Interaction Client - Business Manager (ICBM)

Division of Information Technology

Charles Sturt University

April 2019

Charles Sturt University

Contents

Purpose 3

Introduction 3

How Do I Access ICBM? 3

Getting Started 3

Agent Details 7

Agents Graph 8

Bar Graph View 10

Agent or Workgroup Queue 11

Agent Overview 12

Workgroup Details 13

Workgroup Directory 14

Workgroup Graph 14

Workgroup Overview 16

Workgroup Statistics 16

Reporting 17

Interaction Reporter 17

Historical Reports 19

Interaction Client 20

IC Business Manager Help 22

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

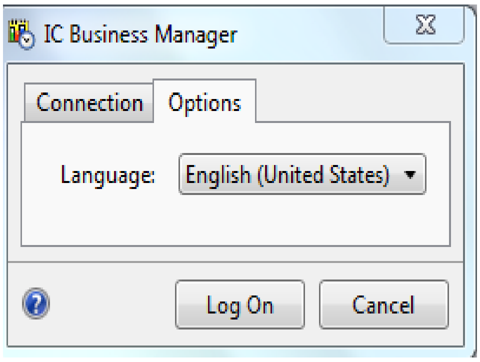
To get started using ICBM, you must open ICBM on your desktop. There are **two ways** to open ICBM:

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

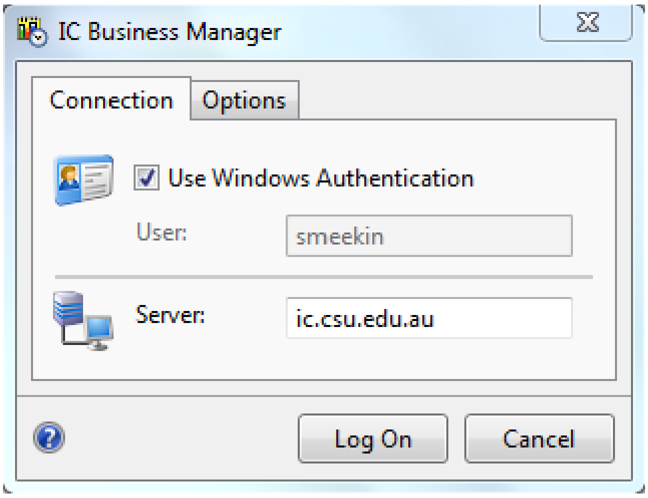
2. Click **Start** > **All Programs > Interactive Intelligence** > **IC Business Manager** (this does not remember your last login settings).

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

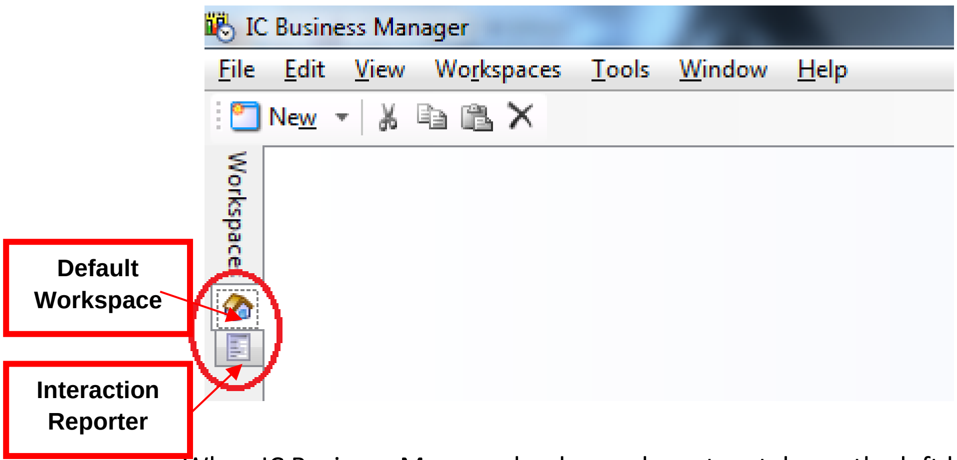
1. Under the Options Tab, change the Language from English (United States) to English (Australia) *(This change will have to be changed this every time you login until a patch is released to fix)*



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.

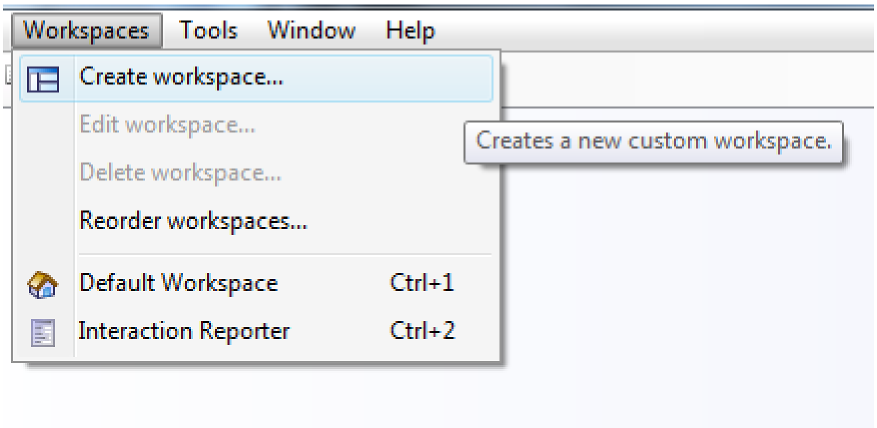


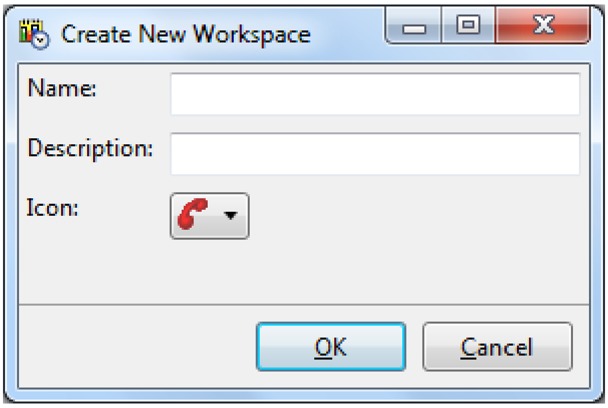
You will be presented with the window below:



When IC Business Manager loads, you have two tabs on the left hand side of the screen (**Default Workspace** and **Interaction Reporter**).

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



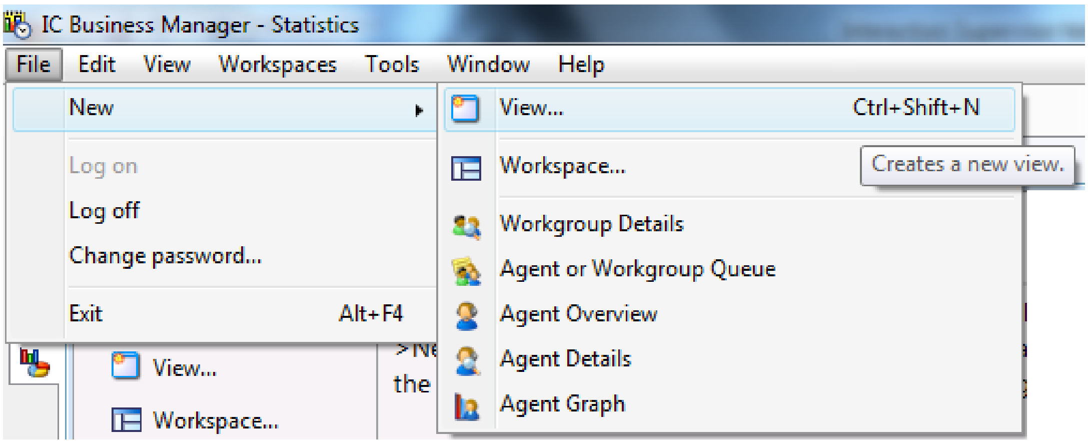


The above box will pop up.

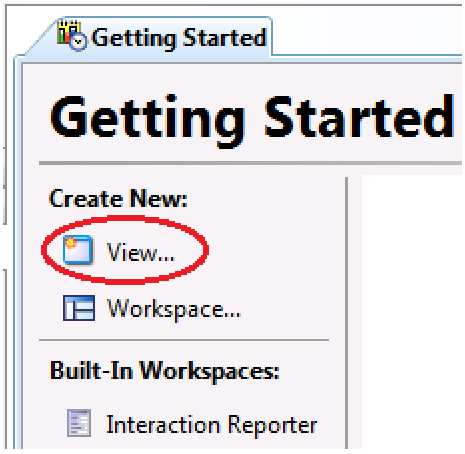
3. Enter a **Name** and **Description** as required, select a meaningful **Icon** for the Workspace (e.g. graph icon for statistics) and click OK. This will add an extra workspace to the left hand side of your screen
4. You can now add agent and queue information to your workspaces.

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

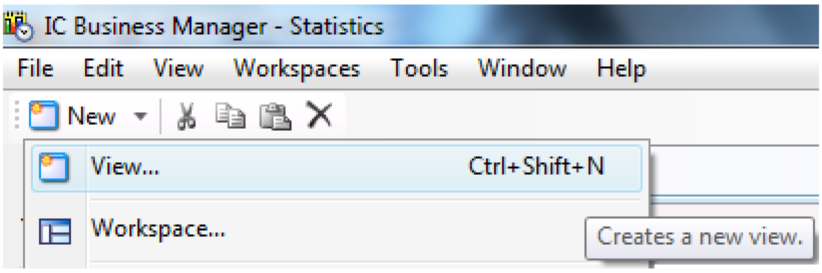
- **Option 1 -** Click **File** > **New** > **View…**



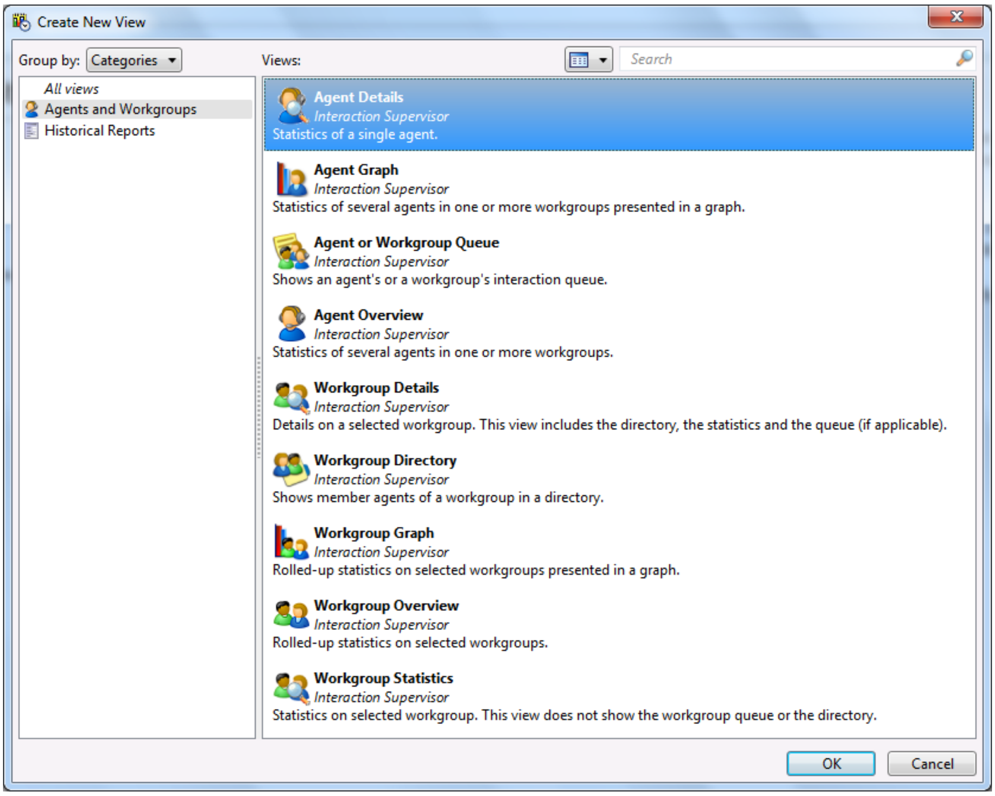
- **Option 2** – In a new workspace, you'll see the **Getting Started** page. Click **View**



- **Option 3** – Click **New** > **View...**



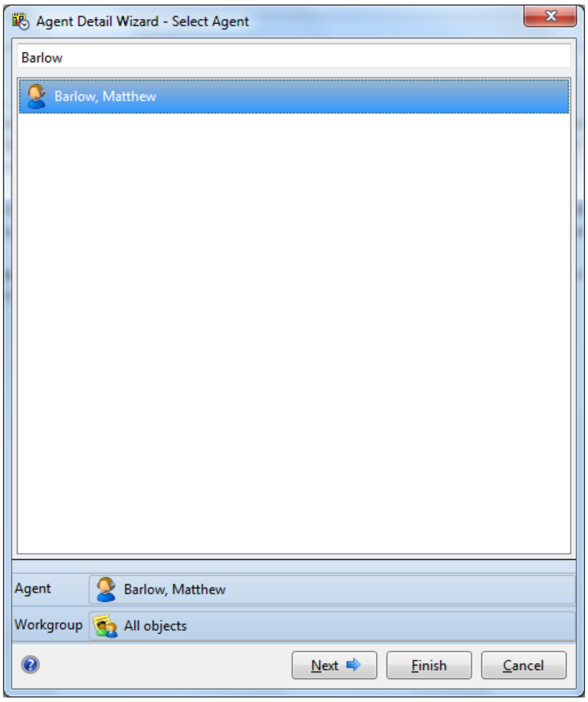
Once you select a new view, you will be presented with the following screen:



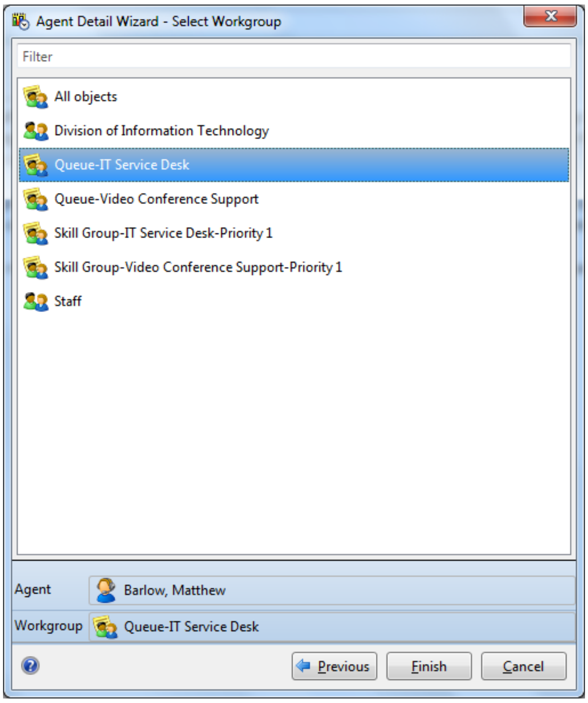
Agent Details

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**



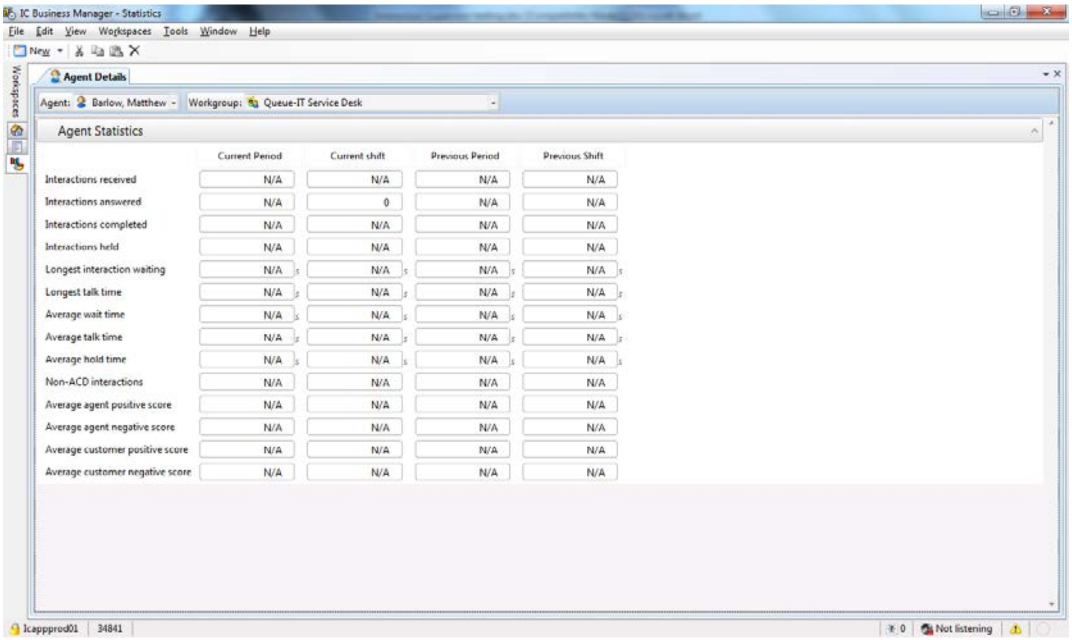
3. Workgroups that the selected agent is a member will display in list format:



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

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

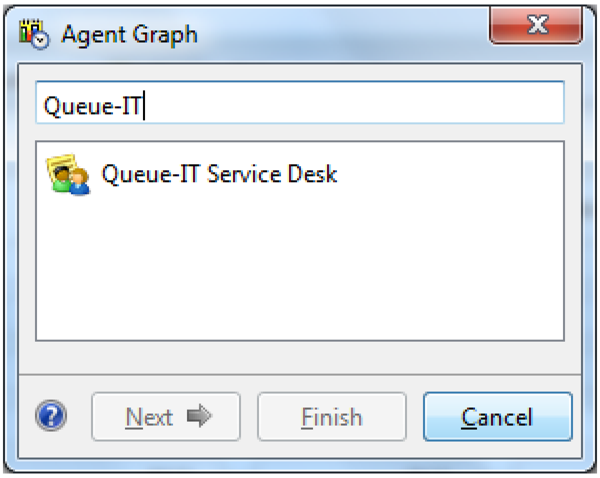
You have the choice to either leave the page (for a specific user and a workgroup they are in) and create a new view per agent, or you can use this view to go to different agents as required.



Agents Graph

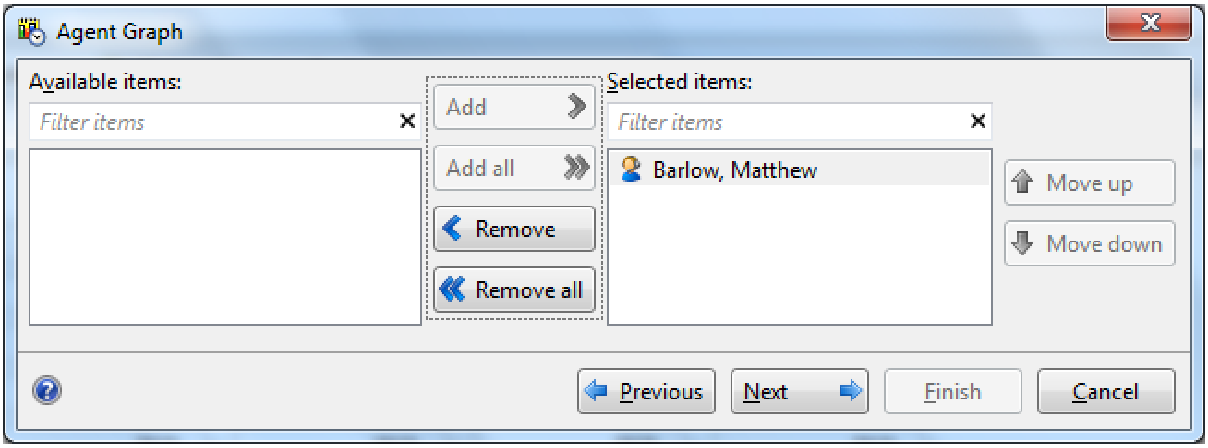
This view shows a graph with specified visual statistics for multiple/singular agents:

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



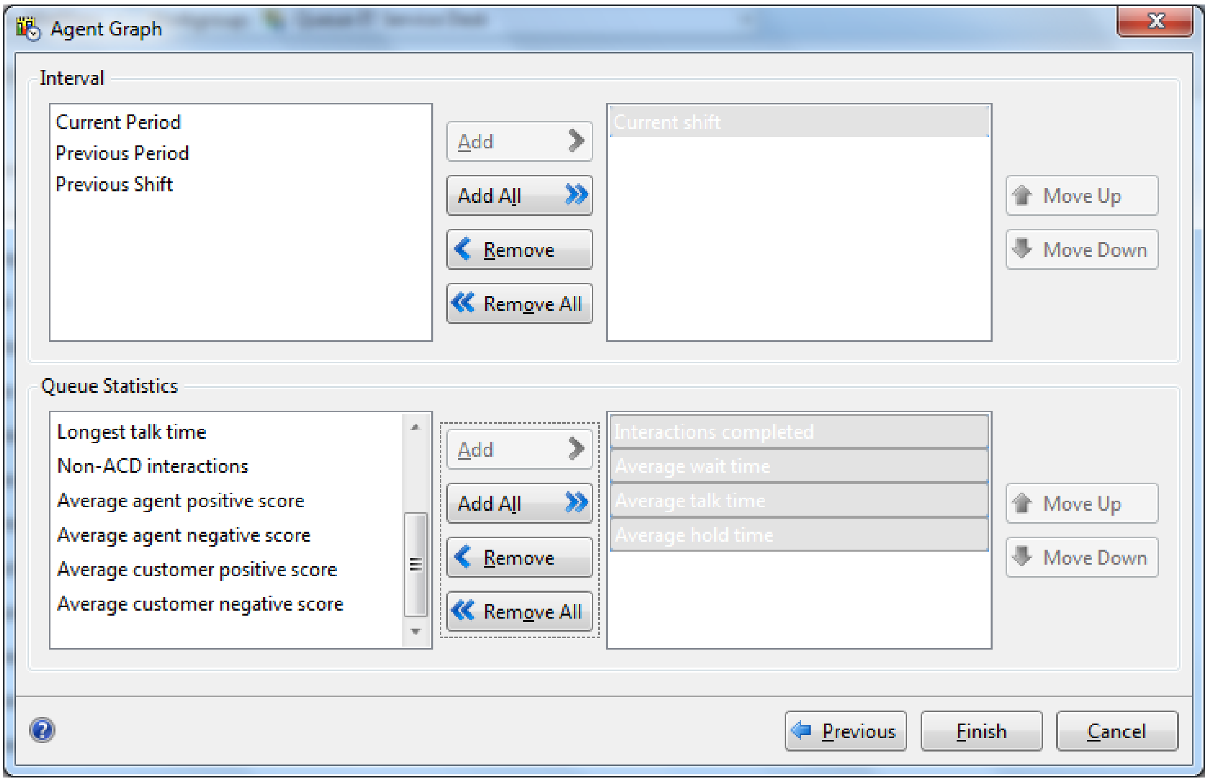
3. Select the **Agents** you want to add to the graph (hold control (Ctrl) and click the Agent) and click **Add** (if you want all **Agents** in the **Workgroup**, click **Add all**)
4. Click **Next**

Charles Sturt University

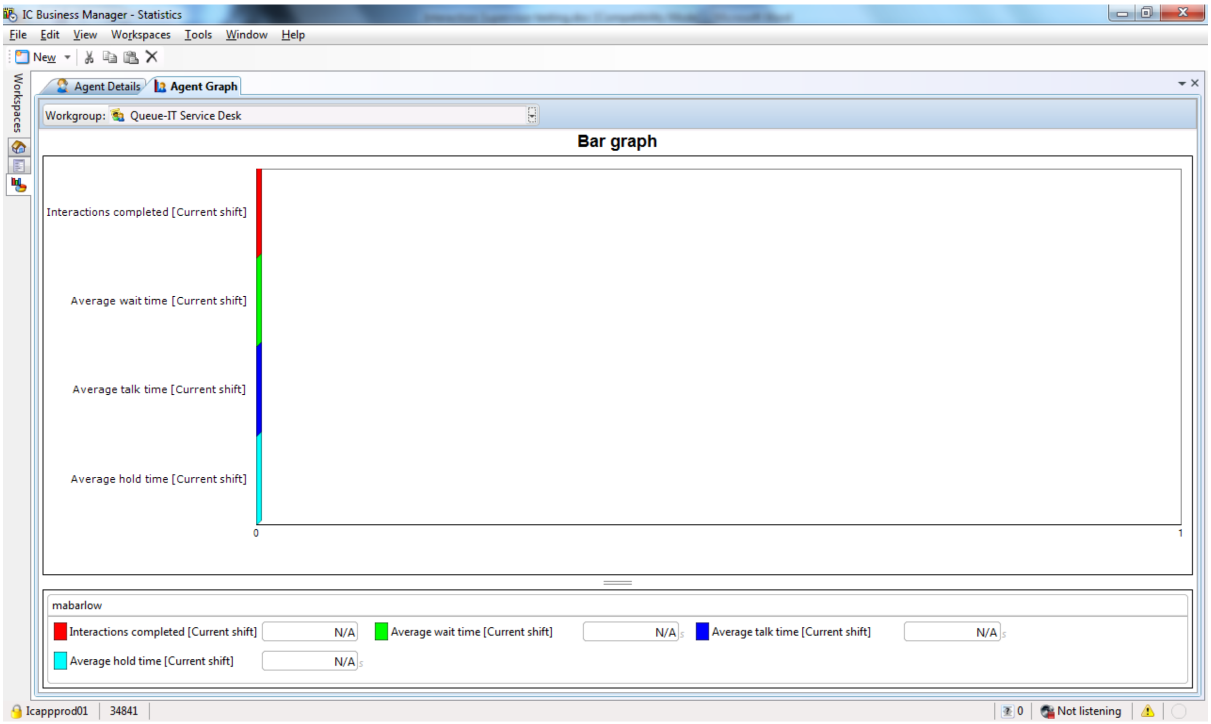


By default, this graph selects **Current Period**, **Current Shift**, **Previous Period** and **Previous Shift** interval periods. You can **select** and **remove** the intervals you don't need.

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

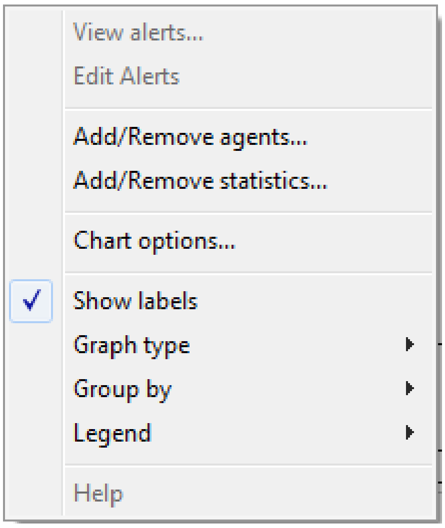


Bar Graph View



You can edit the graph once saved:

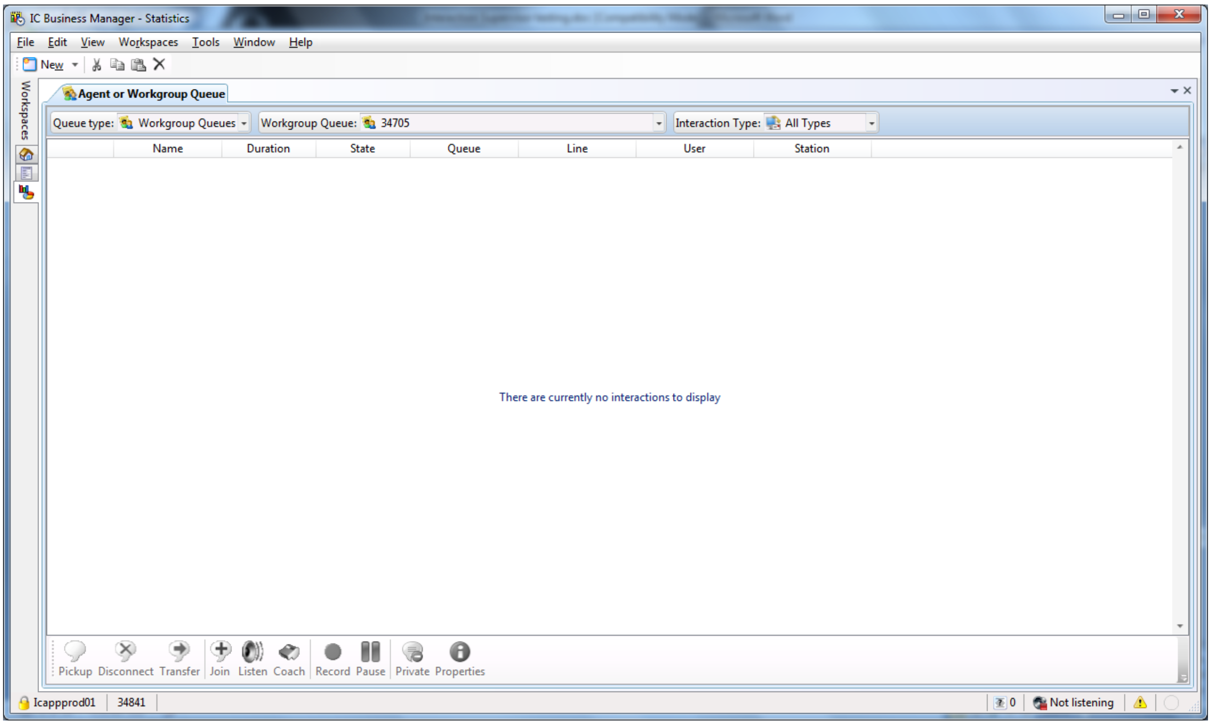
- Right click on the graph and select what you want to edit (e.g. graph types, interval periods, grouping etc.)



Agent or Workgroup Queue

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

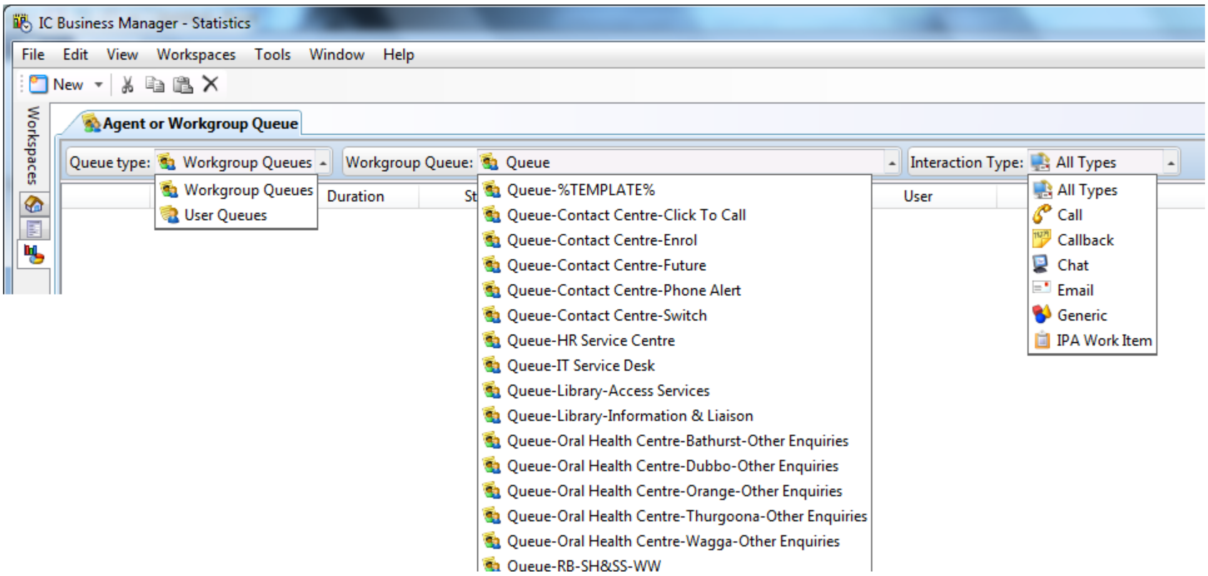
1. Select **Agent or Workgroup** view – you can alter the entries in the window shown below



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

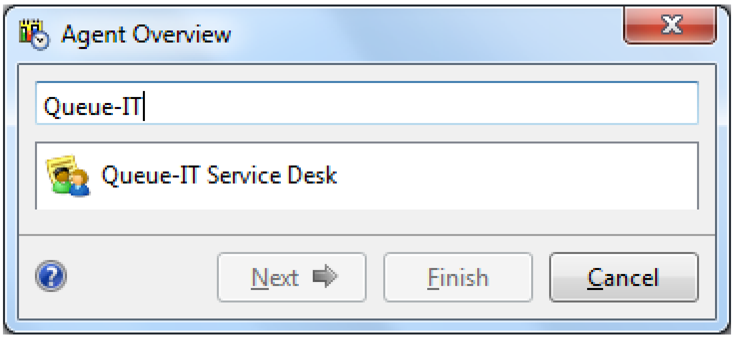
Charles Sturt University



Agent Overview

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

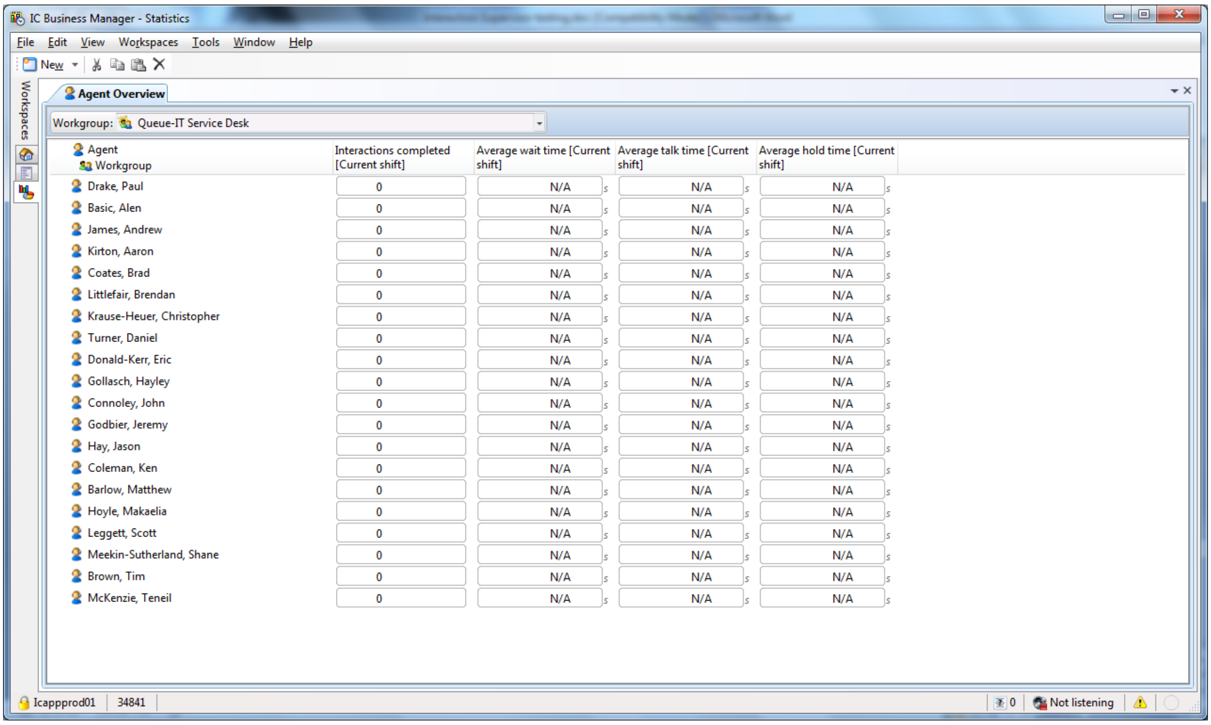
1. In the top filter text box, search for a **Workgroup**
2. When found, select the workgroup and click **Next**



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.

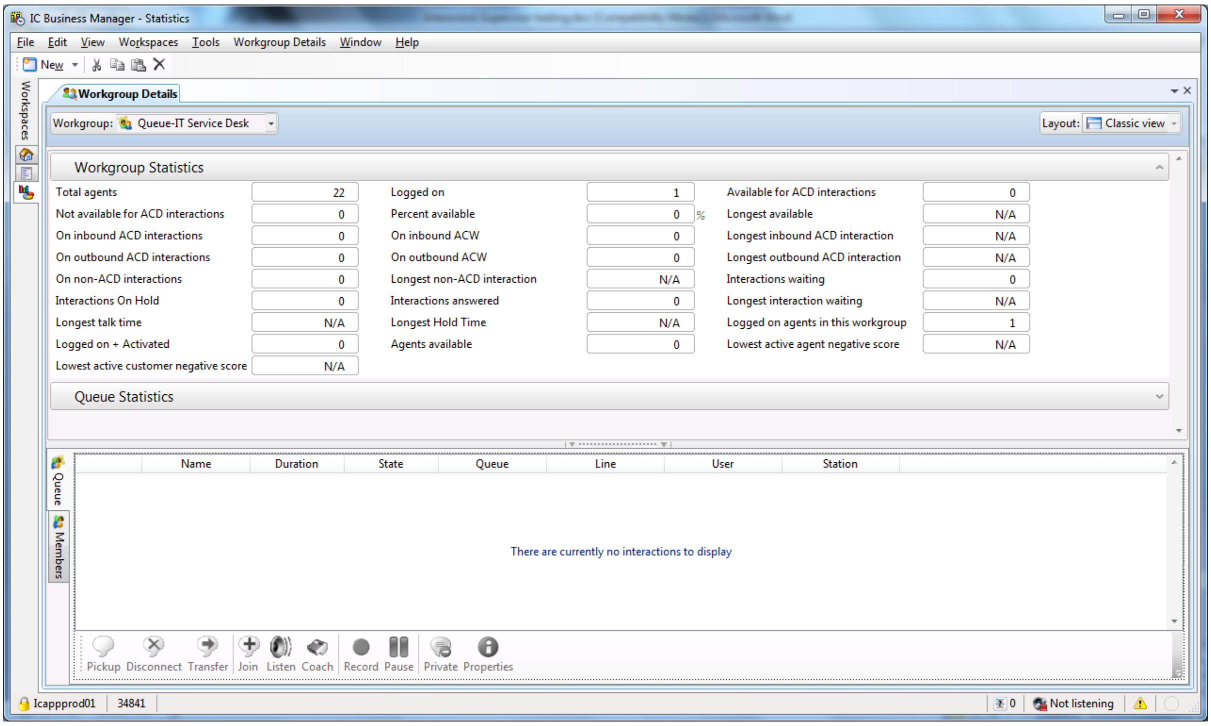
5. Select the **Queue Statistics** you wish to see in the graph and click **Add**
6. Click **Finish** to see the requested information for each Agent.



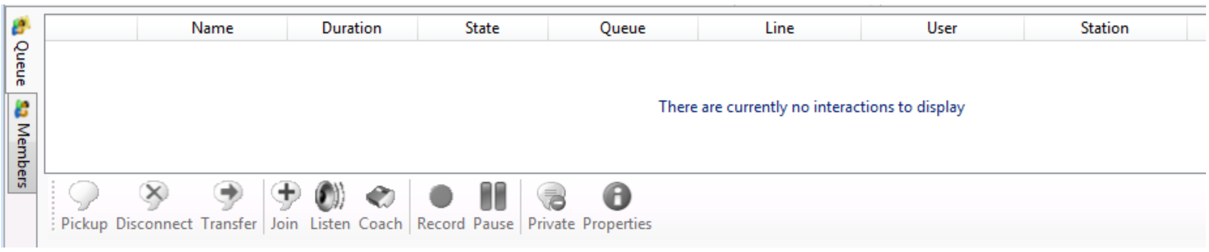
Workgroup Details

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

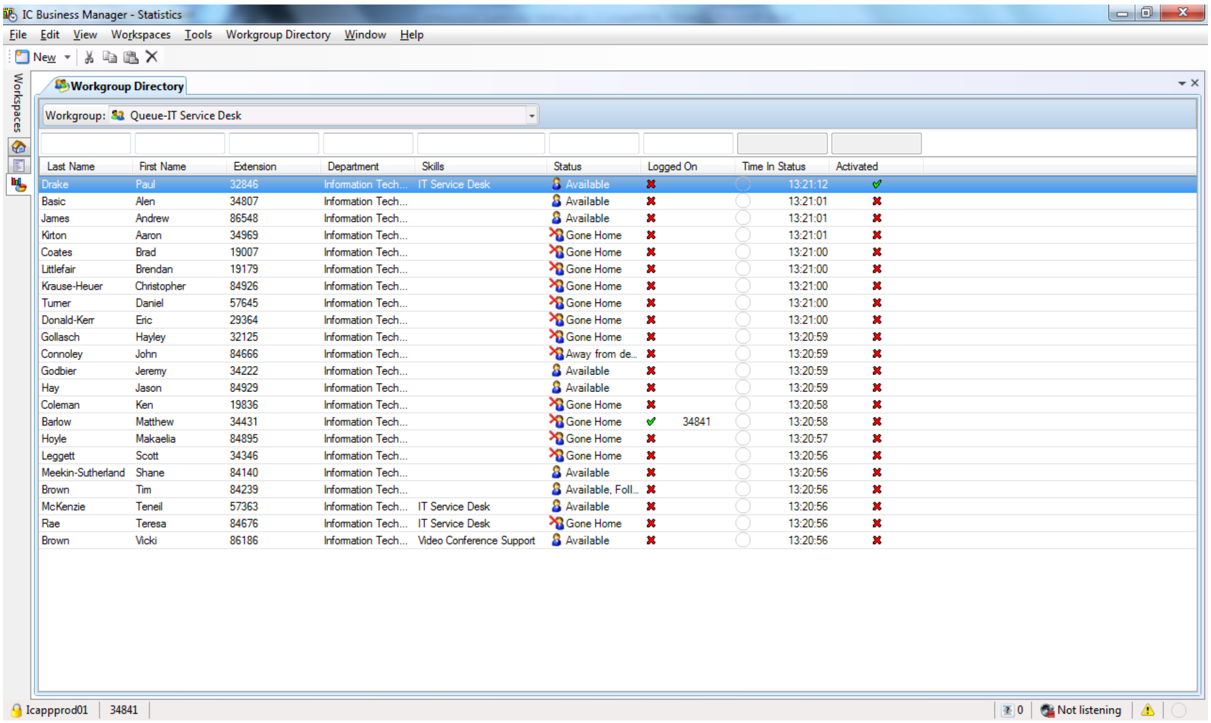


2. Select either Queue and Members (tabs on the left hand side of the screen) for further details:
    - **Queue** – shows all current calls for the Workgroup
    - **Members** – show the agents in the Workgroup with details (e.g. status and queue activation)



Workgroup Directory

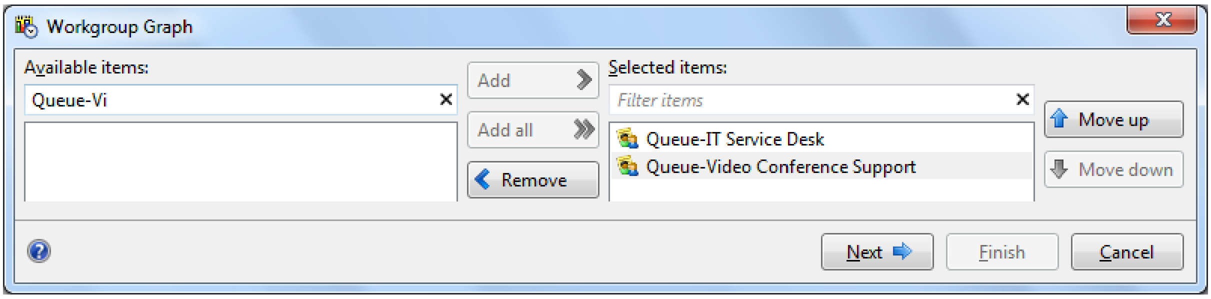
The Workgroup Directory view shows the same details in the **Members** tab (as appears in the **Workgroup Details** view).



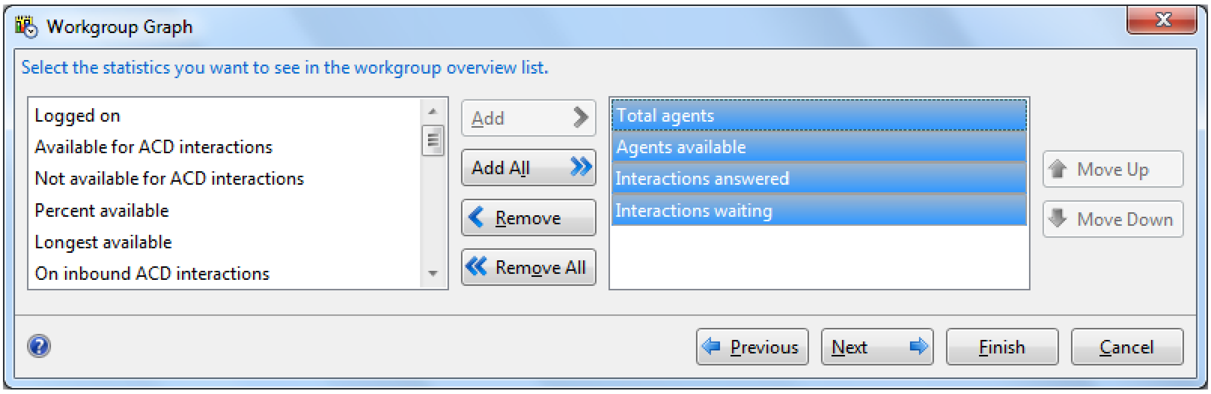
Workgroup Graph

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

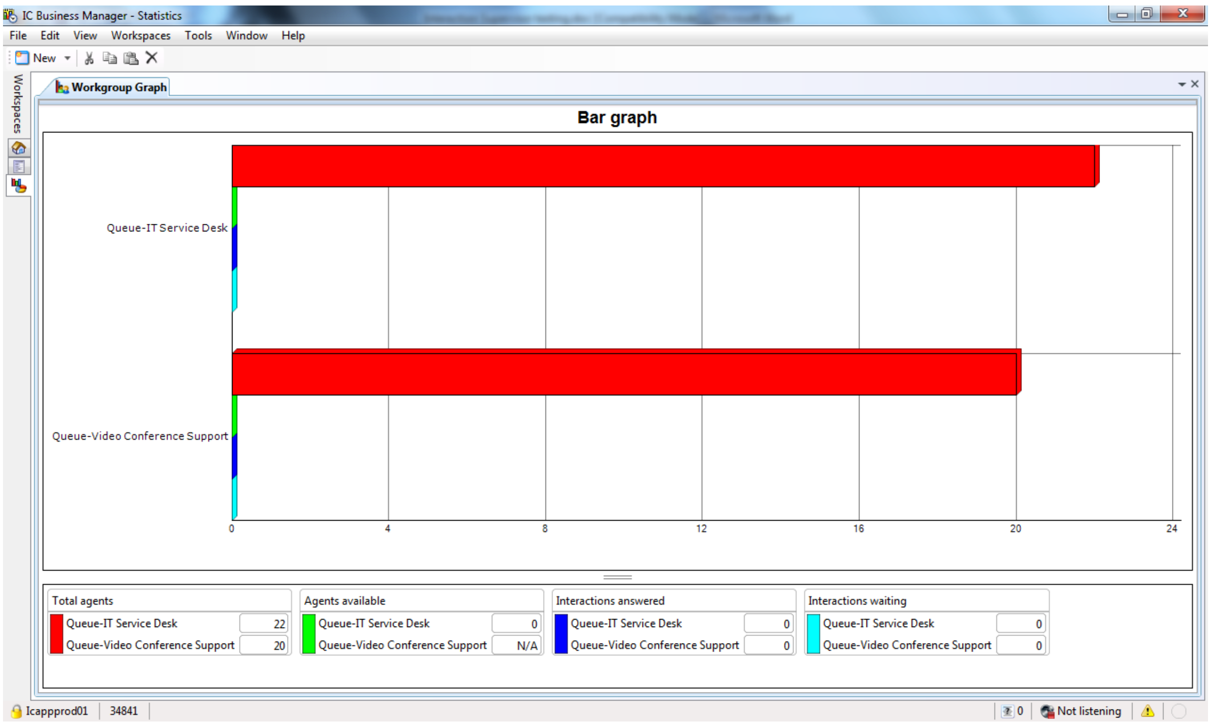
1. Select required queue and click **Add**



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

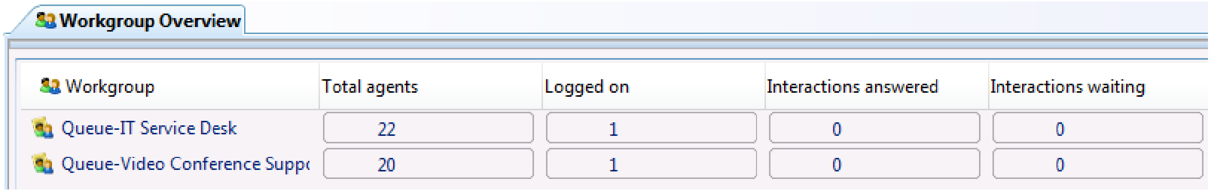


A bar graph will be generated by default. You also have the ability to change the types of information displayed (see **Agents Graph**).



Workgroup Overview

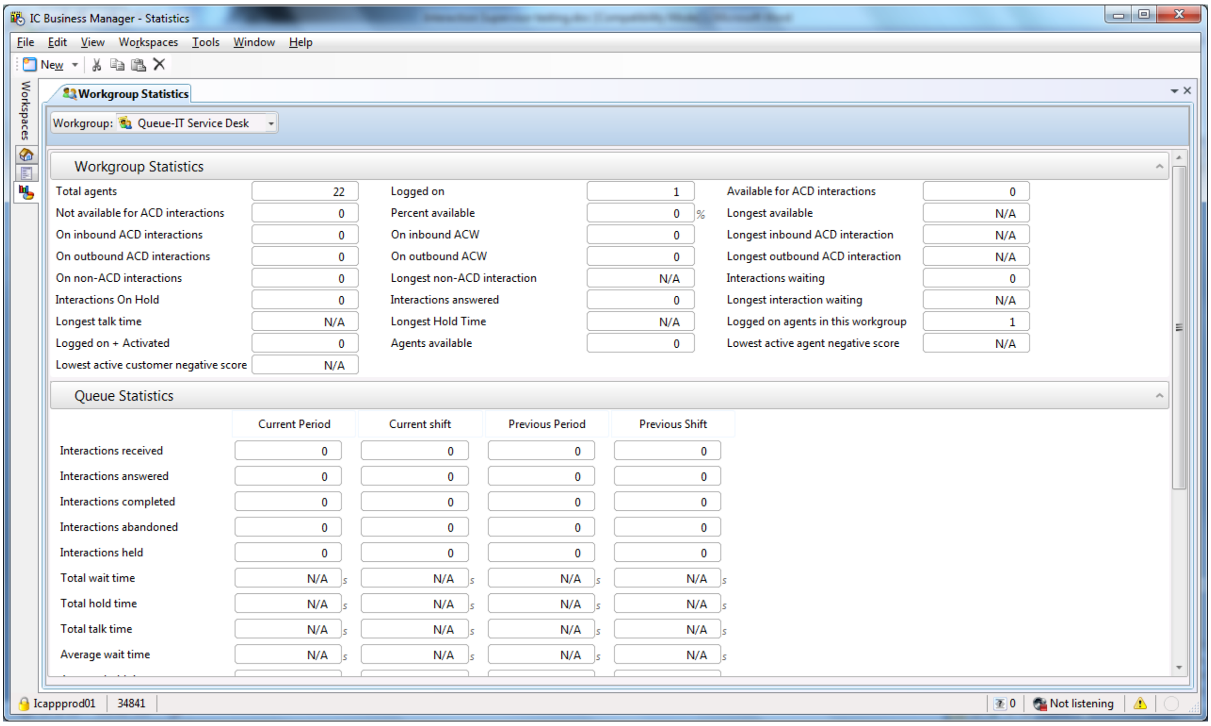
Provides you with the same information as the **Workgroup Graph** but in list view:



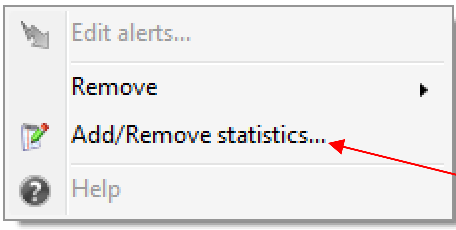
Workgroup Statistics

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.

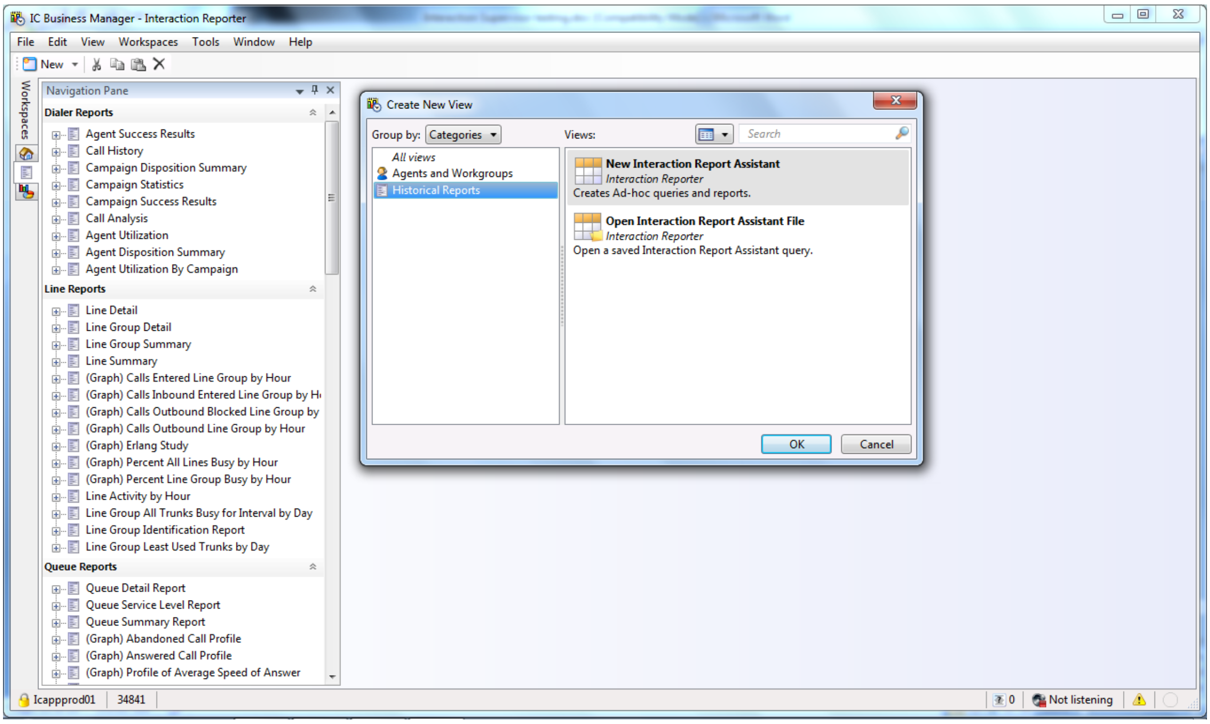


Right Click inside the Workgroup/Queue Statistics field and select Add/Remove statistics. This will open a window where you can add/remove statists as required

Reporting

There are two methods of reporting:

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



Both of these options can be exported by **clicking** Export **to Excel, PDF etc.** and used as required.

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

Interaction Reporter

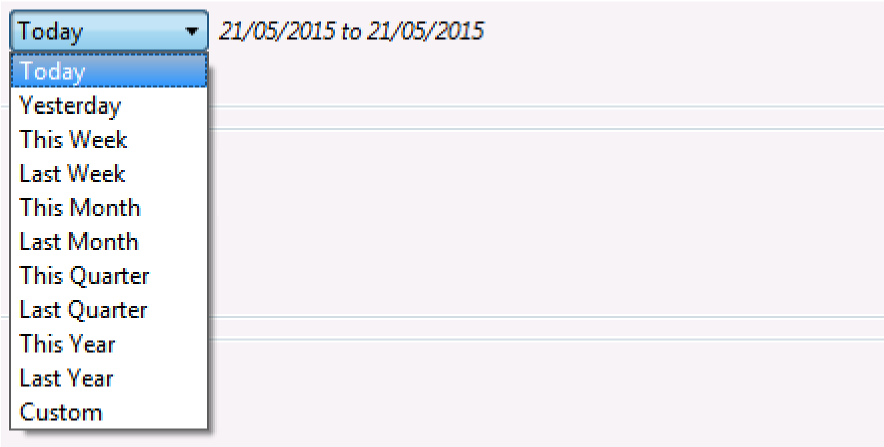
Each workspace has a number of inbuilt reports that you can select and change as required.

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).

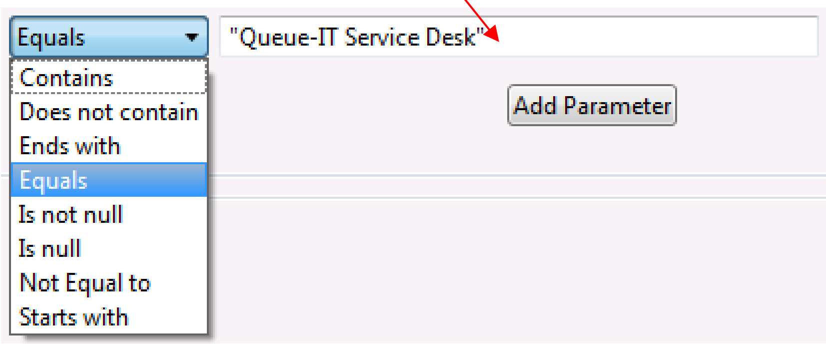
There are preset options such as **Yesterday**, **This Week**, etc and you can enter a **Custom** value (date or time frame).



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.



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 

Historical Reports

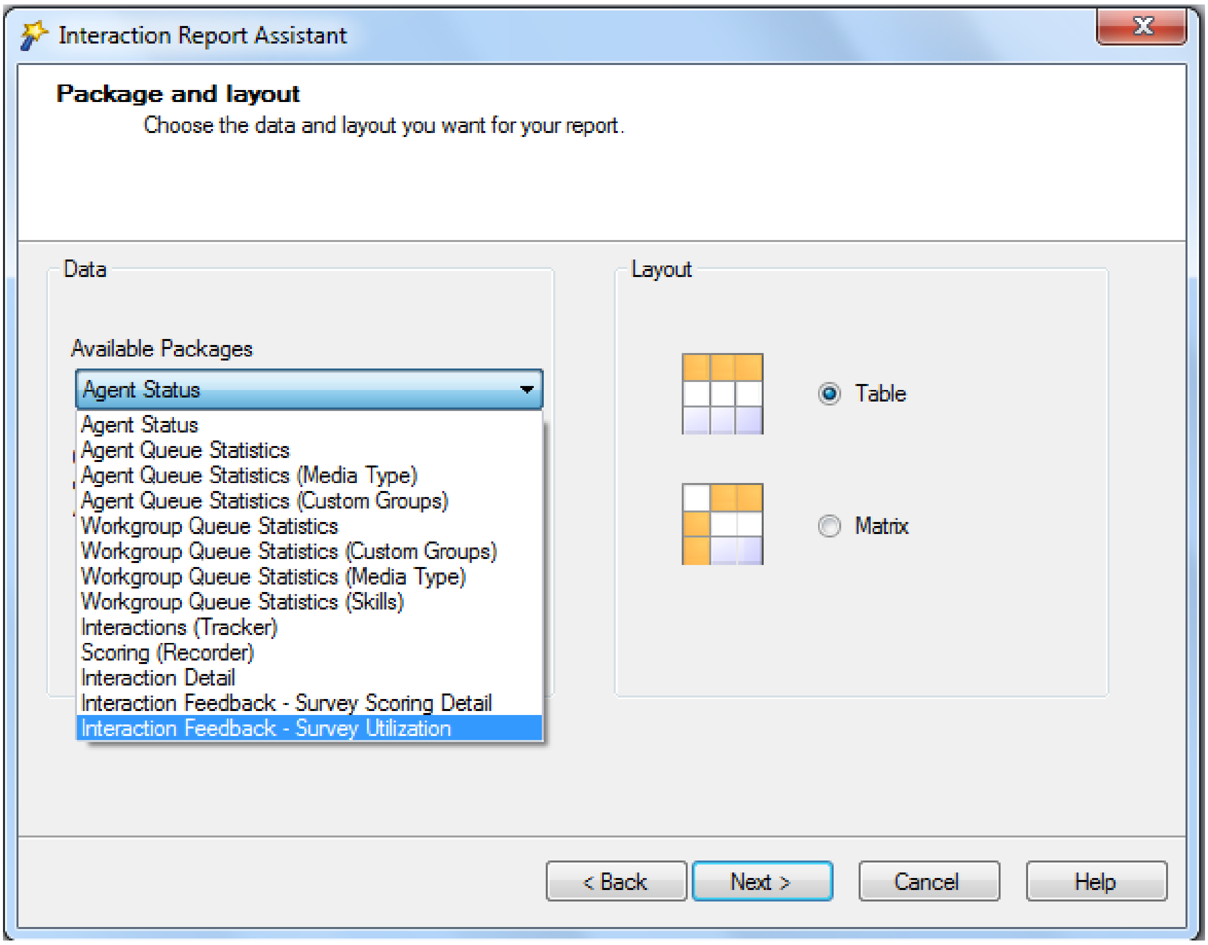
This view allows you to create custom reports.

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



Charles Sturt University

Interaction Desktop

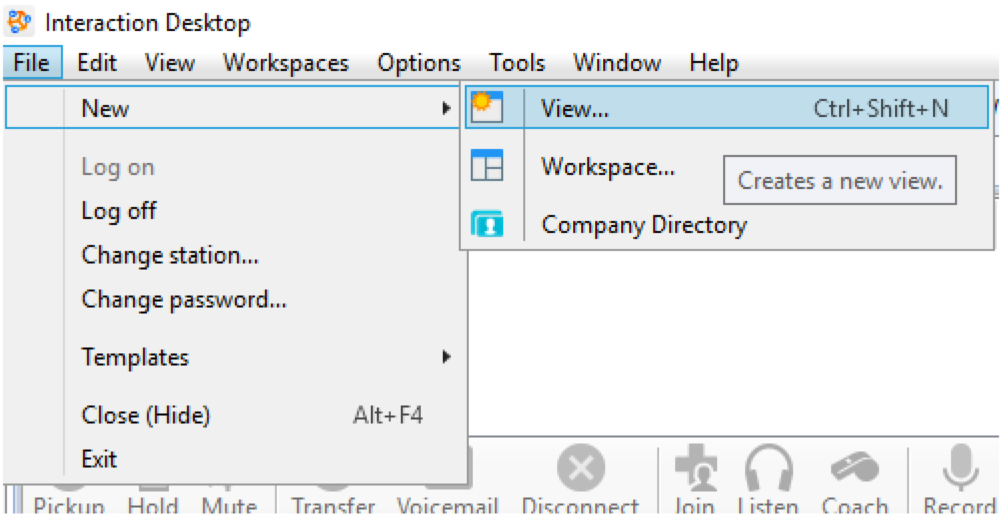
As a Call Queue Supervisor, you will need access to both ICBM and Interaction Desktop. You can monitor your workgroup and its statistics from within Interaction Desktop by adding your workgroup view.

- 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**.

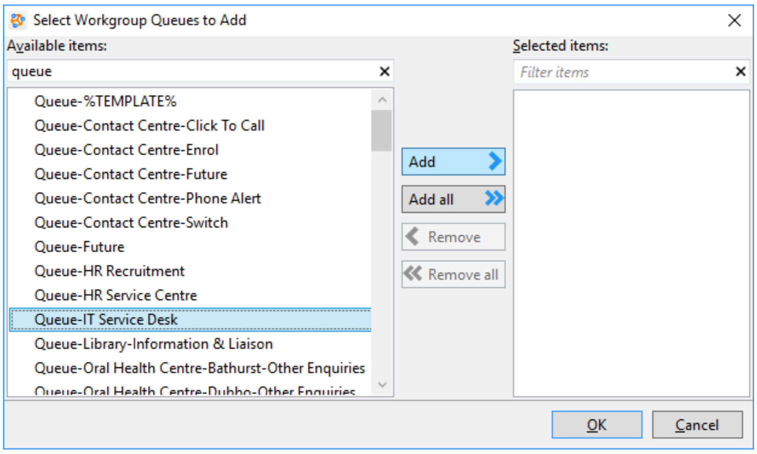
Create the new workspace view

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

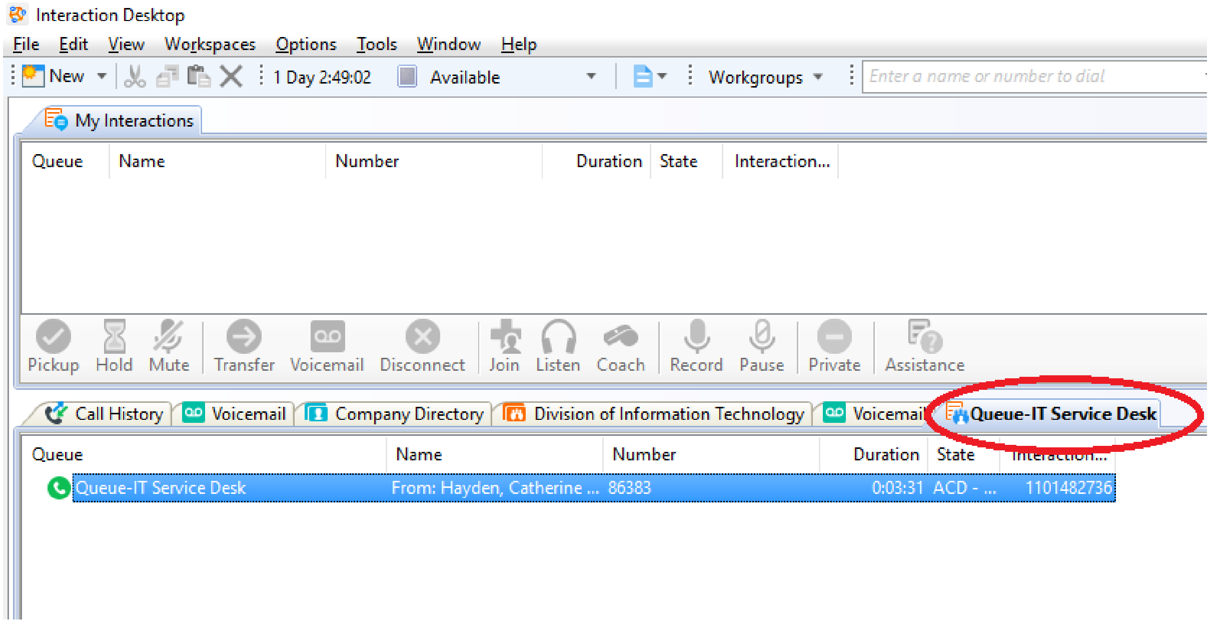


- In the Create New View dialog box, set **Group by** to **Categories**, and then from the list of categories, select **Queues**.
- In the *Views* window select Workgroup Queue and click OK
- Under *Available items* select the queue you wish to add.
  You can use the filter box at the top of the list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

- Click **Add** and **OK**



- The workgroup will appear as a new tab

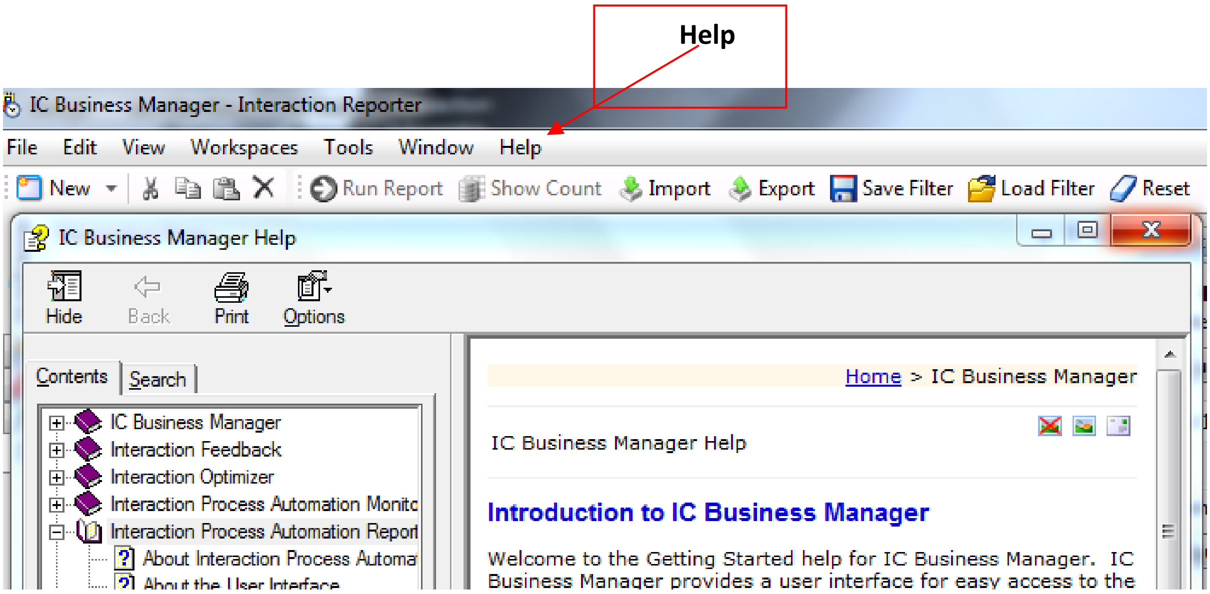


For additional views relevant to Business manager users please refer to the help guides in the next section.

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.



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 [IT Service Desk.]