

Interaction Client - Business Manager (ICBM)

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Purpose

To provide an introduction to the Interaction Client Business Manager (ICBM) software application.

Introduction

Interaction Business Manager (ICBM):

- provides Call Queue Supervisors with a user interface for easy access to display real-time performance monitoring of Call Queues
- sends out notifications when user-defined thresholds are reached
- allows users to access various 'views'- presented in statistics, graphs, queue and reports
- provides users with a workspace where views can be organised (including views from different application modules)

How Do I Access Business Manager?

A license must be purchased to use ICBM.

To obtain access to ICBM, log a call with the CSU IT Service Desk (providing an account code).

You can contact the Service Desk either by calling x84357 or Online Self Service.

Getting Started

To get started using ICBM, you must open ICBM on your desktop. There are **two ways** to open ICBM:

1. Double-click the **IC Business Manager icon** that appears on your desktop (this will remember your last login settings); or



2. Click Start > All Programs > Interactive Intelligence > IC Business Manager (this does not remember your last login settings).

Whether you double click the icon or access ICBM through your Start Menu, you will see the ICBM login screen:

1. Under the Options Tab, change the Language from English (United States) to English (Australia) (*This change will have to be changed this every time you login until a patch is released to fix*)





- 2. Under the Connection Tab, Click Use Windows Authentication tick box
- 3. Enter your CSU credentials into the User and Password boxes, and then enter the server address of **ic.csu.edu.au** and click Log On.

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Connec	ction	Options		
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0			Log On Can	cel

You will be presented with the window below:



Workspace and Interaction Reporter).

You can add additional workspaces by going to the top of the screen and clicking **Workspace** > **Create workspace**.



ĺ	Wor	kspaces Tools Window	Help
-		Create workspace	
1		Edit workspace	Creates a new custom workspace.
		Delete workspace	
		Reorder workspaces	
	@	Default Workspace	Ctrl+1
		Interaction Reporter	Ctrl+2
L	_		
ſ	ii (Create New Workspace	
	NI-		

Create Ne	w Workspace
Name:	
Description:	
Icon:	
	OK Cancel

The above box will pop up.

- 3. Enter a **Name** and **Description** as required, select a meaningful **Icon** for the Workspace (e.g. graph icon for statistics) and click OK. This will add an extra workspace to the left hand side of your screen
- 4. You can now add agent and queue information to your workspaces.

There are multiple ways to add a view to your workspace.

• Option 1 - Click File > New > View...





• Option 2 – In a new workspace, you'll see the Getting Started page. Click View



• Option 3 – Click New > View...



Once you select a new view, you will be presented with the following screen:



Interaction Client Business Manager (ICBM)



Agent Details

This view gives statistics for a specific agent for a specified Workgroup:

- 1. In the top filter text box, you can search for an Agent (Last name, First name)
- 2. When found, select the agent and click **Next**

🚯 Agent Detail Wizard	- Select Agent	J
Barlow		
🔮 Barlow, Matthew		
Agent C. D. L	· Mathema	
Agent Barlow	v, Mattnew	
Workgroup 🧐 All obj	ects	
0	<u>N</u> ext ➡ <u>Finish</u> <u>Cancel</u>	,

3. Workgroups that the selected agent is a member will display in list format:



4. Select the workgroup you wish to see the details of and click **Finish**.

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A new view will be created (Agent Details) with down boxes for Agent and Workgroup.

You have the choice to either leave the page (for a specific user and a workgroup they are in) and create a new view per agent, or you can use this view to go to different agents as required.

2 Agent Details								
gent: 💈 Barlow, Matthew - 🛛 W	orkgroup: 🐔 Queue	-IT 5	ervice Desk					
Agent Statistics								
	Current Period		Current shift		Previous Period		Previous Shift	
Interactions received	N/A		N/A		N/A		N/A	
Interactions answered	N/A		0		N/A		N/A	
interactions completed	N/A	1 (N/A		N/A		N/A]
nteractions held	N/A		N/A		N/A]	N/A	
Longest interaction waiting	N/A	} (N/A],	N/A];	N/A),
ongest talk time	N/A	} (N/A]:	N/A]:	N/A	1
Average wait time	N/A	4 (N/A]:	N/A	5	N/A]e
Average talk time	N/A	} (N/A)s:	N/A	5	N/A].
Average hold time	N/A]s [N/A	5	N/A]\$	N/A	
Non-ACD interactions	N/A		N/A		N/A		N/A	
Average agent positive score	N/A		N/A		N/A		N/A	
Average agent negative score	N/A		N/A		N/A		N/A	
Average customer positive score	N/A] [N/A		N/A		N/A]
Average customer negative score	N/A		N/A		N/A	1.	N/A	

Agents Graph

This view shows a graph with specified visual statistics for multiple/singular agents:

- 1. In the top filter text box, search for a **Workgroup**
- 2. When found, select the workgroup and click Next

🚯 Agent Graph
Queue-IT
Service Desk
<u>N</u> ext ➡ <u>Finish</u> <u>Cancel</u>

- 3. Select the **Agents** you want to add to the graph (hold control (Ctrl) and click the Agent) and click **Add** (if you want all **Agents** in the **Workgroup**, click **Add all**)
- 4. Click Next



🗓 Agent Graph		×
Available items:	Selected items:	
Filter items	× Add ≯ Filter items ×	
	Add all Remove Remove all	Move upMove down
0	(<u>P</u> revious <u>N</u> ext <u>Finish</u>	Cancel

By default, this graph selects **Current Period**, **Current Shift**, **Previous Period** and **Previous Shift** interval periods. You can **select** and **remove** the intervals you don't need.

- 5. Select the Queue Statistics you wish to see in the graph and click Add
- 6. Click Finish

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Interval		
Current Period Previous Period Previous Shift	Add Current shift Add All Remove Remove All 	Move Up
Queue Statistics Longest talk time Non-ACD interactions Average agent positive score Average agent negative score Average customer positive score Average customer negative score	Add Interactions completed Add All Average wait time Add All Average talk time Image wait time Average talk time Average hold time Average hold time	Move Up Move Down
0	Previous	inish <u>C</u> ancel



Bar Graph View

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Work	🙎 Agent Details 🚹 Agent Graph		~ X
space	Workgroup: 🍓 Queue-IT Service Desk	B	
		Bar graph	
	Interactions completed [Current shift]		
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	Average talk time [Current shift]		
	Average hold time [Current shift]		1
	mabarlow		
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	anceactions completed [current shift]		
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🦰 1Ca	hhionor 24041	₹ 0	

You can edit the graph once saved:

• Right click on the graph and select what you want to edit (e.g. graph types, interval periods, grouping etc.)

	View alerts Edit Alerts	
	Add/Remove agents Add/Remove statistics	
	Chart options	
\checkmark	Show labels	
	Graph type	•
	Group by	+
	Legend	+
	Help	



Agent or Workgroup Queue

This view will give the current interaction detail(s) for users and workgroups:

1. Select Agent or Workgroup view - you can alter the entries in the window shown below



- 2. Choose the drop down menus which suits:
 - **Queue Type** allows you to select Workgroup Queue information or User Queue information
 - Workgroup Queue allows you to select the queue you wish to monitor (NOTE: this will alter Agent Queue if User Queue type is selected above).
 - Interaction Type provides a list of different interactions to monitor



🚯 IC Business Manager - Statistics		
File Edit View Workspaces Tools Window Help		
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Agent or Workgroup Queue		
🖞 Queue type: 🐞 Workgroup Queues 🔺 Workgroup Queue: 🐞 Queue	Interaction Type:	😫 All Types 🔺
🖞 🙀 Workgroup Queues Duration St 🖏 Queue-%TEMPLATE%	User	🚉 All Types
🖉 😨 User Queues 🚳 Queue-Contact Centre-Click To Call		🔗 Call
😼 Queue-Contact Centre-Enrol		💯 Callback
🕲 Queue-Contact Centre-Future		😰 Chat
🔞 Queue-Contact Centre-Phone Alert		=* Email
🔞 Queue-Contact Centre-Switch		💙 Generic
🔞 Queue-HR Service Centre		📋 IPA Work Item
🔞 Queue-IT Service Desk		
🔨 Queue-Library-Access Services		
🔨 Queue-Library-Information & Liaison		
🐞 Queue-Oral Health Centre-Bathurst-Other Enquiries		
🐞 Queue-Oral Health Centre-Dubbo-Other Enquiries		
🐞 Queue-Oral Health Centre-Orange-Other Enquiries		
🐞 Queue-Oral Health Centre-Thurgoona-Other Enquiries		
🐞 Queue-Oral Health Centre-Wagga-Other Enquiries		
🗟 Oueue-RB-SH&SS-WW		

Agent Overview

Provides the same information as the Agent Graph but in list view:

- 1. In the top filter text box, search for a Workgroup
- 2. When found, select the workgroup and click Next

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Queue-IT	
🚳 Quei	ue-IT Service Desk
0	<u>N</u> ext ➡ <u>F</u> inish <u>Cancel</u>

- 3. Select the **Agents** you want to add to the graph (hold control (Ctrl) and click the Agent) and click **Add** (if you want all **Agents** in the **Workgroup**, click **Add all**)
- 4. Click Next

By default, this graph selects **Current Period**, **Current Shift**, **Previous Period** and **Previous Shift** interval periods. You can **select** and **remove** the intervals you don't need.

- 5. Select the Queue Statistics you wish to see in the graph and click Add
- 6. Click **Finish** to see the requested information for each Agent.



Initial View Workgraves I cols Window Help Initial Network Initial Network <tr< th=""><th>ii 🖓</th><th>Business Manager - Statistics</th><th>and the second</th><th>or Species subsystem (1)</th><th>- and the second</th><th>a da se</th><th></th></tr<>	ii 🖓	Business Manager - Statistics	and the second	or Species subsystem (1)	- and the second	a da se	
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2 Donald-Kerr, Eric 0 N/A N/A N/A N/A S 2 Gollasch, Hayley 0 N/A N/A N/A N/A S 2 Gonoley, John 0 N/A N/A N/A N/A S 2 Godlier, Jeremy 0 N/A N/A N/A N/A S 2 Hay, Jason 0 N/A N/A N/A N/A S 2 Coleman, Ken 0 N/A N/A N/A S 2 Barlow, Matthew 0 N/A N/A N/A S 2 Hoyle, Makaelia 0 N/A N/A N/A S 4 Hoyle, Makaelia 0 N/A N/A N/A S 2 Hoyle, Makaelia 0 N/A N/A N/A S 3 Brown, Tim 0 N/A N/A N/A S 4 Brown, Tim 0 N/A N/A N/A S 2 Brown, Tim 0 N/A N/A N/A S 3 McKenzie, Teneil 0 N/A N/A		🙎 Turner, Daniel	0	N/A s	N/A s	N/A s	
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Workgroup Details

This view gives the majority of statistics for a singular queue in one view. You can also toggle between Queue calls and Queue members to see their activation.

1. In the filter section (top left of the view), select the queue you wish to monitor

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Eile	<u>E</u> dit	<u>V</u> iew Wo <u>r</u> kspaces <u>T</u> oo	ls Workgroup Deta	ls <u>W</u> indo	w <u>H</u> elp							
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	On	inbound ACD interactions		0	On inbo	und ACW		0	Longest int	bound ACD interaction	N/A	
	On	outbound ACD interactions		0	On outb	ound ACW		0	Longest ou	tbound ACD interaction	N/A	
	On	non-ACD interactions		0	Longest	non-ACD interaction		N/A	Interaction	s waiting	0	
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		Queue Statistics										~
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	約 Queue	Name	Duration		State	Queue	Line		User	Station		*
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- 2. Select either Queue and Members (tabs on the left hand side of the screen) for further details:
 - Queue shows all current calls for the Workgroup
 - **Members** show the agents in the Workgroup with details (e.g. status and queue activation)

Name	Duration	State	Queue	Line	User	Station
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Workgroup Directory

The Workgroup Directory view shows the same details in the **Members** tab (as appears in the **Workgroup Details** view).

	Queue-IT Servic	e Desk		•					
ast Name	First Name	Extension	Department Skills	Status	Logged On	Time In St	atus /	Activated	
ake	Paul	32846	Information Tech IT Service Desk	Available	×	0	13:21:12	4	
asic	Alen	34807	Information Tech	Available	×	Ŏ	13:21:01	×	
mes	Andrew	86548	Information Tech	Available	×		13:21:01	×	
rton	Aaron	34969	Information Tech	Gone Home	×		13:21:01	×	
oates	Brad	19007	Information Tech	Xa Gone Home	×		13:21:00	×	
tlefair	Brendan	19179	Information Tech	Gone Home	×		13:21:00	×	
ause-Heuer	Christopher	84926	Information Tech	Gone Home	×		13:21:00	×	
umer	Daniel	57645	Information Tech	Xa Gone Home	×		13:21:00	×	
onald-Kerr	Eric	29364	Information Tech	Xa Gone Home	×		13:21:00	×	
ollasch	Hayley	32125	Information Tech	X Gone Home	×		13:20:59	×	
nnoley	John	84666	Information Tech	Away from de	×		13:20:59	×	
odbier	Jeremy	34222	Information Tech	Available	×		13:20:59	×	
ay .	Jason	84929	Information Tech	Available	×		13:20:59	×	
leman	Ken	19836	Information Tech	X Gone Home	×		13:20:58	×	
wohe	Matthew	34431	Information Tech	X Gone Home	✓ 34841		13:20:58	x	
oyle	Makaelia	84895	Information Tech	Xa Gone Home	×		13:20:57	x	
ggett	Scott	34346	Information Tech	Xa Gone Home	×		13:20:56	x	
eekin-Sutherland	Shane	84140	Information Tech	Available	×		13:20:56	x	
own	Tim	84239	Information Tech	Available, Foll.	×		13:20:56	x	
cKenzie	Teneil	57363	Information Tech IT Service Desk	Available	×		13:20:56	x	
e	Teresa	84676	Information Tech IT Service Desk	X Gone Home	×		13:20:56	x	
	Vicki	86186	Information Tech Video Conference Suppo	rt 🙎 Available	×		13:20:56	×	

Workgroup Graph

Search using the filter for the Queue(s) you wish to appear in the graph:

1. Select required queue and click Add



🐯 Workgroup Graph		X
A <u>v</u> ailable items:	Add	Selected items:
Queue-Vi ×		Filter items
	Add all 💙	🔹 Queue-IT Service Desk
	Remove	Sq Queue-Video Conference Support
0		<u>N</u> ext ➡ <u>F</u> inish <u>C</u> ancel

- 2. Select that statistics you want to appear in your graph
- 3. Click Add
- 4. Click Finish

🗓 Workgroup Graph		×
Select the statistics you want to see in the workgroup Logged on Available for ACD interactions Not available for ACD interactions Percent available Longest available On inbound ACD interactions	Add Total agents Add All Agents available Interactions answered Interactions waiting Kemove All Interactions waiting	Move Up Move Down
0		Cancel

A bar graph will be generated by default. You also have the ability to change the types of information displayed (see **Agents Graph**).

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Queue-IT Service Desk (
Queue-Video Conference Support				
0	4 8	12	16	20 24
	Agents available	Interactions answered	Interactions waiting	
Queue-II Service Desk 22 Queue-Video Conference Support 20	Queue-IT Service Desk 0	Queue-II Service Desk 0	Queue-IT Service Desk	0
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Workgroup Overview

Provides you with the same information as the Workgroup Graph but in list view:

Sa Workgroup Overview							
Se Workgroup	Total agents	Logged on	Interactions answered	Interactions waiting			
🍓 Queue-IT Service Desk	22	1	0	0			
🍓 Queue-Video Conference Suppo	20	1	0	0			

Workgroup Statistics

This view gives you the top half of the Workgroup Details view.

Statistics will appear for a particular queue once selected.



You have the ability to add and remove statistics.



Right Click inside the Workgroup/Queue Statistics field and select Add/Remove statistics. This will open a window where you can add/remove statists as required



Reporting

There are two methods of reporting:

- Interaction Reporter (inbuilt workspace)
- **Historical Reports** (manual report view)

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⊕-E Queue Detail Report ⊕-E Queue Service Level Report ⊕-E Queue Summary Report ⊕-E (Graph) Abandmed Call Profile ⊕-E (Graph) Aromed Call Profile ⊕-E (Graph) Profile of Average Speed of Answer	
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Both of these options can be exported by **clicking** $\stackrel{\text{log}}{\Rightarrow}$ **Export** to Excel, PDF etc. and used as required.

You can also save reports and re-run as desired.

Interaction Reporter

Each workspace has a number of inbuilt reports that you can select and change as required.

Each report has a specific purpose and is fairly rigid in terms of the data it returns but is consistent and easy to use.

For each report you will need to define a time frame and often a parameter.

Each report will have a **REQUIRED PARAMETER** and an **ADDITIONAL PARAMETERS** section, these will change depending on the report you are running. Each report will have a timeframe you will need to select and has the option to enter a specific area of focus (either in the required section or by adding an additional parameter).



There are preset options such as **Yesterday**, **This Week**, etc and you can enter a **Custom** value (date or time frame).

Today 🔹	21/05/2015 to 21/05/2015
Today	
Yesterday	
This Week	
Last Week	
This Month	
Last Month	
This Quarter	
Last Quarter	
This Year	
Last Year	
Custom	

Parameters

If it is required or additional, you can select several different types of information depending on the report as well as how you would like the report to obtain the information. You will need to highlight searches in inverted commas.

For example "Queue-IT Service Desk" If you do not add this, the report will not recognise this and will give you incorrect data.

Equals 🔹	"Queue-IT Service Desk"
Contains	
Does not contain	Add Parameter
Ends with	
Equals	
Is not null	
Is null	
Not Equal to	
Starts with	

To Run a New Report:

- 1. Select the Interaction Reporter workgroup
- 2. On the left hand side of the screen, you will see a column with grouped entries. Hover over an item to see a summary of the report
- 3. Double click the report you want to run and enter your information (see timeframe and parameters as above) when prompted

NOTE: Ensure parameter searches have " "

4. Click SRun Report



Historical Reports

This view allows you to create custom reports.

It is highly customisable (different options, multiple pieces of information in a singular report) but more difficult to create than inbuilt reports.

NOTE: You can run old saved reports from the previous version of Interaction Supervisor.

To create a custom report:

- 1. Click New > Historical Report
- 2. Depending on the report you would like to create, select **Available Packages** and **Layout** (Table or Matrix) of the report
- 3. Click Next
- 4. Add Fields, Agents, Queues, Dates, Times etc. and then adjust to fit your purpose

F Interaction Report Assistant			×
Package and layout Choose the data and layout you want for you	report.		
Data Available Packages Agent Status Agent Queue Statistics Agent Queue Statistics (Media Type) Agent Queue Statistics (Custom Groups) Workgroup Queue Statistics (Custom Groups) Workgroup Queue Statistics (Media Type) Workgroup Queue Statistics (Skills) Interactions (Tracker) Scoring (Recorder) Interaction Feedback - Survey Scoring Detail Interaction Feedback - Survey Utilization	Layout	 Table Matrix 	
	< Back Next >	Cancel	Help



Interaction Desktop

As a Call Queue Supervisor, you will need access to both ICBM and Interaction Desktop. You can monitor your workgroup and its statistics from within Interaction Desktop by adding your workgroup view.

• Double-click the Interaction Desktop icon that appears on your desktop





If you are unfamiliar with Interaction Desktop and the login process, please refer to the **Interaction Desktop User Guide**.

Create the new workspace view

 Right click anywhere within the *My Interactions* window and click on **'New View'** (or click on **File > New > View**)

😵 Interaction Desktop



- In the Create New View dialog box, set **Group by** to **Categories**, and then from the list of categories, select **Queues**.
- In the Views window select Workgroup Queue and click OK
- Under *Available items* select the queue you wish to add. You can use the filter box at the top of the list to refine these results.



•

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ailable items:		Selected items:				
ieue	×	Filter items	×			
Queue-%TEMPLATE%	~					
Queue-Contact Centre-Click To Call						
Queue-Contact Centre-Enrol						
Queue-Contact Centre-Future	Add	2				
Queue-Contact Centre-Phone Alert	Add all	>>				
Queue-Contact Centre-Switch						
Queue-Future	Remove					
Queue-HR Recruitment	K Remove a					
Queue-HR Service Centre	- terrove a					
Queue-IT Service Desk						
Queue-Library-Information & Liaison						
Queue-Oral Health Centre-Bathurst-Other	Enquiries					
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For additional views relevant to Business manager users please refer to the help guides in the next section.



IC Business Manager Help

Further help can be found by selecting Help.

A separate browser window displays the help topics along with Contents and Search navigation controls.

	Help						
🖏 IC Business Manager - Interaction Reporter							
File Edit View Workspaces Tools Window Help							
🎦 New 👻 🐰 🗈 🛍 🗙 🛛 🚱 Run Report 🎯 Show Count 👶 Import 👶 Export 🔚 Save Filter 🤗 Load Filter 🖉 Acad Filter							
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Contents Search		Home > IC Business Manager					
IC Business Manager Interaction Feedback Interaction Optimizer	IC Business Manager Help						
About Interaction Process Automa About the User Interface	Welcome to the Getting Started help for IC Business Manager, IC Business Manager provides a user interface for easy access to the						
 Access additional support articles from the Genesys support database Genesys Support Articles: Interaction Business Manager Or watch informational video's from the Interaction Desktop playlist on youtube Genesys Demonstation Video's: Interaction Business Manager 							

If you cannot find the help you need in these guides, please contact the <u>IT Service Desk.</u>