CallCopy

Innovations in Call Recording
and Contact Center Solutions

cc: Clarity Administration Manual, v5.2 R2

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Note: Applicable non-disclosure agreements must be in force for authorization.

Revision History			
Revision	**Change Description**	**Author**	**Effective Date**
0	Added AHT Goal configuration. Updated Labor Settings > Leave Request Types. Explained AvayaCMS deletion conditions and that devices with call splits associated to them cannot be deleted until the splits are removed. Noted caveat with Fall DST adjustments. cc: Clarity permissions moved to cc: Discover Administration Manual.	MBuckingham	2013-05-31
1	Noted Device and Device Unique ID combination requirement.	MBuckingham	2013-06-11
2	Updated AHT Goal to indicate future functionality.	MBuckingham	2013-07-18

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Introduction

This manual is for cc: Clarity installers and administrators.

This section provides a generic overview of cc: Clarity's components and their interactions. PBX-specific cc: Clarity integration docs provide additional details. Information on using SSL, TLS, and Encryption are available in the *cc: Discover Administration Manual*.

Component	Function
PBX	Source for historical call data as well as real-time agent status and skill data.
cc: Clarity Import Service	Gets historical call volume data, which is written to the CallCopy database. Data import is scheduled from the cc: Clarity Configuration page.
cc: Clarity Real-Time Listener	Service that receives real-time status data that appears on the cc: Clarity roster. (The specific listener depends on the source PBX.)
cc: Clarity Web Portal	Provides employees ability to forecast call volumes, create schedules, and communicate. Administrators configure the system and manage user accounts from the portal. The Web Portal can be on a different machine from the Import Service and Real-Time Listener if necessary.
CallCopy Database	Stores user accounts and permissions along with cc: Clarity configuration settings, roster settings, call volume settings, and other information.

PBX Integration Settings

Note On cc: Clarity's Configuration pages, the Cancel button sometimes functions as a Back button.

Devices

cc: Clarity integrates with devices running telephony services in order to import user data and call volume histories used for forecasting, scheduling, and real-time roster reporting.

A device must be created for each data source. The system uses that device to track the source of the call history data and appends new data to the already imported data. If you import data from CSV files exported from devices, you can create generic ACD entries. Name each device entry to reflect the source device's name and always select that device entry when importing the data.

Follow these steps to add a device:

1. On the Configuration tab, click **Device**.
2. Click **Add Device**.
3. Select a device type.
4. Click **Add Device**.
5. Configure the device settings explained below.
6. Click **Save**.

Existing devices can be edited or removed by clicking the appropriate button on the Device Configuration page. Before changing the settings of or removing a device, confirm that it is not needed by another device. For example, an Avaya CMS device will fail to delete if there is an Avaya ACD device associated with it. Editing the ACD to remove the CMS association will allow the CMS to be removed.

Avaya ACD

Call data is imported from an Avaya CMS' ACDs. An entry for the CMS with the ACD data must be created before the ACD entry can be created. These settings are needed for an Avaya ACD:

- **Device Name:** Enter a name that easily identifies the ACD.
- **ACD Number:** A CMS device can have data for more than one PBX/ACD. This value is the specific ACD number from the CMS.
- **CMS:** Select from the list the CMS that has the ACD data.
- **Active:** Check to register the device as active in the system. This tells cc: Clarity whether or not to interact with this device.

Any device that has a Skill configured with a specific Split on that ACD cannot be deleted. All Call Splits associated with that ACD should be deleted before the ACD is deleted.

Avaya CMS

cc: Clarity can import user data (i.e., user name, title, skills, and work-mode status) from Avaya Call Manager System (CMS). If an account already exists in cc: Clarity, changes made in CMS such as new skills being added are imported. Create an entry for each CMS from which data will be imported:

- **Device Name:** Enter a name that easily identifies a specific CMS.
- **DSN Name:** Data source name for the CMS server or database. This must match the data source name (DSN) in the ODBC client.
- **Time Zone:** Time zone used by the CMS. cc: Clarity will convert the CMS data's time stamp to Universal time.
- **Active:** Check to register the device as active in the system. This tells cc: Clarity whether or not to interact with this device.

An Avaya CMS cannot be removed from the system if it is still associated with an ACD. Edit any ACDs so that they are not linked to the CMS that needs to be removed before attempting to remove it.

Avaya Aura CCMS

Use this device type if you are importing call history data from Avaya Aura Contact Center Manager Servers. Enter these values:

- **Device name:** Enter a name that easily identifies a specific CCMS.
- **DSN Name:** Data source name for the CCMS server or database. This must match the DSN in the ODBC client.
- **Time Zone:** Time zone used by the CCMS. cc: Clarity will convert the CCMS data's time stamp to Universal time.
- **Active:** Check to register the device as active in the system. This tells cc: Clarity whether or not to interact with this device.

Generic ACD

Use this device type if you are manually importing data using a CSV file. Enter a unique device name that reflects the data source.

Import Service

The Import Service configuration controls how data is imported from the configured devices. One import service is needed. Multiple services can be installed on different machines for redundancy or performance needs. The service runs at the configured import times. Each time it runs it interfaces with each of the device entries.

1. On the Configuration tab, click **Import Service**.
2. Click **Add Configuration**.
3. Click **Edit** beside each field and enter the following values:

    * Multiple values can be entered by separating them with a semicolon.

    - **ID #:** This value is automatically generated and used by the system to run the import service. This value is needed when the Import Service on a machine is configured.
    - **Historical import times*:** Specify the times that call volume data is to be imported.
    - **Agent import times*:** Specify the times that agent/employee account data is to be imported.
    - **Error notification emails*:** Enter full email addresses.
    - **Success notification emails*:** Enter full email addresses.
    - **Number of days to go back when acquiring data:** If importing is scheduled daily, then set this value to 1 to get all of the previous day's data. If importing fails, this value can be changed to get data from the missed day. Data that has already been imported is identified and not duplicated.
    - **Default title:** When new user accounts are imported, the system automatically assigns this title to the account if the account does not have a title. If the account already exists in cc: Clarity with a title and location, the existing values are not over written.
    - **Default location:** Location assigned if an imported account has no location.
    - **Overwrite agent skills?:** True/False. If the user account already exists in cc: Clarity, the 'Yes' setting causes cc: Clarity to delete any current skills and add skills from the CMS account.
    - **Import new skills?:** True/False. If set to False, no new CMS account skills will be imported for existing cc: Clarity accounts. If set to True, new skills will either be added to or replace existing skills in cc: Clarity based on the Overwrite setting above.

4. Click **Save**.

Existing services can be edited or removed. Click **Save** to record any changes.

System and Site Widget Settings

Site Settings

These settings are used if both cc: Discover and cc: Clarity are installed. These settings enable users to login to one system and then access the other system without having to login again.

1. On the Configuration tab, click **System Settings**.
2. In the Site Settings area, select the option to enable integration.
3. Enter the URL of the cc: Discover Web Portal's login page.
4. Click **Save**.

Email Server Settings

The email-server settings must be specified in order for cc: Clarity to send emails other than those sent when users reset their passwords. Follow these steps to add an email server:

1. On the Configuration tab, click **System Settings**.
2. In the Email Settings section, enter these values:

   - **SMTP Host Email Server:** Enter the hostname of the SMTP mail server cc: Clarity will use to send emails.
   - **'Send from' Email Account:** This can be any email address, real or fake. It does not have to be an address tied to the account for the entered username and password.
   - **'Send from' Username:** Username for authentication onto the SMTP server.
   - **'Send from' Password:** Password for authentication onto the SMTP server.
   - **Enable Email Notifications:** This option must be selected in order for cc: Clarity to send email notifications.

3. Click **Save**.

Data Settings

CallCopy recommends that these settings not be changed after the initial installation. Doing so can cause current schedules, forecasts, and roster information to become unusable.

1. On the Configuration tab, click **Data Settings**.
2. Edit the settings as needed:

   - **Fundamental Interval:** The basic length of time in the system via which scheduling/forecasting/charting is done. This is the granularity at which charts will show and activities can be scheduled. CallCopy recommends that all installs use the lowest setting of 15 minutes.
   - **Real-Time Interval:** Specifies how the real-time services track device statistics that accumulate over an interval and reset. This value is the reset value (i.e., every *x* minutes). This value is specific to the client's device configuration. (AACC uses 15 minutes. Some versions of Avaya CMS use 30 minutes although it might be possible to configure it to be 15, 30, or 60 minutes.)
   - **Calls logged upon ending instead of beginning:** This setting is related to the user's device. It indicates whether a call and associated data is written to cc: Clarity's historical records in the time period when the call ended or when it began.
   - **First Day of Work Week:** Sets the starting day of the work week. This is used in tracking and calculating minimum, maximum, and overtime hours for the week. This will also change the way reports, charts, and calendars are displayed in the web portal, changing the first day of the week to match what is set here.

3. Click **Save**.

Widget Settings

These settings control all the widgets for a cc: Clarity site. If multiple sites are installed in an environment, each site will have different widget settings. Follow these steps to configure the home page settings:

1. On the Configuration tab, click **Widget Settings**.
2. Configure the settings explained below.
3. Click **Save**.

Twitter

Enter Twitter settings as needed:

- **Twitter Screen Name:** Screen name of the Twitter account, not the User ID.
- **Number of Twitter Posts to Show:** Set this value based on the space available on the cc: Clarity Home page and frequency of tweets. Up to 100 tweets can be displayed.
- **Twitter Access Token:** Value created when Twitter application is created.
- **Twitter Access Token Secret:** Value created when Twitter application is created.
- **Twitter Consumer Key:** Value created when Twitter application is created.
- **Twitter Consumer Secret:** Value created when Twitter application is created.

Facebook

Enter Facebook settings as needed:

- **Facebook App ID:** ID created by Facebook when you register your Web site with them.
- **Facebook App Secret:** Value created by Facebook when you register your Web site. Used to decode encrypted messages from Facebook.
- **Facebook Page ID:** ID for Facebook home page.
- **Number of Facebook Posts to Show:** Set this value based on the space available on the cc: Clarity Home page and frequency of posts.
- **Facebook Publish Access Token:** Value generated by Facebook when creating a Facebook application. Used by cc: Clarity to publish schedule announcement to a Facebook page.

Labor, Shifts, and Schedule Settings

Managers and system administrators control cc: Clarity's functions from the Configuration tab.

Some items depend on other items to be configured before they can be configured. The table below illustrates these dependencies. Being aware of the dependencies will help you understand the order to perform tasks. Also, titles, locations, and teams cannot be deleted if they are used by an employee account.

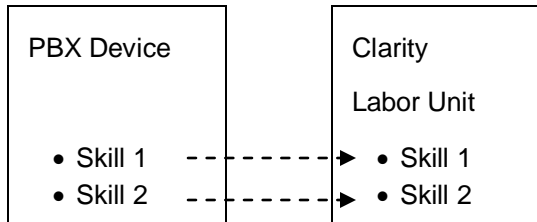| These	are used to configure these,	which are used to configure these items.
Device	Labor units	Schedule type
Titles	Team	Import service
Skills/Service Levels	Shift template	
Location		
Users		
Shift activity types		
Roster types		
Work modes		
Aux reasons		

Labor Settings

Titles

Every user must be assigned a title. Typical titles are employee, supervisor, trainer, and others. Follow these steps to add a title:

1. On the Configuration tab, click Miscellaneous > Titles.
2. Click **Add Title**.
3. Click **New Title for entry**. Edit the field as needed.
4. Click **Save**.

Titles can be edited. They can be removed if they are not in use.

Skills

Skills in cc: Clarity can be the same as the skills, splits, and hunt groups defined on the PBX/ACD. Other soft skills can be added if employees in a labor unit perform tasks not related to calls such as delivering training. A skill can be associated to one or more cc: Clarity labor units.

```
┌─────────────────┐         ┌─────────────────┐
│ PBX Device      │         │ Clarity         │
│                 │         │ Labor Unit      │
│                 │         │                 │
│   • Skill 1  ──┼──────────┼─► • Skill 1     │
│   • Skill 2  ──┼──────────┼─► • Skill 2     │
└─────────────────┘         └─────────────────┘
```

Follow these steps to add a skill:

1. On the Configuration tab, click Miscellaneous > Skills.
2. Click **Add Skill**. A new entry appears.
3. Click **Edit** beside each field and enter text as necessary:

   - **Name:** The same name can be assigned to different skills, but doing so may confuse users of this information on other tabs.
   - **Time Zone:** This value is used for Forecasting. The Forecasting algorithm assumes similar call volumes will occur at the same time each day. This value is also used for Daylight Savings Time adjustments. Select the time zone of the majority of the calls the skill services so that the incoming call patterns line up with time of day in that time zone. If this value is not set, Forecasting will instead attempt to use the device time zone of the first device it finds related to the skill.
   - **Device:** Select a value from the list. Leave this field blank for soft skills (e.g., Training, HR).
   - **Split:** Enter the split, skill, or hunt group value from the PBX. This value MUST match that on the PBX device. Leave this value blank for a soft skill. If a skill is specified, a service level entry is created automatically and configured on a separate page.

4. Click **Save**.

Skills can be edited or removed. Skills assigned to Labor Units cannot be removed until they are removed from the Labor Units. If the skill was originally configured with a split and the split is later deleted, cc: Clarity disconnects the skill from the split.

Service Levels

Every skill associated with a PBX split will have a service level associated with it. Skills that do not have splits will not appear on this list.

1. On the Configuration tab, click Miscellaneous > Service Level.
2. Locate a skill and enter the required values:

   - **Waiting time (in seconds):** How many seconds a customer can wait on line before being answered.
   - **Percent Answered:** The percentage of calls that must be answered in the service level waiting time.

3. Click **Save**.

Service levels can be changed after they are created. Those changes affect only future scheduling calculations.

Labor Units

cc: Clarity's labor units are groupings of PBX skills or people such as departments and divisions in the company. They can indicate the type of calls an employee can answer or make. A labor unit can have zero or more skills associated with it. Teams and labor units are not related. Labor units include skills that are configured on a separate page. Labor unit names do not have to be unique. However, users select labor units from lists for several cc: Clarity tasks and searches. Only the names of the units appear in the lists. Duplicate names on this page may confuse users on other pages.

1. On the Configuration tab, click Miscellaneous > Labor Units.
2. Click **Add Labor Unit**.
3. Click the **New Labor Unit** label. Enter a name for the unit.
4. Optional – Click **Add Skill**. Click **Edit** beside the new skill label and select a skill from the list.
5. Click **Save**.

Existing labor units and the skills associated with them can be edited and removed. Any changes must be saved.

Locations

Locations are places to which employees are assigned for labor law compliance. Locations are tied to schedule types, which specify the labor rules used for scheduling. If different labor rules apply to different employees at a location, different locations may be needed for each class of employee.

A Default Location is automatically created when cc: Clarity is installed. It can be deleted or edited as necessary.

Follow these steps to add a location:

1. On the Configuration tab, click Miscellaneous > Location.
2. Click **Add Location**.
3. In the new entry, click **New Location** and enter a name.
4. Click the time and select the time zone for the location.
5. Click **Save**.

Existing locations can be edited or removed if they are not used. Any changes must be saved.

> **Note** At least one location must exist so that new users may be added. If only one location remains, the system will not allow you to delete it, and will display a warning message if you attempt to do so.

Teams

Teams are used to assign supervisors who can then view employees' profiles and create schedules. Teams and labor units are not related, and they do not affect schedule rules. An employee can be a member of more than one team. People from different labor units can be on the same team.

Follow these steps to add a team:

1. On the Configuration tab, click Miscellaneous > Teams.
2. Click **Add Team**.
3. In the new entry, click **New Team** and enter a unique name.
4. Optional – If the team needs a user to be specified as a supervisor, click **Add Supervisor**. Supervisors are needed to approve swap requests, leaves, and other tasks. To appear in the list of possible supervisors, the user must have a role with the CanBeSupervisor permission. If a supervisor loses that permission, she will automatically be removed as a supervisor from all teams.
5. Click **Save**.

Leave Request Types

Requests are used to mark times when employees are not available to be scheduled. Leaves can be voluntary or involuntary (i.e., call offs, suspensions). Employees can request voluntary predefined leaves when viewing their own schedules. cc: Clarity is configured with some leave request types including PTO/Vacation.

1. On the Configuration tab, click Scheduling > Leave Request Types.
2. Click **Add Leave Type**.
3. In the new entry, click **Edit** beside each field and enter a value:

   - **Name:** Add a unique name for the leave.
   - **Employee can choose:** Set to 'True' for vacation, paid time off, FMLA and other voluntary leaves. Click on the word True/False to change.
   - **Requires approval from Supervisor:** Leaves that do not require approval can include involuntary leaves or call offs that are assigned to the employee's schedule. Click on the word True/False to change.

AHT Goal

This setting is not currently used and is for a future function of the software.

Work Modes

The settings on this page:

- Specify activities that appear on schedules and how they appear.
- Specify states used by the roster.
- Relates the activities on cc: Clarity's schedule shifts and roster with the activities and agent states from the PBX, ACD, or other system. Related activities may have the same name (e.g., lunch, break, meeting).

It is possible to delete the items on the Work Modes page. CallCopy suggests administrators delete only items that have never been used or have not been used for several months or years. Shift activity types in use cannot be deleted. Deleting old shift activity types will delete old schedule shift records. Deleting actively used roster types, work modes, and aux reasons will remove users from the roster immediately or possibly when their work mode/state changes.

Note For some integrations, certain Work Modes must not be deleted. Please refer to the integration guide specific to the customer's environment for more information.

Shift Activity Types

Shift activity types have to be created before supervisors can assign those activities to shift templates. cc: Clarity includes default activities such as lunch.

1. Click **Add Shift Activity**.
2. In the new entry, enter the following items:

   - **Name:** Enter a unique, descriptive name.
   - **Paid Activity:** Paid activities count towards maximum/minimum hours per week/day and overtime calculations when doing scheduling; unpaid activities do not. For instance, if someone is set to work a maximum of 40 hours per week, you can schedule them for five nine-hour days where each day has a one hour unpaid lunch, so they are only working eight paid hours every day.
   - **Color:** Click in the field and select a color. Activities appear on the schedule in this color.
   - **Late Threshold (seconds):** This value is used by the roster to determine if an employee is late for an activity. For example, if the threshold for lunch is 300 seconds (five minutes) and the employee is still logged into the PBX four minutes after lunch has started, the roster does not show the employee as late.

3. Click **Save** to commit the changes.

   Note A shift activity type can only be deleted if it is not currently in use by a roster type or a shift template (see below). If a user tries to delete a shift activity type that is in use, the interface will alert the user by highlighting the entry that cannot be deleted.

Roster Types

A roster type is an activity or state that appears on the cc: Clarity roster. These activities can be related to schedule shift activities, work modes, and aux reasons. Roster types can include phone states (e.g., On Call, Call Wrap, Available, In Ring), shift activities (e.g., lunch, break, meeting), or general status (e.g., Off Shift). cc: Clarity comes with default roster types.

> **Note** An Off-Shift roster type must be configured and linked to the corresponding Work Mode(s) for breaks between shifts to be displayed correctly under Schedule Adherence. If no Off-Shift activities are specified, down time between shifts may not be detected correctly, causing it to appear as if shifts run together continuously.

1. Click **Add Roster Type**.
2. In the new entry, enter the following items:

   - **Name:** Enter a unique, descriptive name for the roster type state.
   - **Shift Activity Type:** For activities that appear on both the schedule and roster, select the corresponding Shift Activity Types (e.g., lunch).
   - **On Shift:** This option determines if a state appears in the cc: Clarity roster as On Shift or Off Shift. Select this setting for most activities. If the Off Shift type or something similar is used, the On Shift option usually should be cleared.

3. Click **Save** to commit the changes.

Work Modes

Work modes and aux reason codes entered on the PBX are entered in cc: Clarity in order to relate status and activity information from the PBX to that in cc: Clarity. Which Work Modes and Aux Reasons are available is determined by what the customer has selected to use based on the integration type, some of which may allow customers to create custom values. Examples of a Work Mode could include "On-Site" or "In Queue." There needs to be at least one Work Mode, with any number of Aux Reasons used to further define the type of work being performed.

1. Click **Add Work Mode**.
2. In the new entry, enter the following items:

   - **Name:** Enter the name exactly as it is configured on the PBX/ACD.
   - **Value:** Enter the value exactly as it is configured on the PBX/ACD.
   - **Roster Type:** Select a type to have cc: Clarity map events from the PBX/ACD with this mode to the roster activity.
   - **Use Aux Reason:** If a work mode is related to an aux reason on the PBX, both will appear in a data event from the PBX. Select this option if you want cc: Clarity to use the aux reason instead of the work mode.

3. Click **Save** to commit the changes.

Aux Reasons

Aux reason codes configured on the PBX/ACD are more specific than the work mode, like "Agent Troubleshooting" or "Hardware Maintenance" are more precise details for a Work Mode like "On-Site." For example, Avaya CMS can use an Aux-Work mode. Agents in this mode enter a code to specify if they are on break, at lunch, or in a meeting.

1. Click **Add Aux Reason**.
2. In the new entry, enter the following items:

   - **Name:** Enter the name exactly as it is configured on the PBX/ACD.
   - **Value:** Enter the value exactly as it is configured on the PBX/ACD.
   - **Roster Type:** Select a type to have cc: Clarity map events from the PBX/ACD with this mode to the roster activity.

3. Click **Save** to commit the changes.

Shift and Schedule Settings

Schedule types and shift templates together specify the labor rules governing work activities and hours.

A schedule type specifies rules for weekly and daily total time and specifies the types of shifts that can be assigned during a week. The rules set on the schedule and the shift control when employees can be scheduled to work. A schedule type can include one or more shift templates.

Shift templates specify shift activities such as breaks and lunch and the time guidelines for each activity. They can be used by multiple schedule types.

To create these items, users must understand the applicable corporate and government labor regulations. The automated scheduler uses this information to determine what shifts to give an employee.

An employee can be associated with only one schedule type. There is no way to assign employees to specific shifts. The minimum-minutes-between-shifts setting prevents users from being scheduled on a mixture of day and night sets during the same week. If users rotate shifts from one week to another, this change must be made manually after a schedule is created.

The number of schedule types and shift templates needed varies based on a company's needs. Here are some example schedules.

Scenario 1: Three Eight-Hour Shifts

A company has three shifts: 8 AM – 4 PM, 4 PM – 12 AM, and 12 AM – 8 AM. Staffing is seven days a week. Employees do not rotate shifts and work either Monday – Friday or Saturday – Sunday. In this scenario, these schedules and shifts could be created:

- Weekday Morning schedule with a basic shift of a 30-minute lunch and two 15-minute breaks.
- Weekday Evening schedule with a basic shift
- Weekday Night schedule with a basic shift
- Weekend Morning schedule with a basic shift
- Weekend Evening schedule with a basic shift
- Weekend Night schedule with a basic shift

Scenario 2: 7 AM – 8 PM Hours

A company is staffed from 7 AM – 8 PM, Monday through Saturday. Employees' shifts can change (i.e., morning, afternoon, evening) and can be four, six, or eight hours. Employees work no more than 32 hours a week over five days. In this scenario, one schedule and three shifts could be created.

Schedule settings:

- Minimum minutes between shifts: If an employee can work until 8 PM and then work another shift at 7 AM, this value would be 660 (11 hours * 60 minutes).
- Maximum hours: 32
- Maximum hours per day: 8
- Schedule shift days: All days except Sunday

One shift template would be created for each four, six, and eight hour block. Each template may require different activities based on labor regulations.

<u>Scenario 3: 7 AM – 8 PM Hours, Rotating Saturdays</u>

This scenario is the same as Scenario 2 except that employees are required to work only one Saturday per month. In this case, the schedule and shift templates mentioned above would still be created except the schedule shift days would exclude Saturday and Sunday. Three Saturday-only shift templates would be created, one for each time block.

Assuring that employees work only one Saturday per month would require manual editing of the schedule. Schedule flexibility and complexity necessitates greater manual editing.

> **Note** For Spring Daylight Savings Time adjustments, if an event is created that:

- Ends at 2:00 A.M., 2:15 A.M., 2:30 A.M., or 2:45 A.M., the event start time will automatically be moved to 1:00 A.M., 1:15 A.M., 1:30 A.M., or 1:45 A.M., respectively.
- Ends at 2:00 A.M., 2:15 A.M., 2:30 A.M., or 2:45 A.M., the event end time will automatically be moved to 1:00 A.M., 1:15 A.M., 1:30 A.M. or 1:45 A.M., respectively.
- Starts before 2:00 A.M. and ends at 3:00 A.M. or after, the event will be created normally.

> For Fall Daylight Savings Time adjustments, complications may arise when creating schedules that overlap with the time change, particularly schedules that start or end at 2 A.M. when the time change occurs.

Business Closures

Business closures are known dates and times for which employees do not need to be scheduled. Holidays such as New Years Day, Thanksgiving, or the Fourth of July in the United States are typical business closures. Other business closures include days when employees will be at a company meeting or employees will be moved to a different office. If an office is closed one day each month (e.g., the first weekday of the month), those dates should be configured as business closures. If an office is closed the same day each week (e.g., Sunday), Sunday should be configured on a Schedule Type as a day for which the schedule cannot be used.

Holidays that recur each year must be entered each year. If a business closure affects multiple locations, a separate closure must be created for each location. Once the date of a closure has passed, the closure can be deleted without affecting historical schedules. If a business closure is added for a time frame during which employees are already scheduled at that location, a warning message will be displayed alerting the user of the situation. Business closures will be displayed at a user's location on the Edit Calendar and Edit Schedule pages, and will not allow a user to manually add shifts during those times.

Follow these steps to specify a date as a business closure:

1. In cc: Clarity, click Configuration tab > Business Closures.
2. In the Add Closure line, click in the **Date** field and select a day from the calendar.
3. Select start and end times. For an entire day, the Start Time is 00:00, and the End Time is 24:00.
4. Select a location.
5. Click **Add**. The date appears in the list.

Shift Templates

Follow these steps to add a shift template:

1. On the Configuration tab, click **Shift Templates**.
2. Click **Add Shift Template**.
3. In the new entry, click **Edit** beside each field and enter a value:

   - **New Shift Template:** Add a unique name for the template.
   - **Length in Hours:** This is the total hours including lunch and break hours for a shift. Numeric values can be in two point decimals.

4. Click **Add Activity**. (Optional: A shift template can have zero or multiple activities.)
5. In the new entry, click **Edit** beside each field and enter a value:

   - **Activity type –** Select an activity type configured earlier. The cc: Clarity employee roster compares this value and the work state the employee is in when logged in to the PBX to determine if an employee is early/late to an activity. Multiple instances of the same activity type can be created, such as two breaks for a shift. Each instance should have different values.
   - **Length in hours:** The total length in hours for all activities cannot exceed the length in hours entered for the shift.
   - **Start of starting range (hours from start of shift):** Earliest time that the activity can start.
   - **End of starting range (hours from start of shift):** Latest time that the activity can start.
   - **Buffer minutes before activity:** Minutes between a previous activity and the start of this activity. For example, entering 60 minutes would prevent an employee from taking a 15 minute break and then 30 minutes later taking lunch. Values entered in this field must follow the Fundamental Interval setting configured on the Data Settings page.
   - **Buffer minutes after activity:** Minutes after this activity and the start of a new activity.

     Buffer minutes must be considered carefully if employees' schedules will be filled with multiple types of activities. The buffer applies to all activities, not specific ones. If lunch has a 60 minute after-buffer, then a training activity could not be scheduled immediately after lunch.

6. Click **Save**.

Schedule Types

Follow these steps to add a schedule type:

1. On the Configuration tab, click **Schedule Type**.
2. Click **Add Schedule Type**.
3. In the new entry, click **Edit** beside each field and enter a value:

   - **Name/New Schedule Type:** Enter a name for the schedule type.
   - **Location:** Enter a location that will use this schedule.
   - **Minimum minutes between shifts:** Enter whole minutes.
   - **Maximum non-overtime hours per week:** Once employees exceed this number of hours, they are working overtime.
   - **Maximum total hours per week:** This value includes both standard and overtime. If employees cannot work overtime, then this setting and the previous setting should be the same value.
   - **Minimum hours per week:** Hours can be to two decimal points (i.e., .25 is 15 minutes).
   - **Maximum hours per day:** Total shift hours that can be worked regardless of the number of shifts that are worked on one day. This number includes lunch and breaks. For example, if employees work from 8 AM to 5 PM with a one hour lunch, the maximum hours per day is 9.

4. Multiple shift templates can be added to a schedule.

   Click **Add Type Entry** and configure these settings:

   - **Shift template:** Click the template name and select a template from the list.
   - **Days:** Select days on which the template can be used.
   - **Start of starting range (hours from midnight):** Specify the earliest time that the shift can start.
   - **End of starting range (hours from midnight):** Specify the latest time that the shift can start.
   - **Start granularity in minutes:** Typically, shifts can start on the hour (60 minutes), half hour (30 minutes), or quarter hour (15 minutes).

     Note If the Start of starting range and End of starting range are the same, creating a fixed starting time, then start granularity should not be changed from the default. Placing the value of 0 in this field will cause the schedule to error and not process correctly.

5. Click **Save**.

Roles, Permissions, and Accounts

This section is for administrators and explains cc: Clarity's user security.

Accounts and roles are key security features:

- Even if an employee will never be allowed to login to cc: Clarity, that employee will need a user account in order to be scheduled and tracked on the real-time roster.
- A user account allows an employee to login to cc: Clarity, assuming that the employee knows the username, password, and cc: Clarity URL. But the employee can see only the Home tab with his employee profile information, cannot see his schedule, and cannot perform any actions without a role.
- A role has permissions that specify the actions an employee can perform. Any permissions dependent on one another will be granted automatically when assigning the parent permission. For example, granting LeaveRequestApprovalAll would include LeaveRequestApprovalTeam since "All" includes "Team," so granting the former would also give users with the specified role the latter.

CallCopy's cc: Discover and cc: Clarity store user account information in the same database.

Users can login to each application if they know their account names, passwords, and the application URLs. In other words, users can login to cc: Clarity and then access cc: Discover without logging in again and vice versa. In order to access any functionality in either application, they have to be assigned roles.

Both cc: Discover and cc: Clarity allow logging in with Windows credentials with correctly configured Active Directory integration. Please see the *cc: Discover Administration Manual's* "Security" section for more information.

Role design varies by the needs of each installation. Two common role design strategies are user-based and task-based. User-based roles combine the type of user (e.g., employee, supervisor, system administrator) and tasks performed. For example, a supervisor may need to view the real-time roster, create schedules, and create users. Or user creation may be assigned to system administrators. Task-based roles focus on tasks, not users. A task role can be Manage Users with the permission to create users and schedules. Another task can be Monitor a Shift in with permission to view the roster and real-time reports.

Agents may login to multiple devices (e.g., ACDs). cc: Clarity can tie each user account to only one ACD. If users must be tracked for each login, a separate cc: Clarity account must be created for each login.

Create a Role

A role is assigned to a user and specifies what a user is permitted to do in the system. To create a role, on the **Configuration** tab, expand **Miscellaneous** on the left navigation bar, click **Roles**.

At this point, the display for Roles will vary depending on whether or not cc: Discover is installed with cc: Clarity. If cc: Discover is installed, roles are shared across systems and are managed from the Administration tab > Permissions > Roles in cc: Discover (this page will open automatically when clicking Roles from cc: Clarity). Please refer to the *cc: Discover Administration Manual* for further information on configuring roles there.

If cc: Discover is not installed with cc: Clarity, roles can be added by doing the following.

1. Click **New Role**.
2. Enter a unique role name in the Name field.
3. Enter a description for the role.
4. Click **Create New Role**.
5. Select the role from the drop-down list.
6. Select the necessary permissions.
7. Click **Save**.

Example Role: Employee

If employees should be able to perform just these tasks:

- Login to cc: Clarity
- Change their password
- View their schedule
- Request leaves and schedule swaps
- View their profile information – Name, labor units, teams, skill sets, etc. but not roles or schedule types.

Assign them a role with these permissions:

- AllowChangePassword
- Employee Section
- EmployeeProfileAllView
- HomePageWidgets – This permission is not critical but can be useful.

Please refer to the "Permissions" section of the *cc: Discover Administration Manual* for detailed Permissions explanations.

Create an Employee

Follow these steps to create an employee.

> **Note** If the employee was initially created in cc: Discover, do not manually recreate them in cc: Clarity. Refer to the "Mass Update Incomplete Users" section of this guide. Manually creating a new user in cc: Clarity creates their accounts in both cc: Discover and cc: Clarity.

1. Click the **Employees** tab.
2. Click **Create**.
3. Enter information into each field or select a value from the drop down lists (required fields are denoted by an asterisk - *.)

   - **First Name***
   - **Last Name***
   - **Title*:** Values in the drop down menus are configured elsewhere in the system.
   - **Location*:** This is the location of the office/call center where the employee works or to which the employee is assigned. Field employees or home-based employees may not actually go to this location. Location's have an associated time zone. See the Labor Time Zone value for additional information. An employee can be associated to only one location because that value is associated to a schedule. If an employee rotates shifts from one week to another (i.e., first shift to second shift and then back to first shift), this location field must be changed each week.
   - **Employee ID:** Any value can be entered here such as an ID from an HR system or PBX.
   - **Labor Unit:** Labor units are groupings of skills and people such as departments and divisions in the company. They can indicate the type of calls an employee can answer or make. A labor unit can have zero or more skills associated with it. Team and Labor Unit are not related.
   - **Team:** An employee can be a member of more than one team. People from different labor units can be on the same team.
   - **Username*:** Value used to login to the system.
   - **Password*:** See the "System Security" section of the *cc: Discover Administration Manual* for password requirements configuration.
   - **Email:** Requires the full address. Example: joesmith@gmail.com. This can be either a work or home address.

     > **Note** If you do not enter an email address, "Forgot My Password" functionality will not work for the user.

   - **Phone:** This can be a work or home number. The field accepts only numbers. (Also see the Cell Phone field below.)
   - **Active:** Inactive employees cannot access cc: Clarity or be scheduled. Their historical information still appears on reports. Inactivate employees can be reactivated.
   - **Super User:** A super user has unlimited access to cc: Clarity and cc: Discover. This privilege should be granted to only a small number of administrators.
   - **Schedule Type:** A schedule type specifies rules for weekly and daily total time and specifies the types of shifts that can be assigned during a week. Users must have a schedule type in order to be scheduled automatically.

- **Labor Time Zone:** Time zone in which an employee works for labor law compliance. If employees work in a different time zone than that of the location to which they are assigned, enter their actual time zone here. If a value is not entered here, the Location time zone is used.
- **Roles:** Roles specify what an employee is permitted to do in the system. Multiple roles can be selected.
- **Skills:** Skills can be those defined on the PBX/ACD or others. Multiple Skill and Labor Unit values can be selected by holding the Shift or Control key while clicking values.
- **Device:** Select an ACD device on which the employee has a login ID.
- **Device Unique ID:** Unique login ID for the agent on the ACD device. Example: For Avaya CMS, this ID is the logid. For Avaya AACC, this ID is the TelsetLoginID.

  Note The **Device** and **Device Unique ID** combination must be unique to the agent being created. If it is not unique and the agent is saved, other details will be saved, but these fields will remain blank.

- **Cell Phone:** Enter the user's cell phone number. This number can be used for either calling the user or sending the user a text message.
- **Cell Carrier:** Select the user's cell phone carrier if text messages will be sent to the user and Enable SMS option is selected.
- **Enable SMS:** Select this option if text a message will be sent to the user when a schedule is published.

4. (Optional.) Click **Upload New Photo**. Navigate to the location of the photo file. Select the file and click **OK**. If a photo of the employee will be included in the profile, it must be on your PC or an accessible network drive. Photos can be GIF, PNG, or JPEG. (Photos are uploaded to the cc: Clarity Content/images directory.)
5. Click **Create**. The user account is created.

Import Employees

Employees can be imported into the system in batches using the CSV (Comma Separated Value) file import function in cc: Discover. If you have a database or Excel spreadsheet of agents, you may be able to generate a CSV data file of your employees. That information can then be imported into cc: Discover, then migrated and updated into cc: Clarity, saving time by minimizing data entry tasks.

A file must be in the following format: username, password, locked, first_name, last_name, email, system_username, system_domain, employee_id, site_id, phone1;phone2;phone3;, role1;role2;role3;

> **Note** Roles are optional.

Follow these steps to import users:

1. Create the CSV file and store it on a local or network drive.
2. In cc: Discover > Administration tab > Permissions > Users, click **Import Users**.
3. Click **Select**.
4. Browse to locate and open the file.
5. If the CSV file contains a heading row (Name, Title, Position, etc.), check the box for "Import file has a header:" to ignore this row during import. Click **Upload File**.

6. When the upload is complete and the file has been parsed successfully, continue to the following "Mass Update Incomplete Users" section to integrate the imported users into cc: Clarity and ensure all the necessary data for user records is up to date.

Mass Update Incomplete Users

This function is needed if cc: Clarity users are created in cc: Discover. Users created in cc: Discover do not have the location, schedule type, user time zone, and other information required for cc: Clarity scheduling and roster reporting. As those users are created, they appear on the Mass Update list and must be updated.

1. On the Configuration tab, click Mass **Update Incomplete Users**.
2. Enter the missing information for each user. Users must have a location and title specified. (See the "Create an Employee" section.)
3. Click **Update Selected**.

About CallCopy

CallCopy, a leading provider of innovative call recording and contact center solutions, is dedicated to ensuring the highest standards of customer and employee satisfaction. The award-winning, enterprise-proven cc: Discover suite delivers advanced call recording, screen capture, quality management, speech analytics, performance management, customer survey and workforce management capabilities to organizations of all sizes and industries across the globe.

CallCopy empowers these organizations to gather business intelligence, which is leveraged to maximize operational performance, reduce liability, achieve regulatory compliance and increase customer satisfaction.

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