Admin Notes

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Toshiba Quick Start Guide

Taske Administrator

For additional information, visit our website
www.TelelinkCom.com

Administrator

Taske Reporter

To login into Taske

http://stratamas01/mytaske/

- Open Taske software. Username is "Administrator"
- The password is "password"

Reports Tab:

- Under this tab you can view or add new report templates.
- To add new reports click on the new report template.
- To edit existing reports click on properties.
- To change the name or description of a report click the edit feature in the general area.
- To add or remove reports click the edit link for the desired report in the reports area.
- ACD agents also have the same type of reporting selections.

Creating New Reports:

- The first screen that appears shows you the different types or reports to be created such as daily, weekly, monthly etc. Under this tab you can view or add new report templates.
- To create a new report select new choose the criteria you want to show on the report. Name the report and add a report description.
- Options will also appear and you can choose to include notifications reports or print this report templates according to a schedule set up in the preferences.

Call Visualizer Tab: (Dates / Types)

- Allows you to select reports based on your selected filter criteria. It also allows you listen to the calls if tracer software is installed.
- Search for all calls on today, or a selected date range. To change any field click the edit field.
- Here you can select what type of calls (i.e. incoming, outgoing, internal).
- You can choose answered calls or abandoned calls. Call attributes can show you calls that were put on hold, conference or transferred.
- The color coded bar that appears on the report view allows you to hover your mouse over the fields and view the status of the call. (i.e. how long it waited in queue if the call was put on hold etc.)

Search Area:

- As you select the search criteria the search area of the screen will show you what you have selected. After all criteria is selected click on the search button at the bottom of the screen .

Save Filters:

- After selecting the criteria you can also choose to save this filter and give it a name and description so you can run this report at a later date. You can also go to the options and choose to customize the search and display colored filters.
- You can also organize your filters or add new filters.

Review Tab:

- This allows you to review queues, agents or agent groups. You can review for current day, last hour, last 12 or 24 hours.
- This shows total activity and number of calls. You can show call average time to answer, talk time, answered or abandoned calls.

Agents:

- This report allows you to find calls were one or more agents or agent groups were involved in a call. Or one or more ACD queues were involved.
- The toggle selection appears showing all agents checked click on this to unchecked all agents then check the agents you want to be included in the report.

Trunks:

- This report allows you to find calls and edit reports were one trunk or selected trunks are involved.

Advance Configuration (Voice Mail—Distribution List):

- A user can set up distribution lists so they have the ability to send a message to multiple mailboxes.

Real-Time Area:

- This shows all queues and all agent status. When this is selected the welcome page appears. This will allow you to select the queues you want to monitor. After making your selection the real time page opens.
- The agent state chart shows five fields, idle status ACD calls, non ACD calls, unavailable, and logged out. The web sign Edit the agent properties to display. Examples are ID, agent name, extension, acd queue.
- The web sign field at the top of the page shows real time calls and agent status. Such as calls waiting, longest call waiting, number of agents logged in, etc.
- The layout tab changes the order of the queues and the change contain link allows you to add or delete queues from the view.

Reports Options:

- Click on the edit option to select print, export, email, delete or schedule.
- Print allows you to choose the printer, number of lines per page and font settings.
- Export allows you to choose to export to word, lotus, excel etc.
- Email here you choose the email address and the server.
- Schedule allows you to set a time and date the report prints. You can only have a time schedule per day.

webSign Preferences:

- Used to select which statistics appear in the call viewer window. It there are not enough filters added the fill the status bar the call viewer will not scroll. You can also set thresholds to add or change the warning and critical threshold values.

Chat Preferences:

- You can add or remove members to your chat contacts. Click add + to add someone new to your chat contacts list, or—to remove a member.