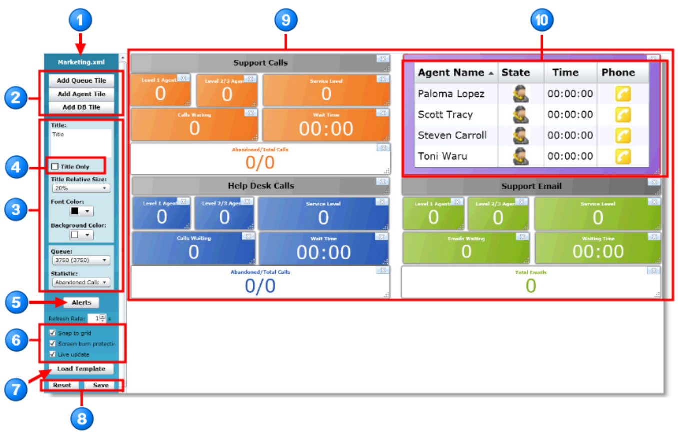
Snapshot

Quick Reference Card

Introducing Snapshot

Snapshot is an intuitive, easy to use plug-in to the system that provides a real-time graphical overview of the performance status of contact center queues and agents. Use the Snapshot:

- Administrator to select the parameters to display, configure applicable alert conditions, and design the visual layout.
- Client to display the graphical real-time data on a PC monitor or an external display using a standard Windows environment.



Item	Description
1	Name of the active template.
2	Add new queue, agent, or database (DB) tiles.
3	Configure the selected agent tile.
4	A selected agent tile.
5	Create and configure alert parameters for the selected queue tile or agent's tile.
6	Do one or more of the following: • Configure the refresh rate for queue and agent tiles. • Snap to grid makes lining up the tiles easier. • Turn on/off either the screen burn protection or live update options.
7	Load a different layout template.
8	Either: • Save the changes. • Reset and revert to the last saved configuration.
9	Queue tiles for the support queue. Individual tiles can be resized and dragged to a new position on the canvas.
10	Agent tile with the selected agents to monitor.

Agent State Icons

The following icons are used to indicate agent activity and states within the agent tile.

Icon	Name	Description
	Agent Red	Agent is logged off, and the **Time** column is not active for agent states.
	Agent Blue	Agent is logged on, and the **Time** column shows the time the agent has been free if not on a call.
	Cup Blue	Agent is on break.
	Clock Blue	Agent is on worktime.
	Wrapup	Agent is on wrapup time.
	Phone Down	Phone is offering from a direct call.
	Phone Blue	Phone is off-hook from a direct call.
	Outbound Call	Phone is off-hook from an outbound call.
	Offering Queue Call	Phone is offering from a queue call.
	OffHook from Queue Cal	Phone is off-hook from a queue call.
	Hold	Phone call is on hold.
	Disconnect	Phone is in a disconnected state after the agent hung up.

Starting Snapshot

1. Enter one of the following URLs into the browser:
   - http://**host**/SnapshotAdmin— to access Snapshot Administrator

- http://**host**/Snapshot—to access Snapshot Client and select a template.
- http://**host**/SnapShot/default.aspx?template=**name**.xml—to access Snapshot Client, the template is pre-selected.

Where:

- **Host** is the name of the server on which Snapshot is installed.
- **Name** is the name of the saved template.

Note: Save the URLs in the browser's **Favorites**.

2. Select or create a new template to load. See "Starting Snapshot" (page 1) for more information.

Define the Display Canvas Layouts

This section describes how to define the queue, agent, and DB display canvas layouts.

Queue Tiles

Individual tiles can be created and freely arranged on the canvas, each displaying selected statistics for selected queues. The visual format, as well as visual alert indications, can be configured for individual tiles. Tiles can also be created for agents to indicate current agent activity and status.

Add/Remove Queue Tiles

» Click the:

- Click the **Add Queue Tile** button to create a new blank tile.
- Tile to remove, and then click the **X** icon.

Move and Resize Queue Tiles

» Click a tile, and then drag the:

- Tile to move it to the new location.
- Tile's border to resize the tile. The tile automatically resizes.

Configure the Queue Tile Content

Make the required selections as listed in the following table.

Settings/Options	Description
Title	Type the tile's title.
Title Only	Click this option to *not* display metrics.
Scroll Text	Type text to scroll in the window. **Note:** Only available when clicking the **Title Only** option.
Title Relative Size	Select an appropriate size for the title.
Font Color	Select the font color.
Background Color	Select the background color.
Queue	Select the queue to be used for metrics.
Statistic	Select a metric.
Abandoned Calls	All abandoned calls after the queue minimum abandon time.
Abandoned/Total Calls	Number of abandoned calls and the number of calls.
Available Agents	All prime agents not on break.
Available Backup Agents	All backup agents not on break.
Average Speed of Answer	(<Total Wait Time + Ring Time>-IVR/Announce Time) / number of calls answered per queue
Average Handle Time	(Talk Time + Wrapup Time + After-Call Worktime) / number of answered calls
Break Agents	All prime agents on any break.
Break Backup Agents	All backup agents on any break.
Callbacks in Queue	Number of callbacks in the queue.
Calls in Queue	Calls in the queue.
Current Call Wait Time	Current longest call wait time.
Current Callback Wait Time	Current longest callback wait time. Only counts how long the callback has been in the queue (different from Desktop).
Idle Agents	All available prime agents not on a call and not on a break.
Idle Backup Agents	All available backup agents not on a call and not on a break.
Logged-In Agents	All logged in prime agents.
Logged-In Backup Agents	All logged in backup agents.
Pending Callbacks in Queue	The number of callbacks currently pending in the queue.
Service level	Same as the Desktop.
Total Callbacks	All callbacks; the running total resets at midnight every night.
Total Number of Calls	Total number of actioned queue calls (queue calls, callbacks, and abandons).
Work Time Agents	All prime agents on After Call Worktime and Requested Worktime.
Work Time Backup Agents	All backup agents on After Call Worktime and Requested Worktime.

Set a Queue Tile Alert

1. Click the tile to configure alerts on, and then click the **Alerts** button.
2. Configure up to five alert conditions per tile:

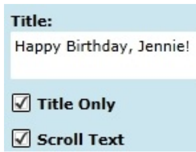
- **Select Operator** = Less than, equal to, or greater than.
- **Numeric Threshold** = Type the required numeric value.

  Note: Times are in seconds.
- **Color**: Select a color to be used to visually indicate the alert condition.

  Note: Each alert condition can have its own color.

Adding Scrolling Text

1. Click the **Title Only** option.
2. Click the **Scroll Text** option.
3. In the **Title** field, type text to scroll in the window.



Agent Tiles

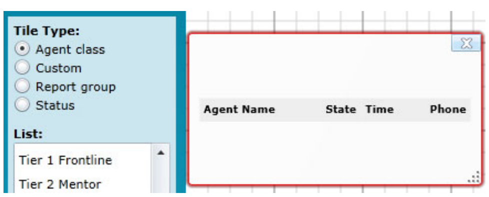
Add/Remove Agent Tiles

» Click the:

- **Add Agent Tile** button to create a new blank tile.
- Tile to remove, and then click the **X** icon.

Add/Remove Agents

1. Choose which tile type you need:
   - **Agent Class** = Lists all of the logged in agents of that class(es).
   - **Custom** = Allows you to choose which individual agents to include.
   - **Report Group** = Lists all agents in the selected report group(s).
   - **Status** = Lists agents based on their status (i.e., free, on break, in worktime, etc.).
2. Drag and drop the necessary items from the **List** section onto the tile.



Move and Resize Agent Tiles

» Click a tile, and then drag the tile's:

- Body to move it to the new location.
- Border to resize the tile. The tile automatically resizes.

Set an Agent Alert

1. Click the tile to configure alerts on, and then click the **Alerts** button.
2. From the **Agent State** list, select the agent's state.
3. Configure up to five alert conditions per agent state:
   - **Select Operator** = Less than, equal to, or greater than.
   - **Numeric Threshold** = Type the required numeric value.

     Note: Times are in seconds.
   - **Color**: Select a color to be used to visually indicate the alert condition.

     Note: Each alert condition can have its own color.

Database (DB) Tiles

The DB tile runs a SQL statement and displays the result that is returned on a tile.

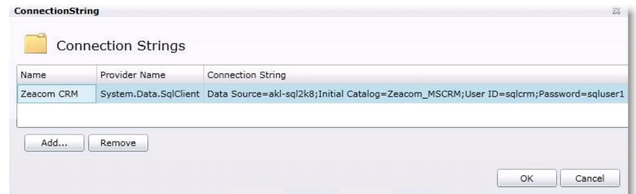
Add/Remove DB Tiles

» Click the:

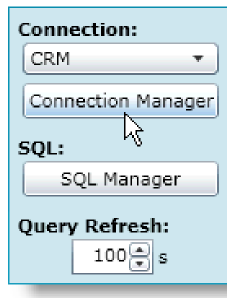
- **Add DB Tile** button to create a new blank tile.
- Tile to remove, and then click the **X** icon.

Configure a DB Tile

1. Open the preferred template.
2. Add a connection string to display in the tile.



   a. Click **Connection Manager** button.

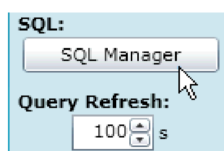


   b. Click the **Add** button.

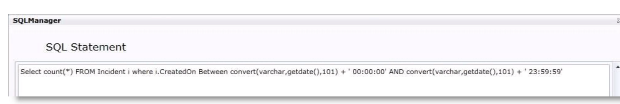
   c. In the **Connection String** field, type a query to return a single value to display in the tile.

   d. Click **OK**.
3. Add a SQL statement to display in the tile.

   a. Click **SQL Manager** button.



   b. Type SQL statement that returns a single value to display in the tile.



   c. Click **OK**.

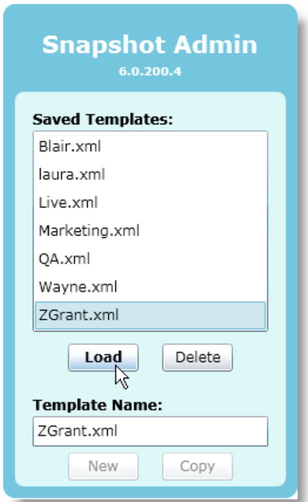
Templates

A template is a Snapshot layout that is saved for future use.

Load a Template

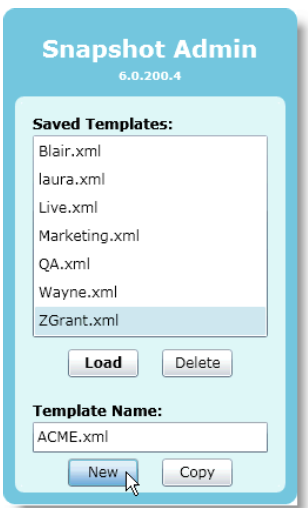
When starting Snapshot, a prompt asks to load an existing layout template.

» From the list of templates, select the template to load (the background image provides a preview of the template), and then click the **Load** button.



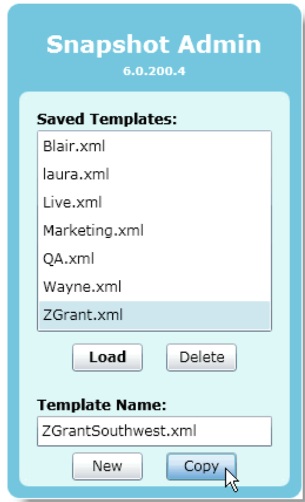
New Template

» In the **Template Name** field, type a new template name and then click the **New** button. A blank palette is created with the new template name.



Copy a Template

1. From the list of templates, select the template to copy.
2. In the **Template Name** field, type another template name and then click the **Copy** button. A copy of the base template with the new name is added to the list.



Delete a Template

1. From the list of templates, select the template to remove and then click the **Delete** button.
2. When prompted, confirm the deletion.

Refresh Rate

» In the **Refresh Rate** field, configure the refresh rate for queue and agent tiles.

Snap to Grid

» Click the **Snap to Grid** option to display grid lines in the main interface window to help make lining up the tiles easier.

Screen Burn Protection

On some older LCD plasma screens, displaying a static image for extended periods of time can produce irreparable screen burn.

» In Administrator, turn on Snapshot's built-in screen burn protection. This setting changes the client to have a border around the outside of the tiles' grid, and moves around inside the boundaries of the window. The direction of movement is random and changes every 10 seconds.

Client Display

When starting the Snapshot Client, a prompt asks to load one of the saved display templates. The Client's display can be updated either live or manually.

Live Update

» Click **Live Update** to automatically update the client display with the latest changes.

Manual Update

» Whenever changes are made and saved in the Snapshot Administrator, select the Snapshot Client display window and press **F5** to update/refresh the window with the latest configuration.

Note: This manual update is not required if the **Live Update** option has been chosen in the Snapshot Administrator.

Save/Reset Selections

» Click the:

- **Save** button to save the latest changes.
- **Reset** button to discard the latest *unsaved* changes and return to the last saved settings.