RightNow Portal User Guide

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Revision Highlights

This version represents a reformatted treatment of the initial document that was published November 23, 2013. Only minor grammatical and syntactical corrections have been made.
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Welcome

Welcome to the RightNow Portal User Guide.

Who Should Use this Guide?

This guide is a reference for Holly users of RightNow, which provides a knowledge base, a method for communicating with third-level application development support and Client Services administrative support. In addition, RightNow provides a means for accessing applications used to test, develop, measure and view transactions.
Overview

The Hosted VoiceXML RightNow application is the point of entry for Platform as a Service (PaaS) / Hosted end users to access necessary applications and support. This application serves as the primary mode of knowledge and communication, offering a knowledge base with relevant data, a method of communication via email for third-level application development support or Client Service administrative support. Functional applications used to test, develop, measure, and view transactions are accessible once authenticated into the RightNow.
Security

User ID

Individual users are provided a unique user ID by the West support team. The user ID is case sensitive, it does not expire, and it may be modified via an administrative request by submitting a Technical request using RightNow Support.

The user account creation request should include:

- User First and Last Name
- User ID (desired)
- User Email address
- User Contact Phone Number
- Client Name

If the needed information is not provided, there will not be enough data available to fulfill the request and ensure all the downstream application configurations are completed.

Systemically, there are no restrictions on the length of a User ID; however, it is recommended that all user IDs be:

- A minimum of 6 characters in length
- A maximum of 20 characters in length
- Devoid of special characters

Password

For the user’s protection and for West’s platform protection, all passwords on the WIC platform should conform to the minimum security and complexity requirements as follows:

- Users should change system passwords every 90 days
- Users should ensure passwords are at least 8 characters in length and no longer than 20 characters
- Users should ensure passwords contain at least 1 of each of the following:
  - One numeric character
  - One uppercase alpha character
  - One special character
Holly Management Links

Links to West Holly Connects display in the right panel of the home page (after successful login). A West Holly Connects Login is required to access those links. To request access, submit a RightNow technical request.
Logging In

Login is required to utilize the West Platform as a Service features. The Hosted VoiceXML RightNow Portal page is accessed at the following link: https://wicpaas.custhelp.com

![Login Prompt](image)

Figure 1: Login Prompt

For either a forgotten user ID or password, select Account Assistance.

1. Enter the email address to retrieve the user ID (username).

   *The email address entered must exist and be active within the system.*

2. Enter the user id (username) to initiate creating a new password.

   *The user ID entered must exist and be active within the system.*
Figure 2: Account Assistance Page

Unavailable URL

If the URL is unavailable, contact the Network Operations Center (NOC) at 1-800-838-8383 to report the incident immediately.

Provide the NOC with the following information:

- URL or Site Name (i.e., wicpaas.custhelp.com)
- Client name
- Impact to Service or Number of users impacted
- Screenshot or detailed description of the error.

Please instruct the NOC to direct the request to open an Incident as assign to the request area:

Enterprise.SysDev.WIC.Dev.RightNow

Logging Out

To logout of the application, click the **Logout** link in the top right corner of the window.
RightNow Landing Page Overview

The Standard RightNow Features for the end user pages appear as tabs across the tops of the page as well as along the right portion of the Announcements section of the page. The Standard RightNow Features are:

- Home page for general information
- Knowledge Base for Client Self-service knowledgebase
- Support for submitting requests to our Support teams
- My Stuff for user preferences and user specific information

Users are provided access to links available in the West Hosted Platform Features section. The links available are entry points to:

- Performance Dashboard for reporting
- CallSpy! for development utilities
- Holly Connects test and production systems
[Page Left Blank Intentionally]
Home Page

After successful authentication, the home page displays. This page provides general announcements as related to the Knowledgebase or Hosted VXML functionality.

![Home Page](image)

**Figure 3: Home Page**

**Change Management Notifications**

Platform Change Notifications display in the upper-left main part of the Announcements section of the page. Check here frequently for updates.

**Production Incident Notifications**

Incident Reporting contact information is available in the upper-right portion of the Announcements section of the page. Contact the Network Operations Center (NOC) immediately if there are production incidents.

Provide the NOC with the following information.

- Client name
- Impact to service or number of users impacted
- Detailed description of the error
The NOC will open and track the progress until resolution. The Incident Management plan will be enacted and internal escalation to support teams will begin once notification is received.
Knowledge Base Page Overview

The Knowledge Base page provides answers to commonly asked questions. A search feature is available to search the Knowledge Base by product, category, keywords or phrases. The results are sorted by the most relevant entries, which are further sorted by date.

Basic Search

Enter a keyword to perform a basic search. The default behavior is “Search by Phrase.” All Knowledge Base entries containing the text entered shall return. Once a keyword search is performed, the search parameters are remembered while the user navigates among the search results pages.

Search parameters are not remembered once the user navigates away from the search results and then returns to the Knowledge Base page. To return to previous search results, use the Back button on the browser.
Figure 5: Knowledge Base Search

Advance Search

Search the Knowledge Base for answers using the provided options to refine the search. If you select the Advanced Search link, the selected options on that dialog are remembered. If you navigate away from the Knowledge Base page, the search options revert to the values they had when the page was originally loaded.

Figure 6: Knowledge Base Search: Advanced Search
Refining Your Search by Product Category

Users have the option to refine the search by Product content (i.e. Hosted VXML – Technical or Hosted VXML – Non-Technical). This will change the content of the returned results.

Figure 7: Knowledge Base Advanced Search: Refine Search by Product
General Search Tips

Type your search terms--a question, a phrase, a series of words, or just a single word – in the Search by Keyword field and then click the Search button.

Use descriptive and specific search terms to retrieve more focused results. When you enter a word, all forms of the word are searched for, including singular, plural, and different verb tenses. For example, a search for reflect will return results containing reflection, reflections, reflected, reflecting, and reflects.

- **Require words**: Type the plus symbol (+) before the words that must be in the search results. For example, +cell +roam +voicemail will return only results that contain all three words.

- **Exclude words**: Type the minus symbol (-) before words you don't want in the search results. For example, cell -biology will return results that contain the first word but not the second.

- **Search with a wildcard**: Type an asterisk (*) after the initial letters of a word to search for all words or terms that begin with those letters. For example, hand* will return results containing handset, hands-free, handbook, handheld, handshake, and handkerchief.

- **Search using synonyms**: Type a tilde (~) before a word to search for answers containing that word as well as synonyms for the word. For example, ~account will return results containing account, bill, and invoice.

Limiting Your Search

Click the Product or Category menu and select a product or category to restrict your search to results associated with that selection.

Selecting the Sort By

The results returned by your search are automatically sorted to display the most relevant answers at the top of the list. If you need to sort the answers by other criteria, click the Sort By menu and select an option. You can also click the Direction menu to sort in ascending or descending order.
Knowledge Base Answers

Previously addressed questions and requests are converted into Knowledgebase results/content by the West team. Once converted, it can be found in user search results. Select the link to display the content.

![Knowledge Base Search: Advanced Search Results](image)

*Figure 8: Knowledge Base Search: Advanced Search Results*
A knowledge base entry details page includes the request and results. If an attachment related to the entry is shown, click the attachment file name to open or save the attachment.

Subscribing to a Knowledge Base Entry

Click Notify Me in the bottom-right corner of the result to subscribe to the entry. The subscription is good for 30 days and may be renewed through the Notifications section under My Stuff. Each time this Knowledge Base entry is updated, an email notification is sent to the email address that is configured for the user account. Manage subscriptions in the Notifications section under the My Stuff tab.

Submitting a Rating

Relevance is the measure of how useful the entry is in satisfying the question or search. To respond about the relevance or accuracy of the answer select Yes or No.

Printing and Emailing

- **Print Answer**: Click this link to print the answer.
- **Email this page**: Click this link to send the link to the entry to an email address. The recipient must have a user account in the system. You are prompted for the recipient's email address.
The following answer has been forwarded to you by Clayton Katskee - crkatskee@west.com.
(The sender's email address has not been verified.)

Summary

-----------------------------------------------
VXML App Troubleshooting

You can view this answer at

Figure 10: Knowledge Base Search: Email this Page Confirmation
Support Page Overview

Submitting a Request

If unable to find an answer using a search, submit a request to the West Hosted VXML support staff. Enter a short summary in the subject field and then enter a complete question in the Question field. Fields with * are required.

Figure 11: Support Page: Submit a Request to Our Support Team

Selecting the Product

Next, select the product related to the question. This ensures that the question routes to the appropriate audience.

For technical questions related to VXML code and development, use the VXML Technical option to route to development support. For configuration or administrative questions, select non-technical questions to route to Client Services.
Attachments

To attach a document to help provide additional details, attach it by clicking on Browse and navigating to the document. After adding the initial attachment, additional attachments may be added by clicking Browse. To remove an attachment, click the Remove link next to the document name.

Submit

After selecting any attachments and completing the form, press Continue.

Confirmation

After successfully submitting a request, the following page is displayed.

---

Figure 12: Support Page: Submit a Request to Our Support Team: Refine Submission by Product

Figure 13: Support Page: Submit a Request to Our Support Team: Attach Documents

Figure 14: Support Page: Submit a Request to Our Support Team: Confirmation
A reference number is assigned to the request; this number is shown with the request under My Stuff. To cancel or add information to a request, update the question in the Requests sub tab of the My Stuff tab.

<table>
<thead>
<tr>
<th>Subject</th>
<th>Reference #</th>
<th>Status</th>
<th>Date Created</th>
</tr>
</thead>
<tbody>
<tr>
<td>test</td>
<td>101123-000000</td>
<td>Open</td>
<td>11/23/2010</td>
</tr>
<tr>
<td>New Holly RNT Site</td>
<td>100824-000000</td>
<td>Waiting</td>
<td>08/24/2010</td>
</tr>
<tr>
<td>RNT Non-Tech 3</td>
<td>100525-000015</td>
<td>Closed</td>
<td>05/25/2010</td>
</tr>
<tr>
<td>RNT Non-Tech 2</td>
<td>100525-000014</td>
<td>Closed</td>
<td>05/25/2010</td>
</tr>
</tbody>
</table>

Request Response Time Expectation

All questions shall receive a response within 2-4 hours between 7 am to 7 pm, Monday – Friday CST per the current Service Level Agreement (SLA) response agreement. To cancel or add information to a request, make updates through the Requests sub area of the My Stuff tab.

Email Updates

When a request has been submitted, the sender will receive an email notification. Provide additional relevant information in the body of the email by typing the response between the two lines as shown below.
My Stuff Page Overview

My Stuff allows you to manage support details. There are three main areas within the My Stuff tab; all are accessible from their respective links on the page or from the dropdown list next to My Stuff on the overhead tab.

![My Stuff: Account Overview](image)

The My Stuff tab includes the following sections.

- **Requests**: View/Update your previous requests submitted.
- **Settings**: Edit personal details, such as name and preferences, and password.
- **Notifications**: Renew/Delete answer subscriptions.
Requests

Any support request submitted by the user currently logged in can be viewed by clicking the “See all Requests” link. The requests will sort in the order in which they were submitted. The date created, reference number, the name of the request, and the status of the request is visible from this view.

![Requests Table](image)

*Figure 18: My Stuff: Requests*

Select from the following actions:

- View Request Details
- Update Request
- Close Request
- Reopen Request
Viewing Request Details

Click on the title of the request to view the details. The request detail page is displayed. The Additional Details section includes the reference number, product, date submitted, date updated and status.

![Communication History]

*Figure 19: My Stuff: Communications History*

Select **Print** to print.

All correspondence pertaining to the original request displays in the Communication History section.

Updating a Request

From within the request details page, if it is available, to update the request, simply add additional details to the text field provided, add any attachments needed, and then click **Submit**. Update Request is only available for 7 days after the last correspondence for that request when in “closed” or “completed” status.
Options for question updates include:

- Add additional information to the request
- Indicate an answer is no longer required (closes the request at the client's request)
- Attach additional attachments to the request
Discussion Thread in Email

Figure 21: My Stuff: Discussion Thread in Email

Closing a Request

A request’s status can be changed to “Closed” by the West team or the initiating user. The West team will mark the request ‘Completed’ status with the final response.

Clients may select the No, I don’t need this question answered now selection from the drop-down list located under the Do you want a response? label in order to close the request.
Reopening a Request

After a request is closed, a user may reopen it within 7 days of the closed date by using the Update this Question screen to submit additional information.

Requests that have been closed for 7 or more days are considered to be permanently closed and cannot be reopened or updated.
Notifications

Notifications are for the Knowledge Base entries in which the user has subscribed. Any time the content for the entry changes, the user receives an email while the Notification status is still valid. Click the subject link to view the Knowledge Base entry details. The notification can be renewed or deleted.

![Notifications](image)

Figure 23: My Stuff: Notifications Links

Expired Requests

After 30 days has elapsed, users will receive a notification to their accounts associated email address advising that the subscription has expired. This notification contains the items which are now expired and links for renewal.

![Expired Requests Notification](image)

Figure 24: My Stuff: Expired Requests Notification

Renewing a Request

Click Renew Request to extend the notification another 30 days.

Deleting a Request

Click Delete Request to stop the subscription of updates when a notification has been updated.

Profile

The Profile section allows for setting the user default preferences and email/instant messenger contact preferences.
Please refrain from changing the username or email address; this could potentially create errors if the same name already exists in the system. For username or email address changes, please submit a technical request.

![Account Settings](image)

**Figure 25: My Stuff: Account Settings**

**Profile – Email / Messenger Contacts**

Users may wish to change the default email address, as well as add additional email addresses and / or instant messenger contacts (however, chat is not supported at this time). Such changes are completed on this page.

*No duplicate email addresses are allowed in the system at this time.*
### Contact Information

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name *</td>
<td>Clayton</td>
</tr>
<tr>
<td>Last Name *</td>
<td>Katskee</td>
</tr>
<tr>
<td>Email Address *</td>
<td><a href="mailto:crkatskee@west.com">crkatskee@west.com</a></td>
</tr>
<tr>
<td>Alternate Email 1</td>
<td></td>
</tr>
<tr>
<td>Alternate Email 2</td>
<td></td>
</tr>
<tr>
<td>IM Contact</td>
<td><a href="mailto:crkatskee@hotmail.com">crkatskee@hotmail.com</a></td>
</tr>
<tr>
<td>Afterhours Phone</td>
<td></td>
</tr>
</tbody>
</table>

*Figure 26: My Stuff: Contact Information*

**Profile – Saving / Submitting Changes**

When all updates to the profile are complete, click the **Save Changes** button.

**Changing Your Password**

Enter the old password, new password and confirm the new password. Click **Submit**. See the Password section of this guide for additional information about password standards.
Figure 27: My Stuff: Change Your Password
West Hosted Platform Features

The platform feature links display to the right of the Home page pane. Link availability is configured based on a per user account basis at the time of account creation.

Figure 28: Hosted Platform Features
Performance Dashboard

The Performance Dashboard is a metrics summary and detail overview for hosted interactive voice response (IVR) speech applications on the Hosted Platform infrastructure. The dashboard views are confined to a rolling 24-Month window for data visibility.

Figure 29: Performance Dashboard
Dashboard – Filtering data

Users may wish to narrow the results that appear in the dashboard summary totals grid and their associated below charts. This can be accomplished through the pop-up window available under the Dashboard link located directly above the “Client Total” text in the upper-left section of the page.

![Dashboard Link](image)

**Figure 30: Dashboard Link**

Dashboard – Filtering Data – Pop-up Window

When the cursor is over the Dashboard selection, it turns green. Click once to be presented with the pop-up filter window. This pop-up window has three tabs:

- Clients
- Applications
- Numbers

Each tab’s content is populated by the previous tab’s selections.

Dashboard – Filtering Data – Pop-up Window – Client Selector

Select the client in the list to be presented with the available applications in the next tab. Alternatively, you may click the **Submit Query** button to view the data with only this filter.

![Build Query Dialog](image)

**Figure 31: Build Query Dialog**
The feature to allow users to make multiple selections is not available at this time.

Dashboard – Application Filter
On the Applications tab, you are presented with a list of applications associated with this client. Select the application in the list to be presented with the available numbers in the next tab. Alternatively, you may click the **Submit Query** button to view the data with the select client and applications filters only.

![Figure 32: Build Query Dialog: Application Filter](image)

Dashboard – Number Filter
On the Numbers tab, you are presented with a list of 8yy numbers associated with this application for the client. Select the 8yy number and click the **Submit Query** button to view the data with the client, applications, and numbers filters selected.

![Figure 33: Build Query Dialog: Number Filter](image)
The feature to allow users to make multiple selections is not available at this time.

Dashboard - Reading the Charts

Allowing the cursor to hover over any part of each bar causes the value details for the bar to be displayed. For example, holding the mouse over the light blue section (the Omaha section) of the bar for the 11th hour below shows the calls for that hour for that site.

![Dashboard: Displaying Value Details](image)

**Figure 34: Dashboard: Displaying Value Details**

Dashboard – Chart Functions

Right-clicking the display causes several options to be displayed:

- Stop Update
- Clear Chart
- Print Chart
- Copy Data to Clipboard
Dashboard - Near Real-Time Calls Currently on the Platform

The upper-left most chart contains the “Calls Currently On The Platform” graph. This is a near real-time data feed (refreshed after 15 minutes) for call volumes being captured on the platform.
Dashboard - Call By Hour for Current Date (by site)

Just to the right the Near Real-Time Calls graph is the “Call by Hour” graph, which displays a count of call volume on each site for the client. This is current day view only. Previous days are captured in the “Call By Day” graph.

![Call By Hour Graph](image)

Figure 37: Dashboard: Calls by Hour

Dashboard – Call by Hour Drill-down View to Minute View

You can drill down into the details to see a per-minute view of the platform volumes for the client broken down by site for the selected hour. The “Call By Minute” view is displayed in the lower-most pane of the dashboard page.

![Call By Minute Graph](image)

Figure 38: Dashboard: Calls by Hour: Per-Minute View

*Per-minute views details are only be available for the most current three months.*
Dashboard - Call By Day for Current Month (by site)

Just below the “Calls Currently on the Platform” graph is the “Call by Day for Current Month” graph, which displays a count of call volume on each site for the client. This is current month view only.

![Dashboard: Call by Day](image)

*Figure 39: Dashboard: Call by Day*

Dashboard – Call by Hour Drill-down View to Minute View

You can drill down into the details to see a per-hour view of the platform volumes for the client broken down by site for the selected day. The “Call By Hour” view is displayed in the lower-most pane of the dashboard page.

You may also further drill-down into the details within this pane to show the “Call By Minute” view for the selected hour.
Dashboard - Call By Month for Current Year (by site)

Just below the “Calls by Hour” graph is a “Call by Month for Current Year” graph, which displays a count of call volume on each site for the client. This is current year view only.

![Call By Month Graph](image)

*Figure 40: Dashboard: Call by Month*

Dashboard – Call by Month Drill-down View to day View

You can drill down into the details to see a per-day view of the platform volumes for the client broken down by site for the selected day. The “Call By Day” view is displayed in the lower-most pane of the dashboard page.

You may also further drill-down into the details within this pane to show the “Call By Hour” view for the selected hour.

Dashboard - Call Summary Tables

Dashboard – Call Summary Table – Column Definitions

The Call Summary Table shows summarized volume counts:

- **Today**: Current day
- **Yesterday**: Current day -1
- **WTD (week to date)**: Current week only
- **MTD (month to date)**: Current month only
- **QTD (quarter to date)**: Current quarter only
- **YTD (year to date)**: Current year only
Dashboard – Call Summary Table – Row Definitions

- **Total Calls**: Total number of calls for corresponding time period (Today, Yesterday, etc.)
- **Average Length of Call (ALC)**: Average length of call in seconds (total time for all calls/number of calls)
- **Peak Calls**: Peak number of calls received at any one time for the client
- **Longest Call**: Longest call in seconds in that time period

Dashboard – Call Summary Table - Overall Section

The Overall section of the Call Summary Table displays the summarized call volume totals for all sites (i.e., Omaha, Denver and Atlanta).

Dashboard – Call Summary Table - <Site> Section

Each <Site> section of the Call Summary Table displays the summarized call volume totals broken down by site (i.e., Omaha, Denver, and Atlanta).

![Figure 41: Dashboard: Call Summary Table](image)

*If a site is not listed, it is because there were no calls processed at that site.*
Dashboard - Exporting Table Data to Microsoft Excel

You may export this data by right-clicking anywhere in the call summary table and then selecting Export to Microsoft Excel to send the data to Excel.

![Dashboard: Call Summary Table: Exporting to Excel](image1.png)

Call Detail Report including Traces & Recordings

The Call Detail Report is a useful tool for gaining additional visibility into the data that is represented within the dashboard view(s). The Call Detail Report allows you to view call event step-by-step processing information (traces) as well as listen to or download call recordings for the call, if enabled.

The link to the Call Detail Report can be found via the Performance Dashboard page in the upper-left section under the Reports page.

Call Detail Report – Filtering Data

Users may wish to view detailed call information regarding calls placed on the WIC hosted VXML platform. Select the link for the pop-up dialog for the Call Detail Reports page.

![Reports Link](image2.png)
Call Detail Report – Filtering Data – Pop-up Window

When the cursor is over the Reports selection, it turns green. Click once to be presented with the pop-up filter window. This pop-up window has three tabs:

- Reports
- Clients
- Applications
- Numbers
- Other

Each tab’s content is populated by the previous tab’s selections.

Call Detail Report – Filtering Data – Pop-up Window – Reports Selector

Select the Report Type in the list to be presented with the available applications in the next tab. Alternatively, you may click the **Submit Query** button to view the data with only this filter.

![Build Query Dialog](image)

*Figure 44: Build Query Dialog*
Call Detail Report – Filtering Data – Pop-up Window – Client Selector

Select the client in the list to be presented with the available applications in the next tab. Alternatively, you may click the Submit Query button to view the data with only the Reports and Clients filters applied thus far.

Figure 45: Build Query Dialog: Client Filter

The feature to allow users to make multiple selections is not available at this time.
**Call Detail Report – Filtering Data – Pop-up Window – Application Selector**

A list of applications associated with this client is listed on the Applications tab. Select the application in the list to be presented with the available numbers in the next tab. Alternatively, you may click the **Submit Query** button to view the data with the select client and applications filters only.

*Figure 46: Build Query Dialog: Application Filter*

The feature to allow users to make multiple selections is not available at this time.
Call Detail Report – Filtering Data – Pop-up Window – Numbers Selector
On the Numbers tab, you are presented with a list of 8yy numbers associated with this application for the client. Select the 8yy number and click the **Submit Query** button to view the data with the client, applications, and numbers filters selected.

![Build Query Dialog: Number Filter](image)

*Figure 47: Build Query Dialog: Number Filter*

The feature to allow users to make multiple selections is not available at this time.

Call Detail Report – Filtering Data – Pop-up Window – Other Selector
On the Other tab, you are presented with additional options for further filtering of the data that will be returned in the result set. Enter the information into the appropriate field and click the **Submit Query** button to view the data with the Report Type, Client, Applications, Numbers, and Other filters selected.

- **Call ID**: The System generated unique value assigned to the call.
- **ANI**: The number from which the call originated.
- **Dialed Number**: The 8yy number that was dialed.
- **Call Type**: Descriptor for call purpose.
Figure 48: Build Query Dialog: Other Filter

Call Detail Report – Viewing the Result Set

Once you click the Submit button, the report is created and return as shown blow. The available columns are:

- **Start Time**: Date and Time the call started (EST)
- **End Time**: Date and Time the call ended (EST)
- **Duration**: Call length in seconds
- **Call ID**: System generated unique value assigned to the call
- **Application**: Application Name associated with the number called Phone
- **Number**: Number from which the call originated
- **Caller’s Phone**: System generated unique value assigned to the call
- **Data Center**: Site location reference for where the call was processed
- **Call Type**: Descriptor for call purpose
  - Inbound
  - Outbound
  - BillSub
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- **Result Code**: call disposition code
  - Blocked
  - No Answer
  - Hangup (on transfer)
  - Missing Account Statement
  - Error
  - Good
  - Limited
  - Bad
  - Busy
  - Short

**Figure 49: Reports List**

You may choose to further narrow down the content already presented by entering the data into the text fields above the columns in the report. The fields/lists in white are editable.

*The use of the editable fields/lists provides additional filtering of the current result set only.*
Call Detail Report – Maximum Report Window Returned Results

The Call Detail Report presents only 500 rows for the selections made in the pop-up query dialog selections. If you are unable to refine search parameters to a result set under 500 rows, you have the option to download the entire result set.

![Alert](image)

Figure 50: 500+ Rows Alert

The Export to CSV option allows you to save the data locally, and import into a local tool for further sorting / searching.

Call Detail Report – Downloading the Result Set to CSV

You have the option to download the entire result set to a .csv file by selecting the link at the bottom of the screen as shown here.

![Export](image)

Figure 51: Export to CSV Option

The Export to CSV option allows you to save the data locally, and import into a local tool for further sorting/searching as needed.

![Save Prompt](image)

Figure 52: Export to CSV Save Prompt
Call Detail Report – Viewing a Trace for a Call

Once the report content is presented, there is an option to view the trace file as an attribute of the Call ID value.

The Call ID field of the Call Detail Report is a hyperlink to the call trace, or step-by-step call events. Selecting the Call ID hyperlink causes a new window (or tab) for the Call Trace details to appear. Clicking on a hyperlink in the Call ID column of the Call Detail Report displays the Call trace details and allows a user to reproduce the processing events of the call - an essential tool for tracking down problems experienced by a user on a particular call.

Each call made in the VXML platform is logged as a sequence of call events. Drilling into the details of a call visible on the Call Detail Report shows the events the call has taken through each dialog during processing.

The above example has been edited to conceal confidential/proprietary information.

Call trace details/Call events are only available for 14 days. Calls displaying on the report beyond 14 days will show a hyperlink for the Call ID but will not be able to produce the trace data for the user.
Call Detail Report – Listening to a Call Recording

From within a Call Trace/Call Event Details, if available, “Play Call Recording” is displayed in the upper-left corner of the screen. Selecting the “Play Call Recording Hyperlink” allows you to both listen to the recording on file and download the .wav recording.

You must consult with West before implementing full call recording logic to ensure that West is prepared to accommodate the request.
Holly Connects – Holly Management System (HMS)

The Holly Management System access/entry point is available via link(s) on the RightNow page under the “Hosted Platform Features” section.

The HMS provides extended reporting, configuration capabilities, call diagnostic information including event tracing and call recordings, if enabled.

Understanding the Links available on the RightNow page

Production

For West production systems, there are five URLs:

- West Holly Connects
- West Holly Connects – DNV1
- West Holly Connects – DNV2
- West Holly Connects – ATL1
- West Holly Connects – ATL2

Typically, you will only need to access Tier2 West Holly Connects unless diagnostic call event data is needed in which case, you will need to navigate to the Tier 1 site specific URLs: West Holly Connects – DNV1, West Holly Connects – DNV2 and West Holly Connects – ATL1, West Holly Connects – ATL2.
The details for navigating the Production Tiers are included in this guide.

**Pre-Production**
For West Pre-Production/Test systems, only the West Holly Connects-Test is necessary.

**Login Access**
To use the Holly Management System (HMS), you must first supply a username and password. This is necessary for security reasons, and it ensures sensitive information about the platform remains confidential. The HMS associates each user to a group and each group has a defined set of roles.

When you login, the HMS generates a tool menu from your group’s set of permissions.

![Login](hollyconnects/login.png)

*Figure 57: Holly Connects Login Window*

**Navigating the Holly Management System**
The web pages for the Holly Management System are displayed as a single page. On the top-left is a navigation menu of all the tools and reports available to the user (depending on your role), and on the bottom the detail for each particular tool or report. The number of tools and reports available depends on your level of access to the system. This level of access is entirely configurable by an administrator.
Administration

The Holly Platform Virtual IVR deployment model supports four hierarchical levels of system partitioning:

- **System Owner**
  - Has access to and visibility of all areas of the system. There is only one System Owner for the Holly deployment. West is the System Owner. West works with clients to determine the best control structure for projects.

- **Service Provider**
  - May provide hosting solutions to various companies. For example, a reseller or umbrella company may be Service Providers in the Holly Management System.

- **Affiliate**
  - The owners of the applications running on the system. Synonymous with Enterprise, Company, Virtual Tenant, Application Owner etc. Affiliates are managed by a Service provider.

- **Application**

**Figure 58: System Partitioning**

*For Platform as a Service (PaaS) users, the Service Provider and Affiliate hierarchical levels will only be available. Clients will be placed into the proper hierarchical level upon creation based on their role/need.*

Provisioning

**Provisioning to Service Providers**
Groups and Roles are provisioned by West team members. An admin user for a Service Provider user or Affiliate User is created initially with pre-defined group roles to enable clients to manage their own users.

Service Provider Users login to the Holly Management System as:

<username>@<service provider domain name>

**Provisioning to Affiliates**
Roles are provisioned by West team members. An admin user for an Affiliate is created initially with pre-defined group roles to enable clients to manage their own users.

Affiliate Users login to the Holly Management System as:

<username>@<affiliate domain name>.
DNIS Ranges Display

The Holly Management System also provides a summary screen to show the DNIS ranges for all Service Providers, Affiliates and Applications, which are available with data visibility limited to your group. This allows you to quickly see how the DNIS as a whole is used and also to determine who is using a particular DNIS range.

![DNIS Ranges Display](image)

**Figure 59: DNIS Ranges Display**

Reports

The Holly Management System includes several pre-defined reports which are based on information collected by the Holly Log Manager. The data available for viewing within the reports is dependent upon the group configuration for the user. This section of the document provides a guide to using these reports.

Note: All Dates and Times referenced in Holly Management System are EST. Users will need to take this into account when working within the system.

System Usage Report

The System Usage report provides daily call statistics in both graphical and tabular formats. This report clearly shows the call activity of the whole system over time. This information may be used for many reasons, such as tuning an application, resource forecasting, or troubleshooting.

The report statistics are based on call records which are stored in the database by the Holly Log Manager.
These records hold details of each call made in the system including the date and time of the call, the “A” and “B” party numbers, the duration of the call and the identity of the caller (details of these records are described in the Holly Voice Platform Operations Guide). From these records the Holly System Usage report can present traffic usage details showing:

- Total number of calls
- Number of distinct callers
- Average duration of calls
- Total number of call minutes
- Call volumes, showing high-water usage of the system ports (i.e., the number of simultaneous calls across the system)

The System Usage graphs this information, to clearly show trends in system usage and customer behavior, and also presents a daily breakdown in tabular form. The Date column of the daily breakdown table contains a hyperlink which displays all the calls for that day in the Customer Usage report.

**Figure 60: System Usage Graph**

**Customer Usage Report**

The Customer Usage report displays the list of calls matching a given search criteria that fall within a specified usage period. This report can be used to examine individual calls made to the system, perhaps to determine origin or the caller’s identity for customer support purposes.
Calls may be filtered by any of the call attributes, including:

- Call ID
- Application Name
- Duration
- CLID (the “a” party or caller’s phone number – Calling Line ID)
- DNIS (the “b” party or host’s phone number – Dialed Number Information Service)
- CLID P/R (whether full CLID is Present or Restricted or if the P/R status of the CLID is Unknown)
- Clear CLID
- Event ID
- Parameter

The report presents the call’s details in tabular format. The column values for Service Provider, Affiliate, Application, CLID, DNIS, CLIDP/R and Clear CLID are also hyperlinks which will display a Customer Usage report restricted by the selected column value.

For example, clicking on a CLID will restrict the report to show only calls made from that particular phone for the defined period. The Call ID value is also a hyperlink, which will display the Event Details of that call in the Customer Usage call events report.

Figure 61: Customer Usage Report
Call Events

Clicking on a hyperlink in the Call ID column of the Customer Usage report displays the Customer Usage call events report and allows a user to reproduce the call – an essential tool for tracking down problems experienced by a particular user on a particular call.

Each call made in the Holly system is logged as a sequence of call events, drilling into the details of a call visible on the Customer Usage Report shows the events the call has taken through each dialog during processing.

The logging of an event can be configured by an administrator.

Figure 62: Customer Usage Report: Call Events
The Received Document URL shows the URL that was used to fetch the individual VoiceXML document. Selecting from this drop-down menu lets you choose from all available VoiceXML document dumps within the call without having to go back to the Log Events page.

**Figure 63: Customer Usage Report: Document Dumps**

In some HMS setups, the ASR logs can also be viewed from the Customer Usage report. If multiple ASR engines and hosts were used during the call, you can choose to view logs for a selected ASR engine on a particular host.

**Call Events**

Our architecture and build out allows a user to login to a common second tier server to view the calls from multiple sites. But there is a shortcoming in this view that all the call events (trace) do not get propagated to this second tier. Hence, when you need to access details of a call, you will need to go directly to the site server repository.

*West is actively pursuing couple of options to overcome this deficiency.*
The following points highlight the advantages of continuing to login to the second tier.

- Not all the calls need to be looked at in detail. This is mostly for research and debugging purpose only (in production this happens far fewer occasions).
- High powered hardware in the second tier will speed up the process to locate the call.
- Still will be able to get the call count, duration and other call detail record.
- Should be able to filter the calls based on basic criteria such as ANI, DNIS, application name, affiliate name, and duration range.
- Should be able to do the system usage statistics.
- Single logon account.

**Procedure**

1. Login to the second tier server: [http://hollyprod.westvxml.com/hms/page/login](http://hollyprod.westvxml.com/hms/page/login)

2. Go to the customer usage page and set up the query as per the requirement (except for Event ID) and execute it (by clicking the **Submit** button).

**Customer Usage**

**Figure 64: Customer Usage Report: Query Setup**
3. Once the result is furnished, copy the call ID for which you need to get the events from the first column.

<table>
<thead>
<tr>
<th>Call ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>e3113-20100416083950858-426</td>
</tr>
<tr>
<td>e3124-20100416083937185-966</td>
</tr>
<tr>
<td>e3120-20100416083936212-025</td>
</tr>
<tr>
<td>e3050-20100416083930805-159</td>
</tr>
</tbody>
</table>

4. Use the links on the RightNow page to open the site specific Holly Connects instance in a separate tab. Please use the call ID prefix to locate the appropriate site from the figure below below.

5. Go to the customer usage page and paste the entire copied call ID value to the ‘Call ID’ field and click the Submit button.

You do not have to choose all the filters that were applied in the second tier search query. However, it is important to select the appropriate date (no need to change the time range).

Figure 65: Site-Specific Servicer Listing (call ID prefix)
Call Utterances

Any captured utterances for the call are shown in the Utterance column of the Call Events Details. Selecting the value will allow you to listen to the captured .wav file. Call Utterance capturing is not to be enabled without knowledge and coordination of the West team.

ASR Logging

The ASR Logging page provides access to daily ASR log data for use in debugging or tuning the ASR engine. To simplify searching for desired ASR daily log data, it is possible to restrict which ASR entries are listed by searching on date range, host machine, application name (as set in Applications page or the Developer Applications page) and by a particular ASR engine.

This page permits download of a compressed file containing log data in a form determined by the particular ASR engine provider. The data can then be used with the development tools supplied by the ASR engine provider.

Daily ASR logs are only present for applications that have the application parameter sr.asrlogmode set to a value containing daily (e.g., “daily” or “daily,call”).

Figure 66: ASR Daily Logs
Fetch Latencies

The Fetch Latencies report page displays latency metrics for the fetching of VoiceXML documents, audio files, grammars and other objects. These metrics include:

- Number of Fetches
- Percent Not Cached
- Average Duration Maximum Duration
- Total Number of Bytes
- Average Number of Bytes
- Number of Fetch Errors
- Fetch Type

These fetch latencies can be grouped on different levels, that is, for a given Service Provider, Affiliate, Application, Host or for each individual call. The call fetch latencies can be displayed in both tabular and graphical formats.

Figure 67: Fetch Latencies
Response Latencies

The Response Latencies report page displays response latencies, such as Response Events, Average Latency and Maximum Latency. These response latencies can be displayed on different levels, that is, for a given Service Provider, Affiliate, Application or for each individual call. The call response latencies can be displayed in both tabular and graphical formats.

**Figure 68: Response Latencies**

Report Group Editor

Holly’s Report Generator tools enable user-defined reporting on applications and extends on the predefined call detail reports described in the previous section. The tools provide a mechanism to extract call statistics by defining call even criteria to a report group and then enabling these report groups to be graphed over time either in isolation or in comparison to other report groups.

The Report Generator is particularly useful for defining and monitoring Key Performance Indicators in applications. For example, the event(s) that determine a successful transaction to monitor task completion rates can be defined, or the areas of any given system which are most frequently used can be compared. The Report Generator produces data in both a graphical and tabular form.

To produce a report, first define report groups using the Report Group Editor, and then display the results using the Report Generator.

The Report Group Editor allows users to create a combination of one or more call events or call variables to be defined as a report group. The Report Group Editor, therefore, requires knowledge of call events in any given application. A report group is a set of criteria that can be applied to any call to determine whether or not the call matches.
Report Generator

After report groups have been defined, graphical and tabular information can be produced using the Report Generator. The information can be in the form of aggregate values or data can be calculated in proportion to a baseline report group.

**Holly Report Generator**

To generate graphs one or more report groups must be selected and associated to a graph color. The first report group is designated as the base group and will serve as the base line for the proportional graph which is produced if two or more report groups are specified.

**Figure 69: Holly Report Generator**

**Report Groups**

The threshold field is available to be set for all groups other than the base group. The threshold can be set between 0 and 100, which represents a percentage in relation to the base group. The threshold displays as a straight line on the proportional graph in the same color as the data line.

**Figure 70: Holly Report Generator: Groups**