

Checkmate

Business Intelligence
for Intelligent Business

**Realtime Online for Cisco Unified Contact Center
Express**

Quick Start Guide

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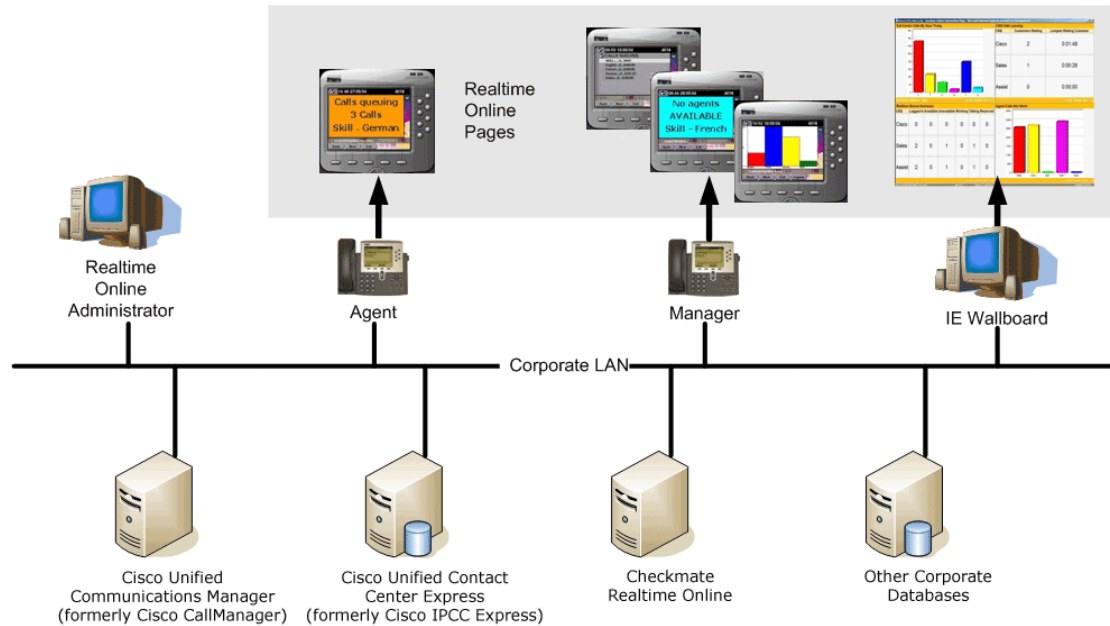
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1 Quick Start for Cisco Unified Contact Center Express

Using Cisco XML Phone Services, Realtime Online pushes information such as customers queuing, resource shortages and service level breaches directly to desktop clients and idle Cisco IP phones around the organisation. Realtime Online has been specifically designed to match the needs of contact centres enabling improved pro-active management by providing real time alert driven data.

Realtime Online connects over the LAN to Cisco Unified Contact Center Express in order to operate. The diagram below provides an overview of the connections between Realtime Online, Cisco Unified Contact Center Express and your corporate LAN.



The aim of this document is to enable you to get off the ground with configuring and displaying the 'out of the box' wallboards that are provided immediately post installation.

1.1 Wallboard

This section provides a preview of the default wallboard packaged with your installation of Realtime Online.

1.1.1 Main Wallboard

The wallboard, named Main Wallboard (shown in the screenshot below), consists of five individual pages embedded within the Wallboard structure and shows a variety of contact service queue (CSQ) statistics as a summary.

Team	Waiting	Longest Wait	SL %	15/05/2007 17:00:48				
Finance	0	00:00	100	Calls Waiting 1				
Support	1	00:44	66					
Sales	0	00:00	81					
Team	Logged In	Ready	Not Ready	Offered	Handled	Name	State	Time
Finance	3	0	2	8	8	Harry Roberts	Not Ready	431:55
Support	3	0	2	4	4	Andy Mason	Talking	01:19
Sales	3	0	2	22	15	Dave Batson	Not Ready	00:39
						Mike Cheetham	Not Ready	00:27

The left hand column of the wallboard actually consists of two pages, *CSQ Waiting and S/L In* in the top half with the page *CSQ Various* positioned beneath it.

- CSQ Waiting and S/L* shows statistics relating to all CSQs that are configured within your Cisco Unified Contact Center Express. The following columns of information are displayed: the CSQ name (labelled 'Team'), the number of customers waiting to be answered against this CSQ (labelled 'Waiting'), the length of time that the customer who has been queuing longest has had to wait (labelled 'Longest Wait') and the percentage of calls that have been answered within xx seconds for the day so far (labelled 'SL%'). Thresholds have been defined on 'Waiting' (if there are 0 customers waiting the 'Waiting' cell is displayed with a green background, if there is 1 or more then displayed with a red background), on 'Longest Wait' (if the longest wait is greater than 20 seconds then the cell is displayed with a red background) and on 'SL%' (if the service level is greater than 80% then the cell is displayed with a green background, if service level is less than or equal to 80% then displayed with a red background).

Tip – The xx seconds figure is configured in the Service Level field against the CSDQ in Cisco Unified Contact Center Express.

- *CSQ Various* shows all CSQs that are configured within your Cisco Unified Contact Center Express. The following columns of information are displayed: the CSQ name (labelled 'Team'), the number of agents that are logged into the CSQ (labelled 'Logged In'), the number of agents that are available to take a CSQ call (labelled 'Ready'), the number of agents currently not ready (labelled 'not ready'), the number of calls that have been offered to each CSQ for the day so far (labelled 'Offered') and the number of CSQ calls that have been answered for the day so far (labelled 'Handled'). Thresholds have been defined on 'Logged In' (if less than 1 agent is logged in then the cell is displayed with a red background) and on 'Ready' (if there are no agents available the cell is displayed with a red background).

The right hand column of the wallboard actually consists of three pages, *Time and Date* at the top of the column, *Total Calls Waiting* beneath it and *Agent Status* at the bottom of the column.

- *Time and Date* simply shows the current date and time as taken from the Realtime Online server.
- *Total Calls Waiting* shows the total number of calls queuing against all of the CSQs that are configured within your Cisco Unified Contact Center Express.
- *Agent Status* shows real time agent status information.

All of the aforementioned 'out of the box' pages already exist within your Realtime Online database.

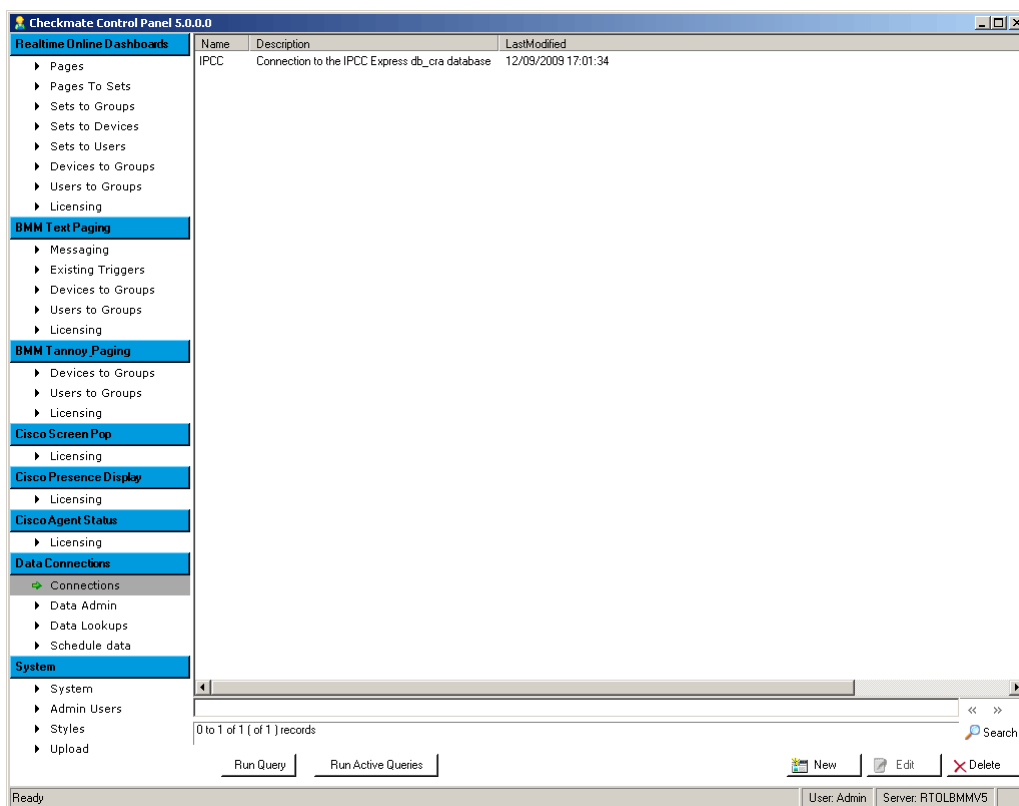
2 Quick Start Step-by-Step

Follow the steps outlined below to get the Cisco Unified Contact Center Express demonstration wallboard up and running.

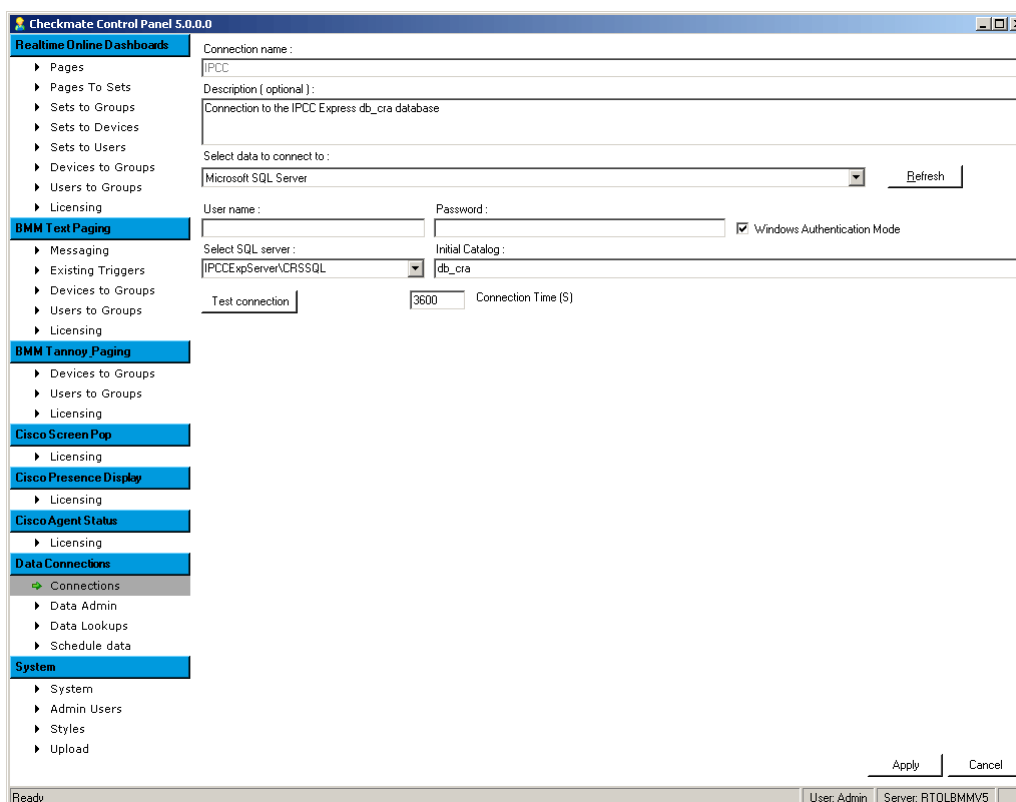
2.1 Configure the Existing IPCC Data Connection

Configure the default IPCC data connection that is created in Realtime Online so that it represents your IPCC.

- 1) Open the Checkmate Control Panel on your Realtime Online server (remember, the username is **admin** with no password).
- 2) Select the **Connections** sub-menu within the **Data Connections** menu.



- 3) Select the **IPCC** connection followed by clicking the **Edit** button (alternatively double-click the **IPCC** connection). A connection configuration dialog is displayed.



- 4) Ensure that the **Windows Authentication Mode** checkbox is ticked.
- 5) As Windows authentication is being used the **User name** and **Password** fields default to being blank (i.e. empty). However, the account used must exist on both the RTOL server and the Unified Contact Center Express server and use the same password in both instances. Remember that the RTOL server user must be a member of the server administrator group.
- 6) The **Select SQL Server** editable drop-down control defaults to:


```
IPCCExpServer\CRSSQL
```

Replace `IPCCExpServer` with the IP address, or name, of the server hosting the Cisco Unified Contact Center Express system database. **DO NOT** remove the `\CRSSQL` part.
- 7) Expand the **Initial Catalog** drop-down list control. You are prompted to save the connection details (i.e. click the downward pointing arrow head). Click the **Yes** button to continue.
- 8) Ensure that the **Initial Catalog** drop-down control remains configured as `db_cra`.
- 9) Click the **Test Connection** button. Wait for confirmation of successful completion of the connection test. If the connection test fails double check all connection details and try again.
- 10) Once the connection test can be successfully completed click the **Apply** button to save the changes you have made to the IPCC connection.

2.2 Licence the Wallboard Display Device

The pages used within the wallboard are already assigned to sets (a set can be thought of as a grouping that can be easily assigned to devices or to users) but the sets of pages need to be assigned to the licensed device upon which you want to display the wallboard.

Before you can do that the device upon which you want to display the wallboard must be licensed.

- 1) Download and configure the **Realtime Online desktop client** on the machine upon which you want to display the wallboard.
- 2) Restart the **Checkmate Control Panel**.
- 3) Select the **Licensing** sub-menu within the **Realtime Online Dashboards** menu.
- 4) A list of unlicensed and licensed devices is displayed included in which is the device upon which you installed the desktop client.

Move the appropriate device from the unlicensed list to the licensed list.

- 5) Click the **Apply** button.

2.3 Assign Sets of Pages to the Wallboard Display Device

With the device licensed assign the sets of pages to the device.

- 1) Select the **Sets to Devices** sub-menu within the **Realtime Online Dashboards** menu.
- 2) Select your **device** in the panel on the far left hand side (immediately to the right of the menu system).
- 3) Ensure that the **Set 1** set is assigned (i.e. move them to the **Sets Assigned To This Device** list).
- 4) Click the **Apply** button.

Now return to the device and restart the Realtime Online desktop client; the preconfigured wallboard of pages should now be displayed.

3 Contacting Support

Should you require assistance whilst configuring the out of the box wallboards please contact the Checkmate support team who will be happy to help.

The support team can be reached...

- ...by telephone, using the numbers 0870 220 4033 if calling from the United Kingdom, or 1 866 243 1700 if calling from the United States of America.
- ...by e-mail using the address support@checkmate.com.

Our normal operating hours are 08.30 to 17.30 (GMT), Monday to Friday.