the message to send a URL to the recipient. It enables the URL field so that a URL may be typed in.

Related Topics

-  [Alert Properties Dialog](#) (p. 91)
-  [Manage Alerts](#) (p. 64)
-  [Send Messages to Interaction Client users](#) (p. 76)

Custom Handler page



Use the options on this page to invoke a handler when the alert is active.

Initiate handler on Entering range checkbox

Initiates a handler when the statistical item enters the specified alert range. "Entering" the range is independent from which direction it approaches the alert range.

Initiate handler on Exiting range checkbox

Initiates a handler when the statistical item exits the specified alert range. "Exiting" the range is independent from which direction leaves the alert range.

Initiate handler when this Alert changes

Initiates the handler when anything defined for the alert changes, including changes to the icon, range, sound, notification selections, or specified values within the alert.

Initiate the handler anytime the observed value changes and is in range

Initiates the handler when the observed value of the alert changes, and is within range. Use this option carefully since it could potentially initiate many handler instances.

User data passed to handler

Any information that should be passed to the handler as payload.

OK button

Closes the dialog and puts alert properties into effect.

Cancel button

Closes the dialog without setting alert properties.

Help button

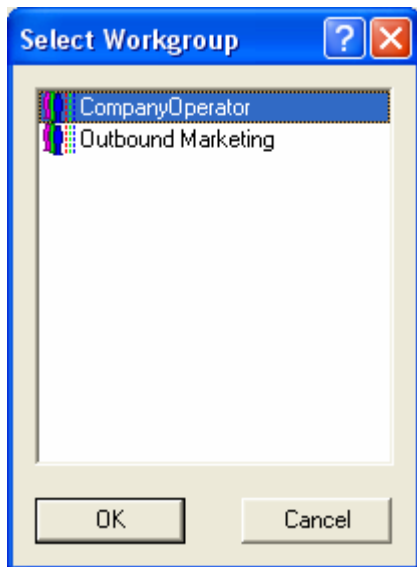
Opens this help topic.

Related Topics

 [Alert Properties Dialog](#) (p. 91)

 [Manage Alerts](#) (p. 64)

Change Caption Selection dialog



This dialog appears when the user presses a toolbar button or selects "Change [item]" from a custom menu to change the item that a view reports on. For example, you might select a different workgroup, workflow, or agent, depending upon the plug-in and view. The purpose of this dialog is to allow one item to be selected for display by the view.

Item list

This list contains the names of items that may be selected for display. This is normally a workgroup, but could be the names of workflows, campaigns, agents, etc.

OK button

Closes the dialog and changes the view selection.

Cancel button

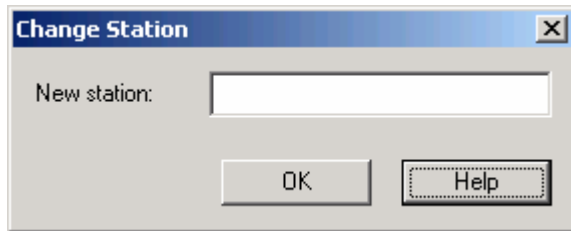
Closes the dialog without changing the view.

Related Topics

 [Change the Caption Selection](#) (p. 31)

 [Manage Views](#) (p. 29)

Change Station dialog



The Change Station command allows you to switch to a different workstation, without restarting Interaction Supervisor. Please note that Supervisor does not "Log in" to a station. A user that runs Supervisor will not be shown as logged in to that station in Interaction Administrator or Interaction client. The system makes no association between user and station. The station is used only to specify where the audio will be played for call monitoring.

Incoming calls will still be routed based on the where a user has "logged in" via Interaction client or the telephony user interface (TUI). For example, an Administrator might retrieve and place calls on one station and perform supervisory monitoring on another station. Of course they can also do both from the same station if they choose.

To change station, follow these steps:

1. Pull down the *File* menu and select *Change Station*.
2. Enter a different station name in the *New Station* field.

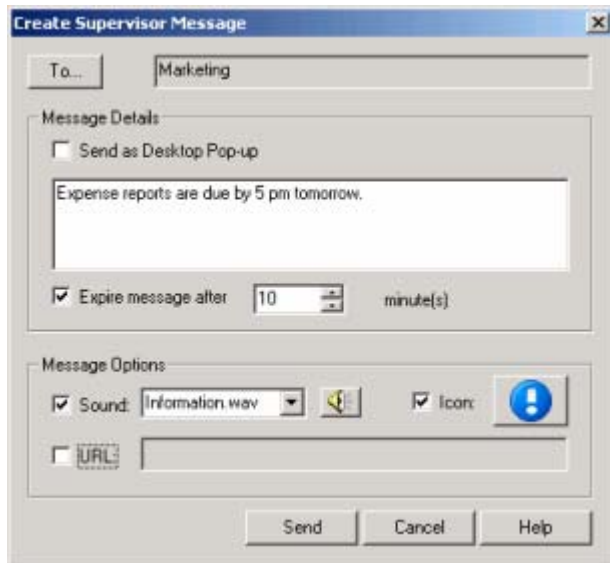
This dialog doesn't offer a Cancel button, but you can close this dialog without entering a different station, press the close box in the top right corner of the title bar.

3. Press *OK*.

Related Topics

- [Commands](#) (p. 82)
- [Dialogs](#) (p. 84)

Create Supervisor Message dialog



Use this dialog to compose and send a new Supervisor message. It appears when the [Create Message](#) (p. 78) command is invoked. For background information, see [Send Messages to Interaction Client Users](#) (p. 76).

To... button

Press this button to select Users or Workgroups that should receive this message. It opens the [Recipients](#) (p. 122) dialog. The destinations you select will appear in the read-only field to the right of the button.

Message details frame

Send as Desktop Pop-up

This option determines whether or not the message will be displayed in a pop-up message box, or in the client notification area at the bottom of the client window.

Message Text

This box prompts for the text of the message that will be sent.

Expire message after n minutes

Sets a timer that automatically removes the message from the client after a configurable number of minutes.

Message Options frame

Sound checkbox

Check this box to play a sound when the message arrives.

Sound File drop list

When this drop list is enabled, you can choose a sound to play.

Speaker button

Plays the selected sound.

Icon checkbox

Check this box to associate an icon with the message.

Icon browse button

Push this button to browse for icon (.ico) files. The selected icon will appear on the button face.

URL Checkbox

Check this box when you want the message to send a URL to the recipient. It enables the URL field so that a URL may be typed in.

Send button

Sends the message and closes the dialog.

Cancel button

Closes the dialog without sending the message.

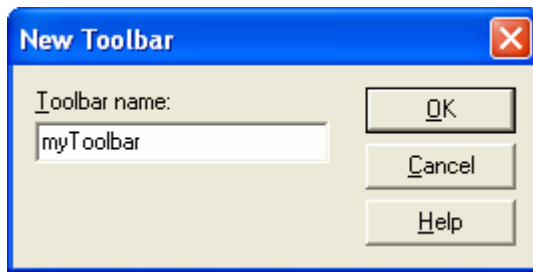
Help button

Opens this help topic.

Related Topics

 [Send Messages to Interaction Client Users](#) (p. 76)

Custom Toolbar Name dialog



This dialog appears when a new toolbar is added from the [Toolbar Options](#) (p. 128) dialog.

Toolbar name

Type a short descriptive name for the custom toolbar in this field.

OK button

Closes the dialog and creates a new toolbar with the name specified.

Cancel button

Closes the dialog without creating a new toolbar.

Help button

Opens this help topic.

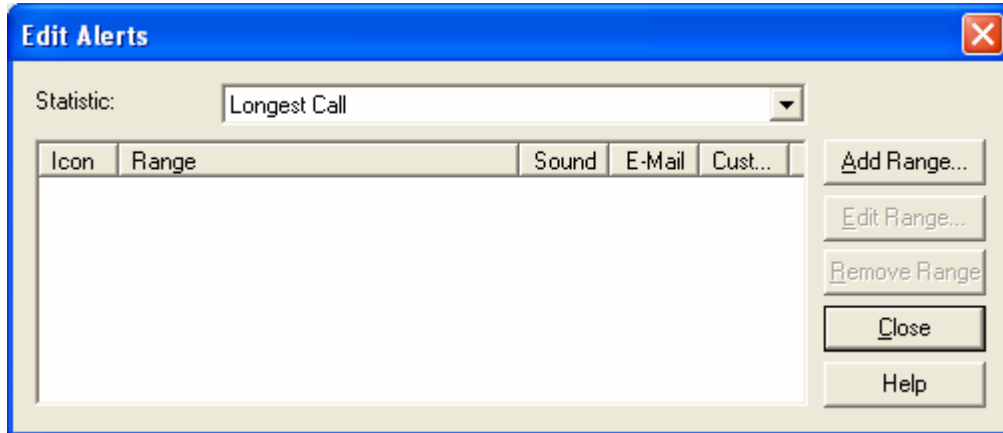
Related Topics

 [Toolbar Options dialog](#) (p. 128)

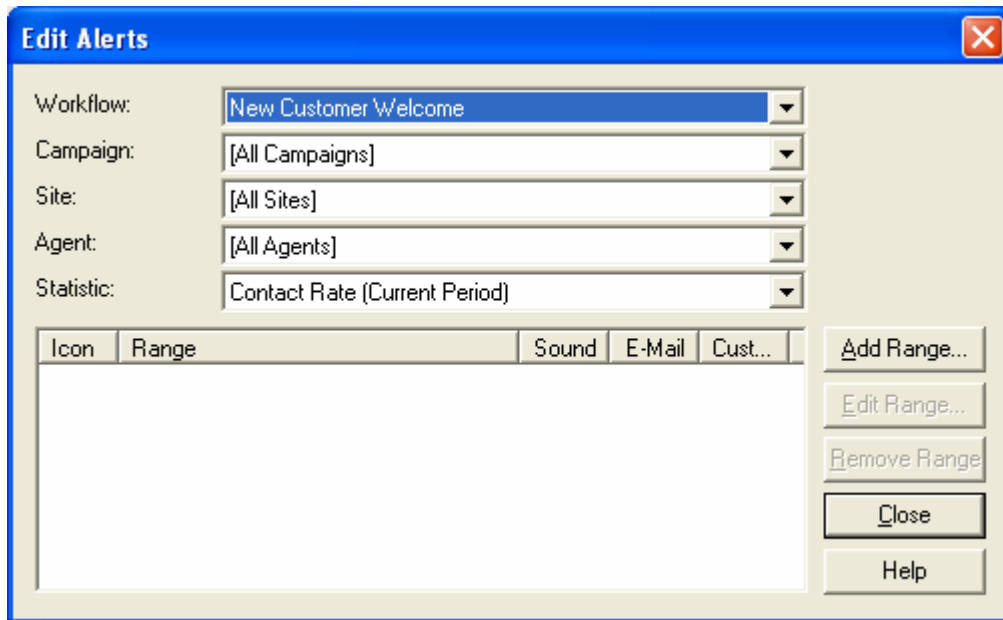
 [Manage Toolbars](#) (p. 74)

Edit Alerts dialog

The *Edit Alerts* dialog selects a statistic to base an alert on. This dialog presents different options in accordance with data items used by the active view. For example, the *Edit Alerts* dialog for a *System Statistic* is simple:



Conversely, selecting a statistic for Interaction Dialer's "Agent Detail" view is more complicated, since you must also select Workflow, Campaign, Site, and Agent information:



The point to remember is that this dialog, regardless of its appearance, has one purpose—to select the statistic to base an alert on. Once you have selected a statistic, the next step is to define its range of "From" and "To" values, icon colors, and notification details.

Add Range button

Opens the [Alert Properties](#) (p. 91) dialog, which sets a range of values for the alert, and defines the manner in which the alert will notify (by changing colors in the display, playing a sound, sending an Email, or invoking a handler).

Edit Range button

Edits Alert Properties for the selected statistic.

Remove Range button

Removes selected alerts for this statistic. When you press this button, the selected items are removed immediately—you are not prompted to confirm the operation.

Close button

Closes the dialog and puts the alert into effect.

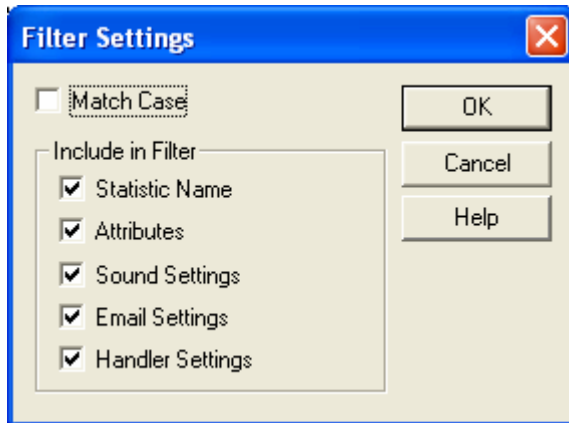
Help button


Opens this help topic.

Related Topics

 [Manage Alerts](#) (p. 64)

Filter Settings dialog



This dialog appears when the *Filter Settings* toolbar button () is pressed from the [Manage Alerts](#) (p. 116) dialog. It displays settings that affect the filtering of alerts based upon text entered in the *Look For* text box.

Match Case

When checked, the selection of alerts will be case-sensitive to match the case specified in the *Look For* text box.

Include in Filter

The settings in this group determine which data elements are compared to the search criteria entered in the *Look For* text box. The elements that can be evaluated are:

Statistic Name—name of the statistic.


Attributes—data items evaluated by the statistic. The attributes required for each statistic are defined by the plug-in.

Sound Settings—evaluate sound filename (Play on Entering, Exiting, Play While).

Email Settings—evaluate Email address associated with each alert.

Handler Settings—evaluate handler settings.

OK button

Applies selected filter settings and closes the dialog. Changes go into effect when the *Filter Now* button () is pressed.

Cancel button

Closes the dialog without changing settings.

Help button

Opens this help topic.

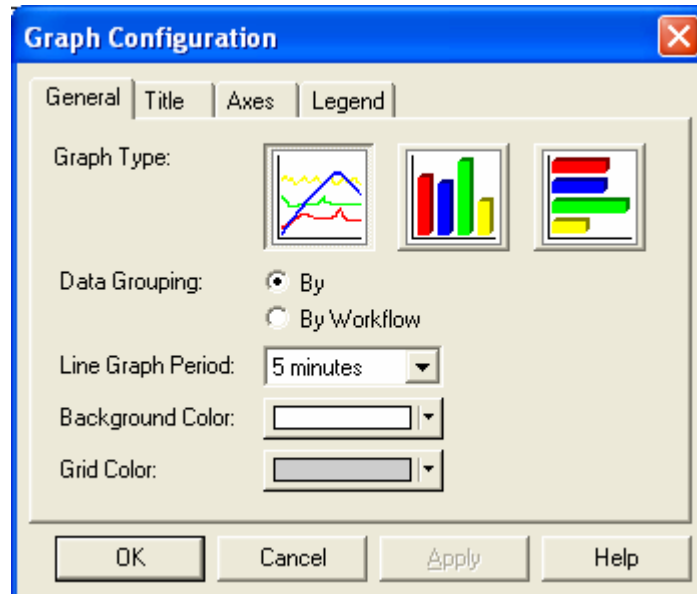
Related Topics

 [Manage Alerts dialog](#) (p. 116)

Graph Configuration dialog

The [Graph Configuration dialog](#) (p. 109) configures all aspects of a graph, including its type, grouping, period, colors, title, axes, and legends. Tabs on this dialog place these options at your fingertips.

General page



Options on the *General* page manage the appearance of the graph:

Graph Type buttons

These options change the graph type to line, vertical bar, or horizontal bar.

Data Grouping radio buttons

These radio buttons control the manner in which statistics are aggregated. The specific grouping options vary by plug-in and view.

Line Graph Period list box

Specifies the length of time for which statistics should be graphed for a line chart.

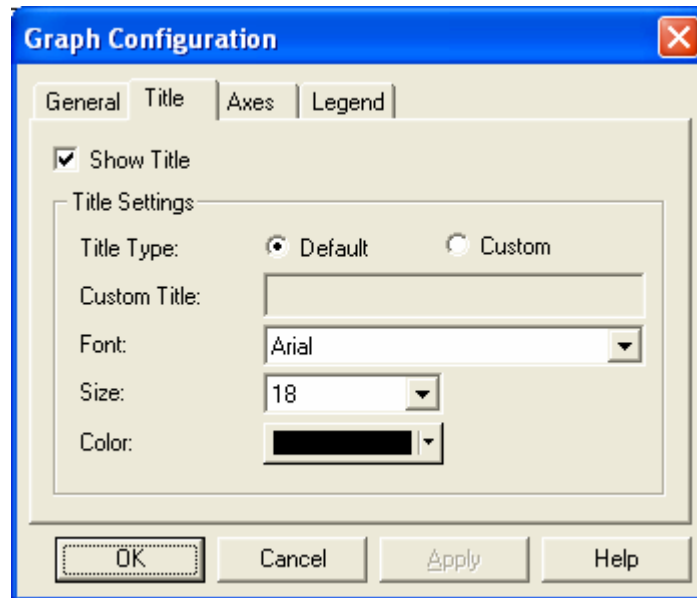
Background Color list box

Selects the background color of the graph.

Grid Color list box

Selects the color of lines in the graph.

Title page



Options on the Title page manage the graph's title, font, size and color.

Show Title checkbox

When checked, displays the title of the graph.

Title Type radio buttons

Select Default to use a default title, or select Custom to define a custom title.

Custom Title field

When Title Type is Custom, you can enter a custom graph title in this field. Otherwise this field is disabled and is not used.

Font list box

Selects the title font.

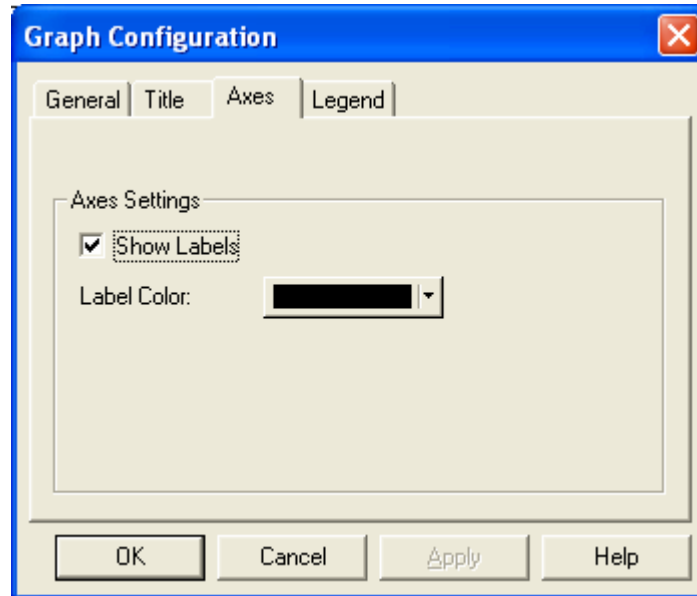
Size list box.

Selects the title font size.

Color list box.

Selects the title color.

Axes page



Options on this page manage the display of labels along the axes of the graph.

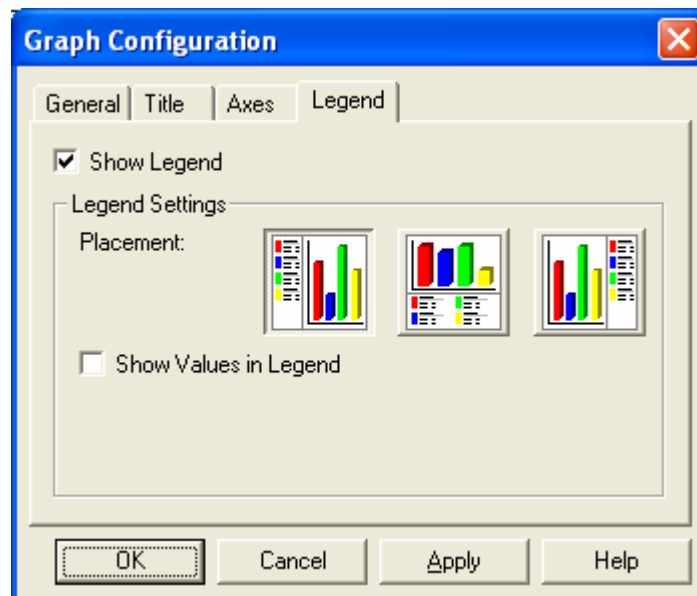
Show Labels checkbox

This option is checked by default, so that labels appear along the axes of the graph.

Label color list box

Selects the color of axes label text.

Legend page



Options on the Legend page affect the display of legends.

Show Legend checkbox

Controls whether or not the graph has a legend.

Legend Settings buttons

These buttons position the legend left, below, or to the right of the graph.

Show values in Legend check box

Values appear in the legend when this option is checked.

OK button

Closes the dialog and applies changes to the graph.

Cancel button

Closes the dialog without applying changes to the graph.

Apply button

Applies changes to the graph without closing the dialog. This allows you to preview the result of a configuration change.

Help button

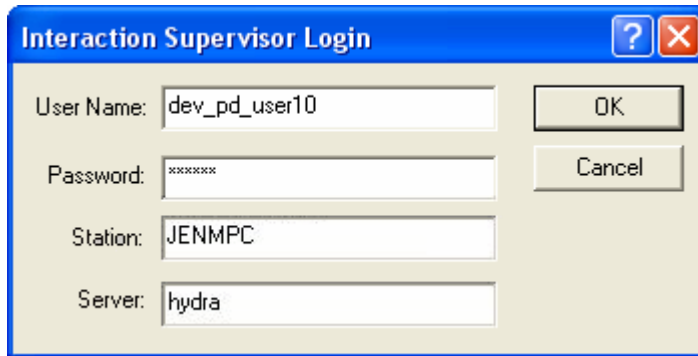
Opens this help topic.

Related Topics

 [Open the Graph Configuration dialog](#) (p. 56)

 [Manage Graphs](#) (p. 53)

Interaction Supervisor Login dialog



The screenshot shows a standard Windows-style dialog box titled "Interaction Supervisor Login". It features a blue title bar with a help icon (question mark) and a close icon (red X). The main area is light gray and contains four text input fields stacked vertically. The first field is labeled "User Name:" and contains the text "dev_pd_user10". The second field is labeled "Password:" and contains seven asterisks "*****". The third field is labeled "Station:" and contains "JENMPC". The fourth field is labeled "Server:" and contains "hydra". To the right of the input fields are two buttons: "OK" and "Cancel".

This dialog prompts for information used to authenticate the user.

Interaction Supervisor can be started using [command-line arguments](#) (p. 23) that eliminate the display of this prompt. See [Start Interaction Supervisor](#) (p. 22) for details.

User Name field

Enter a valid Interaction Center User Name in this field.

Password field

Type the password that corresponds to the user name entry.

Station field

The IC station name defined in Interaction Administrator for the current user.

Server field

Name of this user's IC server.

OK button

Closes the dialog and attempts to authenticate the user. If authentication fails, Supervisor redisplay the Login dialog, so that you can correct a typing error or login using a different ID.

Cancel button

Closes the dialog without attempting to authenticate the user.

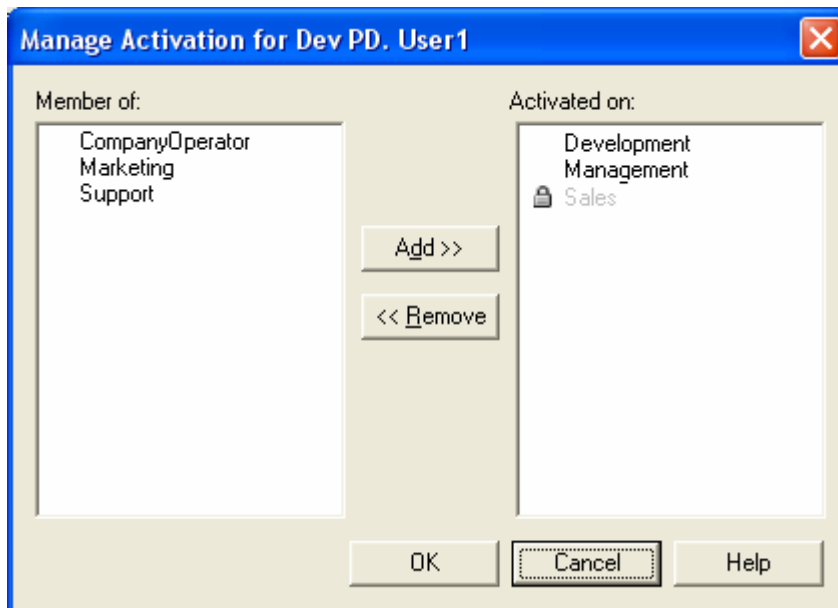
Related Topics

 [Start Interaction Supervisor](#) (p. 22)

Manage Agent Activations dialog

The IC's *Agent Activation* feature dynamically manages which workgroups an agent will receive calls for. Agents can be deactivated from a workgroup while still maintaining membership in the workgroup. Deactivated agents do not receive calls for that workgroup. This helps supervisors to effectively and flexibly manage agents without having to change workgroup membership, and helps many organizations better meet service-level goals.

The *Manage Agent Activations* dialog allows a Supervisor to see which workgroups an individual user is activated on, and then adjust their activation settings as appropriate. It lists the workgroups that an agent belongs to, and allows the agent to be set as active or inactive within each workgroup. The Supervisor must have the right (assigned in Interaction Administrator) to activate or deactivate members of the workgroup—note the padlock icon in the figure below. It indicates that the Supervisor does not have rights to activate or deactivate members of the *Sales* workgroup.



The availability of an agent to receive calls for a particular workgroup is determined by whether or not he or she is in an active or inactive state within that workgroup. Agents will only receive calls for workgroups in which they are active. An agent is eligible to receive an ACD call if he or she:

- Is logged into Interaction Client
- Sets his or her workgroup state to Active
- Sets his or her status to Available

Workgroup activation allows an agent to be a member of multiple workgroups, while at the same time allowing the supervisor to specify the workgroup queues for which he or she will take calls.

Member of list

This list contains the names of workgroups that the agent is not active in. The Agent will not receive calls for workgroups in this list.

Activated on list

This list contains workgroups that the agent is active in. The agent will receive calls for workgroups in this list.

Add button

Adds selected workgroups to the *Activated on* list, so that the agent will receive calls for those workgroups.

Remove button

Moves selected workgroups from the *Activated on* list to the Member of list so that the agent will no longer receive calls for those workgroups.

Ok button

Closes the dialog and places workgroup activation settings into effect.

Cancel button

Closes the dialog without applying changes.

Help button

Opens this help topic.

Related Topics

 [Change an Agent's workgroup activation](#) (p. 75)

Manage Alerts dialog



This dialog lists all alerts and allows any alert to be edited or removed. It appears when *Manage Alerts* is selected from the *View* menu. The data columns in the list are sortable, but are not configurable. You cannot add or remove columns.

Category drop list

Alerts can be filtered by category. An alert category is a logical grouping of statistics that have the same Stat Watcher attributes associated with them. Any number of alert categories can be defined by a supervisor plug-in. This drop list allows a specific alert category to be selected. Two additional selections are available: [All Alerts] and [Overview].

[All Alerts]

When [All Alerts] is selected, the list control displays each alert category and the number of alerts configured for each category. The columns displayed are:

Statistic—The stat that the alert is based on.

Category—The category of alerts.

Attributes—One column is created for each attribute required by the statistic. The attributes required for each statistic are defined by the plug-in.

Range—The condition under which the alert is active.

Display—The appearance of text when the alert is active.

Sound—Indicates that a sound is configured to play when the alert is active.

E-Mail—Indicates that an Email is configured to be send when the alert is active.

Handler—The number of alerts configured that will cause a handler to fire.

[Overview]

This selection displays counts for each alert category and for [All Alerts]. The columns displayed are:

Category—The category of alerts.

Total—The total number of alert configured for the category.

Red—The number of red alerts configured for the category.

Yellow—Then number of yellow alerts configured for the category.

Green—Then number of green alerts configured for the category.

Sound—The number of alerts configured that will cause the system to play a sound.

E-Mail—The number of alerts configured that will cause IC to send an Email Alert.

Handler—The number of alerts configured that will cause a handler to fire.

Any Category selection

When a category name is selected, the control lists all alerts associated with that category. The columns displayed are:


Statistic—The stat that the alert is based on.

Attributes—One column is created for each attribute required by the statistic.

Range—The condition under which the alert is active.

Display—The appearance of text when the alert is active.


Sound—Indicates that a sound is configured to play when the alert is active.
E-Mail—Indicates that an Email is configured to be send when the alert is active.
Handler—The number of alerts configured that will cause a handler to fire.

Overview button 


Pressing this button is equivalent to selecting [Overview] from the *Category* drop list. It tells the list control to display counts for each alert category and for [All Alerts].

Open Category button 

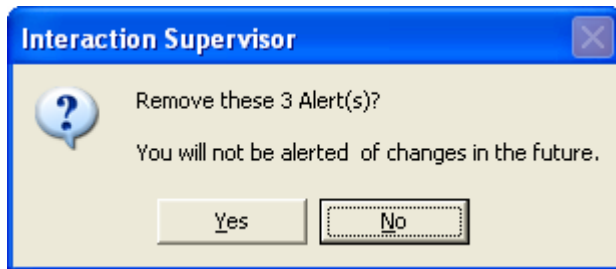
Alerts can be broken into categories; for example, Workgroup, Agent, Queue, and Workflow are category codes. This button is only active when a category is selected in the overview. It opens the selected alert category, which causes the overview to display each category and how many alerts are in each category, so that the user may drill into that category to see the actual alerts. The Open Overview command is also available from the context menu that appears when a category is right-clicked.

Edit Alert button 

To edit the selected alert, press this button or double-click a row in the list. This opens the [Alert Properties](#) (p. 91) dialog, so that you can modify the alert.


Remove Alert(s) button 


Removes selected alerts. The operation must be confirmed before alerts are actually removed. If you press *No*, alerts are not removed.



Removal of alerts can be performed on a multiple selections, or even from the [Overview] to remove entire categories of alerts at once. However, only one alert can be edited at a time.

Look For text box

The text box works in combination with *Filter Now*, *Clear Filter*, and *Filter Settings* buttons. The string that you enter in this list is used to select a subset of listed alerts. To filter the list, enter a search string in the text box and then press the *Filter Now*  button. The list will update to display only those alerts that match the search string.

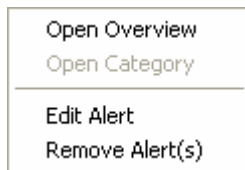
 *Filter Now*—selects alerts that match the string entered in the *Look For* text box.

 *Clear Filter*—removes filter criteria so that all alerts appear in the list.

 *Filter Settings*—opens the [Filter Settings](#) (p. 108) dialog.

Context menu

Right-clicking a row displays context menu commands.



Open Overview tells the list control to display counts for each alert category and for [All Alerts].

Open Category is available in [Overview] display mode. This command tells the list control to display only alerts that match the category of the selection.

Edit Alert opens an alert for editing.

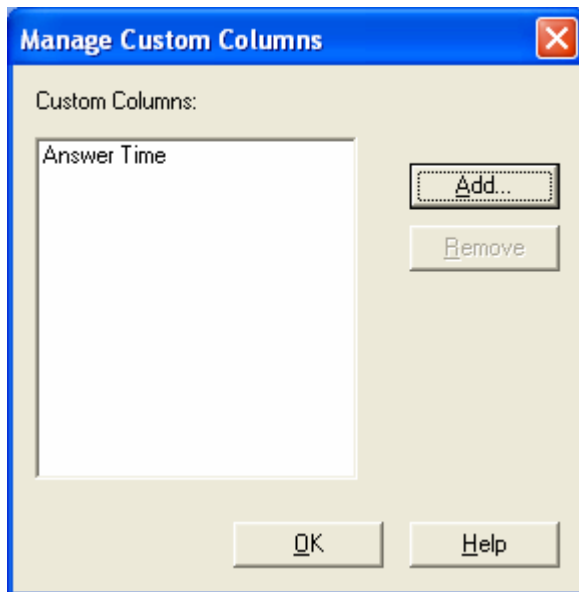
Remove Alert(s) removes alerts from the system.

Related Topics

 [Use the Manage Alerts dialog](#) (p. 73)

 [Manage Alerts](#) (p. 64)

Manage Custom Columns dialog



This dialog appears when the *Custom Columns* button is pressed from the [Add / Remove Queue Columns dialog](#) (p. 89). It adds or removes custom columns to the set of columns that can be displayed by a Queue Monitor control.

Add button

Opens the [Add Custom Column dialog](#) (p. 87) , so that you can define a custom column based upon a single queue attribute, or custom attribute.

Remove button

Removes the selected column from the list of Custom Columns.

OK button

Closes the dialog and applies changes made.


Help button

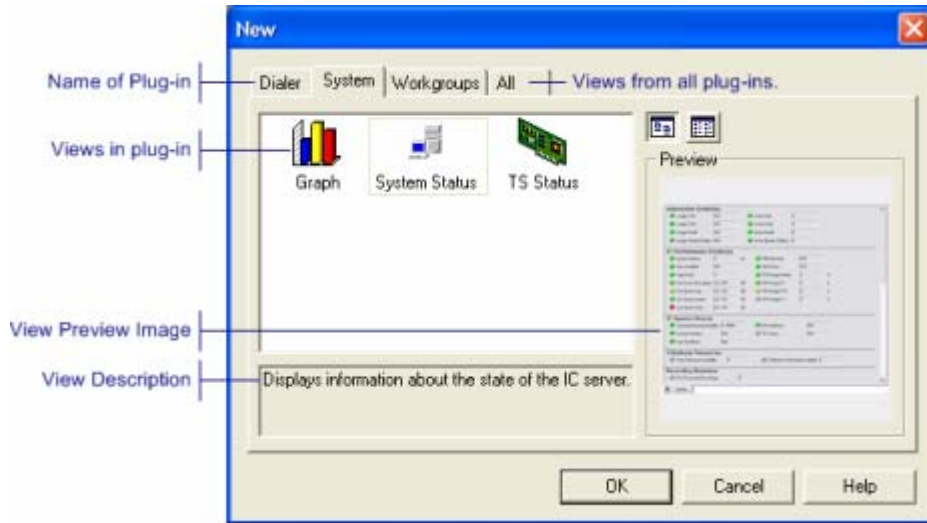
Opens this help topic.

Related Topics

-  [Add custom columns to a Queue Monitor Control](#) (p. 40)
-  [Use Queue Monitor Controls](#) (p. 34)

New View dialog

This dialog box adds a new [view](#) (p. 8) to the workspace. It appears when you press *CTRL + N*, select *New...* from the *File* menu, or click the *New* button () on the Interaction Supervisor toolbar.



Name of Plug-in tabs

Each loaded plug-in has its own tab page on this dialog, which lists views that you can add to the workspace. The *All* tab lists views for all loaded plug-ins, prefixed by plug-in name.

Views in plug-in list

This list displays the name of each view and its icon. The icons in this list are small or large, depending upon whether the *List* or *Large Icons* button is pressed. Each item in this list represents a view that you can add to the workspace.

View Preview image

This pane displays an image of the selected view.

View Description

This pane displays a short description of the selected view.

Large Icons button

This button is pressed by default. It displays the list of views using large icons.

List button

This button displays the list of views using small icons.

OK button

Closes the dialog and creates the selected view.




Cancel button

Closes the dialog without creating a new view.

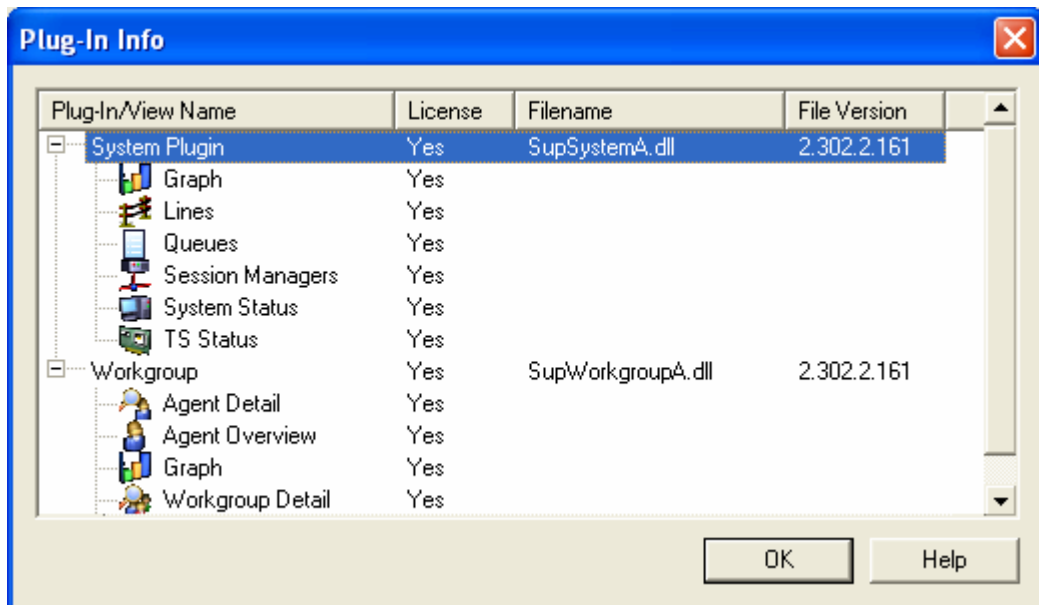
Help button

Opens this help topic.

Related Topics

-  [Add a view to the workspace](#) (p. 30)
-  [Manage Views](#) (p. 29)
-  [View, Menu, and Toolbar Integration](#) (p. 10)

Plug-in Information dialog



This dialog displays the name of each plug-in that Supervisor detects at startup, and indicates whether or not you have access rights to a plug-in and its views. This dialog appears when *Plug-In Info* is selected from the *Help* menu.

Plug-in/View Name column

This column lists the name of each plug-in that Supervisor detected at startup. The row can be expanded to reveal the names of views.

License column

This column indicates whether or not your station has rights to use the plug-in or view. Yes indicates that you do, No indicates that you do not, and Partial (at the plug-in level) indicates that some views are not available to you.

In this release, access to individual views cannot be restricted. If you have rights to the plug-in, you may access all of its views. More granular control over view access may be provided in a future release.

Filename column

Name of the plug-in DLL.

File version

Version number of the plug-in DLL.




OK button

Closes the dialog.

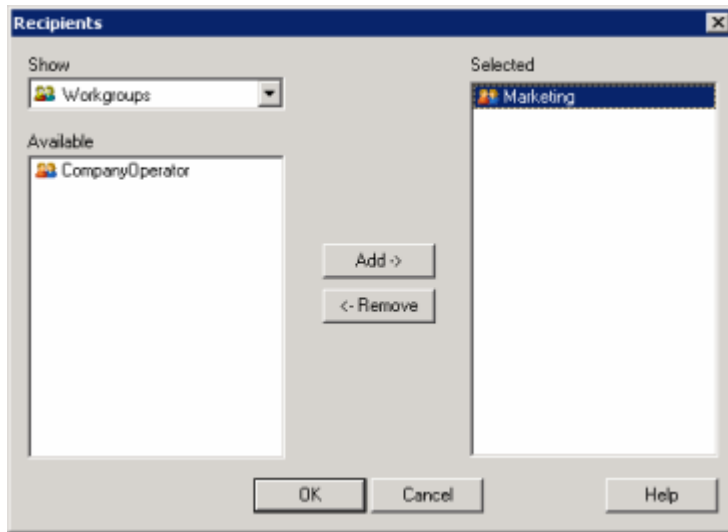
Help button

Opens this help topic.

Related Topics

-  [Display rights assigned to you](#) (p. 17)
-  [Required access rights](#) (p. 13)
-  [Recommended access rights](#) (p. 15)

Recipients dialog



Use this dialog to specify where a Supervisor message should be sent. It appears when the *To* button is pressed from the Create Supervisor Message dialog.

Show drop list

This control displays a list of Workgroups, User names, or both in the Available drop list.

Available list box

Select the names of Users or Workgroups from this list. Then press *Add* to move them to the Selected list.

Selected list box

This list box contains the names of Users or Workgroups that will receive the message.

Add button

Adds items selected in the Available list box to the Selected list box, so that they will receive the message.

Remove button

Adds items selected in the Selected list box to the Available list box, so that they will not be sent the message.

OK button

Closes this dialog, saving the selections that you have made.

Cancel button

Closes this dialog without saving selections.

Help button

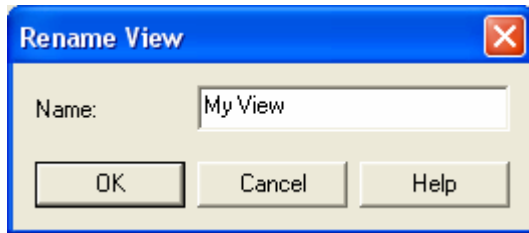
Opens this help topic.

Related Topics

 [Create Supervisor Message dialog](#) (p. 103)

 [Send Messages to Interaction Client users](#) (p. 76)

Rename View dialog



This dialog appears when you rename a view using a method documented in the [rename a view](#) (p. 33) procedure.

Name field

Enter a descriptive name for the view in this field. This name will appear on the view's tab page.

OK button

Closes the dialog and applies the new name to the view.

Cancel button

Closes the dialog without applying a new name to the view.

Help button

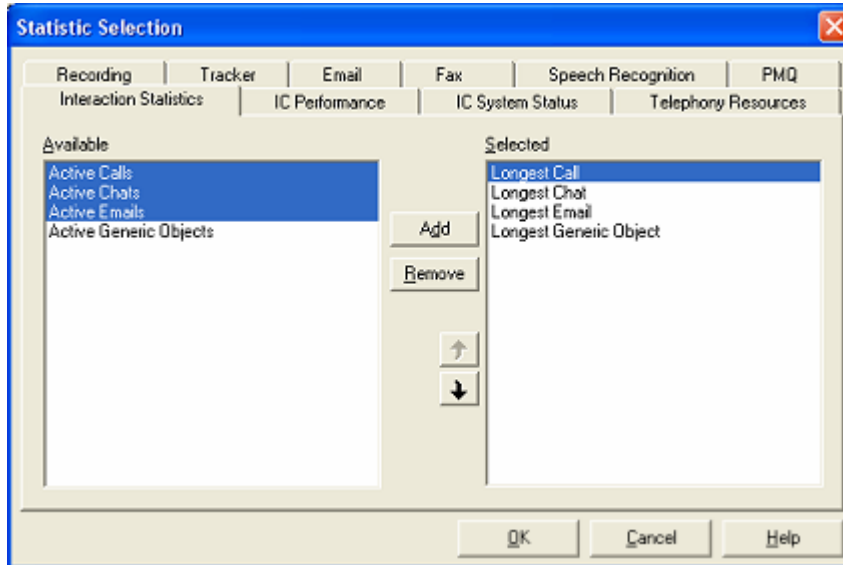
Opens this help topic.

Related Topics

-  [Rename a View](#) (p. 33)
-  [Manage Views](#) (p. 29)

Statistic Selection dialog

This dialog selects statistics to include or exclude from a view. Its appearance varies by plug-in and view. The dialog may offer supplemental tabs to organize statistics by category.



In general, *Statistic Selection* dialogs have several features in common:

- They provide two lists—one that displays data items selected for display in the view, and another that list items that you can add to the view.
 - You can press an *Add* button to move selected items from the *Available* list to the list of items selected for display.
 - Conversely, you can press a *Remove* button to moves selected items to the *Available* list. This prevents them from appearing in the view.
 - Up and Down buttons change the order of items in the Selected list, and control the display order of items in the view.
- If the view provides statistics for multiple view categories, controls may appear on tab pages.

OK button

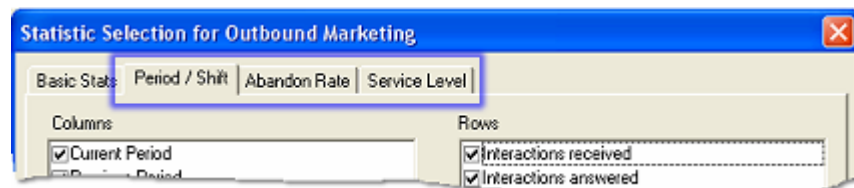
Applies selections and closes the Statistic Selection dialog.

Cancel button

Closes the dialog without applying changes.




Supplemental Category Tabs

Supplemental tabs on the dialog, if any, are implemented by the plug-in and serve to categorize statistics so that you can locate them more easily.

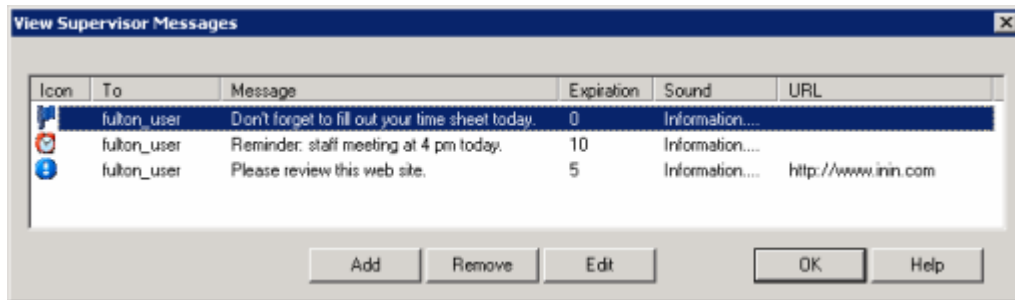


You may need to refer to help for a plug-in module for more information about the statistics that you can select.

Related Topics

-  [Add or remove statistics from a tabular view](#) (p. 32)
-  [Add or remove statistics from a graph view](#) (p. 57)
-  [Manage Views](#) (p. 29)

View Supervisor Messages dialog



Interaction Supervisor automatically saves messages on the IC server until they are deleted or expire. This dialog lists each message and the options selected when the message was composed or last sent. Use this dialog to add, edit, or remove messages.

Supervisors can use this dialog to review all messages in the system, to edit and remove messages, as well as create new ones. Pressing *Add* or *Edit* opens the [Create Supervisor Message](#) (p. 103) dialog, unless it is an alert message, in which case the proper Edit Alert dialog will pop opened to the [Messaging tab](#) (p. 98).

This dialog appears when the toolbar button is pressed, or when the *View > Supervisor Messages* command is invoked.

Columns listed

Icon column

This column displays the icon associated with each message.

To column

This column lists the recipients of each message.

Message column

This column lists the body text of each message.

Expiration column

This column displays the amount of time that the message will be held in the client before it is automatically removed. If an expiration time was not set, zero is displayed to indicate that the message will be held until the user deletes or, or until it is deleted by an Administrator using this dialog. When a message expires, it disappears from this list.

Sound column

This column displays the name of the sound file that plays when the message is received.

URL column

If a *Universal Resource Locator* (e.g. a web address) is associated with the message, it is displayed here.

Add button

[Composes a new Supervisor message](#) (p. 78).

Remove button

[Removes a saved message](#) (p. 80). Use this feature carefully, since you are not asked to confirm the removal operation.

Edit button

Opens the message so that you can [reuse](#) (p. 79) it.




OK button

Closes the View Supervisor Messages dialog.

Help button

Opens this help topic.

Related Topics

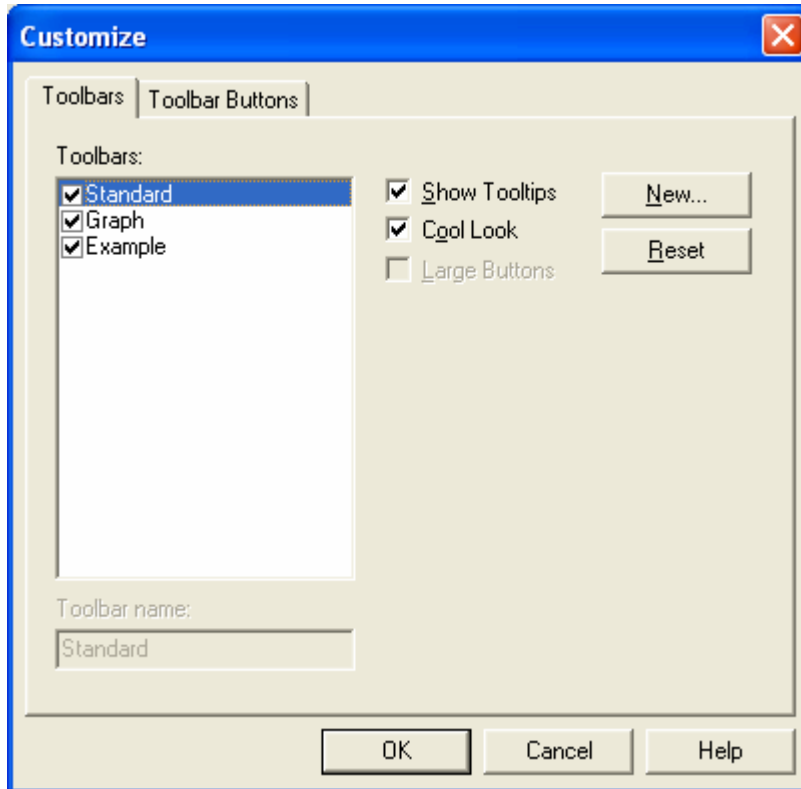
-  [Send Messages to Interaction Client users](#) (p. 76)
-  [Allow Supervisor Message Creation](#) (p. 15)
-  [Supervisor Alert Message Page](#) (p. 98)

Toolbar Options dialog

The *Toolbar Options* dialog appears when the *View > Toolbars* command is issued. This dialog allows users to customize toolbars by dragging and dropping buttons onto an existing toolbar.

Toolbars tab

Options on its Toolbars tab determine which toolbars are visible, and their visual appearance.



Toolbars list

This list displays the names of available toolbars, including toolbars added by plug-ins. Toolbars that are checked in this list are displayed in the user interface.

Show Tooltips checkbox

When this option is checked, short descriptions of each toolbar function are displayed when the mouse hovers over a button. Unchecking this option disables display of Tooltips.

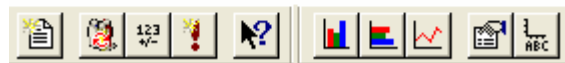
Cool Look checkbox

This option determines whether all toolbar buttons have button borders. When checked, buttons are drawn without borders.

with "Cool Look"



without "Cool Look"

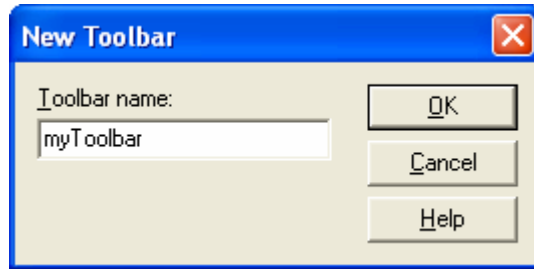


Large Buttons checkbox

Displays large toolbar icons if the plug-in provides them. This option is disabled when large icons are not available.

New button

Creates a custom toolbar that you can position anywhere on the screen. Type a short descriptive name and press *OK*.



To add buttons to this toolbar, select the [Toolbar Buttons tab](#) (p. 130). Then drag and drop toolbar icons to your custom toolbar.

Reset button

Resets the selected toolbar to its default settings. This removes icons that added from other toolbars.

Delete button

If the selected toolbar is a custom toolbar, the caption of the Reset button is changed to Delete, so that you can remove a custom toolbar.

Toolbar Name field

This field displays the name of the toolbar. It is read-only unless a custom toolbar is selected in the list. You can rename a custom toolbar by editing its name in this field.

OK button

Closes the Toolbar Options dialog and puts changes into effect.

Cancel button

Closes the Toolbar Options dialog without putting changes into effect.

Help button

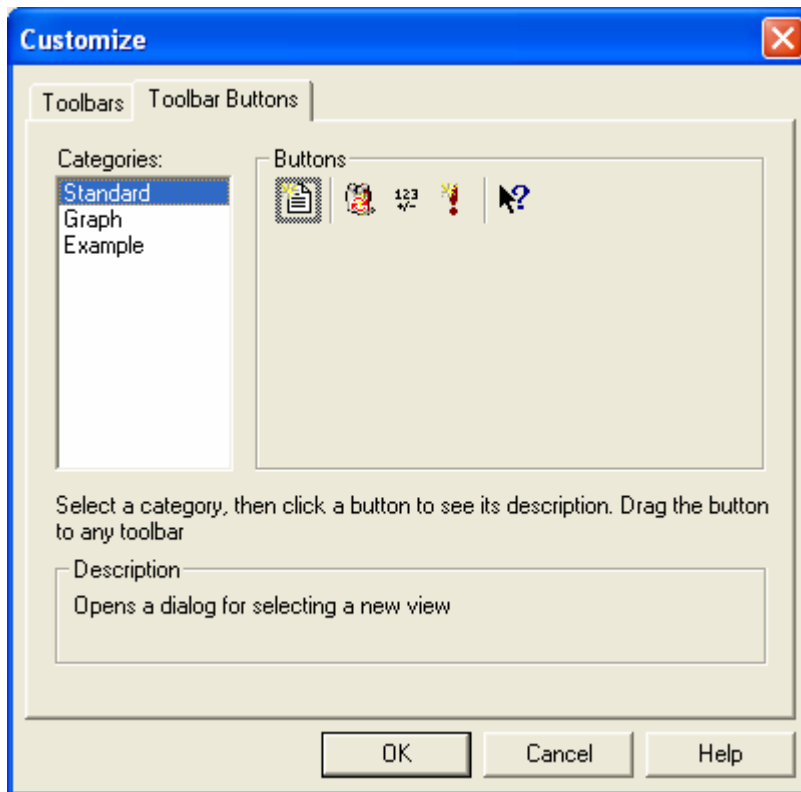
Opens this help topic.

Related Topics

 [Toolbar Options dialog \(Buttons page\)](#) (p. 130)

 [Manage Toolbars](#) (p. 74)

Toolbar Options dialog (Buttons page)



This page of the Toolbar Options dialog allows toolbar buttons to be dragged and dropped between toolbars.

Categories list

This list displays the names of available toolbars. Buttons are displayed for the toolbar that is selected in this list.

Buttons frame

This frame contains buttons for the selected toolbar. These buttons can be dragged and dropped to custom or built-in toolbars.

Description

Short, read-only description of the selected toolbar button.

OK button

Closes the Toolbar Options dialog and puts changes into effect.

Cancel button

Closes the Toolbar Options dialog without putting changes into effect.

Help button

Opens this help topic.

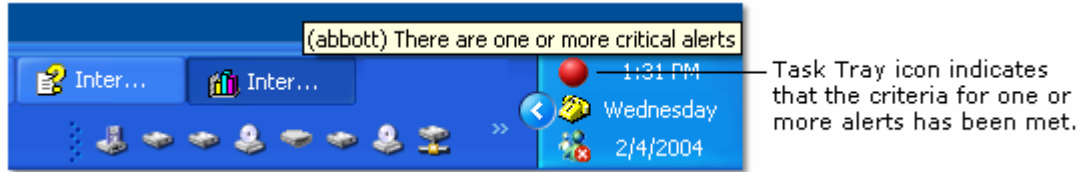
Related Topics

 [Toolbar Options dialog](#) (p. 128)

 [Manage Toolbars](#) (p. 74)

Tray Icon

At [startup](#) (p. 22) , Interaction Supervisor creates a tray icon that indicates whether any alerts are active. Alerts notify when a statistic is in or out of a chosen range, based on statistical items or values on the IC Server. If there are no active alerts, the tray icon is gray.



Once you [set an alert](#) (p. 65) and it becomes active, the tray icon changes to the color assigned to the alert. If multiple alerts are active, the color of the worst-case alert is displayed. The tray icon provides an indicator of alerts when Interaction Supervisor is minimized. The tray icon also provides a context menu.



These commands are available when the tray icon is right-clicked:

Help

Launches Interaction Supervisor online help.

Show Active Alerts

Opens the [Active Alerts](#) (p. 85) dialog box. It displays the status of the current alerts you have set.

Show Supervisor

Displays Interaction Supervisor as the active window with focus.

Exit Supervisor

Closes Interaction Supervisor.

Related Topics

 [Manage Alerts](#) (p. 64)

Glossary

To use Interaction Supervisor effectively, it helps to understand the terms listed on this page.

Abandoned Call

An abandoned inbound call is a call that was disconnected before an agent connection could be established. These are usually calls that end when a caller decides not to wait for an agent. However, abandonment applies to outbound calls also. An abandoned outbound call is a call answered by a live contact that was disconnected before an agent could communicate with the party. For example, Interaction Dialer may abandon calls if the pace of outbound dialing is too aggressive. By default, Interaction Dialer disconnects calls when no agents are available. In most cases, the percentage of abandoned calls is extremely low compared to the total volume of calls. But if pace is set too high, the Outbound Server places additional calls, raising the possibility that some calls will be abandoned. Abandoned calls are sometimes called nuisance calls, since most people find it irritating to be hung up on. Nuisance calls can be frightening to older individuals, especially those living alone. Consequently, it is a good idea to monitor the number of abandoned calls, so that the pace of outbound calling can be adjusted to keep nuisance calls to a minimum.

Alert

An Alert notifies when a statistic is in or out of a user-defined range, based on statistical items or values on the IC Server. When an alert becomes active, it can play a sound, change the color of an icon, send Email, or initiate a handler.

ANI

ANI stands for Automatic Number Identification. ANI is often called Caller ID. All phone calls contain the numbers of the dialing phone. Those numbers can be displayed on a screen or used by the receiving phone system to tell the call recipient useful information.

Call Attribute

A call attribute is a piece of information about an object that travels with it throughout the Interaction Center. For example, one standard attribute of a call object is the telephone number of the person who placed the call. A call object can have as many attributes as are needed. Attributes stay with a call until it is disconnected. The IC supports application programming interfaces (API's) that provide access to call object attributes. Dynamic Data Exchange (DDE) is commonly used to accomplish this, as is the Interaction Client COM API. Attributes typically store information that is passed to a database or a third-party application. For example, the IC can be set up to "pop" a database application when an incoming call arrives at an agent's workstation. For more information about DDE and other APIs, see the *System APIs* section of the master documentation library on your IC server. Likewise, the *Interaction Attributes Reference Guide* (attrib.chm) in the *System APIs* section of the documentation library describes attribute names that are reserved by IC. If you assign data to a standard IC attribute, you could potentially affect the execution of a handler. The Object Attributes Reference Guide identifies attributes whose value you should not change.

Customer Interaction Center (CIC)

The Customer Interaction Center (CIC) is designed for sophisticated contact centers managing inbound, outbound, or blended interactions. CIC provides skills-based routing not only for telephone interactions, but faxes, Emails, text chats, Web call-back requests, and voice over IP calls. CIC can support up to several hundred agents per site, and offers optional pre and post-call routing across multiple locations. And it makes screen popping a breeze, with easy interfaces to products from leading CRM vendors such as Siebel, Pivotal, Onyx, Peoplesoft, and many more.

DNIS

Dialed Number Identification Service (DNIS) is a feature of digital T-1 and ISDN lines (like 800 and 900 lines) that provides the number the caller dialed. DNIS is a system by which IC can determine what number a caller dialed.

Enterprise Interaction Center (EIC)

The Enterprise Interaction Center (EIC) is targeted at the needs of businesses, dotcoms, not-for-profits, etc. EIC can serve the 20-person startup just as well as the Fortune 500 company with five thousand

people at headquarters and dozens of offices around the world. EIC provides auto attendant, unified messaging, IVR, Email auto-response, presence management, conferencing, and much more.

IC Server

The Interaction Center (IC) is a client/server software product that transforms a Windows NT server into a comprehensive communications system. The IC server answers and processes calls.

Handler

Handlers are programs that the IC Server executes to respond to an event, such as an incoming call. Handlers are created using Interaction Designer, the visual programming tool included with Interaction Center. A handler performs an action or actions in response to the occurrence of some event. A handler is simply a collection of steps that are organized and linked to form a logical flow of actions and decisions.

Interaction Attendant

The graphical tool for configuring and maintaining IC's auto attendant.

Interaction Designer

The IC graphical application development tool for creating, debugging, editing, and managing handlers and subroutines.

IVR

Interactive Voice Response (IVR) allows phone users to use their telephone keypad as a keyboard to input values in response to voice prompts played by a computer.

Notifier

The Notifier is an Interaction Center module that acts as a communication center for all other modules. It listens for events generated by other modules and notifies other interested modules that the event has occurred.

Queue

Queues are containers for calls and other types of interactions that can be processed. Each Interaction Client user has a user queue. Each workgroup, such as marketing or support, has a workgroup queue. Stand-alone phones not connected to PCs and fax machines have station queues.

Queue Transfer

Transfers a call directly to a user, workgroup, or station queue.

StatWatcher

StatWatcher is a subsystem of IC that contains information about all statistics in the IC system. StatWatcher is a generic "watcher" of statistic-related notification messages. Interaction Supervisor plug-ins receive statistical data from StatWatcher.

Station Groups

Station groups are groups of phones in break rooms, conference rooms, and other public areas.

Station Queue

A queue where interactions are placed when they are to be processed by a station.

Supervisor Plug-In

A Supervisor plug-In is a set of custom Supervisor View objects that are contained in a separate DLL. For each view object type it contains, the Plug-In provides an interface to access the menu, toolbar, doc, view, help, and other information needed by Supervisor to host the Plug-In.

Trunk

A trunk is a communications line that connects two switching systems, such as the equipment in a telephone company's central office, and the PBX in a company.

User Queue

A queue where interactions (such as calls and chat sessions) intended for an individual user are routed.

View

A *view* is a window that displays data. Information can be displayed in columns, or rendered as a graph. Views can be positioned anywhere on the screen, or docked within Supervisor's *workspace*.

Voice Mail Transfer

Allows a caller to leave a voice mail for a specific queue.

Workgroup

In Interaction Center, a workgroup is a defined group of users related by function, department, project, or other organization. Workgroups can have extensions and queues, which enable all members of a workgroup to receive calls passed to the workgroup. An *ACD Workgroup* is a workgroup queue that receives ACD calls and chat sessions.

Change Log

Interaction Supervisor documentation was updated for IC 2.4 as follows:

1. Added a *Tech Support Note* to the topic titled "Exit Supervisor". It explains how to remove the user's Supervisor configuration registry key, should the key become corrupted. This problem is extremely rare, having occurred only once.
2. Added a new IC Performance statistic named "Average Latency" to the System Monitoring Guide.
3. Renamed some statistics in the documentation to better match labels displayed in Supervisor:
 - "Total CPU Utilization" is now "Total CPU Usage".
 - "System Host Tool Connection Errors" is now "Host Tool Connection Errors"
 - "System Host Tool Other Errors" is now "Host Tool Other Errors"
 - "Transaction Server Avg. Time per Successful Transaction" is now "Transaction Server Average Successful Transaction Time"
 - "Tracker Server Failed Transactions" is now "Failed Transactions"
 - "Tracker Server Posted Transactions" is now "Posted Transactions"
 - "Tracker Server Notifications" is now "Interaction Segment Notifications"
 - "Interaction Tracker Statistics" was renamed "Tracker Server Statistics"
 - "Transaction Server Executed Transactions" is now "Executed Transactions"
 - "Transaction Server Failed Transactions" is now "Failed Transactions"
 - "Maximum Speech Recognition Sessions" is now "Peak Number of Recognition Sessions"
 - "IP Connected to Database" is now "IP is Connected to Database"
 - "IP Server Connected to Database" is now "IP Server is Connected to Database"
 - "Admin Server Connected to Database" is now "Admin Server is Connected to Database"
 - "StatServer Connected to Database" is now "StatServer is Connected to Database"
 - "Admin Server PMQ is persisting to disk" is now "Admin Server's PMQ is persisting to disk"
4. Added a new statistic category: "Transaction Server statistics". These statistics indicate the overall health of Transaction Server—a generic transaction server used for recording and logging.
5. Help context strings for "Unlicensed Recordings (Today)" and "Unlicensed Recordings (Last Hour)" were swapped. That was corrected so that "What's This" help will open the correct user assistance.
6. Added a new statistic category: IC Memory Usage. These statistics report memory consumption for various IC Subsystems:

| | |
|----------------------|----------------------|
| Acc Server | Acd Server |
| Admin Server | Alert Server |
| Client Services | Compression Manager |
| Data Manager | DS Server |
| EMS Server | FAX Server |
| File Monitor | Host Server |
| IP | IP Server |
| IPDB Server | Mail Account Monitor |
| Notifier | Out Of Proc |
| Paging Server | Post Office Server |
| Reco | Recorder Server |
| Recorder Tran Server | SMS Server |
| Statistics Server | Switchover |
| Telephony Services | Tracker Server |
| Transaction Server | VPIM Receiver |
| Web Processor | |
7. Added additional Switchover stats to the IC System Status statistics topic:

- Backup Ready - indicates the health of the backup (Switchover) server. Displays Yes if the backup server is ready, or No if the backup server is known to be in a bad state.
 - Backup Server Name - provides the name of the backup server, if one is configured.
 - Time Since Last Switchover - indicates the amount of time since a switchover last occurred.
 - TS Ping Time - the amount of time in milliseconds to ping the IC's Telephony Services subsystem.
 - UDP Heartbeat Interval - Heartbeats are a series of signals emitted at regular intervals, by IC servers on the network. This stat indicates the transmission rate for UDP heartbeats on the Switchover server, expressed in milliseconds.
8. Added a procedure titled "Allow Supervisor Message Creation" to the "Recommended Access Rights" topic. This procedure explains how to grant the User right to send messages from Interaction Supervisor to Interaction Client users.
 9. In 2.4, Interaction Supervisor can send message to Interaction Client users (all versions except the Win32 version). Administrators may choose to send a one-time informational message, or to use an alert to send messages automatically based on any real time statistic that Interaction Supervisor can monitor. To become acquainted with this feature, read "Send Messages to Interaction Client users". It provides an overview of features that allow a Supervisor user to compose and send messages.
 10. Updated coverage of the *Alert Properties* dialog, which now offers the means to send a Supervisor Message in response to an Alert.
 11. Added a new statistic, Number of available remote licenses, to the IC System Statistics.
 12. Added new Interaction Recorder Error statistics:

| | |
|--|---|
| <ul style="list-style-type: none"> Destination Device Full Errors Destination Directory Non-Writeable Errors Number of Chat Generation Errors Number of Fax Generation Errors Source Directory Permission Errors Source File Non-Existent Errors | <ul style="list-style-type: none"> Destination Directory Non-Existent Number of Call Generation Errors Number of Email Generation Errors Source Directory Non-Existent Errors Source File Delete Errors Source File Permission Errors |
|--|---|
 13. Added new *Host Tools Error* statistics:

| | |
|--|--|
| <ul style="list-style-type: none"> Ave. Host Connection Time Ave. Time for Successful Disconnects Ave. Time for Successful Screen Validations Ave. Time for Successful Wait-for-Cursors Host Connection Time Host Tools Connection Time Host Tools Validation Time Number of Failed Disconnects Number of Failed Screen Validations Number of Failed Wait-for-Cursors Number of Successful Connects Number of Successful Screen Transitions Number of Successful Wait for Ready-To-Sends Number of Successful Wait-for-Strings Wait-for-Cursor Time | <ul style="list-style-type: none"> Ave. Successful Connects Ave. Successful Screen Transitions Ave. Successful Wait for Ready-To-Sends Ave. Successful Wait-for-Strings Host Tool Transition Time Host Tools Disconnect Time Number of Failed Connects Number of Failed Screen Transitions Number of Failed Wait for Ready-To-Sends Number of Failed Wait-or-Strings Number of Successful Disconnects Number of Successful Screen Validations Number of Successful Wait-for-Cursors Wait for Ready To Send Time Wait-for-Strings Time |
|--|--|
 14. Added a help topic for the *Change Station* dialog. It allows users to change stations without restarting Supervisor.
 15. The Lines view was renamed Call Activity view. Instead of just showing line activity, the view now has a drop down to show either line or station activity.
 16. Updated the *Using Queue Monitor Controls* topic to describe the new *Coach* feature. This feature adds the Supervisor to an Agent's interaction in a mode that allows the Supervisor to speak to the Agent without being overheard by the customer. Also added *Coach an Interaction* topic.
 17. Added these additional Recording Statistics to the System Monitoring Guide:
 - *IR Screen Recordings in Progress*—The number of active screen recordings.
 - *Successful Screen Recordings (Today)*—The number of successfully processed screen recordings since midnight of the current day, local to the IC/IR Server.

- *Successful Screen Recordings (Last Hour)*—The number of successfully processed screen recordings in the last hour. This number is accurate to a 1 minute granularity.
- *Unsuccessful Screen Recordings (Today)*—The number of unsuccessfully processed screen recordings since midnight of the current day, local to the IC/IR Server.
- *Unsuccessful Screen Recordings (Last Hour)*—The number of unsuccessfully processed screen recordings in the last hour. This number is accurate to a 1 minute granularity.

A

- access rights, 11, 13, 15, 17, 21, 121
- access to individual views, 17
- active alerts, 131
- active alerts dialog, 85
- add a view, 120
- add/remove statistics command, 57
- alert properties dialog, 91
- alerts, 15, 64, 65, 66, 69, 70, 71, 72, 88, 91, 92, 93, 94, 96, 100, 106, 131
 - setting ranges for, 92
- appearance of statistic text, 93
- audience, 5
- authentication, 113
- auto-updater, 11
- axis labels, 61

B

- bar graphs, 53

C

- call control actions, 38
- change alert icon color, 69
- change graph type, 58
- change period of a line graph, 60
- changing, 92
 - alert ranges, 92
- close a view, 50
- command line parameters, 23
- commands, 82
- configure a graph, 109
- configure graph, 56
- context menu, 55, 86
- Create New View dialog box, 120
- custom toolbar, 105
- customize a graph, 53
- customize toolbars, 74

D

- dialogs, 84, 85
- disk space, 12
- display status of active alerts, 72
- DLL, 121

- dock button, 48

- docked windows, 43

E

- Edit Alert Range, 92
- edit alerts dialog, 106
- edit an alert, 70
- editing, 92
 - alert ranges, 92
- email alert, 15
- exit command, 81
- extension DLLs, 10

F

- floating windows, 43
- floating, docked, or tabbed views, 8
- full-screen mode, 51

G

- Glossary, 132
- graph axis labels, 111
- graph legends, 111
- graph title, 110
- graph type, 109
- graphical views, 53, 55, 56, 57, 58, 60, 61, 62, 63

H

- handlers, 133

I

- IC platform statement, 6
- IC server name, 113
- installation, 19
- integration, 10
- Interaction Supervisor, 82
 - toolbar, 82
- Interactive Intelligence web site, 27
- invoke a handler, 100

L

- legends, 62, 63, 111
- license enforcement, 14
- license file, 13
- line charts, 53
- login dialog, 22

M

Manage Alerts dialog, 73, 116
manage all alerts in one place, 73
memory requirements, 12
menus and toolbars, 10
modifying, 92
 alert ranges, 92
modules, 7, 10

O

online help, 25, 26
online help for a statistic, 26
online resources, 27
organization of material, 5
other requirements, 12
overview, 5

P

password, 113
PDF, 27
persistent settings, 8
plot values over time, 60
plug-in, 121
printable version, 27
procedures, 18
processor requirements, 12
product overview, 7

Q

Queue Monitor control, 34, 40, 41

R

range of alert, 92
remove an alert, 71
rename a view, 33, 123
restart after a switchover, 11

S

send Email messages, 96
shortcut, 24
slide show mode, 52
software and hardware requirements, 12
start the program, 22
state of the interaction, 36
state of the queue object, 35
station licenses, 13
statistic selection dialogs, 32, 124
Statistic Selection dialogs, 32
statistics, 92
 editing alert ranges for, 92
Support, 27

T

tabbed pages, 43
toolbar, 82
toolbars, 128, 130
Transaction Server, 135
tray icon, 131

U

user name, 113

V

version and system information, 27
view, 8
view state, 48
views, 29, 30, 31, 32, 33, 43, 44, 46, 47, 48, 49, 51, 52, 120, 123

W

wave audio sounds, 94
What's This help mode, 26
workspace, 9, 120