Users

The topics in this section provide information about managing users in the Users view.
To access the Users view:

1. On the Navigation bar, click Users

2. The Users view is displayed. By default, the Users tab is selected.

The displayed records reflect your last selected filter.

Printable Job Aids

These job aids are in Word format, and can be opened or saved on your local computer.

Adding a User

Deleting a User

Editing a User

Managing Activity Queue Time Balance

Monitoring User Status

Sending Messages

Viewing a User Schedule
Managing Users

The topics in this section provide information about Managing Users.

To begin managing users:

1. In the Navigation bar, click Users to display the Users view.

2. Click the Users tab to display the list of users and user tasks.

When Allow Team Assignments is enabled in the System Profile:

Viewing Translated Versions of Intradiem

Intradiem is available in the following languages:

- Chinese (China)
- English (Canada)
- English (United Kingdom)
- English (United States)
- French (Canada)
- French (France)
- German (Germany)
- Japanese (Japan)
- Korean (Korea)
- Portuguese (Brazil)
- Spanish (Spain)

To change your Intradiem view to another language:

- Change the language in your browser’s settings.
  - To change language preferences in Internet Explorer:
    - Select Tools -> Internet Options -> General Tab -> Appearance / Languages Button.
    - In the Language Preference window, list your preferred languages, in order of preference.

---

1 A person authorized by a login and password to access the IntraDiem application.
- Close your browser.
- Re-open your browser.
- Open the Intradiem application.
  Intradiem will open in the available preferred language.

Language can also be selected in the General tab of the User record.
Users View

This topic describes the layout and features of the Users view.

Users View

The users that you can view is determined by your assigned Permission Profile.

The Users View displays current information about users, with search options and options to:

- Add, Delete, Edit, Assign Tasks, and send a Message to selected users.
- View a user's scheduled events for the day.
- View Activity Queues and edit user time balances.

Navigation Bar

The Navigation bar provides navigation to Intradiem views. Each view has a separate set of tabs for the tasks that are relevant to the selected view. To access the Users view, click Users.

Task Tabs

The Task tabs in the Users view provide access to the User tasks.

Displayed tabs might vary, depending on your assigned User Profile.

- To manage users, click the Users tab.
- To view the activity queues for selected users, click the Activity Queues tab.

User Tab

The action buttons in the Users tab are used to perform tasks for displayed users. Available actions are determined by selections in your assigned Permission Profile.

- Add: Add a new user
- Delete: Delete one or more selected users
- Bulk Edit: Apply the same edit to selected users
- Assign: Make assignments to one or more selected users
- Message: Send a message to one or more selected users

1 A person authorized by a login and password to access the Intradiem application.
2 The result of a rule. When the conditions of a rule's triggers are met, the rule's actions are triggered.
• **Quick Action**: If you have created a rule\(^1\) that includes Quick Action for users included in the Rule’s action, select the users for the action

## Users View
The Users tab displays user information in a grid format. By default, the grid displays the following for each user record:

- Login ID
- First and Last Name
- User Group
- Profile
- Status

## Customizing the Grid
The grid can be customized to remove or add selected columns.

To customize columns displayed on the grid, click the grid icon.

### Customize Customization

The following additional columns can be added to the grid:

- Business Unit
- In Intradiem Session
- Home Phone
- In Dynamic Session
- In Scheduled Session
- Logged In

\(^1\)Action based on events and conditions. When the conditions of a rule are met, the rule’s actions take place for users that are defined in the rule.
- Location
- Report To
- Timezone
- Work Phone

To change a column size, click and drag the column border.

**Quick Demo**

The following columns are available on the Users grid:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Action / Note</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check boxes</td>
<td>Check top check box to select all users, or select individual users.</td>
<td>When a user is selected, the user action buttons on the Users tab are available, if allowed in your permission profile¹: Delete, Bulk Edit, Assign, and Message. To select all users, click the check box in the column header.</td>
<td>Default column. Cannot be sorted or removed.</td>
</tr>
</tbody>
</table>

¹ A defined set of user permissions.
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Action / Note</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Login</td>
<td>The user's Intradiem login ID.</td>
<td>By default, the display is sorted by this column. The triangle next to the column name indicates the sort. To reverse the sort, click the column header. To sort by another column, click that column header.</td>
<td></td>
</tr>
<tr>
<td>First Name</td>
<td>The user's first name.</td>
<td>To sort the display by first name, click the column header.</td>
<td></td>
</tr>
<tr>
<td>Last Name</td>
<td>The user's last name.</td>
<td>To sort the display by last name, click the column header.</td>
<td></td>
</tr>
<tr>
<td>User Group</td>
<td>The User Group to which this user is assigned.</td>
<td>To sort the display by user group ¹, click the column header.</td>
<td>Default column; can be added or removed in column selector. Click column header to sort in ascending or descending order.</td>
</tr>
<tr>
<td>Profile</td>
<td>The Permission Profile to which this user is assigned.</td>
<td>To sort the display by last name, click the column header. The Permission Profile determines whether this user's Login ID provides access to the Administrator console or the Agent console. On the Administrator console, the Permission Profile determines views and actions available to the user. The Permission Profile is assigned in the user record.</td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td>The current status of this user: either Active or Inactive.</td>
<td>Click to change the status: Active to Inactive or Inactive to Active. When a user is Inactive, other actions are not available for the user record.</td>
<td></td>
</tr>
</tbody>
</table>

¹ A named location on a User Hierarchy that represents a physical group of people or a location.
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Action / Note</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home Phone</td>
<td>The user’s home phone number</td>
<td>Phone numbers are stored in the user record. If a number is not entered into the user’s profile, a number will not be displayed in the User Grid.</td>
<td></td>
</tr>
<tr>
<td>Work Phone</td>
<td>The user’s work phone number</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mobile Phone</td>
<td>The user’s mobile phone number</td>
<td></td>
<td></td>
</tr>
<tr>
<td>In Dynamic Session</td>
<td>Is this user currently in a dynamic session¹?</td>
<td>For Agent users, displays Yes if the user is in a session; displays No if the user is not in a session. For non-agent users, this field is N/A.</td>
<td>Not included in the default grid display. Can be added or removed in the column selector. Click column header to sort in ascending or descending order.</td>
</tr>
<tr>
<td>In Intradiem Session</td>
<td>Is this user currently in an Intradiem session?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>In Scheduled Session</td>
<td>Is this user currently in a scheduled session?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is Logged In</td>
<td>Is this user currently logged in to Intradiem?</td>
<td>For Agent users, displays Yes if the user is logged in to Intradiem; displays No if the user is not logged in to Intradiem. For non-agent users, this field is N/A.</td>
<td></td>
</tr>
<tr>
<td>Report To</td>
<td>Who this user reports to</td>
<td>Report To is stored in the user’s profile. This is a required field in the user record.</td>
<td></td>
</tr>
<tr>
<td>Tags</td>
<td>Tags that have been entered in the user's profile.</td>
<td>Tags is an optional field in the user record. It is a free-form field used to store information that can help identify / find a user in a search. If tags have not been entered for this user, then this field will be blank.</td>
<td></td>
</tr>
</tbody>
</table>

¹The allotted time period for an Intradiem task, typically 15 minutes. It is assigned with special attention to work flow and schedules.
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Action / Note</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Timezone</td>
<td>The timezone used to display the Intradiem interface for this user.</td>
<td>Timezone is selected in the user record.</td>
<td></td>
</tr>
<tr>
<td>UI Language</td>
<td>The language used to display the Intradiem interface for this user.</td>
<td>UI language is selected in the user record.</td>
<td></td>
</tr>
<tr>
<td>Business Unit</td>
<td>The Business Unit to which this user is assigned.</td>
<td>One or more business units can be selected for the user in the user record.</td>
<td>Not included in the default grid display.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Can be added or removed in the column selector.</td>
</tr>
<tr>
<td>Location</td>
<td>The location to which this user is assigned.</td>
<td>One or more locations can be selected for the user in the user record.</td>
<td>Because this field can have multiple entries, the grid cannot be</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>sorted by this column.</td>
</tr>
</tbody>
</table>
**User Actions**

For each user record, the following options are displayed:

- edit the user record
- delete the user record
- view today's scheduled events for the user
- view the user's activity in the User Monitor
- view user information in the User Diagnostics window.

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Edit Icon]</td>
<td>Click Edit to make changes to the user’s record.</td>
</tr>
<tr>
<td>![Delete Icon]</td>
<td>Click Delete to remove the user's record.</td>
</tr>
<tr>
<td>![Schedule Icon]</td>
<td>Click Schedule to view today's scheduled events for the user.</td>
</tr>
<tr>
<td>![Details Icon]</td>
<td>Click Details to view the user’s activity in the User Monitor. User Monitor information includes user activity for the selected date and time period.</td>
</tr>
<tr>
<td>![Diagnostics Icon]</td>
<td>Click Diagnostics to view user information in the User Diagnostics window. User Diagnostics includes:</td>
</tr>
<tr>
<td></td>
<td>- User Name and login</td>
</tr>
<tr>
<td></td>
<td>- Current State</td>
</tr>
<tr>
<td></td>
<td>- Queue Information</td>
</tr>
<tr>
<td></td>
<td>- Client Server Information</td>
</tr>
</tbody>
</table>
User Status
The Status column displays the status for each user to indicate whether the user is Active or Inactive in Intra
diem. An Inactive user is in the system, but no actions are available for that user.

To change user status from Active to Inactive or from Inactive to Active:

- Click the user's current status.

When a user's status is inactive, the Action Icons are not available for the user record.

- On the Confirmation window, click Submit to confirm.

The status is changed. A message is displayed to confirm the change.

When a user's status is changed to active, the Action Icons are activated for the user record.

Teams Tab

When Allow Team Assignments is enabled in the System Profile, the Teams tab is displayed on the Users con-
sole with the name defined in the Team Type parameter. For example, if the Team Type is defined to be Stores, then the tab will have a label of Stores.

Select the Teams tab to add, edit or delete a team.

Activity Queues Tab

The Activity Queues tab displays information about activity and time balances with options to reset or add to
time balances.

Status Bar

Total Agents Logged In: 0 (0%)
The Status bar displays:

- The total number of Agent users logged in, expressed as total number of users
- Percent of active Agent users logged (# of agents logged in/ total # of active agents). Percentage is expressed as xx.x, with no rounding.
  For example:
  Total Agents Logged In: 125 (97.9%)
- The user ID that is currently logged in for this session.

Agents logged in is refreshed approximately every 60 seconds.

Tools Bar

The Tools bar displays the number of users logged in, expressed as total number of users, and percent of active users logged in.

The Tools bar is displayed for every view, with the following icons.

<table>
<thead>
<tr>
<th>Tools Bar Icon</th>
<th>Description</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Messages</td>
<td>Click to view messages in your inbox.</td>
</tr>
<tr>
<td></td>
<td>Send Feedback</td>
<td>Click to send feedback to Intradiem. Feedback can include comments or ideas about Intradiem products or services.</td>
</tr>
<tr>
<td></td>
<td>Display Help</td>
<td>Click to display product WebHelp.</td>
</tr>
<tr>
<td></td>
<td>Open Agent Console</td>
<td>Click to open the Agent Console. This option is available only to users assigned to a profile with the Receive Activity Sessions permission.</td>
</tr>
<tr>
<td></td>
<td>Configure</td>
<td>Click to display the Configure menu. The Configure menu is available only if you are an administrator, or have been given access through the Permission Profile.</td>
</tr>
</tbody>
</table>

List Navigation

Use any of the following methods to navigate a list of users:

- Sort by column
  - To sort by a column, click the column header. To reverse the sort, click the column header again.
  - By default, the list is sorted by the Login name.
Navigate by page

The number of items and pages in the list is displayed. To navigate:

- click the navigation arrows
- click in the Page Size field to change the number of items displayed per page

Scroll bar

If additional items display beyond the screen size, use horizontal or vertical scroll bars to view more records.

Export to Excel

To export displayed records to an Excel Spreadsheet, click Export to Excel. 
Answer the prompt to either open or save the Excel file.

A limit of 3000 records can be exported from the grid.

To manage the size of the file before exporting, filter the records displayed in the grid.
User Monitor Details

To monitor a user's activity:
Viewing Agent State Details

To view today's status and \textsuperscript{1} details for a displayed agent, click the Details icon \footnote{next the agent name}. Details are displayed for the selected agent on the User Monitor window.

![User Monitor window](image)

The default display is for the current date. To change the date and time range, click the calendar and clock icons. Select dates and times up to 30 days prior to the current date and time, then click Monitor to refresh the display with the selected date and time.

Descriptions of Monitor Messages

Viewing Agent Diagnostics

To view diagnostics for a displayed agent, click the Diagnostics icon \footnote{next to the agent name}. Diagnostic information is displayed for the selected agent.

![Diagnostics window](image)

The Agent Diagnostics Information view displays the following for the agent:

<table>
<thead>
<tr>
<th>User Information</th>
<th>Descriptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The user's last name and first name</td>
</tr>
<tr>
<td>Login</td>
<td>The user's Intradiem login ID</td>
</tr>
<tr>
<td>Current State</td>
<td>Active or Passive</td>
</tr>
</tbody>
</table>

\footnote{1}{The allotted time period for an Intradiem task, typically 15 minutes. It is assigned with special attention to workflow and schedules.}
\footnote{2}{A person authorized by a login and password to access the Intradiem application.}
### Queue Information

<table>
<thead>
<tr>
<th>Queue Information</th>
<th>Descriptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACD</td>
<td>ACD instances associated with this user name</td>
</tr>
<tr>
<td>Queue</td>
<td>The queues the user is currently associated with for each ACD instance</td>
</tr>
<tr>
<td>Schedule Allowed</td>
<td>Indicates whether the ACD rules are currently allowing scheduled session for each queue</td>
</tr>
<tr>
<td>Schedule Interruptible</td>
<td>Indicates whether the ACD rule conditions for interrupting scheduled learning have been met for each queue.</td>
</tr>
<tr>
<td>Predictive Interruptible</td>
<td>Indicates whether the ACD rule conditions for interrupting predictive learning have been met for each queue.</td>
</tr>
</tbody>
</table>

### Client Information

<table>
<thead>
<tr>
<th>Client Information</th>
<th>Descriptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Server Name</td>
<td>Web application server the agent is connected to</td>
</tr>
<tr>
<td>Time Zone</td>
<td>Agent's time zone</td>
</tr>
<tr>
<td>XML Version</td>
<td>Version of Intradiem XML messaging layer between the client ActiveX and the server.</td>
</tr>
<tr>
<td>OCX Version</td>
<td>Version of the Intradiem ActiveX Control on the user’s workstation</td>
</tr>
<tr>
<td>IP Address</td>
<td>IP Address of the user’s workstation</td>
</tr>
</tbody>
</table>

### Printable Job Aids

**Monitoring User Status**

---

1. Action based on events and conditions. When the conditions of a rule are met, the rule's actions take place for users that are defined in the rule.
Adding A User

Users ➡ Users ➡ Add

Permissions

To Add a User, your user profile must have the Users Add permission.

Adding A User

This topic describes how to add a user\(^1\) to Intradiem.

Users can be placed into Intradiem in one of two ways.

For sites with more than 100 – 125 users, typically a UMA\(^2\) is used that ‘pulls’ the entire existing user hierarchy\(^3\) over into Intradiem.

Smaller sites are usually set up manually using the Intradiem System Console. Individual agents are added one at a time.

Many sites use both techniques; agents are brought in through a UMA and administrators are added manually.

When you manually add a user, you enter information through a series of tabs.

Manually Adding an Intradiem User

To manually add an Intradiem user:

- Log into the Intradiem Console.
- Click Users on the Navigation bar.
- Click the Users tab.

![Users Activity Queues](image)

- Click the Add link.

Unless you have selected a user, the Add link is the only selection available.

The Add User window is displayed.

\(^1\) A person authorized by a login and password to access the IntraDiem application.

\(^2\) User Management API

\(^3\) A tree structure with branches or levels that represent levels of authority in an organizational structure. The logical groupings of how users are represented in reports and for user privileges.
- Complete the user information in each tab. Required fields are indicated by a red asterisk (*).
- Click Next to progress through each tab. Complete each tab, then click Submit.

**Completing the General Tab**

In the *General* tab, complete the fields with the user’s name, login, email, password and reporting information.

Complete the fields in the *General* tab, then click Next to proceed to the *User Groups* tab.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>The User’s first name.</td>
<td>This entry will be used in reports and other areas of the Intradiem Console.</td>
</tr>
<tr>
<td>Middle Initial</td>
<td>Enter the user’s middle initial.</td>
<td>This entry will be used in reports and other areas of the Intradiem Console.</td>
</tr>
<tr>
<td>Last Name</td>
<td>Enter the user’s last name.</td>
<td>This entry will be used in reports and other areas of the Intradiem Console.</td>
</tr>
<tr>
<td>Login ID</td>
<td>Enter a unique Intradiem Login ID for the user.</td>
<td>This is the Login ID that the user will use when logging in to the Intradiem Console.</td>
</tr>
</tbody>
</table>

*The Login ID can contain up to 260 characters.*
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use Blank Password</td>
<td>If this box is checked, the user will not be required to enter a password at login.</td>
<td><em>This option is only available if your system is set to allow Blank Passwords under System Configuration.</em></td>
</tr>
<tr>
<td></td>
<td></td>
<td>If password rules are defined under System Configuration for your Intradiem system, the password entered here must comply with those rules.</td>
</tr>
<tr>
<td>Password</td>
<td>Enter the user's password.</td>
<td></td>
</tr>
<tr>
<td>Confirm Password</td>
<td>Re-enter the user's password to confirm.</td>
<td></td>
</tr>
<tr>
<td>Email Address</td>
<td>Enter the user's email address.</td>
<td><a href="mailto:xxx@xxxx.com">xxx@xxxx.com</a></td>
</tr>
<tr>
<td>Work Phone</td>
<td>Enter the user's Work Phone number.</td>
<td><em>This information is accessed by the Rules Action: Make Voice Call. Be sure to maintain the correct information in these fields - if the rule is not able to access current phone numbers, the voice call will not be delivered by the rule.</em></td>
</tr>
<tr>
<td>Home Phone</td>
<td>Enter the user's Home Phone number.</td>
<td></td>
</tr>
<tr>
<td>Permission Profile</td>
<td>Select the profile for this user.</td>
<td>ex: Administrator, Agent, Manager, Supervisor</td>
</tr>
<tr>
<td>Report To</td>
<td>Select the name of the person to whom this user reports.</td>
<td>This is a required field. Each user must be assigned one Report To person. The Report To user name cannot be the same as the user name, with the exception of the Admin user. For a user, such as the CEO, who does not report to another user in the system, the Report To selection should be Admin.</td>
</tr>
<tr>
<td>Business Unit</td>
<td>Select one or more business units for this user.</td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td>Select one or more locations with which this user is associated.</td>
<td>This information can be useful when filtering a display or in reports.</td>
</tr>
</tbody>
</table>

*Action based on events and conditions. When the conditions of a rule are met, the rule's actions take place for users that are defined in the rule.*
<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>UI Language</td>
<td>The language the UI should display in for this user.</td>
<td>The UI displays in the selected language for this user.</td>
</tr>
<tr>
<td>Timezone</td>
<td>The user's time zone.</td>
<td>The UI displays in the selected time zone for this user.</td>
</tr>
<tr>
<td>Tags</td>
<td>Text strings that can be used for filters.</td>
<td>Free-form meta tags. Enter strings of text that can later be used in filters when searching for this user. This is a free-form field. Any alpha, numeric or special characters are allowed. Up to 500 characters can be entered in the field, including punctuation and spaces. If you use spaces within an entry for a tag, those spaces must also be included when using a search filter to find the tag. Separate each entry with a comma. tag examples: new hire, seasoned tenure, Spanish, support level2</td>
</tr>
<tr>
<td>Mobile Phone</td>
<td>Enter the user's Mobile Phone number.</td>
<td>This information is accessed by the Rules Actions: Make Voice Call and Send Text Message. Be sure to maintain the correct information in this field - if the rule is not able to access phone numbers, the voice call or text message will not be delivered by the rule.</td>
</tr>
</tbody>
</table>

Completing the User Groups Tab

The Access tab is not displayed for Agent users.

---

1 user, task, task bundle, assignment, and system configuration saved filter definitions.
In the User Groups tab, select the user group\(^1\) to which this user belongs. A user can belong to only one group. To display a list of user groups, either enter a search string in the search field, or display the hierarchy view.

Enter a search string and click Search.

Click to display the User Group hierarchy.

**Searching and Selecting User Groups**

To search for user groups and select from a list of results:

1. Enter a group name or search string and click the Search icon.

The asterisk * can be used as a wild card.

Results are displayed in a list format:

\(^1\)A named location on a User Hierarchy that represents a physical group of people or a location.
Selecting User Groups from the User Group Hierarchy

To search by navigating the user group hierarchy:

1. Click the Hierarchy icon.

   The User Group hierarchy is displayed.

2. Navigate through the hierarchy. Click + to expand a list. Click - to collapse a list. Place a check mark next to the user group to which this user will be assigned.

3. Click Next to proceed to the Cross Reference tab.

Completing the Cross Reference Tab

If applicable, enter the required Cross Reference ID's.

A cross reference ID is a unique identifier for a user in another system that is integrated with Intradiem, typically a WFM and ACD system.

If the user has more than one cross reference, each will be listed separated by commas.

The Cross Reference ID fields must be defined for a user to receive Intradiem Scheduled or Dynamic sessions.

The cross reference id is also used for reporting data between Intradiem and the client Workforce Management system.
In the _Exclude From UMA (ELID) field, optionally enter the user’s ELID to exclude this user from the UMA settings. When this field is completed, the settings in the UMA are bypassed for this user.

In the No Dynamic (ELID) field, optionally enter the user’s ELID to prevent this user from receiving dynamic sessions. When this field is completed with the user’s ELID, dynamic sessions are not delivered to this user.

You must have permission to add / edit cross reference information for this tab to be visible. The instance displayed is based on your system configuration.

The following table demonstrates the effect of a WFM cross reference ID on dynamic delivery:

<table>
<thead>
<tr>
<th></th>
<th>User has a WFM Cross Reference ID</th>
<th>User does not have a WFM Cross Reference ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>User has a schedule</td>
<td>Delivery is possible</td>
<td>Delivery is not possible</td>
</tr>
<tr>
<td>User does not have a schedule</td>
<td>Delivery is not possible</td>
<td>Delivery is possible</td>
</tr>
</tbody>
</table>

Click Next.

Selecting Group Access in the Access Tab

The Access tab controls user visibility Reporting in the Reports view and other view where users are found via user groups, including Scheduled Delivery, Diagnostics, Activity Queues, etc.

To locate groups, select either the List or Hierarchy view.

---

1 A session scheduled and delivered with IntraDiem according to configured delivery rules and thresholds. Monitors ACD to find periods of low call volume. Aggregates pockets of wait time across all agents. Delivers fewer, larger blocks of time to some agents to complete tasks in their Activity Queues.
**List View**

To use the *List view*, enter search characters in the *Search* field, and click the *Search* icon.

<table>
<thead>
<tr>
<th></th>
<th>Group</th>
<th>Path</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Checkmark]</td>
<td>Team JWoods</td>
<td>ROOT &gt; Atlanta &gt; Team JWoods</td>
</tr>
</tbody>
</table>
Hierarchy View

To use the Hierarchy view, click the Hierarchy icon. Click the plus and minus signs to expand and contract the hierarchy.
Select Groups
Select one or more groups to which this user will have access. Place a check mark next to each selected group.

After completing selections in all tabs, click **Submit** to save and submit selections.
The new user is saved with your selections, and is added to the list of users.

Printable Job Aids
Adding a User

Deleting a User

Editing a User
Deleting A User

Permissions

To delete a user, your user profile must have the Users Delete permission.

Selecting Users

To locate users in the list, select from options in the Filter field.

Deleting a User

To delete one or more users:

1. Locate the user names in the list of users.

2. Click the check box next to one or more user names to delete. When you select a user record, available selections for the user are activated. Available selections might vary, depending on your assigned user profile.

3. Click Delete. A confirmation message is displayed.

   - To confirm the Delete, click Submit. The selected users are deleted from the list of users. The user’s activity will still be included for the reporting period.

To delete one user, click Delete next to the user’s record.

---

1 A person authorized by a login and password to access the IntraDiem application.
Printable Job Aids

Adding a User

Deleting a User

Editing a User

Simple assignments stay with the user record. If a user is deleted, assignments for that user are deleted.

If a user that made assignments to other users is deleted, those assignments are not affected - the assignments remain with the user records.
Editing Multiple Users with Bulk Edit

Permissions

To use Bulk Edit, your user profile must have the Users Edit permission.

Editing Multiple Users

This topic describes how to apply an edit to multiple selected users at one time.

Use Bulk Edit to apply the same attribute edit to one or more selected users.

Depending on the selected attribute, additional selection fields are displayed.

To edit multiple users:

1. In the list of Users, locate the users to which you will apply the edit. Click to place a check mark next to each selected user1.

To select all displayed users, click the check box in the header row. To clear all selections, click again.

The selected action2 is applied only to active users. Inactive users are not affected by Bulk Edit actions.

2. Click Bulk Edit. The Bulk Edit Users window is displayed.

---

1 A person authorized by a login and password to access the IntraDiem application.

2 The result of a rule. When the conditions of a rule’s triggers are met, the rule’s actions are triggered.
3. Click in the *Attribute* field and select the attribute to change for the selected users. The remaining field selections display, and vary depending on the *Attribute* selected.

4. Complete the displayed fields with the changes for the selected users.

5. Click **Submit**. The changes are saved and applied to the selected users. Changes take effect immediately.

**Bulk Edit Attributes**

Select from the following attributes:

- Business Unit
- Custom Attributes
- Inactivate
- Location
- Permission Profile
- Report To
- Timezone
- UI Language
- Unlock
- User Group
<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Unit</td>
<td>Add or remove business units. Selected business units are added to or removed from selected users' profiles.</td>
</tr>
<tr>
<td>Custom Attributes</td>
<td>Add or remove Custom Attributes for selected employees: Employee Tenure, Language, Performance, or Skill Level. Selected attributes are added to or removed from selected users' profiles.</td>
</tr>
<tr>
<td>Inactivate</td>
<td>If the selected users have a status of Active, select Inactivate to change the status to Inactive.</td>
</tr>
<tr>
<td>Activate</td>
<td>If the selected users have a status of Inactive, select Inactivate to change the status to Active.</td>
</tr>
<tr>
<td>Location</td>
<td>Select one or more locations to add to or remove from the selected users' profiles.</td>
</tr>
<tr>
<td>Permission Profile</td>
<td>Select a permission profile(^1) to assign to the selected users.</td>
</tr>
<tr>
<td>Report To</td>
<td>Select from the list of valid Report To names or departments for the selected users.</td>
</tr>
<tr>
<td>Timezone</td>
<td>Select a timezone to assign to the selected users.</td>
</tr>
<tr>
<td>UI Language</td>
<td>Select a language for the User Interface display for the selected users.</td>
</tr>
<tr>
<td>Unlock</td>
<td>Unlock Login IDs for users who exceeded the maximum number of failed(^2) logins, resulting in locked Login IDs.</td>
</tr>
<tr>
<td>User Group</td>
<td>Change the assigned user group(^3) for the selected users.</td>
</tr>
</tbody>
</table>

### Business Unit

To add or remove Business Units for the selected user profiles:

- Select either **Add Business Units** or **Remove Business Units**. Your selection will be applied to all selected users.

![Add/Remove Business Units](image)

- Click the **Business Unit** dropdown to display the list of Business Unit options.

  > Available selections vary by site.

---

\(^1\) A defined set of user permissions.

\(^2\) The course completion date will be followed by a failed status if any course was failed prior to achieving a passing score for that user.

\(^3\) A named location on a User Hierarchy that represents a physical group of people or a location.
Select one or more Business Units, and then click **Submit**.
The selected Business Units are added to or removed from the selected users' profiles, depending on your selection.

### Custom Attributes

To add or remove Custom Attributes for the selected user profiles:

- Select either **Add Custom Attributes** or **Remove Custom Attributes**. Your selection will be applied to all selected users.

- To change any of the listed attributes, click the arrow in the field to display the selection list, and select attributes to add or remove.

> Available selections vary by site.
• Click **Submit**.
  The selected Attributes are added to or removed from the selected users' profiles, depending on your selection.

**Change Active Status**

To change user status either from Active to Inactive or from Inactive to Active:

• **Select either Activate** or **Inactivate**. Your selection will be applied to all selected users.

  *If the users you selected for the Bulk Edit have an Active status, the Inactivate option is displayed. If the users you selected have an Inactive status, the Activate option is displayed.*

• Click **Submit**.
  The status is changed for the selected users.

**Add or Remove Locations**

To add or remove locations in selected users’ profiles:
- Select **Location** from the **Attribute** dropdown menu.

  Available selections vary by site.

- Select **Add Locations** or **Remove Locations**. Locations will be added to or removed from profiles for all selected users.
- Click the arrow in the **Location** field to display the location selections.
- Click to select each location to add or remove.
- Click **Submit**.

  The selected locations are added to or removed from the selected users’ profiles.

**Change Permission Profile**

To change the Permission Profile assigned to the selected users:

- Select **Permission Profile** from the **Attribute** dropdown menu.

  Available selections vary by site.

- Click the arrow in the **Permission Profile** field to display the list of available Permission Profiles.
- Click the Permission Profile to assign to the selected users.
- Click **Submit**.
The selected Permission Profile is assigned to the selected users.

**Change Report To Assignment**

To change the Report To Assignment\(^1\) for the selected users:

- Select **Report To** from the **Attribute** dropdown menu.
  
  *Available selections vary by site.*

- To narrow your search, in the **Report To** field, type one or more characters. Results that begin with the entered characters are displayed in the selection list. To display an alphabetic list of all Report To selections, click in the **Report To** field without entering any characters.

- Click the **Report To** selection for the selected users.

- Click **Submit**.

  The Report To selection is assigned to the selected users and saved in the profile for each user.

**Change the Timezone**

To change the timezone for the selected users:

- Select **Timezone** from the **Attribute** dropdown menu.
  
  *Available selections vary by site.*

\(^1\) A task or task bundle assigned to a user.
Click the arrow in the *Timezone* field to display timezone options.

Click the *Timezone* selection for the selected users.

Click **Submit**.

The Timezone selection is assigned to the selected users and saved in the profile for each user.

---

**Change the UI Language**

To change the User Interface language for the selected users:

- Select **UI Language** from the *Attribute* dropdown menu.

- Click the arrow in the *UI Language* field to display language options.

- Click the *UI Language* selection for the selected users.

- Click **Submit**.

The UI Language selection is assigned to the selected users and saved in the profile for each user.

---

**Unlock**

A user's Login ID might be locked if the user unsuccessfullly attempts to log in, and the Maximum Failed Attempts is exceeded. The Maximum Fail Attempts is set in the System Profile.
To unlock the selected users:

1. Select **Unlock** from the **Attribute** dropdown menu.

2. Click **Submit**.

   The selected users Login IDs are unlocked.

**Change User Group**

To change the user group to which the selected users belong:

1. Select **User Group** from the **Attribute** dropdown menu.

   *Available selections vary by site.*

2. To search available groups, enter one or more characters in the **Available User Groups** field and click the **Search** icon.

   User groups containing the entered characters are displayed.

   To select from the User Group hierarchy, click the **Hierarchy** icon.

3. From the displayed results, select the user group for the selected users.

4. Click **Submit**.

   The selected users are assigned to the selected user group.

---

1 A tree structure with branches or levels that represent levels of authority in an organizational structure. The logical groupings of how users are represented in reports and for user privileges.
To edit one user, click **Edit** next to the user record.

**Editing Multiple Inactive Users**

To edit inactive users to change their status to active, do one of the following:

- Select the Public Filter *All Inactive Users*
- Select the users from the displayed list
- Click the **Bulk Edit** action button

![Bulk Edit dialog box](image)

- Click **Submit** to activate the selected users.

**OR**

- Create an ad hoc filter with a Status of Inactive, and any additional criteria to narrow the list of users.

![Ad hoc filter dialog box](image)

- Select the users from the displayed list
- Click the **Bulk Edit** action button
• Click **Submit** to activate the selected users.
Sending Messages

This topic describes how to send messages to selected users. Select one or more users to receive the same message.

To send a message to selected users:

1. Select one or more users from the Users list.

2. Click Message. The Message window is displayed.

3. Enter a Subject in the Subject field.

4. Enter the Message text in the Message field. Either type or copy and past text. If you are copying from a formatted page, such as MS Word, a message is displayed with the option to remove formatting when the text is pasted into the message.

   To remove formatting, click OK.

5. Optionally select the hyperlink icon to include a link in the message.
Enter a name for the hyperlink - this is the text that will display for the link in the message. Enter the URL - either type or copy and paste the link. Click **Submit**. The hyperlink is inserted in the message text area.

6. To deliver the message immediately, click **Deliver Now**. To select a future delivery date, deselect the check box next to **Deliver Now**. Select a date and time for the message delivery.

   *If your site is configured to use the Desktop Experience Application, the option to select a future delivery date is no longer available in this view. Messages can be scheduled through Rules.*

7. To send the message, click **Submit**. The message is delivered to the selected users at the selected time and date.

   *You can send a message to any users that you can access, based on your assigned permission profile."

**Printable Job Aids**

SendingMessages

---

*A defined set of user permissions.*
Quick Action

If you have created a rule that includes Quick Action in the Rule’s action, you can select users for the rule from the User console.

The Quick Action button is available on your console if your assigned permission profile includes the permission Users - Actions Allowed - Quick Actions.

Accessing Quick Action

To use Quick Action on the Users console, you must first:

- Have permission to access Quick Action in your assigned Permission Profile. When you have Quick Action permission, the Quick Action button is displayed on your User console.
- Create a rule that uses Quick Action. Quick Action in a rule indicates that the users to be impacted by the rule’s action.

Using Quick Action

Use Quick Action to invoke a rule to impact users selected from your Users grid.

Quick Action is available for rules that were created using Quick Action in the Trigger or the Action.

- In the Users grid, place a checkmark next to each user to include in the Quick Action. When users are selected, the Quick Action button is activated.
- Select the dropdown on the Quick Action button.
  Actions are identified in the dropdown by an icon and a short description that was entered when the rule was created.
- Select the rule to trigger for the selected users.
  Selected users that meet the conditions of the rule are impacted by the rule.

Users Impacted Messages

When you use Quick Action to trigger a rule from the Users console, you will receive a message with information about the users included in the rule’s action.

The following messages are sent, depending on the criteria of the rule:

© 2017 Intradiem
<table>
<thead>
<tr>
<th>Rule Criteria</th>
<th>Message Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>&quot;These Users&quot; or &quot;These Users Supervisors&quot; is used as the user criteria.</td>
<td>&quot;You selected X user(s). Y user(s) were impacted by the Quick Action.&quot; X equals the number of users checked on the Users console before clicking Quick Action. Y is the total number of users that actually receive the action.</td>
</tr>
<tr>
<td>A user filter other than &quot;These Users&quot; or &quot;These Users Supervisors&quot; is used as the user criteria.</td>
<td>&quot;You selected X user(s). Y user(s) were impacted by the Quick Action because {User_Filter_Name} was used as the user criteria in the rule.&quot; X equals the number of users checked on the Users console before clicking Quick Action. Y is the total number of users that actually receive the action. {User_Filter_Name} is the name of the user filter used as the user criteria in the action.</td>
</tr>
<tr>
<td>If an individual is used as the user criteria, then messaging is:</td>
<td>&quot;You selected X user(s). A single user was impacted because the user criteria in the action is an individual.&quot; X equals the number of users checked on the Users console before clicking Quick Action.</td>
</tr>
<tr>
<td>For actions that do not have a user filter (in other words they don't require user criteria), the following messaging should be used:</td>
<td>&quot;The Quick Action was successful. No users were impacted because the rule does not have user criteria.&quot;</td>
</tr>
<tr>
<td>For actions that have a condition and the condition is not met, the following messaging should be used:</td>
<td>&quot;The Quick Action was not executed because not all conditions were met.&quot;</td>
</tr>
<tr>
<td>If we are unable to determine the impacted users after a period of 30 seconds, the following messaging should be used:</td>
<td>&quot;The Quick Action may have been successful. Details of the Rule will be available in Reports.&quot;</td>
</tr>
<tr>
<td>Rule Criteria</td>
<td>Message Content</td>
</tr>
<tr>
<td>------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>If a Quick Action did not execute due to an error while executing the action, the following messaging should be used:</td>
<td>“The Quick Action was not successful because there was an error executing the Action.”</td>
</tr>
</tbody>
</table>
# Dynamic Delivery- Best Practices

## Managing Agent Interaction with Intradiem

### User Interface Settings

<table>
<thead>
<tr>
<th>#</th>
<th>Parameter Name</th>
<th>Description</th>
<th>Default Value</th>
<th>Comments</th>
<th>Global Queue Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Minimize on Startup</td>
<td>Automatically minimize the Intradiem console when the user(^1) logs in.</td>
<td>True</td>
<td>This is set to make the login process transparent for the agent. There is an icon in the Windows task(^2) bar, but the application will not stay on the screen once launched.</td>
<td>Global</td>
</tr>
<tr>
<td>2</td>
<td>Enable Print</td>
<td>Controls whether users can print courses from Intradiem.</td>
<td>Disabled</td>
<td>When enabled, the print option is displayed only when courses created in Content Builder are launched. When the agent clicks the print icon, an option is displayed to print either the current page or the entire course(^3).</td>
<td>Global</td>
</tr>
<tr>
<td>3</td>
<td>Show End Prompt if Session Refused</td>
<td>Displays an End Prompt if the learning session(^4) is refused by the agent.</td>
<td>Enabled</td>
<td>This might be redundant, as the agent will be aware that the session has been refused.</td>
<td>Global</td>
</tr>
<tr>
<td>4</td>
<td>Show End Prompt if ACD Prevented Training</td>
<td>Used to determine if the end prompt should be displayed at the end of a scheduled session if a non-compliant ACD prevented training.</td>
<td>Disabled</td>
<td>Agents will not be aware that the session was not delivered because of ACD non-compliance.</td>
<td>Global</td>
</tr>
</tbody>
</table>

\(^1\) A person authorized by a login and password to access the IntraDiem application.

\(^2\) A specific unit of work that can be assigned to a user. Examples include courses, knowledge base articles, and coaching.

\(^3\) Content that is assigned for a user to take during a session.

\(^4\) The allotted time period for an Intradiem task, typically 15 minutes. It is assigned with special attention to work flow and schedules.
<table>
<thead>
<tr>
<th>#</th>
<th>Parameter Name</th>
<th>Description</th>
<th>Default Value</th>
<th>Comments</th>
<th>Global Queue Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>Show End Prompt if ACD Interrupted Training</td>
<td>Used to determine if the end prompt should be displayed at the end of a scheduled session if a non-compliant ACD interrupted training.</td>
<td>Disabled</td>
<td>The agent is made aware of the need to get out of training and start taking calls many calls are waiting.</td>
<td>Global</td>
</tr>
<tr>
<td>6</td>
<td>Show End Prompt if No Assignment Available</td>
<td>Show the end prompt at scheduled time if no assignments are available.</td>
<td>Disabled</td>
<td>The agent will not realize there are not any assignments as training will not be offered.</td>
<td>Global</td>
</tr>
<tr>
<td>7</td>
<td>Enable “Sign Out of Intradiem” on Student Control Icon</td>
<td>Used to determine if the “Sign Out of Intradiem” is enabled on the student control icon.</td>
<td>Enabled</td>
<td>The agent signing out of Intradiem is not recommended as they will no longer be able to received training. This is the “Exit ICON” in the system tray.</td>
<td>Global</td>
</tr>
</tbody>
</table>

¹A task or task bundle assigned to a user.
<table>
<thead>
<tr>
<th>#</th>
<th>Parameter Name</th>
<th>Description</th>
<th>Default Value</th>
<th>Comments</th>
<th>Global Queue Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>8</td>
<td>Display Reminder Message</td>
<td>Display reminder message when the agent console has been inactive too long during a session.</td>
<td>Disabled</td>
<td>The learning session reminder prompt will be displayed if:</td>
<td>Global</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- User has clicked OK on start prompt</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- User is in scheduled training block</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- User has not clicked do not disturb</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- User has not received ACD interrupt</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- More than &gt; 2 minutes training left in this block of scheduled training</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Disabled</td>
<td>The learning session reminder prompt will NOT be displayed if...</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- User is actively training during a scheduled session.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- User clicked &quot;Do Not Disturb&quot; on the first learning session prompt.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- User clicked &quot;Do Not Disturb&quot; on a reminder prompt.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- User has received a message indicating ACD override or ACD interrupt.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- Current time does not fall within a scheduled session time frame.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- There is &lt; 2 minutes training time remaining in a scheduled session.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>(This threshold may be configurable)</td>
<td></td>
</tr>
</tbody>
</table>

The following table demonstrates the effect of a WFM cross reference ID on dynamic delivery¹:

<table>
<thead>
<tr>
<th>User has a WFM Cross Reference ID</th>
<th>User does not have a WFM Cross Reference ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>User has a schedule</td>
<td>Delivery is possible</td>
</tr>
<tr>
<td>User does not have a schedule</td>
<td>Delivery is not possible</td>
</tr>
</tbody>
</table>

¹A session scheduled and delivered with IntraDiem according to configured delivery rules and thresholds. Monitors ACD to find periods of low call volume. Aggregates pockets of wait time across all agents. Delivers fewer, larger blocks of time to some agents to complete tasks in their Activity Queues.
Managing Teams

Users ➔ Teams

Permissions

*To Manage Teams, your user profile must have the Users Add permission.*

The **Teams** view is available when **Allow Team Assignments** is selected in the **System Profile**.

**Managing Teams**

This topic describes how to add, edit and delete a team in the Team console.

To access the Teams console:

- Log into the Intradiem Console.
- Click **Users** on the **Navigation** bar.
- Click the **Teams** tab.

The Teams console is displayed.

By default, the following is displayed in the Teams grid:

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The name assigned to this team</td>
</tr>
<tr>
<td>Description</td>
<td>A short description of the team</td>
</tr>
<tr>
<td>Team Type</td>
<td>The Team Type that is defined in the System Profile</td>
</tr>
<tr>
<td>Edit</td>
<td>Click to edit the displayed record.</td>
</tr>
<tr>
<td>Delete</td>
<td>Click to delete the displayed record.</td>
</tr>
</tbody>
</table>

**Adding a Team**

To add a Team:

- Log into the Intradiem Console.
- Click **Users** on the **Navigation** bar.
Click the Teams tab.

The Teams console is displayed.

Click Add.

The Add Team window is displayed.

Complete the team information in each tab. Required fields are indicated by a red asterisk (*).

Click Next to progress through each tab. Complete each tab, then click Submit.

Completing the General Tab

In the General tab, complete the fields with the team's name and description. The Team Type defaults to the Team Type entered in the System Profile.

Complete the fields in the General tab, then click Next to proceed to the Custom Attributes tab.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The Team Name. The name will display in the Team Grid.</td>
</tr>
<tr>
<td>Description</td>
<td>A description of the team. The description will display in the Team Grid.</td>
</tr>
<tr>
<td>Team Type</td>
<td>Defaults to the value entered in the System Profile.</td>
</tr>
</tbody>
</table>

Completing the Custom Attributes tab
Selections displayed on the *Custom Attributes* tab vary, and are based on *Custom Attributes* set in the *Configure* menu.

To complete the fields, optionally make selections from the dropdown lists, optionally enter text strings in entry fields, and then click *Submit.*
Managing User Activity Queues

The topics in this section provide information about Managing User Activity Queues.

To access the Activity Queue display:


2. Click the Activity Queues tab.

The Activity Queue is displayed.
Managing Activity Queue Time Balances

Permissions

To reset or add to activity type balances, you must be assigned to a profile with the Users Adjust Balances permission.

Viewing and Managing the Activity Queue

The Activity Queue provides the administrator the ability to view, by user\(^1\) and activity type\(^2\), assigned tasks and time allocations and to alter time balances for selected agents.

Benefits

The activity queue\(^3\) enables the administrator to manage dynamic delivery\(^4\) by altering time balances for selected agents and activity types.

The Activity Queue Balance View

The Activity Queue Balance view shows the amount of time currently in the user’s queue by activity type. Users can view information such as time to be delivered and last date of delivery.

The data in the Activity Queue Balance is refreshed every 10 minutes.

You can sort or filter the display by any of the displayed fields.

Viewing the Activity Queue

To display the activity queue:

1. On the Navigation menu, click Users

2. Click the Activity Queues tab.

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\(^1\)A person authorized by a login and password to access the IntraDiem application.

\(^2\)A way to organize and group together similar tasks and define the IntraDiem delivery experience specific for such tasks.

\(^3\)A personalized, to-do list for an individual. Created through a combination of activity type business rules for priority, time allocation and task assignments made manually, automatically or through a guided process, for completion during active wait time.

\(^4\)A session scheduled and delivered with IntraDiem according to configured delivery rules and thresholds. Monitors ACD to find periods of low call volume. Aggregates pockets of wait time across all agents. Delivers fewer, larger blocks of time to some agents to complete tasks in their Activity Queues.
The Activity Queue is displayed.

A unique record is displayed for each combination of user and activity type. For example, if user jsmith has five activity type assignments, the queue displays five separate records for jsmith - one for each activity type. For more information about the displayed fields, see Activity Queue Balance Screen Field Descriptions.

### Viewing Field Detail

To view additional information, hover your mouse over the displayed fields. The following is displayed for each field type:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>User</strong></td>
<td>The user’s Intradiem login ID. To view a user's first and last name, hover over the user's login ID.</td>
</tr>
<tr>
<td><strong>Activity Type</strong></td>
<td>The activity type for the displayed record. Hover over the displayed activity type to view detail for the activity type:</td>
</tr>
<tr>
<td></td>
<td>- Time allocation</td>
</tr>
<tr>
<td></td>
<td>- Allocation frequency</td>
</tr>
<tr>
<td></td>
<td>- Minimum minutes per session(^1)</td>
</tr>
<tr>
<td></td>
<td>- Preferred minutes per session</td>
</tr>
<tr>
<td></td>
<td>- Maximum time to accumulate</td>
</tr>
<tr>
<td><strong>Current Allocated Balance</strong></td>
<td>The currently allocated time for this user and activity. Hover over the current balance to view detail for the activity type.</td>
</tr>
<tr>
<td><strong>Last Processed</strong></td>
<td>The date and time of the most recent time allocation by the time allocation process. Manual changes to balances are not reflected in this column.</td>
</tr>
<tr>
<td><strong>Assigned tasks</strong></td>
<td>Yes = the user has incomplete tasks for this activity type. No = the user has no incomplete assigned tasks for this activity type. N/A = no data is available for this record.</td>
</tr>
</tbody>
</table>

\(^1\)The allotted time period for an Intradiem task, typically 15 minutes. It is assigned with special attention to work flow and schedules.
Scheduled Sessions

When the session is delivered and accepted\(^1\), the time taken for that session is deducted from time in the agent’s Activity Queue Balance.

If a session is scheduled for delivery to an agent, that activity is delivered, even if the time is not allocated in the Activity Queue.

If delivery of a scheduled session is attempted, but not accepted or not fully completed, the untaken time for that session is added to the agent’s Activity Queue Balance according to the Prevent Dynamic Delivery Attribute rule\(^2\).

Searching the Activity Queue

The search criteria used for the currently displayed results are displayed next to the Search By button. You can change the search criteria to filter the displayed results.

To search the activity queue:

- Click Search By.
  The Search By window is displayed.
- Select one or more fields for your search. Enter search criteria for each selected field, and then click Search.
  The search is filtered only by fields with a check mark in the box.

To search by entering only part of a name, use one of the following formats, inserting an asterisk * to locate all records that contain the characters that you enter:

- *abc* to locate a record that contains the entered characters
- abc* to locate a record that begins with the entered characters
- *abc to locate a record that ends with the entered characters

Complete any of the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>User</td>
<td>Enter all or part of the Login ID.</td>
</tr>
<tr>
<td>First Name</td>
<td>Enter all or part of the first name.</td>
</tr>
<tr>
<td>Last Name</td>
<td>Enter all or part of the last name.</td>
</tr>
<tr>
<td>Attribute</td>
<td>Select attributes from the displayed hierarchy(^3), and then click OK.</td>
</tr>
</tbody>
</table>

\(^1\)The agent accepted and completed an Intradiem session during the scheduled/delivered time.

\(^2\)Action based on events and conditions. When the conditions of a rule are met, the rule’s actions take place for users that are defined in the rule.

\(^3\)A tree structure with branches or levels that represent levels of authority in an organizational structure. The logical groupings of how users are represented in reports and for user privileges.
User Groups | Select one or more user groups from the displayed hierarchy, and then click OK.
Activity Type | Select from the displayed drop down list.

Attribute Window
In the Attribute window, select the user attributes to include in your search.
To expand a list, click +. To collapse a list, click -.

Changing the Time Zone
The currently displayed time zone is displayed in the Time Zone field. You can change the time zone for your view. A change in time zone affects only the display of any dates impacted by the change in the Last Updated field.

To change the time zone for your view:

- Click the arrow to display the list of time zones.
- Click to select a time zone from the displayed list.
The time zone is changed for the displayed queue.

## Selecting Users

To edit time balances, you must first select one or more users. The time balance changes will be applied to the selected users.

To select one or more users, click to enter a check mark in the box next to each select user.

To select all listed users, click the check box in the header. A check mark is inserted in the check boxes next to all listed users.

## Resetting Time Balances

The time balance for each user and activity type is displayed in the *Current Balance* column of the *Activity Queue Balance* view. Each user has a separate record in the queue for each assigned activity type.

When you reset a time balance, you replace the current balance with a new value.

When resetting or adding to a time balance, you cannot exceed the Maximum Time to Allocate for that activity type. If the number of minutes that you enter exceeds the maximum, the balance will be set to the Maximum Time to Allocate. Maximum Time to Allocate is set through Configure --> Activity Types --> Manage Activity Types.

To reset time balances for selected users and activity types:

- Select one or more user records.
- Click Reset Time Balances.
In the displayed window, enter the number of minutes to allocate for the selected records.

Click **Submit**. The allocation is changed, and is displayed in the *Current Balance* column for the selected users and activity types.

### Adding Time to Balances

The time balance for each user and activity type is displayed in the *Current Balance* column of the *Activity Queue Balance* view. Each user has a separate record in the queue for each assigned activity type.

When you add time to a balance, the value that you enter is added to the current balance.

When resetting or adding to a time balance, you cannot exceed the Maximum time to Allocate for that activity type. If the number of minutes that you enter exceeds the maximum, time will be added up to the Maximum Time to Allocate for the activity. Maximum Time to Allocate is set through Configure --> Activity Types --> Manage Activity Types.

To add time to balances for selected users and activity types:

- Select one or more user records.
- Click **Add Time to Balances**.
- In the displayed window, enter the number of minutes to add to the selected records.
- Click **Submit**. The allocation is changed, and is displayed in the *Current Balance* column for the selected users and activity types.

### Printable Job Aids

**Managing Activity Queue Time Balance**

**View Activity Queue Balance Screen Field Descriptions**
Activity Queue Balance Field Descriptions

Activity Queue Balance View

Field Descriptions
The following table contains descriptions of the fields on the Activity Queue Balance view.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time Zone: (GMT-0500) Eastern Time (US &amp; Canada)</td>
<td>The time zone for the display.</td>
<td>To change the time zone, click in the field, and then select from the displayed list.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
<td>Action</td>
</tr>
<tr>
<td>---------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Reset Time Balances</td>
<td>Option to enter a new time balance for selected users and activities. The value entered replaces the current time balance.</td>
<td>Enter the new time balance, in minutes, in the displayed window.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The balance cannot exceed the Maximum Time to allocate for the Activity Type.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>To view time allocated, go to Configure -&gt; Activity Types -&gt; Manage Activity Types.</td>
</tr>
<tr>
<td>Add Time to Balances</td>
<td>Option to add time to the current balance for selected users and activities. The value entered is added to the current time balance.</td>
<td>Enter the added time, in minutes, in the displayed window.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The balance cannot exceed the Maximum Time to allocate for the Activity Type.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>To view time allocated, go to Configure -&gt; Activity Types -&gt; Manage Activity Types.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
<td>Action</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>![Search By: Activity Type = General Training](49x599 to 201x613)</td>
<td>The search filter for the currently displayed queue is displayed next to the Search By button.</td>
<td>Click to change the search filter. Click a check box to activate a search option, and then enter the search criteria. When you filter your search, you limit the records that display in the grid to those that meet your search criteria.</td>
</tr>
</tbody>
</table>

![Image](303x488 to 519x650)

<table>
<thead>
<tr>
<th>![Image](49x388 to 61x402)</th>
<th>![Image](49x247 to 66x262)</th>
<th><img src="50x738" alt="Image" /></th>
<th>![Image](49x599 to 201x613)</th>
<th>![Image](303x488 to 519x650)</th>
<th>![Image](49x388 to 61x402)</th>
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<td>![Image](49x599 to 201x613)</td>
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<td>![Image](49x388 to 61x402)</td>
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<td>![Image](49x247 to 66x262)</td>
<td><img src="50x738" alt="Image" /></td>
</tr>
</tbody>
</table>

Click to export the displayed grid to an Excel spreadsheet.

* A limit of 3000 records can be exported from the grid.

* To manage the size of the file before exporting, filter the records displayed in the grid.

Check box. Only selected users and activities are affected by time balance changes.

To change time balances for all users and activity types, click the check box at the top of the column; this action inserts a check mark into each check box in the queue. To change time balances for individual user and activity types, click the check box next to each item in the list to be changed.

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1 The result of a rule. When the conditions of a rule's triggers are met, the rule's actions are triggered.

2 A person authorized by a login and password to access the IntraDiem application.
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>User</td>
<td>The user name. For each user, multiple activity types can be displayed.</td>
<td>To sort by user, click the column header. To reverse the sort, click a second time. To display the user's first and last name, hover over the user name with your mouse. To view the user's first and last name, hover over the username with your mouse.</td>
</tr>
<tr>
<td>Activity Type</td>
<td>The activity type(^1) assigned to this user.</td>
<td>Click the column header to sort by activity type. Click a second time to reverse the sort. To view activity type detail, hover over the activity type with your mouse.</td>
</tr>
<tr>
<td>Current Balance</td>
<td>The current time balance, in minutes, for this activity type, for this user.</td>
<td>To change the number of minutes, select one or more users, and then click Reset Time Balances or Add Time to Balances. To view detail, hover over the current balance with your mouse.</td>
</tr>
<tr>
<td>Last Updated</td>
<td>The date that the time balance for this activity for this user was last updated.</td>
<td>Click the column header to sort by date; click a second time to reverse the sort. Hover detail is not available for Last Updated.</td>
</tr>
<tr>
<td>Assigned Tasks</td>
<td>Are any tasks assigned for this user and activity type?</td>
<td>Yes = tasks are assigned; to view detail, hover over this field with your mouse। No = no tasks are assigned। N/A = no task(^2) information is available</td>
</tr>
</tbody>
</table>

\(^1\) A way to organize and group together similar tasks and define the Intradiem delivery experience specific for such tasks.

\(^2\) A specific unit of work that can be assigned to a user. Examples include courses, knowledge base articles, and coaching.
<table>
<thead>
<tr>
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<th>Description</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Page Scroll</td>
<td>indicates the currently displayed page number and the total number of pages for this queue display.</td>
<td>Click arrows to go forward or back one page. Click in the scroll bar to go forward or back multiple pages.</td>
</tr>
</tbody>
</table>
How Time is Added to an Activity Queue Balance

Overview
A user's Activity Queue balance is comprised of two components: an Allocated Balance and an Assignment Balance. The allocated balance consists of time that was either added manually or through a rule to a user's Activity Queue. The assignment balance consists of the sum of the expected duration for each task assigned to the user. The combination of these two balances creates the overall total for the Activity Queue balance by Activity Type. Therefore a user's Activity Queue balance consists of two components for each Activity Type:

- Allocated Balance
- Assignment Balance

Allocated Balance
Any time that has been added to a user's Activity Queue Balance either manually through the user interface or through a rule.

Rule Time Allocation
As part of a rule that uses the Intradiem action of “Add Time to Activity Queue Balance”

When to use
Use this time allocation method when you want to have a recurring amount of time added to a particular set of users' Activity Queue balances. You indicate the number of minutes to allocate. In addition, you indicate the Activity Type to which the minutes are allocated and the user filter to indicate the users who receive the minutes.

When time is added manually it is not removed unless the 'Never accumulate more than' threshold is met.

Examples
- Provide 10 minutes daily to all agents for Email Review activity type
- Provide 30 minute per week to Service agents for back office activity type

If multiple rules are created to add time to the same Activity Type, the maximum time accumulation is capped based on the Never accumulate more than configuration for the activity type.

Manual Time Allocation

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1 A person authorized by a login and password to access the Intradiem application.
2 A task or task bundle assigned to a user.
3 Action based on events and conditions. When the conditions of a rule are met, the rule's actions take place for users that are defined in the rule.
4 A specific unit of work that can be assigned to a user. Examples include courses, knowledge base articles, and coaching.
5 The result of a rule. When the conditions of a rule's triggers are met, the rule's actions are triggered.
6 A way to organize and group together similar tasks and define the Intradiem delivery experience specific for such tasks.
**Time allocated manually through the console - Users / Activity Queues**

Use this time allocation method when a specific set of users need to receive additional time for a specific Activity Type. This time would be incremental time needed that is not covered via an assignment made or a Time Allocation rule.

**Example**

Team member Joe Brown has returned from leave of absence and needs 30 minutes to catch up on reviewing Knowledge Base articles.

> When time is reset for the Users Activity Queue Current Balance, only the Allocated Balance bucket is altered.

> Time can only be manually added to the Allocated Balance up to the maximum accumulation defined in the Activity Type configuration.
Assignment Balance

Time is automatically added to the assignment balance each time an assignment is made to a user based on the expected duration of the respective tasks.

This time allocation method is automatically used each time you make an assignment to the user. The expected duration is for the allocated automatically for the task for each user who receives the assignment. Intradiem then looks for an opportunity to deliver an Activity Session for the expected duration to the user to complete this assignment. No action is required, other than making the assignment for this time allocation method. This ensures that each user receives the time needed to complete each unique assignment.

Example 1

- Assign Sales Agents the Monthly Sales Offers task
- Activity Type "Sales Training"
- The task has an expected duration of 10 minutes.
- Each sales agent receives a 10 minute assignment allocation for the Sales Training activity type

Example 2

- Agent David Smith is transferring to this business unit
- Assign agent the Introduction to Sales bundle
- Activity Type "Sales Training"
- The bundle includes three tasks with a total expected duration of 60 minutes
- David Smith receives a 60 minute assignment allocation for the Sales Training activity type.

This time allocation method does not have a maximum accumulations

If the expected duration of a task is changed, only future assignments are impacted.

ex:

A task has an original expected duration of five minutes. The task is assigned to a set of users. After the assignment is made, the task is edited and the expected duration is increased to ten minutes.

Users with the initial assignment prior to the increased duration, still receive only five minutes. Any future assignment of this task receives ten minutes.

When duplicate assignments are merged, users are allocated only the expected duration one time into their Assignment Allocation.
How Time is Removed from an Activity Queue Balance

Overview
Time can be removed from the Allocated Balance within the Activity Queue Balance in one of four ways:

- by completing an Activity Session
- by deleting a rule
- by using the “Reset Activity Queue Balance” action in a rule
- by manually resetting the allocated balance.

Time can be removed from the Assignment Balance within the Activity Queue Balance in one of two ways:

- by completing an assignment
- by removing an assignment

Removing time from the Allocated Balance
Completing an activity session (from the allocated balance)
Activity sessions from the allocated balance are offered to users so they can complete certain activities that are not direct assignments in the Intradiem system.

Example:

10 minutes is provided to an agent for an Email Review Activity Session

If the session is interrupted, the Allocated Balance is reduced by the number of minutes taken.
When the session ends, the Allocated Balance is reduced by the number of minutes taken.

Deleting a rule with an action of Allocate Time to Activity Queue
Delete a Rule with the action of “Allocate Time to Activity Queue” when you no longer need time regularly allocated (independent of outstanding assignments) to a group of users for an Activity Type.

Example:
Remove the rule that “Provides 10 minutes daily to all agents for Email Review (Activity Type).”

1 Action based on events and conditions. When the conditions of a rule are met, the rule’s actions take place for users that are defined in the rule.
2 The result of a rule. When the conditions of a rule’s triggers are met, the rule’s actions are triggered.
3 A task or task bundle assigned to a user.
4 The allotted time period for an Intradiem task, typically 15 minutes. It is assigned with special attention to work flow and schedules.
Using the Reset Activity Queue Balance Action in a Rule

To reduce the Allocated Balance for a large number of users or to reset the Allocated Balance at a regular interval, a rule which uses the “Reset Activity Queue Balance” action should be leveraged.

Indicate the Activity Type that is impacted, the number of minutes to reset the balance to, and the users to which this action should be performed.

Example

Sales Agents should not receive Must Read time allocated Activity Sessions on Monday. A rule is created and scheduled to run each Monday that leverages the “Reset Activity Queue Balance” action and sets the sales agents’ Must Read Activity Queue balance to zero.

Manually Resetting Activity Queue Balance

If the Allocated Balance needs to be reduced, the reset balance command can be used to reset this portion of the overall time allocation for the Activity Type to the adjusted number of minutes.

Example

A user was given extra time to read through latest Knowledge Base articles. The user has completed this review and does not need additional time for this Activity Type. The allocated balance is reduced as appropriate.

Removing Time by Completing an Assignment

As a user receives an Activity Session to complete a specific assignment, the time used is reduced from the time allocated for the assignment.

Example:

A user is assigned a task\(^2\) with an expected duration of 10 minutes. User receives an Activity Session to complete assignment. User uses entire session. User’s Assignment Allocation for the activity time is reduced by 10 minutes at the end of the Activity Session

\[\text{If an assignment requires agent confirmation and the agent confirms completion during the session, the allocated time for this assignment is set to zero, regardless of whether the agent used all of the time provided to complete the assignment or not.}\]

\[\text{If an assignment requires agent confirmation and the agent fails to confirm completion before the end prompt is accepted}\(^3\), the allocated time for this assignment is reset to the expected duration for the task, regardless of the time used thus far on the assignment. This ensures that when the next Activity Session is offered to complete this assignment, the agent is given the full expected duration to complete the task.}\]

\(^1\)A person authorized by a login and password to access the IntraDiem application.

\(^2\)A specific unit of work that can be assigned to a user. Examples include courses, knowledge base articles, and coaching.

\(^3\)The agent accepted and completed an IntraDiem session during the scheduled/delivered time.
Time Allocation for Assignment that Does Not Require Confirmation

Non-LMS Assignment

If an assignment does not require confirmation, no information is provided to Intradiem to confirm completion of the task. Therefore, when the agent receives and accepts the end prompt, the time for this assignment is up and no further time is offered for this assignment. The Assignment Allocation is reduced by the expected duration of the task.

If an assignment does not require confirmation, when the agent is interrupted during the session, the allocated time for this assignment is reset to the expected duration for the task, regardless of the time used thus far on the assignment. This ensures that when the next Activity Session is offered to complete this assignment, the agent is given the full expected duration to complete the task.

SCORM Scenarios

If an assignment is a SCORM course with completion defined and does not require confirmation, the system uses the defined SCORM completion criteria to evaluate if the assignment is indeed complete. When an agent receives an End prompt, if the assignment has met the SCORM completion criteria, the assignment is considered complete and the Assignment Allocation is reduced by the expected duration for the task.

If an assignment is a SCORM course with completion defined and does not require confirmation, the system uses the defined SCORM completion criteria to evaluate if the assignment is indeed complete. When an agent receives an End prompt, if the assignment has not met the SCORM completion criteria, the assignment is considered to still be in progress. The Assignment Allocation remains unchanged. When the next Activity Session is offered to complete this assignment, the agent is given the full expected duration to complete the task.

If an assignment is a SCORM course with completion defined and does not require confirmation, the system uses the defined SCORM completion criteria to evaluate if the assignment is indeed complete. If the agent is interrupted and the assignment has not met the SCORM completion criteria, the assignment is considered to still be in progress. The Assignment Allocation remains unchanged. When the next Activity Session is offered to complete this assignment, the agent is given the full expected duration to complete the task.

Removing / Deleting an Assignment

If an assignment was made in error is no longer needed, it can be deleted from one or many users and be removed from their queue of assignments to complete.

Example

- A user has moved to a new business unit and several assignments no longer apply.
- An assignment was made in error to a group of users and needs to be removed.

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1Content that is assigned for a user to take during a session.
When an assignment is deleted, the Assignment Allocation is reduced by the expected duration for the task within the assignment that was removed.