* **Dashboard** (CDR) – always lead with the CDR Dashboard showcasing a personalized heads-up display of key telecom activity indicators.
  + Discuss example gate selection shared – *consider pre-demo customization to display and configure gates of interest to stated business needs*
  + Near real-time visualization – most gates refresh as new CDR is received and processed
  + Hover over with pointer and click to drill down to data behind a Summary Gate graph segment our hyperlinked data – opens up a Call Exploration session
  + Toggle display choices within gates - org levels, data sources, date ranges, filters
  + Gates may display graph or data or both - scroll to data below the graph both are enabled
  + Respects users’ authorization for data access (see Directory Security)
  + Share a snapshot of any Summary Gate with others - image (print) or PDF or Excel file (email)
  + Dashboards are per user – each user may/must build their own
  + Choose from a selection of predefined Summary Gates to build your personal Dashboard
  + User may save and toggle between 2 or 3 saved Dashboard views
  + Each Dashboard view may include up to ten Summary Gates
  + Personalize settings for each gate – colors, constraints, fields, graph type
  + Resize and arrange per personal preference – auto saved for next login
  + Option to create new gates from scratch, from templates or modify “provided” gates – name & save
* **Contact Center Dashboard** – if a UCCX play, show Selects real-time display of UCCX stats and Agent state
  + 3 different Summary Gate layouts available – Agent, Queue & Performance Stats
  + Each refreshed every few seconds with current call, queue and Agent status
  + Each offer some level of configuration, sizing, positioning on the Dashboard
  + Select which Queue(s) to display in each – User authorization sensitive
  + Queues may be drawn from multiple UCCX Clusters (Contact Centers) if present
  + Option to toggle a Summary Gate to a large format “Wallboard” view if desired
  + Summary Gate display allows specification of desired Sort options
  + Dashboard offers a Settings Menu to:
    - Definable Thresholds by Contact Center cluster and Queue
    - Set Threshold colors for Good, Fair and Critical conditions
    - Define Messages by Contact Center and Queue – displays scrolling message on Dashboard and Wallboard of those users with access to the Queue
* **Call Exploration** – showcase point-and-click drilldown to call activity as the fastest way to get a summary, detail, exceptions and enhanced visibility into Related Calls (Cradle-to-Grave reporting).
  + Simple View options & constraints control the data presented and how its summarized
  + Select Drill by Organization, check to Show Related Call Legs - *I suggest setting date range for last* ***1 month*** *and* ***All Call Types*** *to get plenty of good call activity after clicking [Get Results]*
  + Click to drill into call detail with related calls – *I suggest choosing the* ***Chicago*** *branch & then* ***Customer Service*** *department & then* ***Rita Cain*** *for some good results*
  + Click to full call detail via magnifying glass icon
  + Click to Reverse Number Lookup via magnifying glass with handset icon
  + Sort call records displayed by any column by clicking on the column header
  + Click on a Related Calls link to see Cradle to Grave association of individual call segments.
  + Share a snapshot of any Call Exploration view with others - image (print) or a PDF, Excel or HTML file (email)
  + Click the breadcrumb chain up top to return to a previous level and re-drill
* **Alarms** – Choose Alarm Definitions under the Administration menu. Discuss ability for near real-time alerts of call activity-based conditions without having to run reports
  + Showcase ability to create user-defined Alarm conditions driven by CDR (or no CDR)
  + Show recent alarms via the Alarms Summary Gate on your Dashboard
  + Recipient notification via text message or email supported
  + Popular Alarm Conditions
    - 911 is a popular example single call alert (not for directing first responders)
    - Robo calls alerting has become popular – X calls from same number in given period of time
    - Poor QoS calls, international calls, high cost calls, long duration calls
    - No CDR
  + Define alarm recipient(s) and method of notification
  + Individual call, multiple calls, X calls within a specified time frame
* **Report Examples** – share selected PDF examples opened, sized and sitting in the tray ready to flip though and chosen to address known needs/pains
  + See recommended list of report examples by business need previously distributed
  + Fewer more impactful examples are typically better then showing many reports – know their needs!
  + *I suggest selecting a few choice report examples that directly address the prospect’s stated need*
  + Showcase the most powerful report capabilities of the Select application
    - How we address Cisco CUIC shortcomings on UCCX reports (see brochure)
    - Integrated QoS reporting (Cisco and Microsoft)
    - Device level visibility (Cisco and Microsoft)
    - Call rating engine if required
    - Depth of predefined reports already on the menus – business centric and a time saver
    - Customizability of report templates
  + Avoid extensive call detail reports unless it is addressing a stated pain
  + Focus on summary reports, exception reports to identify problems and graphical reports to visualize trends
  + *I highly recommend NOT trying to run any reports live during a demo*
* **Report Modules** – identify and showcase 2 popular pre-defined reports menus and those used to create the previously shared report examples. *Briefly* show the easy user experience for creating reports - how they are configured, customized scheduled etc.
  + Reports – motherlode of 150+ predefined reports and templates arranged by business need category
    - Review grouping by business needs (Contact Center reports requires UCCX option)
    - Custom menus, favorite reports and quick search help find desired reports quickly
    - Visit tabs to set parameters for report – Format, Fields, Constraints, Output, Schedule
    - Format for paginated reports (PDF or HTML) or data exports (ASCII or Excel)
    - Work with suggested fields or modify – extensive selection of raw CDR and derived fields
    - Embed graphical analysis of tabular data using integrated graphics tools
    - Constraints control report date range time range and included data sources, call types, departments
    - Save and name customized report designs for re-use and sharing
    - Output to finished report to email, email merge, reports portal or network directory
    - Automatic scheduled production and distribution – hourly, daily, weekly, monthly
    - Organize reports in custom menus with controlled access for end-users
  + Traffic Analysis
    - Same as above but limited a Traffic Analysis business need
    - Emphasize support for both conventional PRI and SIP trunk analysis
    - Peak Concurrent calls is popular
  + Other modules are present, but seldom of interest during a demo
* **Administration** –
  + Directory
    - Explain how this module drives association of calls to people, department and or hierarchy typically missing from CDR
    - LDAP compatible for automated sync
    - Directory import wizard
    - Initial and recurring updates supported
    - Support for fixed and one-time charges by user or department
    - Create your own inventory for telecom equipment and service and associate recurring fees
    - Define security for those with application access – roles based, data source, location, department
  + Trunk and gateway inventory definition and maintenance
  + Billing Descriptions definition and maintenance (only if call rating is desired)
  + Other modules present but seldom of interest during demo