

USER GUIDE

ShoreTel Contact Center Agent Dashboard

ShoreTel Advanced Applications

Introduction

The ShoreTel Contact Center Agent Dashboard (CCAD) is an application for the ShoreTel Contact Center (CC) that provides the ability to monitor, in real time, the service being provided to customers. This application displays customer service metrics such as number of calls waiting, average wait times, and other such performance statistics. It provides agents with real time information not currently available in any Contact Center application thereby empowering them to self-manage customer care standards.



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Contact Center Event Feed Connection Problem	
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Licensing

CCAD is a licensed application and the number of unique concurrent Windows users is limited by licenses purchased. A Windows user can have only one browser session running CCAD and will use only one license. If the same user starts another session from a different machine, or another browser from the same machine, or even a session in another browser tab from the same machine, the user's existing browser session will be closed.

Operational Considerations

General

- CCAD is NOT a replacement for the Contact Center Agent Manager or Wallboard applications.
- CCAD has been currently qualified for only the following browsers: Microsoft Internet Explorer (IE), Mozilla FireFox (FF) on Windows, Safari browser on Apple Mac OS and iPad. Please refer to <u>Supported Browsers and Operating Systems</u> for full details. Apple iPad is the only tablet device currently qualified for CCAD usage from its mobile Safari browser (see <u>Apple iPad Support</u> for specific restrictions.) No browsers on other tablet and mobile devices have yet been qualified.
- Per the default configuration, when the CCAD web page is launched from its start page, it is shown in a browser window without the menu bar and toolbar(s) to conserve screen real estate. However, when the CCAD is configured to launch in full screen and the browser used is IE, the CCAD is launched in a full screen IE browser window (refer <u>Launch in Full</u> <u>Screen Browser Window</u> for full details).
- When the CCAD main web page is launched from the CCAD start page, automatic closing of the start page works currently in IE only. For other browsers, one might need to manually close the browser window hosting the start page.
- Currently drag and drop of reports works for IE browser only and not for any other browser. For the other supported browsers, one can edit a report and change the report's position within a zone and/or move it to a different zone. Refer to <u>Reposition Reports</u> for more details.
- The reports can be moved to only one of four zones in the CCAD web page. The width of these zones is automatically adjusted so as to fully display ALL the reports in each zone and so, in effect, the width of a zone (and so overall display width of the web page) is determined by the widest report in that zone.
- It is not possible to rename reports. If more than one of a kind of report is configured, each report's name or caption is appended with a sequence number. Group Reports' captions, in particular, are appended with the CC group name as well as the below screenshot shows:





- Browsers might render menus and other web page elements slightly differently.
- Only the US English language is supported for the CCAD web page. This application is currently not localized for any other region/language.

User Sessions

• A user's browser session to CCAD is limited to a maximum of 8 hours by default. Thirty (30) minutes before this limit, the user will be shown a warning that his/her session is nearing the maximum time as the below screenshot shows:



By clicking the **Renew session** hyperlink in the warning pop-up, the user can then renew the session for another 8 hours. If the user does not renew the session in this way within 30 minutes before the 8 hour timeout is reached, then the user's session will be closed when his/her session time reaches 8 hours and the associated CCAD user license will be freed. So, an explicit action on the part of a CCAD user is required to keep his/her CCAD session up (beyond 8 hours after the initial login) like other user session oriented web applications. This is to ensure that the CCAD web page does not continue to be updated, potentially wasting bandwidth and locking a user license, when a user is away from the desktop for an extended period of time.

- In order to have "always on" user sessions, the above default behavior can be disabled by a CCAD Administrator. If configured so, a CCAD user session will NOT expire after 8 hours or require renewing the session 30 minutes before that. But, a user session might still be terminated in either of the following cases:
 - The user closes the CCAD browser window.
 - The user's desktop machine/iPad is shut down or disconnected from the network.
 - The CCAD server machine itself is shut down or disconnected from the network.



Windows Authentication

 CCAD web site access is controlled using Windows authentication. When a user browses to the CCAD web site, the browser will prompt for Windows credentials. For instance, when using the IE browser (except IE 10 with "Metro UI" on the Windows 8 desktop), the authentication dialog will be similar to that shown in the below screenshot:

Connect to 10.15.1	1.1 ? 🗙
	G and
Connecting to 10.15	.11.1.
<u>U</u> ser name:	🖸 candy\nmishra 💽 🗾
Password:	•••••
	Remember my password
	OK Cancel

When using IE 10 with "Metro UI" on the Windows 8 desktop, the dialog box will look similar to the below screenshot:

Internet Explorer Connecting to 10.15.11.1.			
ECCAgent1			
•••••	<u>م</u>		
Domain: WIN832BITDEV			
		ОК	Cancel

• Local user accounts on the CCAD server must be prefixed with the machine name as shown in the screenshot below: :



Connect to 10.15.11	.1 ? ×
	G P
Connecting to 10.15.	.11.1.
<u>U</u> ser name:	😨 nmishra-T110\ECCAgent1 💌 📰
<u>P</u> assword:	••••••
	Remember my password
	OK Cancel

• From browsers other than IE, the user will need to enter his/her Windows user name without the domain name (or the machine name when using a local user account on the CCAD server) and password as shown in the below screenshot for the FireFox browser:

Authentication Required										
?	Enter username and password for http://10.15.11.1									
User Name:	ECCAgent1									
Password:	••••••									
	OK Cancel									

The same will be the case for the Apple iPad Safari browser as shown in the below screenshot:



Carrie	. . .			3:19 PM		100%
				Loading		
4		6	m	15.11.1/webagentdashboard	X Google	
				Authentication Required		
				ECCAgent1		
				ECCAgenti		
				Cancel Log in		
				C		



Access and Administration

- To use CCAD a user must be a Windows user (local or domain user) and must be configured to be allowed access by a CCAD administrator, either explicitly or based on his/her membership in a Windows group (local or domain group) that is allowed access. So, the Windows user ID of a CC agent has no relation to the CC Agent ID used to log in to the CC Agent Toolbar; CCAD can be used by a Windows user (that is allowed access) irrespective of being a CC Agent or not.
- Only a user who is configured as a CCAD administrator can design the CCAD web page, add/remove reports, reset and perform other such functions. Normal CCAD users can only view the CCAD web page, as designed and published by a CCAD Administrator, and cannot modify the CCAD web page; they can only minimize, restore, and reorganize the reports. If the CCAD web page is redesigned and published again, it will override the layout changes, if any, of all individual users.

Launch in Full Screen Browser Window

When the CCAD is configured to launch in a full screen browser window and the browser used is IE, the CCAD "main page" (**Default.aspx**) will be opened in a full browser window on clicking the "Launch" button on the CCAD "start page" (**StartPage.aspx**). Please note the following:

- This will be the case when doing login through the CCAD "start page" and launching the "main page" from there. It will NOT apply when directly browsing to the "main page" either manually or automatically(in case the Windows desktop is configured to automatically login and launch CCAD "main page" on startup) and the user must manually switch the browser to full screen mode due to browser security considerations.
- This is supported only when using the Microsoft Internet Explorer (IE) browser (the latest version, Version 9, is recommended) on the Windows desktop platform and, due to browser specific differences, is not guaranteed to work with any other supported browsers (such as FireFox or Safari) or on any other platform/tablet (Mac or iPad.)
- For the new full-screen browser window to display in front, the user will still need to manually close the earlier IE browser window hosting the "start page", again due to browser security considerations.



Web Page Display

• The font size for the CCAD web page and/or the reports cannot be adjusted via application settings. However, using standard browser facilities, one can easily adjust the text size of the full CCAD web page or the "zoom-in" settings as the below screenshot shows:



No other automatic or dynamic scaling as per screen resolution/size is possible. To adjust the display of the CCAD web page to make best use of the screen real estate (for instance, for displaying on a large LCD TV and viewable from a distance), one can use a combination of the following as needed:

- The built-in browser specific facilities to adjust the HTML text size or "zoom-in" level for the full page. (The browsers can either automatically or can be configured to save the zoom-in settings for the next launch.)
- Reorganize the reports on the page by dragging/repositioning them into one of two zones of the CCAD web page.
- Run the browser in full screen mode.



Apple iPad Support

- iPad should have firmware version iOS 4.3.2 or higher. The latest available firmware update is strongly recommended.
- Testing has been done with iPad's Safari browser only and not with other mobile browser application available for iPad.
- Testing has been done with iPad on a Wi-Fi connection only and not with a 3G/GPRS Edge data network. Should CCAD be used from iPad via 3G/Edge network, it will incur data charges as when accessing any other web page.
- Rendering of the CCAD web page and execution of its scripts are subject to the resource constraints of the mobile Safari browser on the iPad.
- To use CCAD from the iPad's Safari browser, the CCAD server must be accessible from the corporate network via corporate Wi-Fi or VPN as appropriate.
- If there are reports in all the 4 zones of the CCAD Web page, when viewing it using the mobile Safari browser on an iPad, it will be then required to swipe through the Web page to view all the reports. For example, reports in the first 2 zones will be visible first:



Then swiping to the right will show the other reports in the next 2 zones:

	► 0	a 🖻	10.15.11.1/webagentdash	hboard/default.a	spx			C Goo	ogle)
) ×	× ShoreTel Contact Center Agent Dashboard												
Dept F	Dept Performance Report - SalesSupport 🗟 👻 Daily Brief Group Report [2]												
			· · ·		<u> </u>								
			10%	Name -	Queued	Curr Max Wait	Max Wait	Accepted	Answered	Abandoned	Login	Release	Id
		1	10%	Name - Dispatch	Queued 0	Curr Max Wait	Max Wait 00:00:00	Accepted 0	Answered 0	Abandoned 0	Login 2	Release 1	<u>Id</u>
		1	10%	Name - Dispatch Customer SAT	Queued 0 0	Curr Max Wait	Max Wait 00:00:00 00:00:00	Accepted 0	Answered 0 0	Abandoned 0 0	Login 2 0	Release	1 1 1



Windows 8 and 8.1 Support

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Daily Brief G Name Sales-Group City Utitites Sales	Group Re Granad S	eport Carr Max Wall - 00.40:14	Max Wait 00.00.00 00.00.00 00.00.00	Accepted	Anaverred 0 0	Abandated 0 0	Login 1 2 2	Release 1 2 2		• • •				
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Jaily Brief G Name Sales-Group Chy Ublies Billing Budgeling Dispatch Accounting E-mail-Group Support-Group	Stroup Re	e port Carr Max Walt - 00.40:14	Max.Wait 00:00:00 00:00:00 00:00:00 00:00:00 00:00:	Accepted 1 0 0 0 0 0 0 0 0 0 0 0 0 0	Annowersed 0 0 0 0 0 0	Abandored 0 0 0 0 0 0 0 3	Login 1 2 2 2 2 2 2 0 2	Release 1 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2						
Daily Brief G Name Sales-Group City Utities Saley Budgethig Dispatch Accounting E-supper-Group Customer SAT Control Boom	Stroup Re	eport Carr Max Wall + 00.40:14	Max Walt 00:00:00 00:00:00 00:00:00 00:00:00 00:00:	Accepted 1 0 0 0 0 0 0 0 0 0 0 0 0 0	2000000000 0 0 0 0 0 0 0 0 0 0 0	Abandoned 0 0 0 0 0 0 0 3 0 0	Login 1 2 2 2 2 2 2 0 2 0 2 0 2	Extense 1 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2						

• IE 10 and IE 11 on Windows 8 desktops (not tablets) are supported.

• In the "Metro" UI of IE 10, the drop drown menu in the top right of a CCAD report does not show up and so the "Edit" and "Minimize" menu options for a report are not available. To use these menu options, a user will need to switch to the "Desktop" version of IE 10:

aily Brief Group Report												
Name	Gueued	Carr Max Wait +	Max Wait	Accepted	Asswered	Abandoned	Logia	Belease	<u>Idle</u>	ACE		
Sales-Group	1	00:42:08	00:00:00	1	0	0	1	1	0	0		
City Utilities	0		00:00:00	0	0	0	2	2	0	0		
Billing	0		00:00:00	0	0	0	2	2	0	0		
Budgeting	0		00:00:00	0	0	0	2	2	0	0		
Dispatch	0		00.00.00	0	D	0	2	2	D	0		
Accounting	0		00:00:00	0	D	0	2	2	D	0		
E-mail-Group	0		00:00:00	0	0	0	0	0	0	0		
Support-Group	0		00:00:58	3	D	3	2	2	0	Ó.		
Customer SAT	0		00:00:00	0	0	0	0	0	0	0		
Control Room	0		00:00:00	0	0	0	2	2	0	0		
Conf Bridge	0		00:00:00	0	0	0	2	2	0	0		

	Ge	t app for thi	s site
	Fin	d on page	_
	Vie	w on the de	sktop
€ http://10.15.11.1/WebAgentDashboard/default.aspx≇	\bigotimes	${}^{\checkmark}$	۲

The drop down menu options for each report will now be available:



Daily Brief Group Report

Daily Brief G	aily Brief Group Report														
Name 🔺	Queued	Curr Max Wait	Max Wait	Accepted	Answered	Abandoned	<u>Login</u>	Release	<u>Idle</u>	AC	🧮 Edit				
Accounting	0		00:00:00	0	0	0	2	2	0	0	 Minimize 				
Billing	0		00:00:00	0	0	0	2	2	0	0					
Budgeting	0		00:00:00	0	0	0	2	2	0	0					
City Utilities	0		00:00:00	0	0	0	2	2	0	0					
Conf Bridge	0		00:00:00	0	0	0	2	2	0	0					
Control Room	0		00:00:00	0	0	0	2	2	0	0					
Customer CAT	0		00.00.00	0	A .	0	A .	A .	0	0					



System Requirements

ShoreTel Version Compatibility

- ShoreTel 14.2 or higher.
- ShoreTel Connect ONSITE but not Connect CLOUD.

ShoreTel Contact Center Version Compatibility

- ShoreTel Contact Center 6 or higher.
- ShoreTel Connect Contact Center ONSITE but not Connect Contact Center CLOUD.

User Desktop Requirements

Supported Browsers and Operating Systems

Browser	Operating System
Microsoft Internet Explorer 7.0	Microsoft Windows (Vista,
or later versions, Internet	Windows 7, Windows 8,
Explorer Edge	Windows 8.1 Desktops,
	Windows 10 desktops)
Mozilla Firefox version 1.5 or	Microsoft Windows (Vista,
later	Windows 7, Windows 8,
	Windows 8.1), Mac OS X
	("Snow Leopard" 10.6.7 or
	higher, "Lion" 10.7.x, "Mountain
	Lion" 10.8.x, "Mavericks" 10.9.x,
	"Yosemite" 10.10.x, "El Capitan"
	10.11.x)
Apple Safari browser 5.0.5 or	Mac OS X ("Snow Leopard"
later	10.6.7 or higher, "Lion" 10.7.x,
	"Mountain Lion" 10.8.x,
	"Mavericks" 10.9.x, "Yosemite"
	10.10.x, "El Capitan" 10.11.x)
Google Chrome browser 29.x	Microsoft Windows (Vista,
or higher	Windows 7, Windows 8,
	Windows 8.1); Mac OS X
	("Snow Leopard" 10.6.7 or
	higher, "Lion" 10.7.x, "Mountain
	Lion" 10.8.x, "Mavericks" 10.9.x,
	"Yosemite" 10.10.x, "El Capitan"
	10.11.x)

Note: The latest versions of the supported browsers are strongly recommended.



Security and Privacy Settings

The following table lists the required browser security and privacy settings for CCAD. In all cases, the recommended settings are the default settings for that browser.

Internet Explorer 7	Make sure that the Internet Zone in the Security Zones settings is set to Medium- High.
FireFox 1.5 or later versions	In the Tools menu under Options , make sure that Enable JavaScript is selected.
Apple Safari browser	In Security tab of Preferences , make sure that Enable JavaScript is checked.
Google Chrome browser	In the Content Settings make sure that "Allow all sites to run JavaScript (recommended)" under the JavaScript section is selected.

Note: If the browser security and privacy settings are set too high, JavaScript might be disabled. In that case automatic updates of CCAD will not work and a user will need to manually refresh the page to see the updated statistics.

Apple iPad Requirements

- Please refer to <u>Apple iPad Support</u> for specific restrictions.
- JavaScript should be enabled for the Safari browser as shown in the below settings screenshot:



	0.40 514								
Settings	Safari 100%								
General	General								
😿 Safari	Search Engine	Google >							
🙊 Photos									
	AutoFill	Off >							
	Always Show Bookmarks Bar	OFF							
	Security								
	Fraud Warning								
	Warn when visiting fraudulent	websites.							
	JavaScript	ON							
	Block Pop-ups	ON							
	Accept Cookies	From visited >							

Usage

Browse Dashboard URL

As CCAD is a web based application, it does not require anything to be installed on your desktop/iPad. Using a supported browser, browse to the CCAD URL given by your CCAD administrator. The URL is typically http://<CCAD-server-name or IP>/WebAgentDashboard/.

Enter Windows Credentials

CCAD access is controlled using your existing Windows authentication credentials and so you will be prompted to enter your Windows credentials as the below screenshot shows when using IE browser:



Connect to 10.1	5.11.1 ? ×
	G A
Connecting to 10.15	. 11. 1.
<u>U</u> ser name:	MISHRA-T110\ECCAgent1
Password:	•••••
	Remember my password
	OK Cancel

For more information regarding different authentication prompts in supported browsers please refer <u>Windows Authentication</u> in the <u>Operational Considerations</u>.

If you are allowed access based on your Windows user name, or are a member of a Windows group that is allowed access, your Dashboard session will begin and you will see a start page to launch the Dashboard page:



🖉 ShoreTel Contact Center a	Agent Dashboard Start Page - W	indows Internet Explorer	_ 🗆 ×
😔 🗢 🖉 http://10.15	.11.1/WebAgentDashbo 🔽 🗟 🧉	🕈 🗙 🔁 Bing	<u> ۹</u>
<u>File E</u> dit <u>V</u> iew F <u>a</u> vorites	<u>T</u> ools <u>H</u> elp		
🔆 Favorites 🛛 🏉 Shore Tel C	ontact Center Agent Dashbo	🛉 🕈 🔊 🔸 🖃 🖶 🝷 Ba	ge 🕶 Safety 🕶 Tools 👻 🕜 🕶 🎽
Welcome NMISHRA-T110/Ed Launch Agent Dashboa	elel ccAgent1 ard		
Done		Internet	🖓 🔹 🔍 100% 🔹 🍃



Launch Dashboard

From the start page, click the **Launch Agent Dashboard** button. A new browser window will open in which the dashboard will be shown as the below screenshot shows:

ShoreTel Contact http://10.15.11.1/V	Center (VebAgen)	Agent Das	hboard (default.	- Wind	ows Int	ternet	Explore	r				_			
<u>Organize</u>												0			
roup Agents	Repo	ort				(Group Report [2] - Sales-Group								
Aqent Bruce Walker John Ford	<u>ID</u> E 4502 5 4501 5	Ext State 502 Idle 501 Idle	<u>Code</u>	<u>DNIS#</u>	<u>DNIS</u>	ANI C	<u>Time</u> 0:47:02 1:02:52		C) Queued O	© Max Wait 00:00:00	© Int Max Wait 00:00:00	€) Aband 0			
Group Report [3] - E-mail-Group									Login 1	ACD O	Release O	ldle 1			
0 00:00:00 00:00 Login ACD Release				Idle	TSF 100%										
0		0		0			0	C	Group Rep	ort [1] - Supp	ort-Group		Ŧ		
									C) Queued O	© Max Wait 00:00:00	© Int Max Wait 00:00:00	🕑 Aband O			
									Login 2	ACD O	Release O	^{Idle}			
									TSF 100%						
										Internet		▼ ① 100%			

When using IE (except IE 10 when using the Windows 8 "Metro" UI), you will be prompted to close the existing browser window or tab (as the case might be) and, if so, please choose "Yes":

Windows	s Internet Explorer 🛛 🛛 🕅
?	The webpage you are viewing is trying to close the window. Do you want to close this window?
	<u>Y</u> es <u>N</u> o



When using IE 10 on Windows 8 with the "Metro" UI, the prompt will be similar to the below:



Note: For the other browsers, the Start Page might not be closed in this manner and, if so, please manually close that browser window.

The CCAD web page will appear more or less the same on all supported browsers. For instance, below is the CCAD web page hosted in the FireFox browser:



horeTel Cont	act Center Ag	ent Dashboar	d - Mozill	a Firefox					
<u>Organize</u>	Devent				6			0	
Froup Agents	Report			Group	керс	ort [2] - Sales	-Group		
Agent Bruce Walker	ID Ext State 4502 502 Idle	e Code DNIS#	DNIS AN	I <u>Time</u> 1d 00:55:05	🕑 Que	eued	🕐 Max Wait	🕑 Int Max Wait	🕑 Aband
roup Report	[3] - E-mail-(Group	II	-	0		00:00:00	00:00:00	0
Queued	Max	Wait	M Int M	ax Wait	Lo	gin	ACD	Release	Idle
0	00:00	0:00	00:0	0:00	1		0	0	1
Login		Poloa		Idlo			T	SF	
0	0	0		0			10	0%	
•		•		•	Group	Repo	ort [1] - Supp	ort-Group	-
					🕑 Que	eued	🕑 Max Wait	🕑 Int Max Wait	🕑 Aband
					0		00:00:00	00:00:00	0
					Lo	qin	ACD	Release	Idle
					1	Í	0	0	1
							T	SF	
							10	0%	

Below is the screenshot for the CCAD web page hosted in the Mac Safari browser:

	Safari	File	Edit	Viev	v History	Boo	kmarks	Develo	op Wir	ndow	Help			
0	0										ShoreTel	Contact Center /	Agent Dashboard	1
Curren	t Page Sc	ope: Per-	-User	Sh Sho	ow Shared Vi	ew 🗏 O	rganize							
Gro	Group Agents Report - Support-Group													
	Agent	<u>ID</u>	<u>Ext</u>	State	Start time	Code [DNIS#	DNIS /	ANI <u>Tim</u>	<u>1e</u>	🕑 Queued	🕑 Max Wait	🕐 Int Max Wait	🕑 Aband
0.	John Ford Bruce Wal	4501 Iker 4502	1 501 2 502	Idle (ACD (03:00:19 PM 03:01:07 PM	7	'51 Sa	alesDNIS 5	00:05 03 00:04	5:07 4:19	0	00:00:00	00:00:00	0
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											2	1	0	1
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And in Apple iPad browser:



O)

Pad ? 12:52	2 PM												
http://10.15.11.1/webagentdashboard/defa	http://10.15.11.1/webagentdashboard/default.aspx												
Organize													
Group Agents Report	Group Repo	rt - Sales-G	roup	•									
Agent ID Ext State Start time Code DNIS# DNIS ANI Time	🕑 Queued	🕑 Max Wait	🕑 Int Max Wait	🕑 Aband									
Bruce Walker 4502 502 RIs 03:16:31 PM No Code 00:53:37 John Ford 4501 501 Idle 11:39:49 AM 04:30:19	0	00:00:00	00:00:00	0									
	Login	ACD	Release	Idle									
	1	0	1	0									
		1	SF										
		10	0%										



Real Time Reports

The CCAD is designed by the administrator. In the CCAD there are following five types of reports:

Group Agents Report

It shows status of agents in selected group(s).

Group Agents Report

	Agent	ID	<u>Ext</u>	<u>State</u>	Code	DNIS#	<u>DNIS</u>	<u>ANI</u>	<u>Time</u>
0	Bruce Walker	4502	502	Idle					00:52:10
0	John Ford	4501	501	RIs	No Code				00:01:06

Notes:

- The agents shown are from particular CC groups as configured by a CCAD Administrator.
- The columns in the report are also configured by a CCAD Administrator.
- To view the list of CC groups from which the agents are shown, hover the mouse over the report title. The list of groups will be shown as a tooltip:

C	Group Agents Report -										
		Ag	Group A following	igents F g 3 CC i	Repor group	t - Show (s): E-m	s statistics (ail-Group, S	of agents ir iales-Group	<u>IS</u>	<u>ANI</u>	<u>Time</u>
	0	Bruce			00:53:38						
		John F	ord	4501	501	RIs	No Code		_		00:02:34

- If an agent is seeking supervisor help, it is not reflected in the agent's state icon or state information.
- Logged off agents are not displayed.
- This report does not display agents logged only into their personal agent queues (which are available as of Contact Center Version 7.) If an agent is logged in to his/her personal agent queue in addition to a group part of the report's group filter, the agent's logged in groups will show "Personal Agent Queue" as one of the groups on mouse hover as the screenshot below shows:



Gr	ou	ip Agents	Rep	ort	[1]					-
	Agent ID Ext State Start time Code DNIS									<u>Time</u>
	John Ford 4501 501 Idle 02:10:02 PM								00:04:24	
	B	3						_		00:05:08
		John For	ď							
		<u>Time in 9</u> 00:04:24	<u>state</u>							
		es,								

 The maximum display length of the ANI column (if configured to be displayed) is dynamically determined by the Caller ID for voice ACD calls received so far and includes the + prefix if present. If the Caller ID of any other type of ACD call is greater than that length (as in the case of ACD e-mails), it will be shown partially up to the maximum length of Caller ID (as determined by voice ACD calls received so far). To view the full Caller ID in that case, one must hover mouse over the ANI column and only then it will be fully shown as a tooltip as the below screenshot shows:



 The maximum display length of the DNIS number column is determined by the CC DNIS numbers for the voice ACD calls received so far. If the CC DNIS number of any other type of call is greater than that length (as in the case of ACD e-mails), it is shown partially up to the maximum length of CC DNIS (as determined by voice ACD calls received so far). To view the full CC DNIS number in that case, one must hover mouse over the DNIS number column and only then it will be fully shown as a tooltip as the below screenshot shows:

Gr	Group Agents Report 🔹 👻									
	Agent	<u>ID</u>	<u>State</u>	Start time	Code	DNIS#	DNIS	ANI]	
	CCONGOS	8434	ACD	01:51:04 PM	-	tacv		VoiceMail@s		
	JMURRAY	8422	RIs	05:58:37 PM	Q Monitor	tacyma	ail@shoretel.	com		

- If the "show paged list" option is configured for the report by a CCAD Administrator, the agents are shown in pages. The page size is currently fixed to 10 rows so that a maximum of 10 agents per page are shown.
- o Only one interaction per agent can be shown by this report.
- If Click to call has been enabled then agent names will be clickable to place call to the agent:



Group Agents Report [1]

	<u>Agent</u> ▲	<u>ID</u>	<u>Ext</u>	<u>State</u>	Start time	Code	<u>DNIS</u>	<u>ANI</u>	<u>Time</u>	InB. ACD Calls	Total Calls
0.	John Ford	4501	501	RIs	10:59:37 AM	No Code			23:49:25	0	0
0.	Moto Tachiri	4503	502	Idle	09:30:00 AM				01:19:02	0	0

Viewing Agent State Duration

The "Time" column, if configured to be shown, will show a running timer of the agent's state duration.

Note: For showing the running state timer, the difference between the CC server' s timestamp of agent state change and current time on the user' s desktop/iPad is calculated. And, then the time elapsed with two successive checking of Web page updates (typically 4 seconds) is added. This calculation is performed on the user' s desktop/iPad and not on the server. So, if the user' s desktop/iPad clock and the CC server' s clock are not in sync, there is a potential for this time to not match exactly with the CC Agent Manager' s real time reports. Also, this running timer is not shown if the difference between the server timestamp of agent state change and time on user' s desktop/iPad comes out to be negative which can happen if the clock on the user' s desktop/iPad is ahead of the CC server' s clock.

Viewing Agent's Logged In Groups

Hovering mouse over an agent's state icon will show, in a bubble, the list of groups the agent is logged in groups as well as time in current state (at that point) as the below screenshot shows:

G	ro	up Agents	Rep	ort						•
		Agent	ID	<u>Ext</u>	<u>State</u>	Code	DNIS#	<u>DNIS</u>	<u>ANI</u>	<u>Time</u>
		Bruce Walker	4502	502	Idle					01:03:14
J Bruce Walker									┺	00:12:10
G	ro	U <u>Time in s</u> 01:03:12	<u>tate</u>							-
	01.05.12									Vait
		:(00							

Note: An agent's state duration shown on mouse hover is not displayed in a continuous fashion but it is shown as of the time of mouse hover and, consequently, it will not exactly match the



agent state timer if that is also configured to be displayed. This state duration is calculated on demand on the user's desktop/iPad and not on the server. As a result, if the user's desktop/iPad clock and the CC server's clock are not in sync, there is a potential for this time to not match exactly with the CC Agent Manager's real time reports. Also, the state duration is not shown if the difference between the server timestamp of agent state change and time on user's desktop/iPad comes out to be negative which can happen if the clock on the user's desktop/iPad is ahead of the CC server's clock.

Sorting Agents

To sort agents, click a column header. It toggles sorting in ascending or descending order. Sort arrows are displayed on each column (except the "Start Time") to indicate the sort direction (ascending or descending.)

For example, below screenshot shows agents sorted by agent name:

Group Agents Report

	Agent-	ID	<u>Ext</u>	<u>State</u>	Code	DNIS	<u>ani</u>	<u>Time</u>
6	Bruce Walker	4502	502	ACD		SalesDNIS	501	00:03:28
6	John Ford	4501	501	Out				00:03:34

And, below screenshot shows agents sorted in descending order by agent state duration:

G	ro	up Agents	Rep	ort						-
Γ		Agent	<u>ID</u>	<u>Ext</u>	<u>State</u>	<u>Code</u>	DNIS#	DNIS	<u>ANI</u>	<u>Time</u> ▼
	3	Bruce Walker	4502	502	Out+RIs	OutOfOff				00:00:33
l	đ	John Ford	4501	501	ACD		751	SalesDNIS	502	00:00:25

Change Font Size

You can configure the HTML font size of a Group Agents report to one of three sizes: **default**, **extra-large** and **extra-extra-large**. For instance, to edit the default font size of a Group Agents Report to extra-large, click the edit icon or drop-down arrow and then clicj edit icon(depending upon the browser) in the top right of a Group Agents Report:

Gro	roup Agents Report [1]								
	Agent-	<u>Ext</u>	State	<u>ANI</u>	Time	Daily ACD Calls	Daily N. ACD Calls		
0	John Ford	501	Idle		00:03:55	0	3		
0	Moto Tachiri	502	Idle		00:03:44	1	0		



Choose the desired font size:

File Edit View Favorites Tools Help						
Editor Zone Close Cu Modify the properties of the Web Part, then click OK or Apply to	rrent Page Scope: Per-User	Show Shared Vi	ew El Organize			
apply your changes.			Dashboa	rd Zone 1		
-Layout	Daily Group Report - Ma	arketing				-
Chrome State:			1			
Zone:	Calls Ans	wered	Agents	Active	Calls A	bandoned
Dashboard Zone 1 V			, goine ,	•		
Zone Index:	1		2/	2		1
1			_			
-Property Grid	Calls in Q	ueue	Answer I	Rate /	Avg Wait	Max Wait
defaultFontSize	•		E0 0/		00.04.40	00.00.20
extraLargeFontSize	U		50%		00:01:18	00:00:39
OK Cancel Apply	тог				N/	Talla
	155		AVG TAIK		wax	
	50%		00.00.00		00.0	າດ.ດດ
	JU /0		00.00.00		00.0	0.00
	Group Agents Report		r - r	1	r	
	Agent	Ext State	ANI Time	Daily AC	CD Calls Dai	ly N. ACD Calls
	Moto Tachiri		501 00.05.22	1	1	0
			501 00.05.22			0
	S John Ford		00:05:40		J	3
II						

Make sure to click **Apply** to confirm the chosen font size. And, then press **OK** to close the report editing mode.



Group Report

The Group Report shows statistics of a chosen Contact Center group. The title of the report also shows the name of the group.

Group Rep	roup Report [2] - Sales-Group							
🕑 Queued	🕐 Queued 🛛 🕐 Max Wait 🖉 Int Max Wait							
0	00:00:00	00:00:00	0					
Login	ACD	Release	Idle					
1	0	0	1					

Notes:

- The statistics shown are from particular CC group as configured by the CCAD Administrator. The name of the group is part of the report's title.
- Only chosen statistics associated with voice and e-mail calls are shown. The statistics panes in the report are also configured by the CCAD Administrator.
- The statistics for voice ACD calls are indicated by phone icon [♥] and that for ACD email calls are indicated by e-mail icon [■].
- The group statistics displayed is for the current statistics interval (as configured for the group in the CC Director) and for inbound ACD voice calls only. They do not account for any outbound ACD voice calls (callbacks, Dial list calls and others), chats or e-mails or any non-ACD calls.
- Currently E-mail only or Voice CC groups are not distinguished. So, when determining whether the "Number of Waiting Calls" threshold has reached (if configured in the CC Director), best guess is done to deduce whether the received statistic feed might be for the queued voice calls or e-mails and, then, "Queued" panel for voice calls or e-mails is colored accordingly.
- If an available statistic in the report reaches corresponding threshold of the group (as configured in the CC Director), the corresponding statistic pane will be highlighted in either yellow or red color:

G	roup Rep	ort [2] - Sale	s-Group	-
	🕑 Queued	t 🕑 Int Max Wait	🕑 Aband	
	0	00:00:00	00:00:00	0
	Login 1	ACD O	Release 1	idle 0

• Hovering mouse over a statistics will show an informative tooltip.



Group R	epor	t [2] - Sale	s-Group	•			
🕑 Queu	ed	🕑 Max Wait	🕑 Aband				
0	C	0:00:00	00:00:00	0			
Logi	n	ACD	Release	Idle			
1	1 0 0 1						
Group RNumber of agents logged in t-Group							



Department Performance Report

Department Performance Report shows the daily performance for the groups that might logically form a "department" for a customer. It measures the daily percentage of successful calls to such a department i.e. those calls that were eventually answered, irrespective of whether they overflowed to separate groups or not in that department (not to separate departments).

ľ	Dept Performance Rep	ort [1] - Helpline -	
1		Dept Performance Report [1] - Shows the current daily
		performance for configured	groups in a Department.
	100%	/o	

If low and high thresholds are configured for the department, as the calculated performance reaches a threshold, the report will be colored accordingly:

Dept Performance Report - Helpline -
50%
Dept Performance Report - Helpline -
33%

Notes:

- A "Department" is a CCAD artifact only.
- A Department' s threshold, if configured in CCAD, is totally unrelated to the thresholds configured for the CC groups in the CC Director.
- The report accumulates data from 12 AM onwards for the day, or from the time of the last Contact Center server restart, to calculate a department' s performance.



Daily Group Report

This report shows the following daily and real-time statistics (as configured by a CCAD Administrator) for a configured CC group in separate panels:

- **Calls Answered**: Shows the number of calls answered for the day by agents in the group.
- Agents Active: Shows the current number of agents not in release state as well as the total number of agents currently logged in to that group. So, for example, if there are 12 agents logged in to the configured group, 4 are in release, 3 are idle, and 5 are on ACD calls, this panel will show "8 / 12".
- **Answer Rate (%)**: Calculated using the following formula for inbound ACD voice calls:

(Calls Accepted -Calls Abandoned -Calls Interflowed Out)/ (Calls Accepted) * 100

- Calls Queued: Shows the current number of ACD calls queued for the group. And, if a threshold is configured for that statistic, the associated panel will be colored yellow or red.
- **TSF**: Target Service Factor of the group for the day.
- **Avg Wait**: Average wait time (in hh:mm:ss format) in queue for the day for inbound ACD calls.
- Avg Talk: Average talk time (in hh:mm:ss format) for the day for inbound ACD calls.
- **Max Talk**: Longest talk time (in hh:mm:ss format) for the day for inbound ACD calls.

If the "Calls in Queue" panel is configured as well as threshold for that panel is also configured, then as the number of queued calls reaches the configured threshold, the panel will be colored accordingly:

Daily Group Report - Sales-Group	Daily Group Report - Sales-Group -								
Calls Answered	Agents Active								
0	0 / 1								
Calls in Queue	Answer Rate								
1	50%								





Notes:

- The daily group statistics displayed are for inbound ACD voice calls only and do not account for any outbound ACD voice calls (callbacks, Dial list calls and others), chats or e-mails or any non-ACD calls.
- The available daily statistics panels (Calls Answered, Answer Rate, TSF, Avg Wait, Avg Talk and Max Talk) accumulate data from 12 AM onwards for the day, or from the time of the last Contact Center server restart.
- This threshold for the **Calls Queued** panel is unrelated to the real time queued calls threshold for a group that is configurable in the CC Director.
- As and when any of the daily/current statistics of the configured group(s) change, the corresponding Daily Group Report(s) will be automatically updated like the other CCAD reports.



Daily Brief Group Report

This tabular report shows the following real-time and daily statistics for multiple CC groups:

- **Name**: Name of the CC Group.
- **Queued**: Current number of waiting inbound ACD voice calls.
- **Curr Max Wait**: The maximum wait time of all currently queued inbound ACD voice calls as a running timer.
- Max Wait: Maximum wait time of all calls queued during the day.
- Accepted: Number of incoming ACD voice calls for the day.
- **Answered**: Number of answered incoming ACD voice calls for the day.
- **Abandoned**: Number of abandoned inbound ACD voice calls for the day.
- Login: Current number of logged in agents.
- **Release**: Current number of agents on release.
- o Idle: Current number of idle agents.
- ACD: Current number of agents handing incoming ACD calls.
- **TSF**: TSF for the day.

If thresholds for the real-time statistics for a group (as configured in the CC Director) are reached, the corresponding table cells are colored coded yellow or red:

Daily Brief Group Report [1]													
Name 🔺	Queued	Curr Max Wait	Max Wait	Accepted	Answered	Abandoned	Login	Release	<u>Idle</u>	<u>ACD</u>			
Sales-Group	0		02:22:40	1	0	1	1	1	0	0			
Support-Group	1	00:00:19	00:00:58	4	0	3	2	2	- 0	0			

Notes:

- The report shows the configured statistics for specified CC groups as chosen by a CCAD Administrator.
- The displayed daily group statistics are for inbound ACD voice calls only and do not account for any outbound ACD voice calls (callbacks, Dial list calls and others), chats or e-mails or any non-ACD calls.
- The daily group statistics (Max Wait, Accepted, Answered and Abandoned) accumulate data from 12 AM onwards for the day, or from the time of the last Contact Center server restart.
- The group statistics (Queued, Curr Max Wait, Login, Release, Idle and ACD) are realtime. A group's thresholds, as configured in the CC Director, are for the real-time and current interval based statistics and so are then applied, if applicable, for these statistics only and NOT for the daily statistics.
- Hovering the mouse over any column header shows short help for that statistic as a tooltip:



					-					
1	Abandoned	Login 🗸	Release	<u>Idle</u>	<u>ACD</u>					
	0	2	1	- 1	0					
	Numbe	r of abando	ned inboun	d ACE) voice d	alls fo	r the day			
	0	2	1	1	0					
							-	-		
I	<u>Curr Max Wa</u>	it Max W	ait Accer	oted	<u>Answ</u>	ered	Abandoned	Login -	Release	
	Current longest wait time of incoming ACD calls waiting in the group's queue									

• The report can be sorted by any column which then shows the sort arrow indicating the sort direction (ascending or descending.)

Daily Brief G	roup R	eport								-
<u>Name</u> ▲	Queued	Curr Max Wait	Max Wait	Accepted	Answered	Abandoned	<u>Login</u>	Release	<u>Idle</u>	<u>ACD</u>
Accounting	0		00:00:00	0	0	0	2	1	0	0
Billing	0		00:00:00	0	0	0	2	1	0	0
Budgeting	0		00:00:00	0	0	0	2	1	0	0
City Utilities	0		00:00:00	0	0	0	2	1	0	0
Control Room	0		00:00:00	0	0	0	2	1	0	0
Customer SAT	0		00:00:00	0	0	0	0	0	0	0
Dispatch	0		00:00:00	0	0	0	2	1	0	0
ECC	0		00:00:00	0	0	0	2	1	0	0
E-mail-Group	0		00:00:00	0	0	0	0	0	0	0
Equipments	0		00:00:00	0	0	0	2	1	0	0
Escalation	0		00:00:00	0	0	0	2	1	0	0
HR	0		00:00:00	0	0	0	2	1	0	0
Inside Sales	0		00:00:00	0	0	0	2	1	0	0
Logistics	0		00:00:00	0	0	0	2	1	0	0
Marketing	0		00:00:00	0	0	0	2	1	0	0
Purchasing	0		00:00:00	0	0	0	2	1	0	0
Quality	0		00:00:00	0	0	0	2	1	0	0
Renewals	0		00:00:00	0	0	0	2	1	0	0
Sales-Group	0		00:00:00	0	0	0	1	1	0	0
Support-Group	0		00:00:08	2	1	1	2	1	0	1
Switch	0		00:00:00	0	0	0	2	1	0	0
Taxes	0		00:00:00	0	0	0	2	1	0	0
UC	0		00:00:00	0	0	0	2	1	0	0



Daily Brief G	Froup R	leport								-
Name	Queued	Curr Max Wait	Max Wait	Accepted	Answered	Abandoned	Login 🗸	Release	<u>Idle</u>	ACD
Billing	0		00:00:00	0	0	0	2	1	1	0
City Utilities	0		00:00:00	0	0	0	2	1	1	0
ECC	0		00:00:00	0	0	0	2	1	1	0
Inside Sales	0		00:00:00	0	0	0	2	1	1	0
Marketing	0		00:00:00	0	0	0	2	1	1	0
Budgeting	0		00:00:00	0	0	0	2	1	1	0
Switch	0		00:00:00	0	0	0	2	1	1	0
Dispatch	0		00:00:00	0	0	0	2	1	1	0
HR	0		00:00:00	0	0	0	2	1	1	0
Accounting	0		00:00:00	0	0	0	2	1	1	0
UC	0		00:00:00	0	0	0	2	1	1	0
Quality	0		00:00:00	0	0	0	2	1	1	0
Taxes	0		00:00:00	0	0	0	2	1	1	0
Control Room	0		00:00:00	0	0	0	2	1	1	0
Support-Group	0		00:00:08	2	1	1	2	1		0
Escalation	0		00:00:00	0	0	0	2	1	1	0
Logistics	0		00:00:00	0	0	0	2	1	1	0
Equipments	0		00:00:00	0	0	0	2	1	1	0
Purchasing	0		00:00:00	0	0	0	2	1	1	0
Renewals	0		00:00:00	0	0	0	2	1	1	0
Sales-Group	0		00:00:00	0	0	0	1	1	0	0
Customer SAT	0		00:00:00	0	0	0	0	0	0	0
E-mail-Group	0		00:00:00	0	0	0	0	0	0	0

• If the report is configured with paging enabled, the statistics will then be shown in pages with statistics of 10 groups in each page:

Daily Brief Group Report [1]												
<u>Name</u> ▲	Queued	Curr Max Wait	<u>Max Wait</u>	Accepted	Answered	Abandoned	<u>Login</u>	Release	<u>Idle</u>	<u>ACD</u>		
Accounting	0		00:00:00	0	0	0	2	1	1	0		
Billing	0		00:00:00	0	0	0	2	1	1	0		
Budgeting	0		00:00:00	0	0	0	2	1	1	0		
City Utilities	0		00:00:00	0	0	0	2	1	1	0		
Conf Bridge	0		00:00:00	0	0	0	2	1	1	0		
Control Room	0		00:00:00	0	0	0	2	1	1	0		
ECC	0		00:00:00	0	0	0	2	1	1	0		
Equipments	0		00:00:00	0	0	0	2	1	1	0		
Escalation	0		00:00:00	0	0	0	2	1	1	0		
HR	0		00:00:00	0	0	0	2	1	1	0		
				1 <u>23</u>								

The page numbers in the bottom of the report can be used to navigate to the individual pages:



Daily Brief G	aily Brief Group Report [1]												
Name 🔺	Queued	<u>Curr Max Wait</u>	<u>Max Wait</u>	Accepted	Answered	Abandoned	<u>Login</u>	Release	<u>ldle</u>	<u>ACD</u>			
Inside Sales	0		00:00:00	0	0	0	2	1	1	0			
Logistics	0		00:00:00	0	0	0	2	1	1	0			
Marketing	0		00:00:00	0	0	0	2	1	1	0			
Purchasing	0		00:00:00	0	0	0	2	1	1	0			
Quality	0		00:00:00	0	0	0	2	1	1	0			
Renewals	0		00:00:00	0	0	0	2	1	1	0			
Sales-Group	0		00:00:00	0	0	0	1	1	0	0			
Support-Group	0		00:00:00	0	0	0	2	1	1	0			
Switch	0		00:00:00	0	0	0	2	1	1	0			
Taxes	0		00:00:00	0	0	0	2	1	1	0			
				<u>123</u>									

C	Daily Brief Group Report [1]												
	Name 🔺	Queued	<u>Curr Max Wait</u>	<u>Max Wait</u>	Accepted	Answered	Abandoned	<u>Loqin</u>	Release	<u>ldle</u>	<u>ACD</u>		
	UC	0		00:00:00	0	0	0	2	1	1	0		
					<u>12</u> 3								

• If Click to call has been enabled then group names will be clickable to place call to be queued for the group:

C	Daily Brief Group Report [1]													
	<u>Name</u> ▲	Queued	Curr Max Wait	<u>Max Wait</u>	Accepted	Answered	Abandoned	<u>Login</u>	<u>Release</u>	<u>Idle</u>	<u>ACD</u>			
	EmailGrp	0		00:00:00	0	0	0	0	0	0	0			
	Marketing	0		00:00:00	0	0	0		0		0			
Π	Sales	0		00:00:00	0	0	0		0		0			
	Support	0		00:00:00	0	0	0		0		0			
	Test Group	0		00:00:00	0	0	0		0		0			

Real Time Update

The CCAD web page is automatically updated as and when the state of an agent changes, a call is queued to a group, and other such conditions. For example, when another agent performs a login, the Group Agents Report will be updated and animated gif will be shown that gives feedback that the Dashboard is being updated as the below screenshot shows:



E	<u>Organize</u>										
C	Group Agents R	eport					Ŧ	Group Rep	ort [2] - Sales	-Group	•
	Agent ID ECC Agent1 450 ECCAgent2 450	Ext State 1 501 RIs 2 502 RIs	<u>Start time</u> 10:27:53 AM 10:54:29 AM	Code Solution States No Code No Code	<u>)NIS</u> <u>ANI</u>		C) Queued O	© Max Wait 00:00:00	© Int Max Wait 00:00:00	🔊 Aband O	
C	Group Report [3] - E-mail Group										
	Queued O	Wait):00	00	Group Report [1] - Support-Group							
	Login	ACD	Rel	ease		Idle		🕑 Queued	🕐 Max Wait	🕑 Int Max Wait	🕑 Aband
	0	0		0		0		0	00:00:00	00:00:00	0
1								Login	ACD	Release	Idle
	2 0 2 0										
2	Updating Dashboardplease wait										

Then the updated Dashboard web page will be shown.



Personalizing Dashboard

You can personalize the CCAD in constrained ways as follows:

- Drag and drop/Move report(s) to particular CCAD zones
- Minimize a report

Notes:

- Your personalization changes will be persisted across your CCAD sessions. That is, if you close your browser and use CCAD again, reports in your CCAD web page will be laid out as per layout personalization changes made in your last CCAD session.
- All of your personalization changes will be lost if the CCAD administrator publishes an updated Dashboard or resets the Dashboard.

Minimize and Restore Reports

You can minimize a report and restore it later. For example, when using the IE browser, clicking the top right down arrow for a report will show the "Minimize" menu item.



The report will be minimized. To restore the report to normal visible state, click the top right arrow in the minimized report and then, in the drop down menu, click **Restore** menu item:

G	Froup Repo	ort [2] - Sales	-Group		-		
G	Group Repo	ort [1] - Supp	ort-Group		*	Restore	
	🕑 Queued	🕑 Max Wait	🕑 Int Max Wait	🕑 Aband		Restores	'Group Report [2]'

For the other supported browsers, the UI will be slightly different as detailed in the <u>General</u> section of the <u>Operational Considerations</u>.

Reposition Reports

When using the IE browser, the report can be repositioned, within a zone or to different zone, by a simple drag and drop mechanism as illustrated below.



Step 1: Click the **Organize** link on the top left of the CCAD.

Organize

The available CCAD zones will be shown and the link will switch back to normal view.

	ormal												
	Switch to not	rmal view	of dashb	oard d Zone 1							Dashb	oard Zone 2	
Gro	oup Agents	Repo	rt					-	C	Group Rep	ort [2] - Sale	s-Group	•
	Agent	<u>ID</u> Ex	t <u>State</u>	Start time	Code	DNIS#	<u>DNIS</u>	<u>ANI</u>		💓 Queued	💓 Max Wai	t 🕐 Int Max Wait	🕑 Aband
	ECC Agent1 4 ECCAgent 2 4	4501 501 4502 502	Ris Ris	10:27:53 AM 10:54:29 AM	No Code No Code					0	00:00:0	00:00:00	0
Gro	oup Report	[3] - E	-mail (Group x Wait		nt Max	Wait	-		Login 1	ACD O	Release 1	ldle 0
	0		00:0	0:00	00	0:00:	:00		c	Group Repo	ort [1] - Sup	port-Group	
	Login	4	CD	Re	lease		Idle			🕑 Queued	🜔 Max Wai	t 🕐 Int Max Wait	🕑 Aband
	0		0		0		0			0	00:00:0	00:00:00	0
										Login	ACD	Release	Idle
										2	0	2	0

Step 2: Using IE drag a report to a different CCAD zone. The screenshots below show a Group Report being dragged from zone 2 to zone 1. A blue rectangle will show the drop target in the zone.

	Normal													
		Dashi	board Zone 1								Dashbo	ard Zone 2		
G	roup Agents R	leport					•	Group Report [2] - Sales-Group 🚽						
	Agent ID ECC Agent1 450 ECCAgent2 450	Ext State 01 501 RIs 02 502 RIs	<u>Start time</u> 10:27:53 AM 10:54:29 AM	<u>Code</u> No Code No Code	<u>DNIS#</u>	<u>DNIS</u>	<u>ANI</u>		🔊 Queued 🚺	©™ 00:	lax Wait 00:0(Int Max Wait 00:00:00 	🔊 Aband O	
G	roup Report [3	6] - E-mail G	Group		nt Max '	Wait	•		Login 1		ACD O	Release 1	ldle O	
	0	00:00	0:00	00):00:	00		G	Group Repo	ort [1] - Supp	oort-Group		
	Login O	ACD 0	Re	lease 0		ldle 0			C [®] Queued O	(© № 00:	lax Wait 00:00	(1) Int Max Wait 00:00:00	🕑 Aband O	
			Gro	up Rep Queued	ort [2]	- Sale	es-G	Gro	oup ^{Login}	P-0) Δ	ACD	Release 2	ldle 0	
				0	00:0	0:00	0	00	0:00:00		0			
				Login 1	A	CD 0			Release 1	- Io - (lle O			



Normal												
	Dashbo	oard Zone 1						Dashbo	ard Zone 2			
Group Agents Report 🚽				G	Group Report [1] - Support-Group							
Agent ID ECC Agent1 450 ECCAgent 2 450	Ext State 11 501 RIs 1 12 502 RIs 1	Start time 0:27:53 AM 1 0:54:29 AM 1	Code Do Code No Code No Code	DNIS# DNIS	<u>ANI</u>		🕑 Queued O	(*) Max Wait 00:00:00	 Int Max Wait 00:00:00 	🔊 Aband O		
oup Report [3]] - E-mail Gi Max	roup Wait	M Int	Max Wait	•		Login 2	ACD O	Release 2	ldle 0		
0	00:00	:00	00:	00:00								
Login O	ACD O	Rel	ease 0	ldle O								
oup Report [2] - Sales-Gr	oup			-							
CODUCED CODUCTION CODUCTICO CODUCTUCTUCTUCTUCTUCTUCTUCTUCTUCTUCTUCTUCTU	🕑 Max Wait)0:00:00	© Int 00:0	Max Wait 00:00	🕑 Aba O	nd							
Login 1	ACD O	Rel	ease 1	Idle 0								

Step 3: Drop the report in the blue rectangle in the target zone.

Step 4: Switch to Normal view.

After dropping a report, click the **Normal** link to toggle back to the normal view of the Dashboard.

Group Agents Report - C							Group Report [1] - Support-Group -							
Agent	ID Ext State	Start time	Code	<u>DNIS#</u>	DNIS	ANI	🕑 Queued	C	🤊 Max Wait	🕑 Int Max Wait	🕑 Aband			
ECC Agent1 ECCAgent 2	4501 501 RIs 4502 502 RIs	10:27:53 AM 10:54:29 AM	No Code No Code				0	0	0:00:00	00:00:00	0			
up Report	[3] - E-mail G	roup				Ŧ	Login		ACD	Release	Idle			
Queued	Max	Wait	🖂 Ir	nt Max	Wait		2		0	2	0			
0	00:00	0:00	00	:00:	00			1	/					
Login	ACD	Re	lease		Idle									
0	0		0		0									
up Report	[2] - Sales-G	oup				Ŧ								
🔊 Queued	🕑 Max Wait	🕑 Int	Max Wa	it 🕑	Aban	d								
0	00:00:00	00:	00:00		0									
Login	ACD	Re	lease		Idle									
1	0		1		0									



When using other browsers – Mozilla FireFox, Apple Safari or iPad Safari browser – the reports cannot be dragged and dropped, but can be repositioned by editing their positions manually. Any CCAD user can change the layout of a report by clicking the **Edit** menu option in the top right of the report. For browsers other than Microsoft IE, the **Edit** menu icon is shown as the below screenshot shows for the Safari browser on a Mac:

Ú	t s	afari File	Ed	lit	View	Hist	ory	Bool	kmarks	Dev	elop	Windo	w H	elp		
0	•) 🔿	_		_	_	_		_	_	Shor	eTel Co	ntact C	enter Ag	ent Dash	board
S	urrer	nt Page Scope	: Per-l	User	<u> 🕵 Sh</u>	iow Sha	ared Vi	ew 😑	<u>Organize</u>							
	Gro	up Agents	s Rep	oort					•		Grou	p Repo	ort - S	upport-	Group	-
G		Agent	D	<u>Ext</u>	State	Code	<u>DNIS</u>	<u>ANI</u>	Tim Con	figure	positio	n and lay	out of t	ne report	🕑 Int M	ax Wait
	0.	Bruce Walker	4502	502	Idle				00:16:49			0	ດດ.ດ	00.00	00.0	ດະດດ
E-	0.	John Ford	4501	501	Idle				00:16:19			v	00.0	0.00	00.0	0.00
ē												agin	ACD	Bal		Idla
í.												gin	ACD	Rei	ease	lale
C.												2	0)	2
8																
														TSF		
▼ 5													1	00%		

Clicking the Edit option will bring up the editor zone in left part of the page with the report layout editor already expanded:

00	ShoreTel Contact Center Agent Dashboard
Editor Zone Close Modify the properties of the Web Part, then click OK or	Current Page Scope: Per-User Show Shared View Organize
Apply to apply your changes. Layout	Dashboard Zone 1
Chrome State:	Agent ID Ext State Code DNIS ANI Time
Zone: Dashboard Zone 1	Image: Bruce Walker 4502 502 Idle 00:20:26 Image: John Ford 4501 501 Idle 00:19:56
Zone Index:	
OK Cancel Apply	

One can then either change the zone of the web page or change the position of the report within a zone. For instance, for a Group Agent Report in Zone 1 in the above example, one can reposition it to Zone 2 by selecting the new zone from the zone list as the below screenshot shows:



000		ShoreTel	Cont	act Ce	nter A	gent [Dashk	oard
Editor Zone Close Modify the properties of the Web Part, then click OK or	Current Page S	cope: Per-l	Jser	Sa Sho	ow Sha	red Vie	w 😑	<u>Organize</u>
Apply to apply your changes.	Group Ag	ents Re	Dashi port	board Z	one 1		-	-
Normal	Age	nt ID	Ext	State	Code	DNIS	<u>ANI</u>	<u>Time</u>
Zone: Dashboard Zone 2	Bruce V John Fo	Valker 4502 ord 4501	502 501	ldle Idle				00:25:24 00:24:54
Zone Index:			-		-		-	
OK Cancel Apply								

With the new zone specified, clicking **OK** and **Apply** button will then move the report to Zone 2 as the below screenshot shows:

000					S	horeTe	el Con	tact (Center A	g
Current Page Scope: Per-User	Show Sh	ared View 😑 Or	ganize							
	-		_							_
	G	roup Agents	s Rep	ort						1
		Agent	ID	Ext	State	Code	DNIS	<u>ANI</u>	Time	
		Bruce Walker	4502	502	Idle				00:26:42	
		👤 John Ford	4501	501	Idle				00:26:12	
	G	roup Report	- Su	ppo	rt-Gr	oup			-	
						•				Γ
		🕐 Queued	C) Ma	x Wait		🕑 In	t Max	Wait	
		0	00):0	0:0	D	00:	00:00		
		Login	AC	D		Relea	se		Idle	
		2	0)		0			2	
		-		·					-	
					TSF					
				1	00%	6				
						•				

To change the position of a report within a zone, one can specify the positional index of the report. For instance, to place the above Group Agents Report below the Group Report, one can edit the layout of the Group Agents Report and specify its position (Zone Index) as 1 as the below screenshot shows:



00	ShoreTel Con	tact (Center Agent	Dasl	iboa	rd					
Editor Zone Close	Current Page Scope: Per-User	5	Show Shared V	'iew	Org	anize					
Apply to apply your changes.	Deebbeerd Zone 1				Deebl	accord 7	0000				_
-Lavout	Dashboard Zone 1				Jashi	board Z	one z		-	_	
Chrome State:	Add a report from catalog to this zone.	Gro	oup Agents	Rep	oort					-	
Normal			Agent	ID	<u>Ext</u>	State	Code	DNIS	<u>ANI</u>	Time	ľ
Zone:			Bruce Walker	4502	502	ldle				00:28:43	
Dashboard Zone 2			John Ford	4501	501	Idle				00:28:13	
Zone Index:		Gro	up Report	- Su	ppo	rt-Gro	oup		-		
) Queued	C) Ma	x Wait		🕑 In	t Max	c Wait	
OK Cancel Apply			0	0	D:0	0:0	0	00:	00	:00	

Clicking **OK** or **Apply** will then reposition the Group Agents Report below the Group Report as the below screenshot shows:

000			5	ShoreTo	el Cont	tact (Center A
Current Page Scope: Per-User 🛛 🕵	Show Shared View 📃 O	rganize					
	Group Repor	t - Sup	oport-G	oup			
	ک) Queued O	ి 00	Max Wai	t 0	^{ر) این} 00:	t Max 00	Wait : 00
	Login 2	AC O	CD Rel D (ise	ie	
			тяғ 1009	%			
	Group Agent	s Rep	ort				
	Agent	<u>ID</u>	Ext State	Code	DNIS	<u>ANI</u>	Time
	Bruce Walker	4502 8	502 Idle				00:29:40
	John Ford	4501 5	501 Idle				00:29:10

Notes:

- The Zone Index has to be a positive integer. A value of 0 means that the report appears at the top of the zone. For example, when you add a report to an empty zone, its Zone Index is 0. When you add a second report to the bottom of the zone, its Zone Index is 1. To move the second report to the top of the zone, type 0.
- Each report in the zone must have a unique Zone Index value. Therefore, changing the Zone Index value for a report will also change the Zone Index value for other reports, if any, in the same zone.

Changing a report's layout will work similarly on the iPad's Safari browser also as the below screenshots show:









Information

Clicking the information icon will gives information about the Agent Dashboard as well as when the page was last updated.





Troubleshooting Common Problems

Not able to login

Symptoms

When browsing to the Dashboard web site, you are prompted repeatedly for authentication credentials and then finally an Access denied error message is displayed.

Possible resolution steps

- Make sure your entered Windows credentials are correct.
- Verify with your CCAD Administrator that your Windows user group is allowed to access the Dashboard.



CCAD Web Page Stops Updating

Symptoms

The information on the CCAD web page does not seem to be updating any more.

Possible resolution steps

- Check whether there is any warning icon (() displayed on the web page. If so, click the warning icon to get information about the exact error (like the server being unavailable, Contact Center Event Feed connection down and others) and contact your CCAD Administrator.
- Verify whether clocks of the CC server, CCAD server and your desktop computer/iPad are in sync.



After CCAD Upgrade New Reports not Visible

Symptoms

After the Dashboard upgrade, you still see the old reports and not the newly added or reconfigured reports.

Possible resolution steps

• Browsers often cache the web pages and so they might still show the old reports on the cached Dashboard web page. So, you might need to clear temporary internet files from your browser. For example, from IE browser, you can clear cached Dashboard web page using **Delete Browsing History** option as the below screenshot shows:

elete Browsing History		×		
Temporary Internet Files Copies of webpages, images, and media that are saved for faster viewing.	Delete files	Delete	Files	×
Cookies Files stored on your computer by websites to save preferences such as login information.	Delete cookies		Are you sure you want to delete all temporary Internet Explorer files?	
History List of websites you have visited.	Delete history		<u>Y</u> es <u>N</u> o	
Form data Saved information that you have typed into forms.	Delete forms			
Passwords Passwords that are automatically filled in when you log on to a website you've previously visited.	Delete passwords			
About deleting browsing history Delete all.	Close			

• In settings for the browser history, make sure that the option for checking newer version of the web pages is not disabled. For example, the below screenshots show how to check this setting for IE:



Internet Options
General Security Privacy Content Connections Programs Advanced
Home page
To create home page tabs, type each address on its own line.
Use <u>c</u> urrent Use de <u>f</u> ault Use <u>b</u> lank
Browsing history
Delete temporary files, history, cookies, saved passwords, and web form information.
Delete
Change search defaults. Settings
Tabs
Change how webpages are displayed in <u>Settings</u>
Appearance
Colors Languages Fonts Accessibility
OK Cancel Apply



Temporary Internet Files and History Settings
Temporary Internet Files Internet Explorer stores copies of webpages, images, and media for faster viewing later.
Check for newer versions of stored pages:
Disk space to use (8 - 1024MB): 252 (Recommended: 50 - 250MB) Current location: C:\Documents and Settings\nmishra\Local Settings\Temporary Internet Files\
Move folder View objects View files
History Specify how many days Internet Explorer should save the list of websites you have visited. Days to keep pages in history:
OK Cancel



Group Agents Report All Blue

Symptoms

After upgrading to the CCAD version 3.5, the rows in previous Group Agents Reports shows up all in blue color and not in alternate blue and light blue colors:

(Gro	oup Agents	Rep	ort						-
		<u>Agent</u>	ID	<u>Ext</u>	<u>State</u>	<u>Code</u>	<u>DNIS</u>	<u>ani</u>	<u>Time</u>	
	0.	Bruce Walker	4502	502	Idle				00:25:45	
	0.	John Ford	4501	501	Idle				00:25:44	ŀ.

Possible resolution steps

Browser might have an old cascading style sheet (CSS) in its cache. Fully refresh the CCAD page by reloading it.



Running Timers not shown in Reports

Symptoms

In the CCAD reports that are supposed to shows the running timers in columns/panels, no such timers are shown. For instance, agent state timer is not shown in the Group Agents Report:

	2								http://	10.15.1	1.1/ - ShoreTe	el Contact Cente	er Age	nt Dash	board - Inter	net Explorer
I		<u>Organize</u>														
	Gr	oup Age	nts F	Repo	rt						_					-
l		Agen	<u> I</u>	<u>D</u> <u>Ex</u>	t State	Code	DNIS#	DNIS	ANI	<u>Time</u>	InB. ACD Calls	O. ACD Calls -	Chats	Emails	N. ACD Calls	Total Calls
I	2	Moto Ta	hiri 45	03 502	ACD		nmec	5666	nmishra@sho		0	0	1	1	0	2

Possible resolution steps

- Make sure that the current time on the agent desktop/iPad is synchronized with that of the CC server. This is because, for showing the running state timer, the difference between the CC server's timestamp of agent state change and current time on the user's desktop/iPad is calculated. This calculation is performed on the user's desktop/iPad and NOT on the server. If this difference comes out to be negative (which can happen if the clock on the user's desktop/iPad is ahead of the CC server's clock, then the running timer is not shown.
- Contact ShoreTel TAC for support.



Problem with Internet Explorer 11

Symptoms

When using Internet Explorer (IE) 11, the CCAD Web page does not update and also the dragand-drop of reports does not work.

Possible resolution steps

• Configure IE 11 to view the CCAD Web site in "compatibility" view as the below screenshots show.





← (⇒) 🥖 http://10.15.1	1.1/WebAgentDashboard/ $ otas acceleft Contact Center A imes Cont$	슈 ☆ 🔅
File Edit View Favorites	; Tools Help	
	Compatibility View Settings	
Shor	Change Compatibility View Settings	
Welcome CANDY\nmishra	Add this website:	
Launch Agent Dashbo	Add	
	Image: Space of the compatibility view: Remove Image: Space of the compatibility view: Image: Space of the compatibility view: Image: Space of the compatibility view: Image: Space of the compatibility view: Image: Space of the compatibility view: Image: Space of the compatibility view: Image: Space of the compatibility view: Image: Space of the compatibility view: Image: Space of the compatibility view: Image: Space of the compatibility view: Image: Space of the compatibility view: Image: Space of the compatibility view: Image: Space of the compatibility view: Image: Space of the compatibility view: Image: Space of the compatibility view: Image: Space of the compatibility view: Image: Space of the compatibility view: Image: Space of the compatibility view: Image: Space of the compatibility view: Image: Space of the compatibility view: Image: Space of the compatibility view: Image: Space of the compatibility view: Image: Space of the compatibility view: Image: Space of the compatibility view: Image: Space of the compatibility view: Image: Space of the compatibility view: Image: Space of the compatibility view: Image: Space of the compatibility view: Image: Space of the compatibility view: Image: Space of the compatibility view:	
		@ 100% 🔻 🔡
File Edit View Favorites → ■ → ■	1.1/WebAgentDashboard/ $\mathcal{P} \cdot \mathcal{O}$ ShoreTel Contact Center A × Tools Help Page × Safety × Tools • @ *	
	Compatibility View Settings	
Launch Agent Dashboa	Add this website:	
	Add	
	Websites you've added to Compatibility View: 10.15.11.1 Remove	
	Display intranet sites in Compatibility View	
	Learn more by reading the <u>Internet Explorer privacy statement</u>	
	Close	
		🔍 100% 🔻 💡

• Upgrade to the latest version of the CCAD.



Not Able to Login

Symptoms

When browsing to the Web Agent Dashboard web site, a user is prompted repeatedly for authentication credentials and then finally an Access denied message is displayed.



401 - Unauthorized: Access is denied due to invalid credentials.

You do not have permission to view this directory or page using the credentials that you supplied.

Possible resolution steps

- Verify that the user has entered correct Windows credentials and check the Windows Security logs for any errors.
- Verify that the Windows user group of the user is allowed to access the Dashboard. Please refer <u>Allowed Windows User Groups</u> for configuration details.
- If the user is an Active Directory domain user, verify that the CCAD server is joined to the same domain.
- If using FireFox 30 or later, enable NTLM V1 in the browser as the below screenshot shows:

Firefox about:config				
Search: Q nego 8				
Preference Name	▲ Status	Type	Value	
network.negotiate-auth.allow-insecure-ntlm-v1	user set	boolean	true	
network.negotiate-auth.allow-insecure-ntlm-v1-https	default	boolean	true	
network.negotiate-auth.allow-non-fqdn	default	boolean	false	
network.negotiate-auth.allow-proxies	default	boolean	true	
network.negotiate-auth.delegation-uris	default	string		
network.negotiate-auth.gsslib	default	string		
network.negotiate-auth.trusted-uris	default	string		
network.negotiate-auth.using-native-gsslib	default	boolean	true	
security.ssl.allow_unrestricted_renego_everywheretemporarily_available_pref	default	boolean	false	
security.ssl.renego_unrestricted_hosts	default	string		
security.ssl.require_safe_negotiation	default	boolean	false	
security.ssl.treat_unsafe_negotiation_as_broken	default	boolean	false	

For more details see this link: <u>https://www.fxsitecompat.com/en-US/docs/2014/ntlmv1-auth-has-been-disabled-ntlm-support-on-non-windows-platforms-is-now-deprecated/</u>.



Warnings Displayed

Contact Center Event Feed Connection Problem

Symptoms

A warning icon is displayed on the web page and/or a warning message is displayed that there is problem connecting to Contact Center Event Feed.



Possible resolution steps

- Contact Center server might be down. Please contact your CCAD Administrator.
- Try to refresh the web page from the browser.



License Not Verified

<u>Symptoms</u>

A warning icon is displayed on the web page and/or a warning message is displayed on the Dashboard that its license could not be verified.



Possible resolution steps

Please contact your CCAD administrator.



Near Maximum Session Time

Symptoms

A warning icon is displayed on the web page and/or a warning message is displayed that you are near the maximum session time.



Possible resolution steps

Unless user session timeout is disabled by a CCAD administrator, thirty (30) minutes before the 8 hour maximum session timeout, you will be shown this warning that your session is near maximum time. Click the **Renew session** link to renew your CCAD session for another 8 hours.



Errors Displayed

Maximum Session Time Reached

Symptoms

An error page is displayed that you have reached the maximum session time and you are logged out.



Possible resolution steps

Unless user session timeout is disabled by a CCAD administrator, if you don't renew your session upon receiving a warning Thirty (30) minutes before the 8 hour maximum session timeout (as the below screenshot shows), you will be logged out.

You are near to maximum session time! Renew session

You will need to login again either by clicking the link on the page or navigating to the start page.



Logged in from Different Location

Symptoms

An error message box is displayed that your session will be closed because you have logged in from different location. When OK button is clicked, the browser window is closed.



Possible resolution steps/explanation

You can't login to CCAD from more than one location. CCAD restricts a <u>single</u> browser session for a user. If you start another CCAD session from a different machine, or another browser from the same machine, or even in another browser tab from the same machine, your earlier browser session will be closed.



Failed to Make Call

Symptoms

When clicking an agent or a group to make call, an error message box is displayed similar to the following:

10.15.11.1 says:	×
Can't find your ShoreTel extension to make call! Please contact your administrator.	
Prevent this page from creating additional dialogs.	
ОК	
10.15.11.1 says:	×
Can't make call! Extension 501 is Out Of Service! Please contact your administrator.	
Prevent this page from creating additional dialogs.	

Possible resolution steps

• Contact your CCAD administrator to verify your ShoreTel extension is correctly mapped to the Windows User ID with which you login to the CCAD.