Gladly

INTEGRATION NOTE – PRE-REQUISITES AND INFORMATION

Contents

Introduction

Teleopti WFM, a Calabrio company product, is a unified workforce management (WFM) software that integrates with Gladly to provide workforce management features. This solution supports better, faster decision-making at all levels of the organization.

Important: When you select Teleopti WFM as your WFM solution, Professional Services handles the full implementation process. This includes the design and discovery, execution, testing and validation, and trainings phases. For more details and resources see Implementation Resources on the Calabrio Success Centre.

WORKFORCE MANAGEMENT (WFM)

AVAILABLE FEATURES

This chapter describes the features covered by a standard CC platform integration with Calabrio Teleopti WFM and their availability in Gladly.

Feature	Available	Currently Unavailable
Real-time feed	x	
Real-time feed (omni-channel)		*)
Historical data feed - queue stats	x	
Historical data feed - agent stats	x	
Historical data feed - agent queue stats	x	
Forecasting (voice)	x	
Forecasting (chat)	x	
Forecasting (email)	x	
Forecasting (omni-channel)	x	

Architecture Overview

WFM endpoints (443):
- WFM Web Tools
- Super User
- SDK
- RTA

Teleopti
Cloud
WFM

NOTE: The arrows describe from where
the network communication is initialised

| 1 | RTA – HTTPS 443 | Inbound |
| 2 | Historical – HTTPS 443 | Inbound |

Cloud

Real-time feed
Web API

Historical data feed
Web API

Gladly

Integration Server

Storage
Endpoint
- SQL Azure
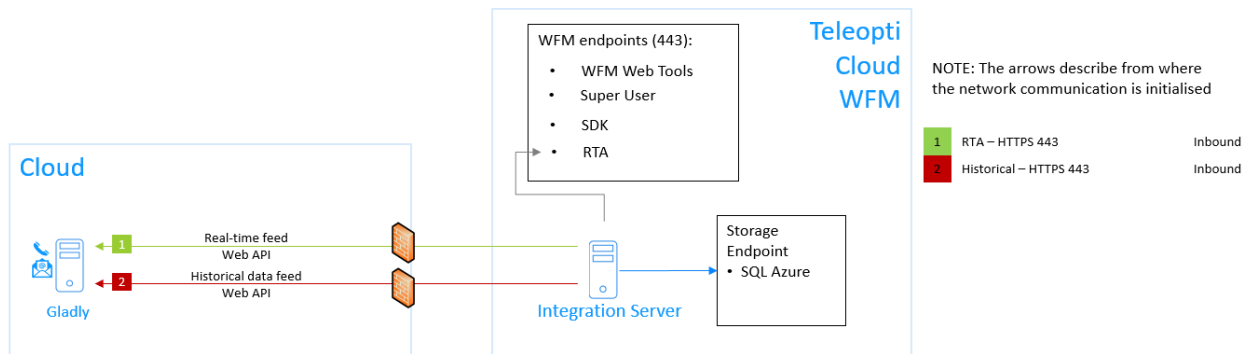
Connecting to Gladly

GENERAL PRE-REQUISITES

AGREED SETUP ON TECHNICAL DISCOVERY SESSION

During the project's technical discovery sessions, the Teleopti engineer will present the intended solution and distribution of the components included in the Teleopti WFM delivery. At this stage, a decision on the location of the integration services is to be agreed between the customer and the Teleopti engineer. The agreed server hosting the integration services is referenced below as "the integration server".

HISTORICAL DATA – PRE-REQUISITES

INTERVAL LENGTH

If Calabrio WFM is installed on a dedicated tenant (ask the Calabrio engineer for details), a decision needs to be made on whether to configure Calabrio WFM's historical data connector to 15- or 30-minute interval length.

You as a customer works with Gladly to generate the username and the password (a token) for a Calabrio integration user, see:
https://developer.gladly.com/rest/#section/Getting-Started/Creating-API-Tokens

Make sure the user get Access to "API User Role", see:
https://developer.gladly.com/rest/#section/Getting-Started/Permissions

Return this to your Calabrio Project manager:

- API URL
- Username
- Password (API Token)
- How long does it take to close out an email case?

REAL-TIME DATA – PRE-REQUISITES

Same as for Historical data

LIMITATIONS

HISTORICAL

Currently Historical data is delayed by one hour before being available via the Gladly API.

REAL-TIME DATA

Due to limitations in the CTI functionality, the away reason will only be available when the agent identifies the away reason in Gladly prior to going away, if the agent becomes idle and then sets the reason for the idle time, it will not be available in Teleopti.

VALIDATION

QUEUE STATS

The customer should pull the Work Sessions Report in the Gladly UI in the call center time zone.

AGENT QUEUE STATS

The customer should pull the Work session report from the Gladly UI filtered by Agent name to.

AGENT STATS

The customer should pull the following reports 'AgentLoginTime Report' and 'AgentAvailableTime Report' for Agent stats validation.

SETTING UP

Once Calabrio PS Tech get access to the Web API they will install and configure the integration services. The Integration service will pull the data and put the aggregated result into Calabrio Teleopti WFM.

Historical data feed

DATA MAPPING

QUEUE STATISTICS

Queue Statistics report in Teleopti WFM	In CC platform (work-session-events)	Description
Date/Interval	contact_session_created_at	Date and time according to selection
Queue Id	Inbox_id + channel	Unique queue ID in the CC platform. Not shown in the reports, but important for the queue mapping
Queue	Inbox_name + channel	Queue name as defined in the CC platform
Offered calls	COUNT(Id) tied to contact_session_created_at	Total number of incoming calls to this queue.
Answered Calls	COUNT (Id) tied to agent_accepted_at	Total number of answered calls on this queue
Answered within service level	COUNT(within_sla < 0)	Total number of answered calls on this queue within the CC platform's configured Service Level
Abandoned Calls	COUNT(Id) tied to [contact_session _created_at and Status = "abandoned" and Channel="PHONE_CALL"]	Total number of abandoned calls on this queue
Abandoned within service level	Not available at this time	Total number of calls abandoned where the time of answer is between the defined "Short call threshold in seconds" and the defined "Service level in seconds"

Abandoned short calls	Not available at this time	Total number of calls abandoned where the time of answer is less the defined "Short call threshold in seconds"
Overflow Out	Not available at this time	Total number of calls to this queue that were sent to another queue or to a third party
Overflow In	Not available at this time	Total number of calls to this queue, that first went to another queue
Talk time	SUM(work_session_handle_time) tied to agent_accepted_at	Total call duration for calls put on this queue and subsequently answered (in hh:mm:ss)
After call work	work_session_unknown_time	Total wrap-up duration (administrative time after a call) for calls answered on this queue (in hh:mm:ss)
Total delay in queue, answered	SUM(contact_session_created_at - agent_accepted_at)	Total queue time for calls put on queue and subsequently answered (in hh:mm:ss)
Total delay in queue, abandoned	SUM(contact_session_ended_at – contact_session_created_at) where Status = "abandoned"	Total queue time for calls put on queue and subsequently lost (in hh:mm:ss). *) applies to Voice only
Longest delay in queue, answered	MAX(Total delay in queue, answered)	Longest queue time for calls put on queue and subsequently answered (in hh:mm:ss)
Longest delay in queue, abandoned	MAX(Total delay in queue, abandoned)	Longest queue time for calls put on queue and subsequently lost (in hh:mm:ss). *) applies to Voice only
Agents Ready (report Service Level & Agent ready)	Depricated	Average available agents for the specified queue

AGENT QUEUE STATISTICS

Agent Queue Statistics report in Teleopti WFM	In CC platform (work-session-events)	Description
Date/interval	item_created_at	Date and time according to selection
Queue Id	Inbox_id + channel	Unique queue ID in the CC platform. Not shown in the reports, but important for the queue mapping
Queue	Inbox_name + channel	Queue name as defined in the CC platform
Agent	Agents.name lookup on agent_id	Agent name as defined in Teleopti WFM People
Agent Id	agent_id	Unique agent ID in the CC platform. Not shown in the reports, but important for the agent mapping
Acd Login	agent_name	The agent's login as defined in the CC platform
Answered Calls	COUNT (Item_id) tied to agent_accepted_at	Total number of answered calls on this queue
Transferred Calls	Tracked as new Items as the change inbox. If multple Agents colloborate on an Item, that's tracked as	Number of transferred calls
Talk Time	SUM(work_session_handle_time) tied to agent_accepted_at	Total talking time (s) for ACD calls
After Call Work	Not available at this time	Total wrap-up time (s)

AGENT PERFORMANCE STATISTICS

Agent Statistics report in Teleopti WFM	In CC platform (AgentAwayTimeReport) (AgentLoginTimeReport)	Description
Date/interval	Date	Date and time according to selection
Agent	Agent_Name	Agent name as defined in Teleopti WFM People
Agent	Agent_ID	Unique agent ID in the CC platform. Not shown in the reports, but important for the agent mapping
Acd Login (*)	Not available at this time	The agent's login as defined in the CC platform
Logged In Time	AgentLoginTimeReport. LoggedInTime	Total logged-in time during the interval (s)
Ready Time	AgentLoginTimeReport. LoggedInTime - AgentLoginTimeReport. AwayTime	Total available time (s) during the interval (logged in time – not ready time)
Not Ready Time	AgentLoginTimeReport. AwayTime	Total pause duration (s) excluding wrap-up duration
Idle Time	Not available at this time	Total time that the agent is ready and waiting for calls
Admin Time	Not available at this time	
Direct Outbound Calls	Not available at this time	Number of outgoing direct calls
Direct Outbound	Not available at this time	Total call duration for outgoing calls (including parked time)

Calls Talk Time			
Direct Incoming Calls	Not available at this time	Number of incoming calls to this extension (not calls to this queue)	
Direct Incoming Calls Talk Time	Not available at this time	Total call duration for incoming calls to this extension	

Real-time data feed

STATE LOGIC

TeleoptiWFM real time field	In CC platform (events)	Description	Is mandatory? Yes/No
TimestampValue	occurredAt	Event datetime	No
LogOn	agentId	Acd Login, as defined in 0	Yes
AgentName	N/A	Acd Login, as defined in 0	No
StateCode	Type	State code, as defined in the CC platform's documentation	Yes
StateDescription	If type = Agent_Availability then: availableFor If type = Went_Away and awayReason is populated Then: awayReason.Name	State name, as defined in the the CC platform's documentation	No

| TimeInState | N/A | Time (in seconds) that the agent has been in this state | No |