Cisco webex

WebEx WebACD Monitor User Guide

for Support Center

Version 3.26

cisco

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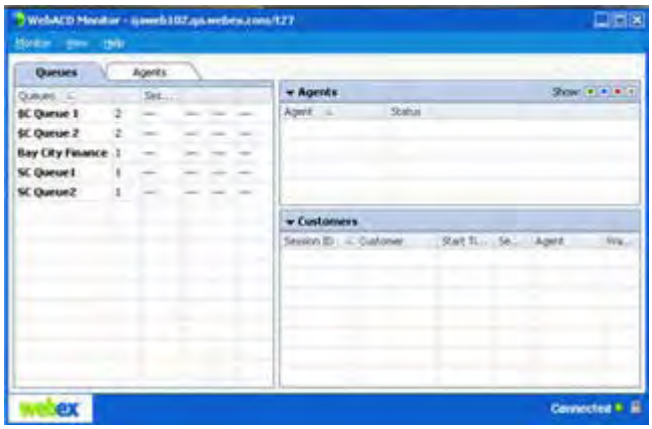
1

Setting up WebACD Monitor

Using WebACD Monitor, you have your finger on the pulse of your support organization. You can check the volume of requests, ensure that customer calls move quickly through the queue, and agents handle requests in a timely manner.

WebACD Monitor provides a number of tools that help you track activity: flow of customer requests and agent response to these requests.

Before you can begin to assist customers, you must first install and setup WebACD.



- Download WebACD *More…* (on page 1)
- Set up your accounts *More…* (on page 2)
- Set your global and individual preferences *More…* (on page 3)

Downloading WebACD

To download WebACD

1. Go to your WebEx Meeting Center site.
2. On the left navigation bar, under **Support**, click **Downloads**.
3. Under WebEx WebACD Inbox and Monitor, click **Download now**.

4 Follow the installation instructions.

The Account Setup window appears.

You do not need to enter http:// when you enter your site URL
More… (on page 2)

Entering your account information

WebACD uses your WebEx site URLs to identify you and route requests to you. The first time you download WebACD Inbox, you provide a URL and your username and password.

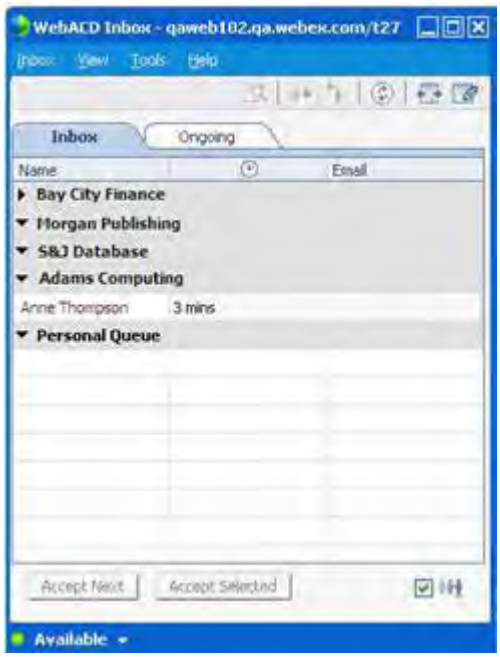
Your site administrator or manager supplies you with the details you need to get started in responding to requests in your assigned queues:

- account names (URLs) for the sites you work with
- your username
- your password

You enter this information once, your queues become available, and you are set up to handle calls immediately. Once you are in a session, other features allow you to invite a customer or another colleague to join the session, or to transfer the session to one or more agents.

You do not need to enter http:// when entering your site URL.

After you enter your site URL, username and password, you log in automatically to your WebACD Inbox.



As a WebACD agent, you can view incoming customer requests, and session activity on ongoing support sessions in queues assigned to you by your administrator.

- You can view incoming customer requests for your queues in the Inbox tab. More…
- You can view ongoing support sessions in the Ongoing tab. More…

Setting your preferences

Set up WebACD Monitor to match your work style.

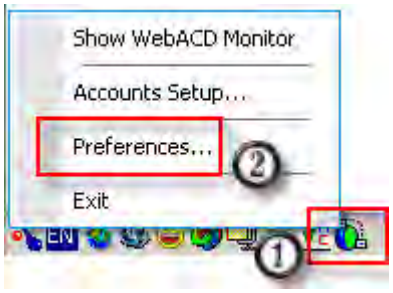
- Launch WebACD Monitor yourself, or, for a fast start, you can launch WebACD Monitor automatically whenever you start your computer *More…* (on page 4)
- Keep WebACD Monitor on top of other windows on your desktop *More…* (on page 4)
- Set keyboard shortcuts for using WebACD Monitor. *More…* (on page 5)

Streamlining startup

If you want to check support activity the moment you log in, use the WebACD Monitor preferences to assist you. For example, you can set preferences to log in to all your WebACD accounts automatically each time you start your computer.

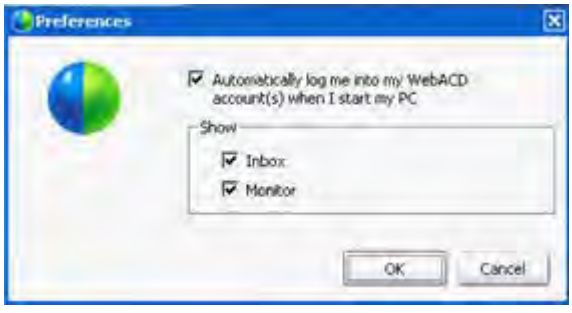
To set preferences:

1. Go to the Windows taskbar.
2. Right-click the **WebACD** icon.



1. WebACD Inbox icon on the Windows taskbar
2. Choose preference

The Preferences dialog box appears.



If you have elected to start WebACD automatically, you can specify what tools you want to show at startup.

WebACD saves your username and password and supplies them to the WebACD Inbox when you start your computer.

General preferences

If you have a lot of applications open on your desktop, WebACD can place your Monitor so it is always on top and visible.

To set WebACD Monitor to always appear on top of other windows on your desktop

1. On the menu bar of the WebACD Monitor, click **Monitor**, then choose **Preferences**.
2. The Preferences dialog appears.
3. If it is not already checked, select the checkbox for **Always keep WebACD Monitor on top**.

Keyboard Shortcuts preferences

Use the preset keyboard shortcuts or set your own.

To set keyboard shortcuts:

1. On the menu bar of the WebACD Monitor, click **Monitor**, then choose **Preferences**.

   The Preferences dialog appears.
2. Click **Keyboard Shortcuts**.

   The Keyboard Shortcuts pane appears.

Preference	Description
Enable keyboard shortcuts	Use the key combinations (either preset or the alternative you have set) as shortcut keys.
Control Alt Shift	Use combinations of these special keys (the Ctrl, Alt, or Shift key) to form different shortcuts, if you do not want to use the preset key combinations. Type the letter or symbol in the box next to the **Set Key** button. **Note** You enable all or no shortcut keys.

Understanding the WebACD Monitor

Your site administrator sets up queues to manage the flow of requests to your WebACD URL in a timely and efficient manner.

For example, if agents you manage support a product or service that has many features, your administrator may assign a pool of agents to handle requests and calls about one or more features. Or, if your company provides numerous products or services, your site administrator can assign agents to support particular products.

WebACD is very flexible and your administrator can set up queues in a way that makes sense for you, the agents you manage, and your customers.

WebACD Monitor is flexible in how it allows you to monitor acitivity:

- view and monitor session activity by queue or by agent *More…* (on page 6)
- Customize how information appears on the Queues tab *More…* (on page 9)
- Customize how information appears on the Agents tab *More…* (on page 13)
- Choose and position Monitor panes to suit your viewing preference *More…* (on page 16)

Two views: by Queue or by Agent

If you want to check the traffic in the queues you monitor, go to the **Queues** tab. Select a queue and then see the number of agents assigned to that queue and the status of each agent. You can also see details about customers being helped.

To view by Queue:

In WebACD Monitor, select the **Queues** tab.

1. Monitor view by Queue
2. List of queues
3. Agents assigned to this queue
4. Information about the select customer

If you want to view the agents you manage and customers they are currently assisting, go to the **Agents** tab.

To view by Agent:

In WebACD Monitor, select the **Agents** tab.

1 Monitor view by Agent

2 List of agents

3 Queues assigned to selected agents

4 Information about the customer being assisted

Collapsing and expanding panes

You can easily collapse a pane if you need to see other items on your desktop. You can expand the pane again when you need to view the information on it.

To collapse a pane:

Click the icon in the upper left corner of a pane to collapse it.

The pane collapses, leaving just the title bar visible.

To expand a pane:

If a pane is collapsed (you only can see its title bar), click the icon in the left corner of the title bar to expand it.

Pane is open. To collapse the pane click the down arrow

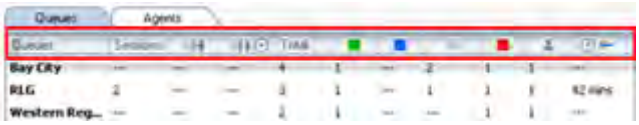
These panes are collapsed. To restore a pane, click the arrow

Customizing your Monitor: Queues tab

You can choose the details you see about the queues and agents you manage. You can set the items you see on each pane, except for the **Customer Details** pane:

- **Queues** pane *More…* (on page 9)
- **Agents** pane *More…* (on page 11)
- **Customer** pane *More…* (on page 12)
- **Customer Detail** pane-you cannot customize this pane.

Columns available on Queues tab: Queues pane



Column name or symbol	Description
Queue	Name of queue
Session	Number of ongoing sessions in this queue
	Number of customers waiting in this queue
	Longest waiting time among customers in queue
Total Agents	Total number of agents assigned to this queu.
	Number of agents assigned to this queue with "available" status

Column name or symbol	Description
	Number of agents assigned to this queue with "busy" status.
	Number of agents assigned to this queue with "disconnected" status
	Number of agents assigned to this queue with "unavailable" status
	Number of active agents assigned to this queue
	Longest ongoing session among agents assigned to this queue

To select the information you want to see on the Queues pane:

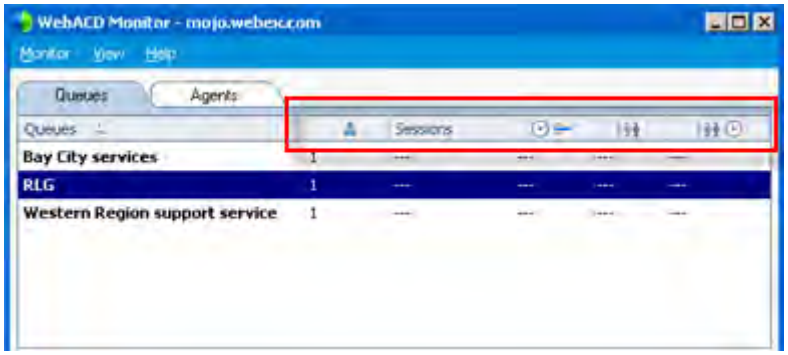
1. On the **View** menu, choose **Customize View**.
2. Choose the **Queues** tab.
3. In the **Select Pane** dropdown list, select **Queues**.

This example shows options for customizing your Queues pane view

① Use these arrows to select the fields you want to view in the Queues pane.

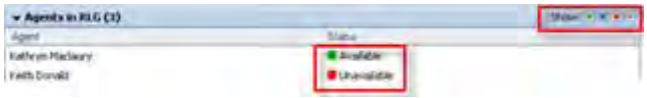
② Use these arrows to reorder the fileds in the Queues pane view.

This example shows how the selected fields appear in WebACD Monitor.



Fields selected in the Customize View dialog box

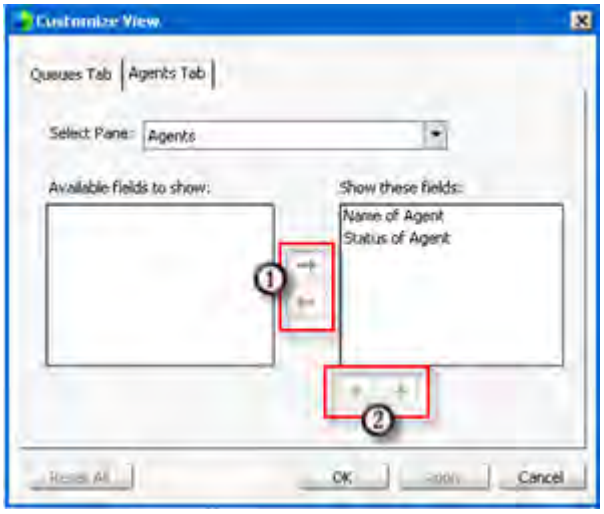
Columns available on the Queues tab: Agents pane



Column name	Description
Queue	Name of queue
Session	Number of ongoing sessions in this queue

To select the information you want to see on the Agents pane:

1. On the **View** menu, choose **Customize View**.
2. Choose the **Agents** tab.
3. In the **Select Pane** dropdown list, select **Agents**.



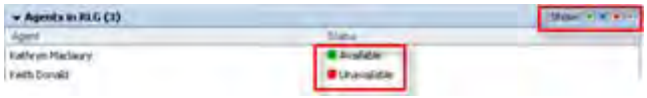
This example shows options for customizing your Agents pane view

① Use these arrows to select the fields you want to view in the Agents pane.

② Use these arrows to reorder the fileds in the Agents pane view.

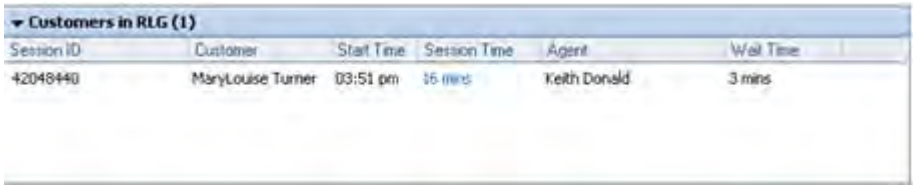
To hide or show the status of agents:

In the upper right corner of the Agents pane, look for the palette with the four agent statuses. Click a status to show it; click it again to hide it.



The Available and Unavailable statuses are currently selected

Columns available on the Queues tab: Customer pane

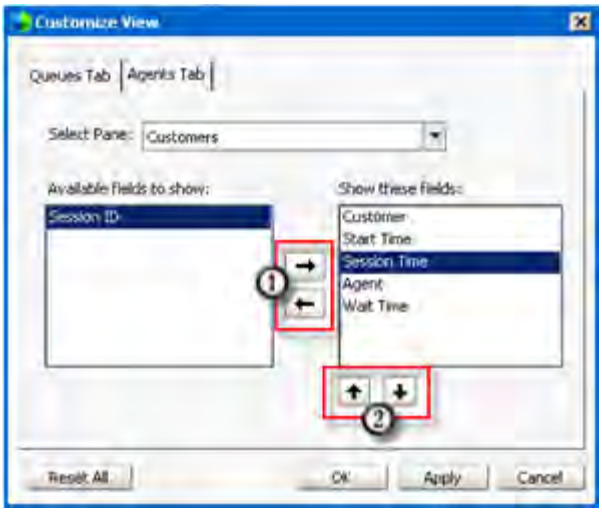


Column name	Description
Session ID	Session number assigned to session. For customers not yet helped, you see "Waiting..." in this column.
Customer	Customer's full name
Start time	For active sessions, displays the time the session started.

Column name	Description
Agents	Name of agent or agents assisting this customer
Wait time	The number of minutes the customer waited

To select the information you want to see on the Customer pane:

1. On the **View** menu, choose **Customize View**.
2. Choose the **Customer** tab.
3. In the **Select Pane** dropdown list, select **Customer**.



This example shows options for customizing your Customer pane view

① Use these arrows to select the fields you want to view in the Customer pane.

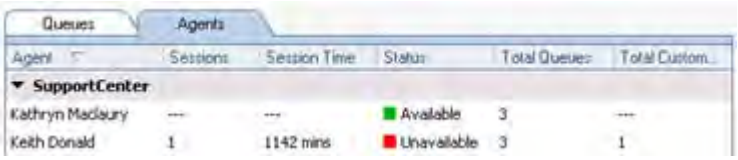
② Use these arrows to reorder the fileds in the Customer pane view.

Customizing your Monitor: Agents tab

You can choose the details you see about the queues and agents you manage. You can set the items you see on each pane, except for the **Customer Details** pane:

- **Agents** pane *More…* (on page 14)
- **Customer** pane *More…* (on page 15)
- **Customer Detail** pane-you cannot customize this pane.

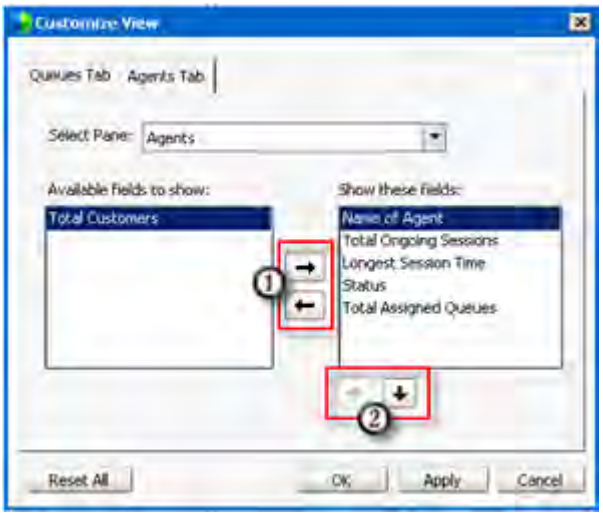
Columns available on Agents tab: Agents pane



Column name or symbol	Description
Agent	Full name of agent
Sessions	Number of sessions in progress
Status	Status of agent
	Agent status is "available"
	Agent status is "busy"
	Agent status is "disconnected"
	Agent status is "unavailable"
Total Queues	Number of assigned queues
Total Customers	Number of customers

To select the information you want to see on the Agents pane:

1. On the **View** menu, choose **Customize View**.
2. Choose the **Agents** tab.
3. In the **Select Pane** dropdown list, select **Agents**.

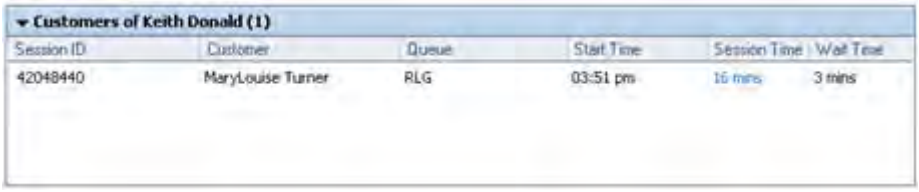


This example shows options for customizing your Agents pane view

① Use these arrows to select the fields you want to view in the Agents pane.

② Use these arrows to reorder the fileds in the Agents pane view.

Columns available on the Agents tab: Customers pane



-

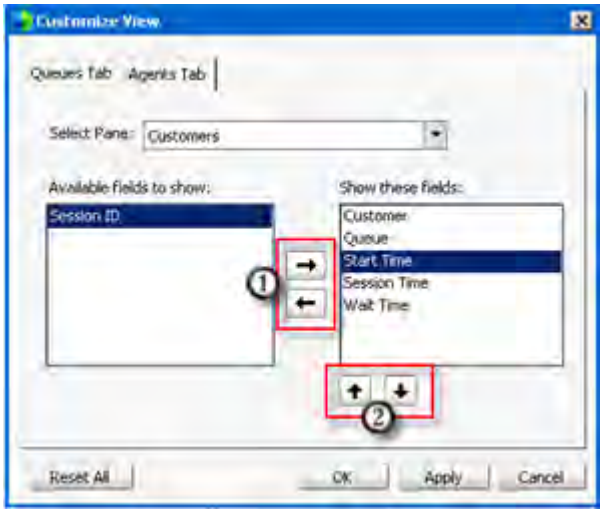
Column name	Description
Session ID	Number assigned to session. For customers not yet helped, you see "Waiting..." in this column.
Customer	Customer's full name
Start time	For active sessions, displays the time the session started
Queue	Name of queue
Session Time	Length (in minutes) of this session
Wait time	Number of minutes the customer waited

To select the information you want to see on the Queues pane:

1 On the **View** menu, choose **Customize View**.

2 Choose the **Queues** tab.

3 In the **Select Pane** dropdown list, select **Queues**.



This example shows options for customizing your Queues pane view

① Use these arrows to select the fields you want to view in the Queues pane.

② Use these arrows to reorder the fileds in the Queues pane view.

Choosing panes and rearranging panes

On each tab (Queues or Agents) you can select the panes you want to see. You can view the selected panes side-by-side, in two columns or stacked.

To choose the panes you want to view:

1 Select the tab you want to update (**Queues** or **Agents**).

2 On the **View** menu, choose **Panes**.

3 Select the pane or panes you want to view.

To view the panes side-by-side, in two columns:

On the **View** menu, choose **Double Panes**.

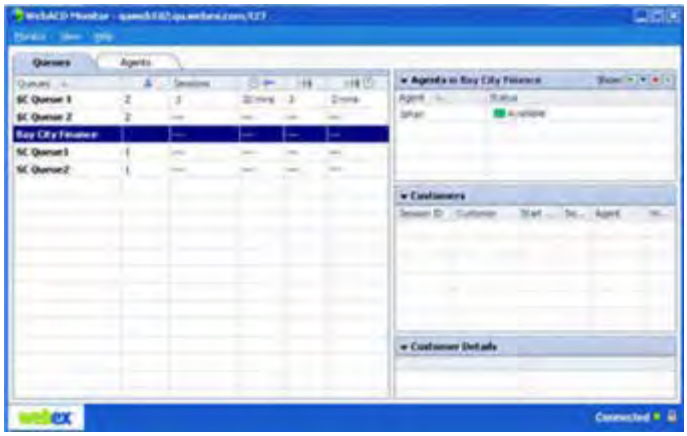
To view the panes stacked, in a single column:

On the **View** menu, choose **Single Pane**.

2

Getting started with WebACD Monitor

WebACD Monitor is responsive in meeting your needs for monitoring queue and agent activity. You can quickly switch from viewing traffic in a queue to checking a single agent's activity.

WebACD Monitor	What you can do
	▪ view details about a particular queue *More…* (on page 17) ▪ see how many customers are waiting for help *More…* (on page 18) ▪ get an overview of agent activity *More…* (on page 20) ▪ view information about a customer *More…* (on page 19) ▪ check the activity of a particular agent *More…* (on page 21)

Monitoring queue activity

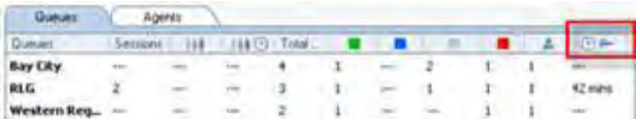
The Queues tab in WebACD Monitor provides the details you need about the queues you monitor. For information about customizing the information that appears on this tab, see *Customizing your Monitor: Queues tab* (on page 9).

You can also sort the information on a tab by clicking any column heading.

For instance, you may want to view queue information, sorted by the:

- queue with the largest number of ongoing sessions
- queue with the longest wait time
- queue with the most active agents

Click a column heading to change how information is sorted



Click here to sort by longest waiting time in any queue

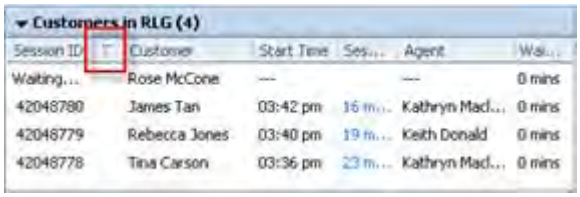
Checking how many customers are waiting in a queue

The Customers pane in the Queues tab of WebACD Monitor displays a list of customers in a session or waiting to join a session for a particular queue.

To see customers for a specific queue

1. Select the **Queues** tab.
2. In the **Queues** pane, select the name of the queue you want to review.
3. If necessary, scroll down to the **Customers** pane.

   You see the list of customers in a session or waiting to join a session. Click the arrow next to the Session ID heading to bring the "Waiting" customers to the top of the list.



Click this arrow to sort the Session ID list

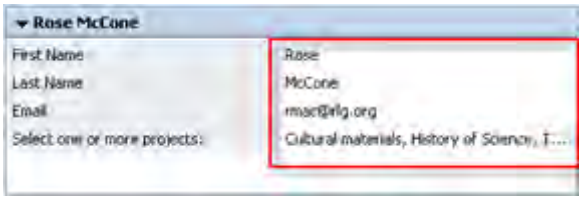
Viewing details about a customer in a session or waiting to join a session

The Customers pane in the Queues tab of WebACD Monitor displays a list of customers in a session or waiting to join a session for a particular queue.

To see details about a specific customer in the Customers pane.

1. In the **Queues** pane, select the queue you want to review.
2. If necessary, scroll down to the **Customers** pane.

   You see the list of customers in a session or waiting to join a session in the selected queue.
3. Right-click on the customer name.



The details about this customer appear in the Customer Details pane.

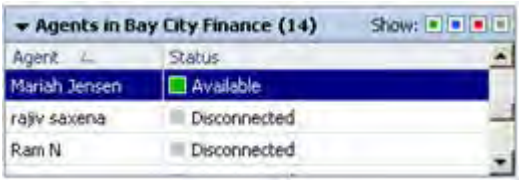
This information is retrieved from the entry form completed by the customer

Viewing which agents are assigned to a particular queue

The Agents pane in the Queues tab of WebACD Monitor displays a list of agents assigned to a particular queue.

To see the list of agents assigned to a particular queue

1. Select the **Queues** tab.
2. In the **Queues** pane, select the name of the queue you want to review.
3. If necessary, scroll down to the **Agents** pane.



You can filter or order the list of agents by status (for instance, hide the names of agents who are disconnected)

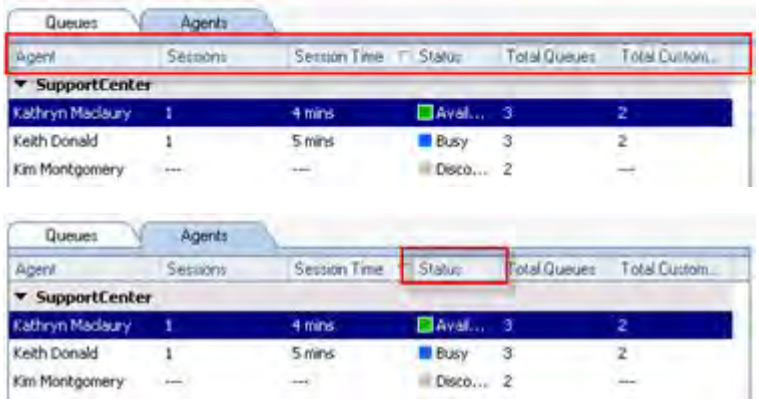
Monitoring agent activity

The Agents tab provides the details you need about the agents you manage. For details about customizing the information that appears on this tab, see *Customizing your Monitor: Agents tab* (on page 13).

You can also sort the information on a tab by clicking any column heading.

For instance, you may want to view the agents sorted by :

- agent status
- agent with longest session time
- agent assigned to most queues



Click a column heading to change how information is sorted

Click here to sort by agent status

Viewing queues handled by a particular agent

The Queues Assigned pane in the Agents tab of WebACD Monitor displays a list of all queues currently handled by a particular agent.

1. Select the **Agents** tab

   You see the list of all agents you manage. You can sort the list in different ways by clicking the column headings. You can easily check the status of any agent.

2. In the **Agents** pane, select the name of the agent.
3. If necessary, scroll down to the **Queues Assigned** pane.

You see a list of all queues currently handled by the agent you have selected.

Checking the status and activities of an agent

The Customers pane in the Agents tab of WebACD Monitor displays a list of all customers currently handled by a particular agent.

1. Select the **Agents** tab.

   You see the list of all agents you manage. You can sort the list in different ways by click the column headings. You can easily check the status of any agent.

2. In the **Agents** pane, select the name of the agent.

3. If necessary, scroll down to the **Customers** pane.

You see a list of all customers currently handled by the agent you hav e selected.

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