



BroadWorks Call Center Agent/Supervisor

User Guide

Release 14.sp6

Document Version 1

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BroadWorks® Guide

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1 Introduction

1.1 About This Guide

This guide provides step-by-step procedures and reference information for BroadWorks Call Center Release 14.sp6.

BroadWorks Call Center herein is referred to as Call Center.

1.2 Overview

BroadWorks Call Center is a carrier-class, lightweight desktop communications management product for everyday users of Microsoft Outlook or Internet Explorer with the BroadSoft® BroadWorks® telephony softswitch platform.

With BroadWorks Call Center you can manage Call Center activity from your desktop.

BroadWorks Call Center delivers the following real benefits to users:

- An elegant design that is aesthetically pleasing
- An ergonomic design that follows the natural “workflow” of a call from the top to the bottom of the screen
- Improved business processes as only “valid” options are presented to the attendant
- Professional call handling as critical information is available in “real time”

Along with this focus on design, BroadWorks Call Center employs the latest technology platforms and communications facilities.

1.3 Audience

This document is intended for end users of Call Center.

1.4 Additional Resources

For Application Server procedures used by group administrators, department administrators, and users, see the following BroadWorks guides:

- *BroadWorks Application Server Group Web Interface Administration Guide (Parts 1 and 2)*
- *BroadWorks Getting Started Web Interface Administration Guide*
- *BroadWorks Application Server User Web Interface Administration Guide*
- *BroadWorks CommPilot Call Manager User Guide*

1.5 First Time Login for Agents

When starting Call Center for the first time, several items must be correctly configured or checked.

To start Call Center on subsequent occasions, follow the procedure in section [1.7 Subsequent Use](#).

To start Call Center:

Navigate to the program group **BroadSoft**, followed by **BroadWorks Call Center**.

- 1) Click the **BroadWorks Call Center** shortcut.

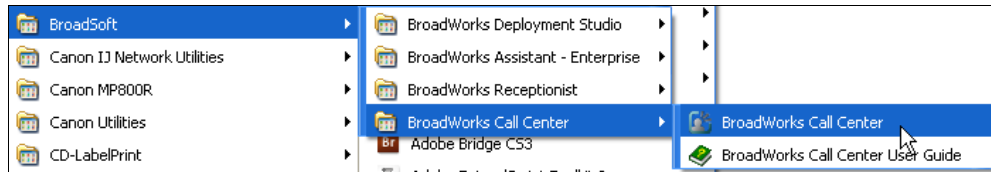


Figure 1 Start Menu

Call Center starts and you are presented with the following login interface:

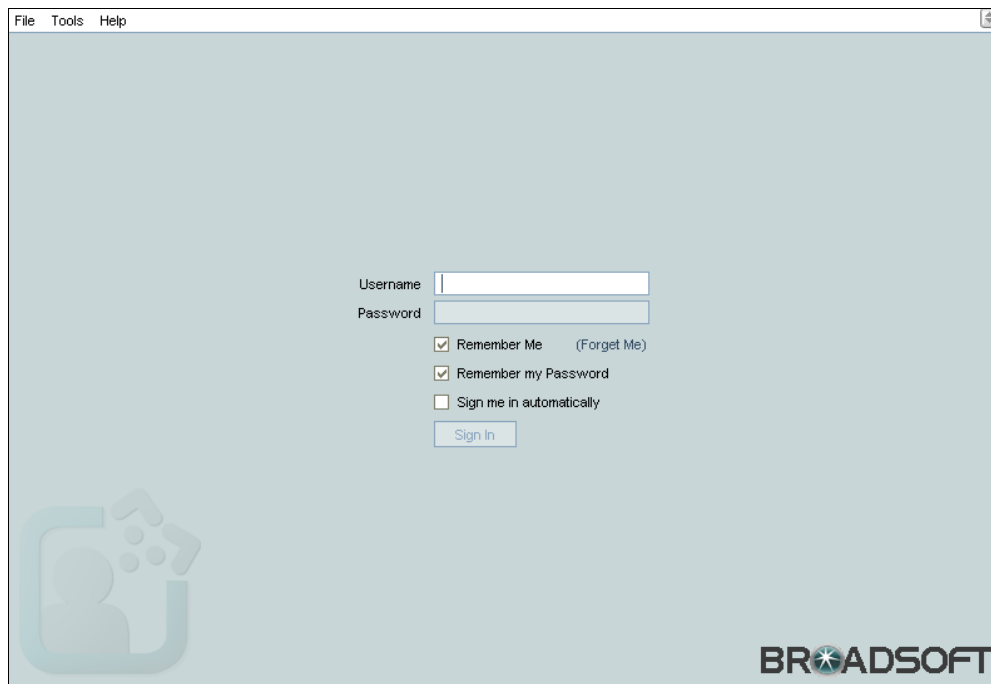


Figure 2 Login Interface

Enter your service provider username and password. If you are unsure of your username and password, contact your service provider.

You can also select the *Remember Me* (or *Forget me*) and the *Save Password* option so that your username and password are remembered on your machine.

Check *Sign me in automatically* to log in to BroadWorks Call Center if a forced logout occurs.

- 3) From the Tools menu, select *Options*. The *BroadWorks Call Center - Options* dialog box opens on the *General* screen. Check *Show call notifications* to show notifications and *In auto answer mode* if you want visible notifications when answering calls automatically. Check *Show call notifications* to show notifications. Check *In auto answer mode* if you want visible call notifications when auto answer is enabled.

The *Language* drop-down list allows the option of changing the language from the default English (US). The language options are:

- English (US)
- French (France)
- German (Germany)
- Italian (Italy)
- Spanish (Spain)
- Spanish (CALA), for Central and Latin America
- Simplified Chinese (PRC), for People's Republic of China
- Any custom language the administrator has specified

Selecting the desired language, click **OK** and restart Receptionist for the changes to take place.

Sync to service provider language, when checked, enables Call Center to automatically match the application language to the language set within the BroadWorks subscribers' profile after signing-in.

NOTE: If no profile match is found, the language will remain set to the current language.

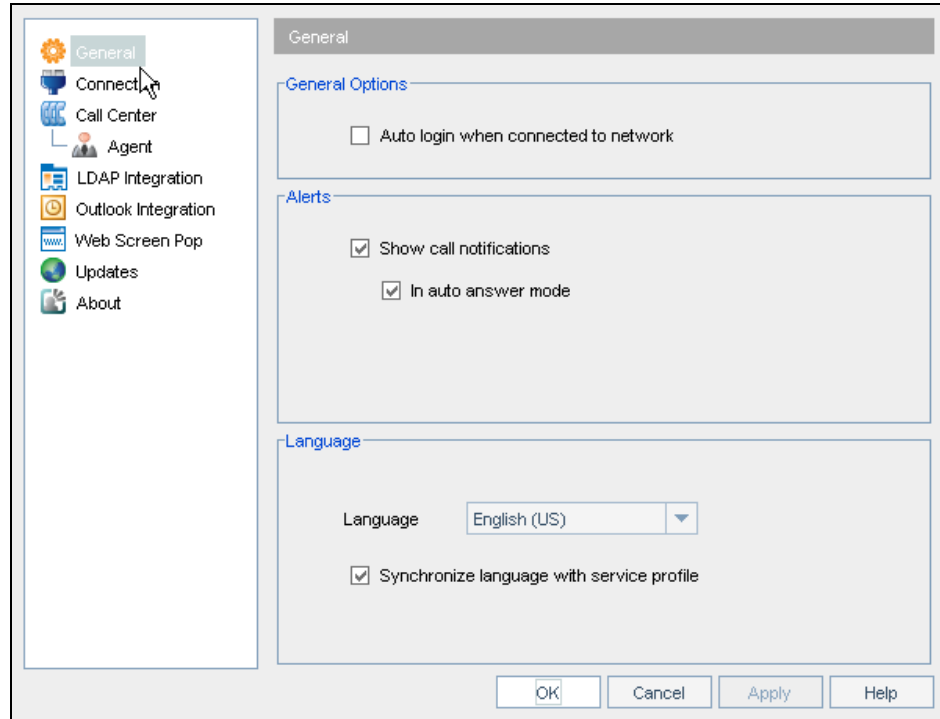


Figure 3 Options Dialog – General Screen

- 2) Click on the *Connection* tab and enter the server's host name (Host Address) and port number (Host Port) for your service provider. To obtain this information, contact your service provider.

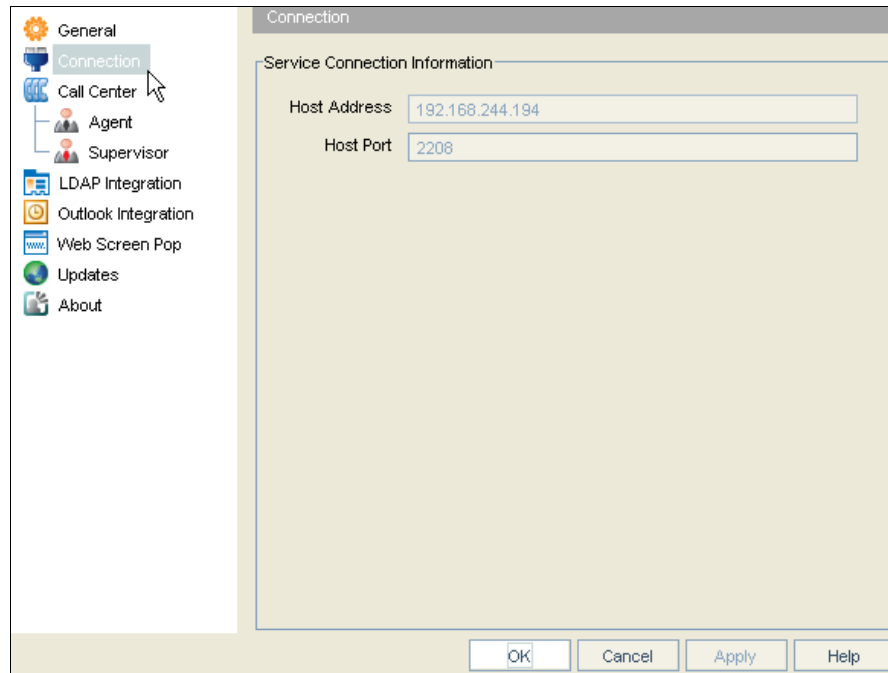


Figure 4 Options Dialog – Connection Screen

- 3) Click on the *Agent* tab. Check *Join* to participate in the Automatic Call Distribution (ACD) for your Call Center. To configure the Agent Settings:

The preferred post sign-in ACD state options are:

- *Available* sets your ACD state as available to take calls when you log in.
- *Unavailable* sets your ACD state as unavailable to take calls when you log in.

The post-call ACD state options are:

- *Wrap-up* configures your status as *Wrap-up* on completion of a call. When using *Wrap-up*, check the *Timed wrap-up period* and select the length of time before your status changes to *Available* upon the completion of a call.
- *Available* displays your status as *Available* upon the completion of a call.
- *Unavailable* displays your status as *Unavailable* upon the completion of a call.

Agent timed Wrap-Up allows the agent to set a single timer for each Call Center in minutes and seconds. *Agent timed Wrap-Up* is overridden if the *Enable maximum ACD Wrap-up timer* on the *Call Center Profile* page is checked. This profile option is set on a per Call Center basis.

The *Archive Frequency* can be set to “Daily”, “Weekly”, “Monthly”, or “Do Not Archive”. The default is set to “Weekly”.

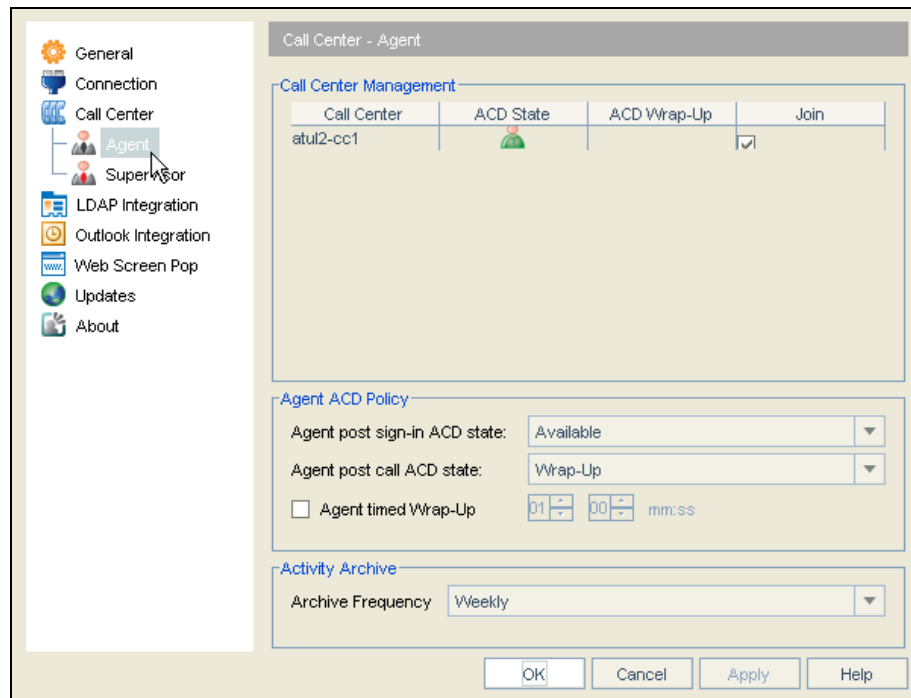


Figure 5 Options Dialog – Call Center – Agent Screen

- 4) Click on the *Updates* tab and enter the proxy connection settings for your network, if it has a proxy server.

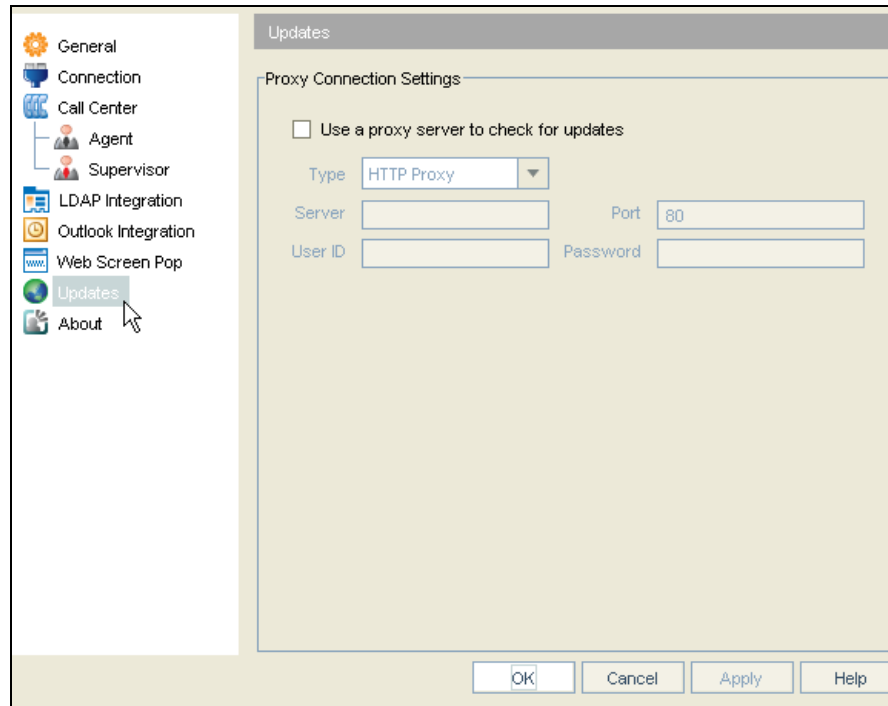


Figure 6 Options Dialog – Updates Screen

- Enter the *Type* of proxy from the drop-down list.
 - Enter the *Server* information.
 - Enter the *Port*.
 - Enter the *User ID* and then the *Password*.
- 5) Click **OK**.
 - 6) Click **LOG IN** from the login screen.

1.6 First Time Login for Supervisors

When starting Call Center for the first time, several items must be correctly configured or checked.

To start Call Center on subsequent occasions, follow the procedure in section [1.7 Subsequent Use](#).

To start Call Center:

- 1) Navigate to the program group **BroadSoft**, followed by **BroadWorks Call Center**.
- 2) Click the **BroadWorks Call Center** shortcut.

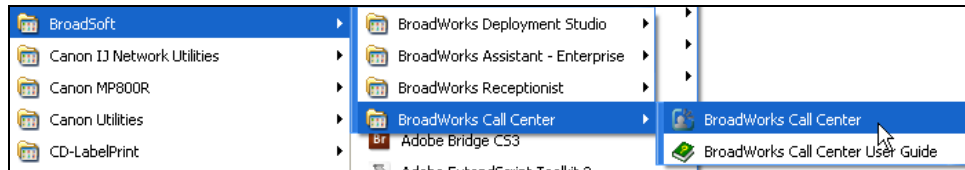


Figure 7 Start Menu

Call Center starts and you are presented with the following login interface:

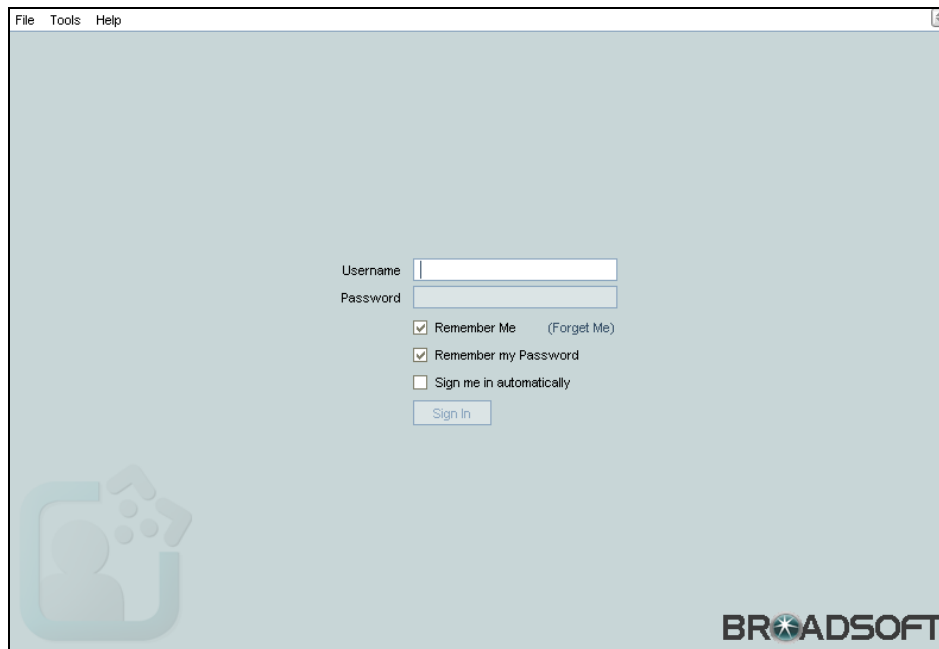


Figure 8 Login Interface

Enter your service provider username and password. If you are unsure of your username and password, contact your service provider.

You can also select the *Remember Me (or Forget me)* and the *Save Password* option so that your username and password are remembered on your machine.

Check *Sign me in automatically* to log in to BroadWorks Call Center if a forced logout occurs.

- 4) From the Tools menu, select *Options*. The *BroadWorks Call Center - Options* dialog box opens on the *General* screen. Check *Show call notifications* to show notifications. Check *In auto answer mode* if you want visible call notifications when auto answer is enabled.

The *Language* drop-down list allows the option of changing the language from the default English (US). The language options are:

- English (US)
- French (France)
- German (Germany)
- Italian (Italy)
- Spanish (Spain)
- Spanish (CALA), for Central and Latin America
- Simplified Chinese (PRC), for People's Republic of China
- Any custom language the administrator has specified

Selecting the desired language, click **OK** and restart Receptionist for the changes to take place.

Synchronize language with service profile, when checked, enables Call Center to automatically match the application language to the language set within the BroadWorks subscribers' profile after signing-in.

NOTE: If no profile match is found, the language will remain set to the current language.

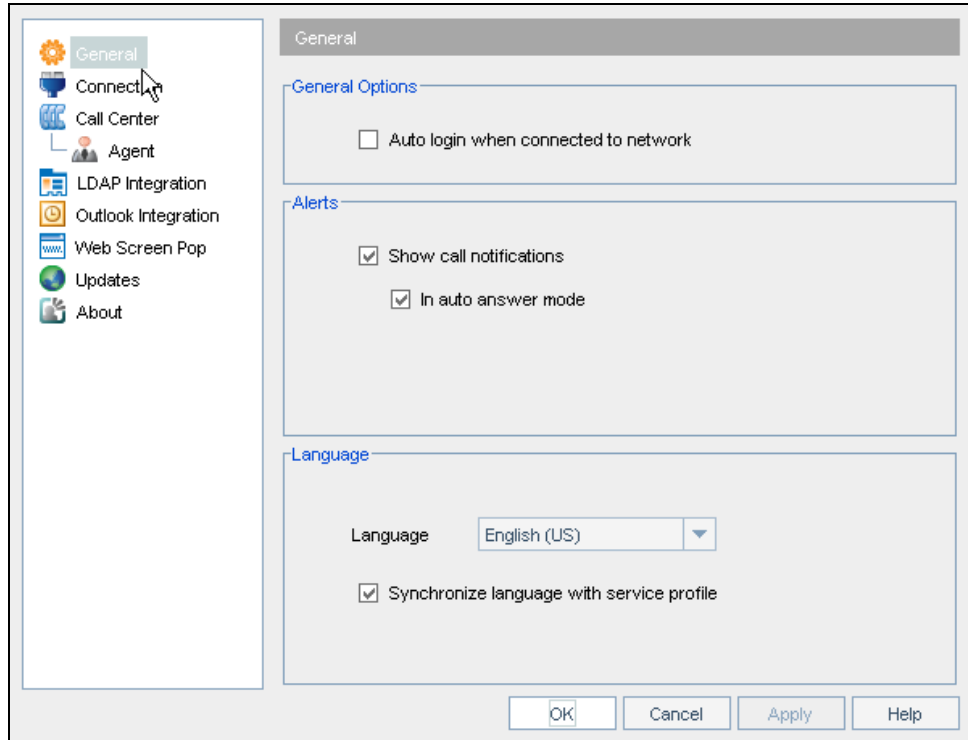


Figure 9 Options Dialog – General Screen

- 4) Click on the *Connection* tab and enter the server's host name (Host Address) and port number (Host Port) for your service provider. To obtain this information, contact your service provider.

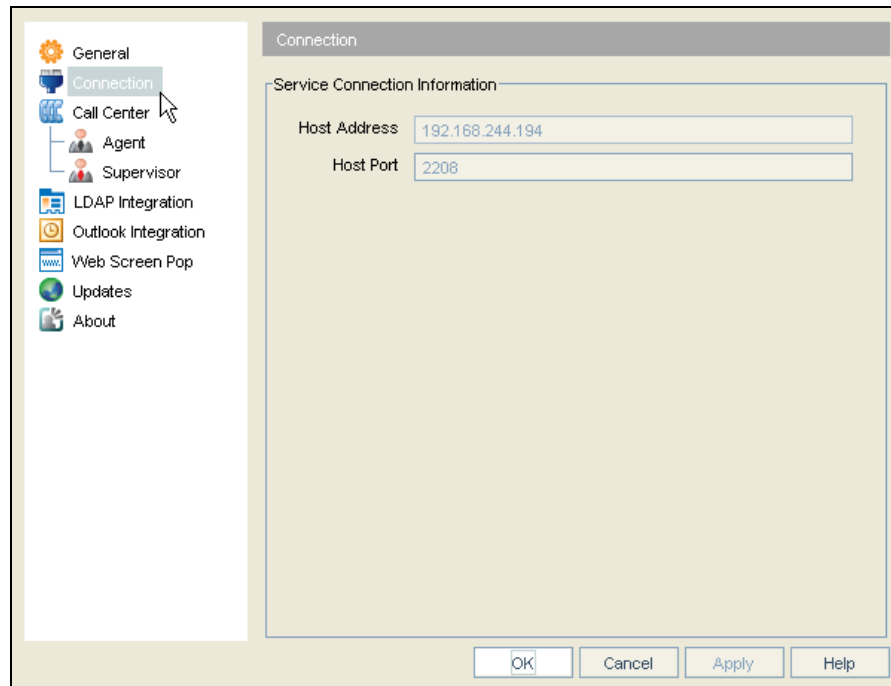


Figure 10 Options Dialog – Connection Screen

- 5) Click on the *Agent* tab. Check *Manage* to control the ACD for your Call Center. To configure the Agent Settings do the following.

The preferred sign-in state options are:

- *Available* sets your ACD state as available to take calls when you log in.
- *Unavailable* sets your ACD state as unavailable to take calls when you log in.

The post-call state options are:

- *Wrap-up* configures your status as *Wrap-up* on completion of a call. When using *Wrap-up*, check the *Time wrap-up period* and select the length of time before your status changes to *Available* upon the completion of a call.
- *Available* displays your status as *Available* upon the completion of a call.
- *Unavailable* displays your status as *Unavailable* upon the completion of a call.

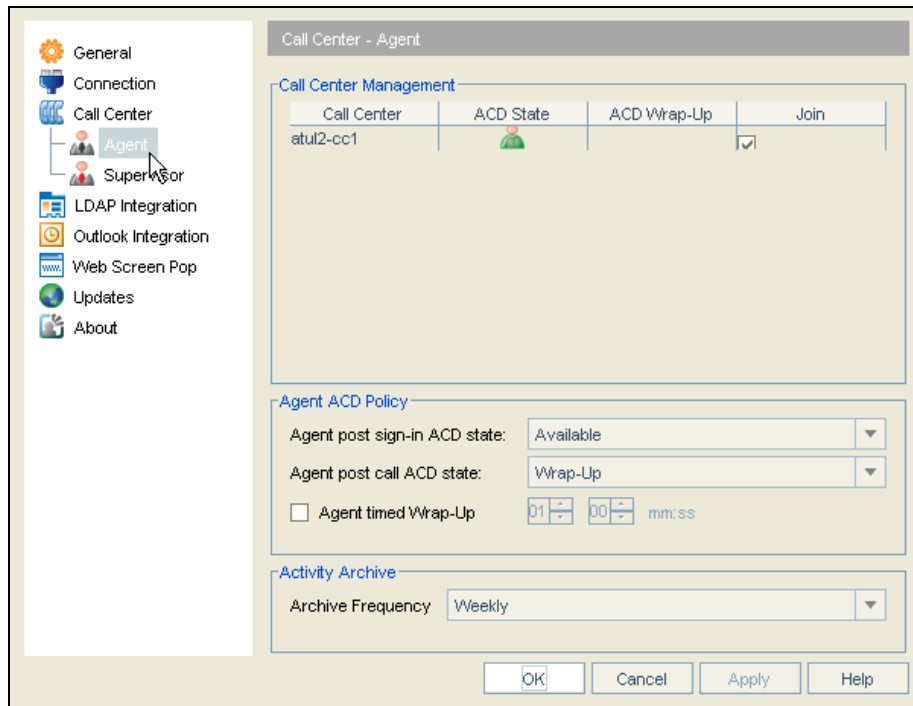


Figure 11 Options Dialog – Call Center – Agent Screen

- 6) Click on the *Update* tab and enter the proxy connection settings for your network, if it has a proxy server.

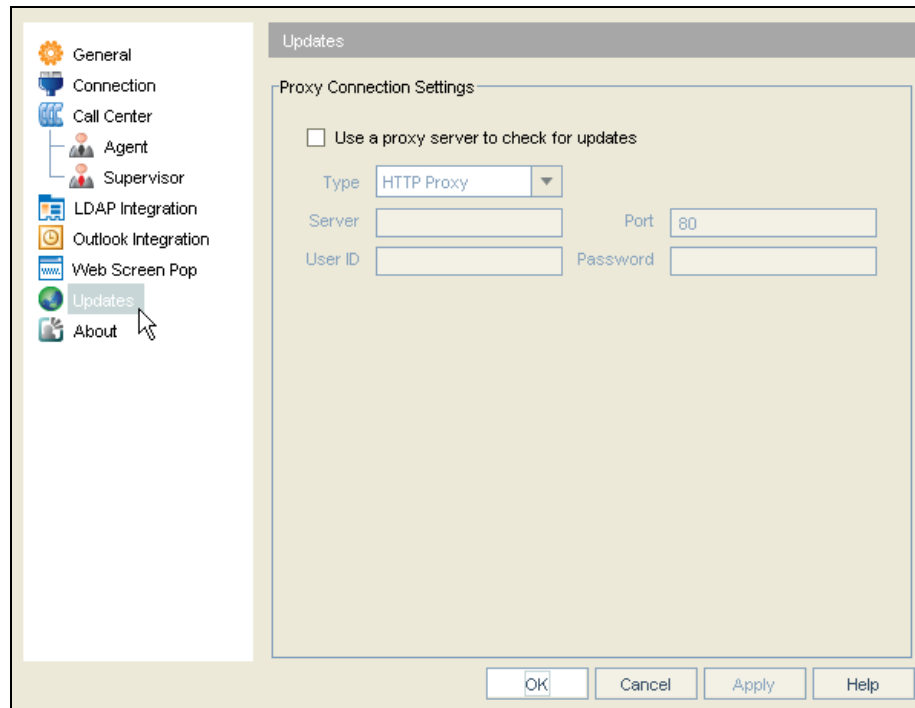


Figure 12 Options Dialog – Updates Screen

- Enter the *Type* of proxy from the drop-down list.
 - Enter the *Server* information.
 - Enter the *Port*.
 - Enter the *User ID* and then the *Password*.
- 7) Click **OK**.
 - 8) Click **LOG IN** from the login screen.
 - 9) From the Tools menu select the *Options* tab.

- 10) Click the *Supervisor* tab. Enter the Call Center password and check *Save password*. This remembers the password for the Call Center you are supervising. This information is available from your service provider. To use a warning tone when barging in, click **Yes**. The default option is “No”.

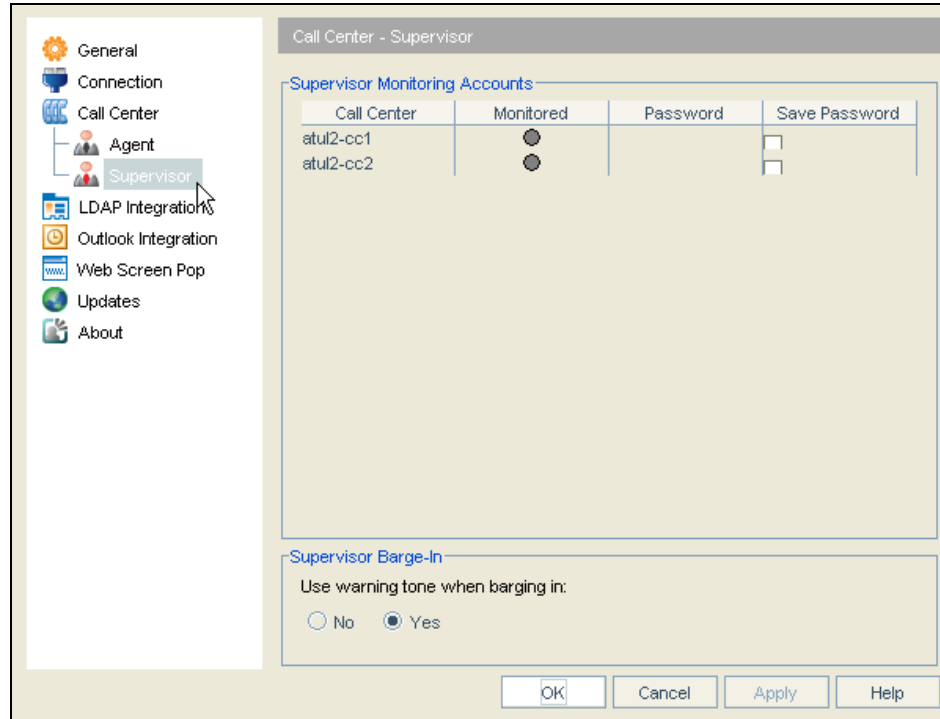


Figure 13 Options Dialog – Call Center – Supervisor Screen

- 11) To save your changes click **OK**.

1.7 Subsequent Use

- 1) Navigate to the program group **BroadSoft**, followed by **BroadWorks Call Center**.
- 2) Click the **BroadWorks Call Center** shortcut.

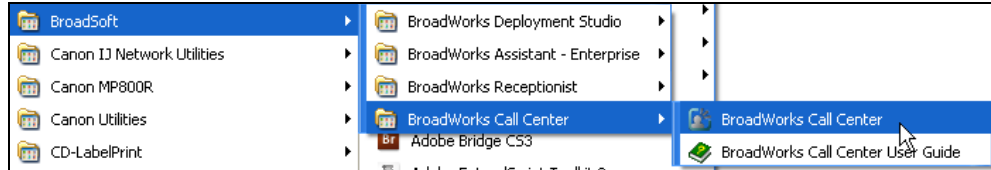


Figure 14 Start Menu

- 3) Click **LOG IN**.

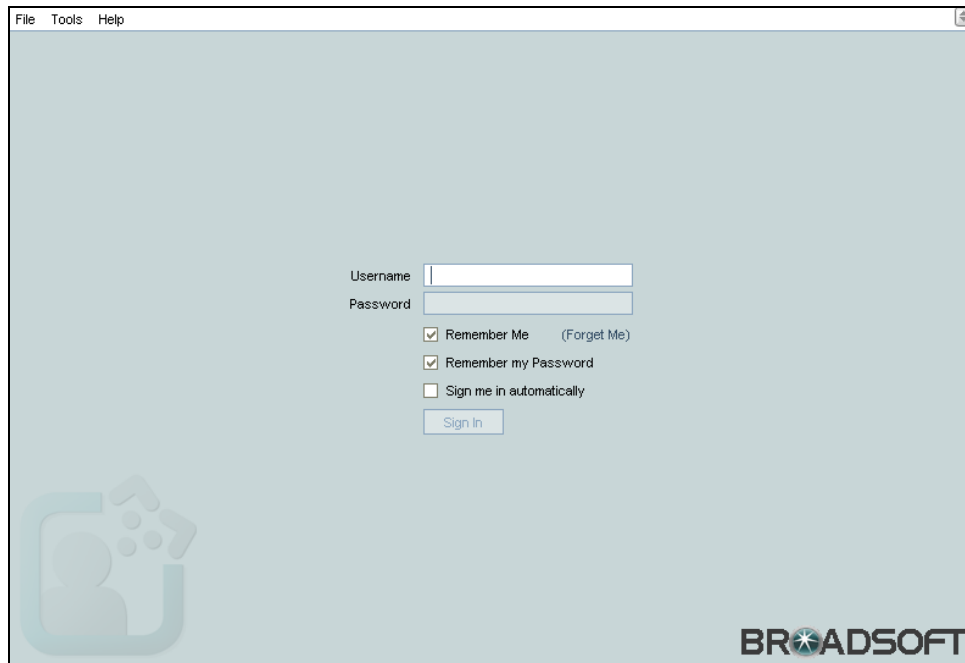


Figure 15 Login Interface

2 Using Call Center

2.1 Main Interface

Figure 16 shows the main interface:

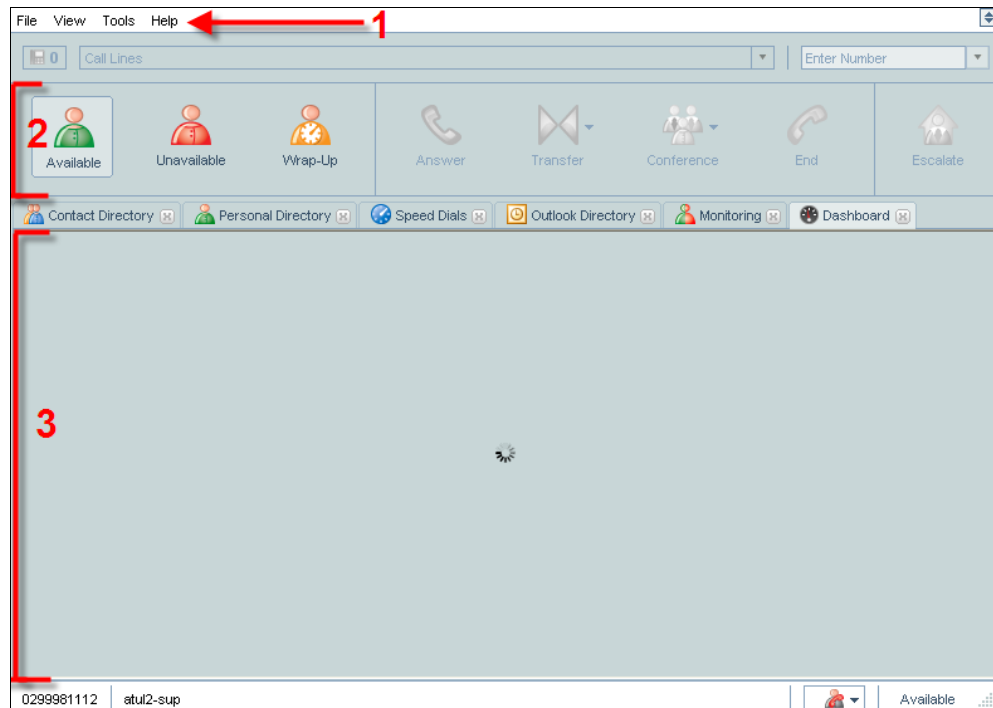


Figure 16 Main Interface

The following legend provides the names to the sections of the main interface. This is followed by more detailed information.

Legend:

1. Menu panel
2. Call Center panel
3. Content panel

Detailed Description

1. **Menu** panel: This is located at the top right-hand panel of the main interface and provides a list of options to configure Call Center.



Figure 17 Menu Panel

- The File menu contains the following menu items:
 - *Sign out* signs you out of Call Center.
 - *Exit* logs you out of Call Center and displays the Login screen.
 - The View menu contains the following menu items:
 - The *Directories* list brings up the Contact Directory, Personal Directory, Speed Dials Directory, LDAP Directory, and Outlook Directory. To display the directories, check the corresponding boxes. If you want them hidden, uncheck the directories you want to hide.
 - The *Reports* list launches the Agent Activity Report, Agent Utilization Report, Queue Performance Report, and Service Level Report. These reports are only available to supervisors, with the exception of the Agent Activity Reports, which are used by agents to view their own statistics only.
 - *Monitoring* makes the teams and Call Centers you are able to see visible. If you want these visible, check the box. If you do not want them visible, leave the box unchecked.
 - *Dashboard* is a summary of statistics on a per Call Center basis. Each AVD or queue is monitored as well as agents. This is only available to supervisors. To make the Dashboard visible, check the corresponding box.
 - *Always on top*, when checked, ensures that Call Center is higher than any other open application.
 - The Tools menu contains *Call History* and *Options* in the drop-down list.
 - The *Call History* dialog box displays information about the history of calls in the queue. It is split up into three sections: Dialed Calls, Received Calls, and Missed Calls. The following list describes the columns on the *Call History* tab:
 - *Name* displays the name of the caller.
 - *Number* is the number of the caller.
 - *Time* displays the date of the call in hours, minutes, the day, the month, and then the year.
 - The *Options* dialog allows you to configure your Call Center. For detailed descriptions of the tabs, see section [2.2 Tools Dialog](#).
2. **Call Center** panel: This is located on the second panel of the main interface.

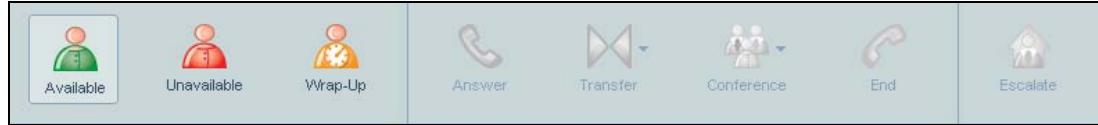


Figure 18 Call Center Panel

It has the following components (from left to right):

- The Available button, when clicked, changes your availability status to *Available* to receive calls.
- The Unavailable button, when clicked, changes your availability status to *Unavailable* to receive calls.
- The Wrap-Up button, when clicked, changes your status to *Wrap-up*. Time allocated to the wrap up is captured in agent statistics.
- The Answer button, when clicked, picks up the active incoming call. If your device is Advanced Call Control-compliant, your Answer button doubles as your Hold button according to the context of your call.
- The Transfer button, when clicked, transfers the active call. There are three types of call transfers available. For more information, see section [2.12.2 Blind Transfer Call](#), section [2.12.3 Transfer Call with Consultation](#), and section [2.11 Manage Queues](#).
- The Conference button, when clicked, initiates a conference call.
- The End button, when clicked, disconnects the active call.
- The Escalate button, when clicked, makes a new call to the selected supervisor and puts the active call on hold.
- The Barge-In button is only for supervisors. When clicked, it allows you to barge in on the active call.
- The Call Pick-Up button is only for supervisors. When checked, it allows you to pick up an unanswered call.

NOTE: You must be assigned the BroadWorks Directed Call Pick-Up with Barge-In feature to use the Barge-In button. Contact your administrator to activate this service.

3. Content panel: This is located on the third panel of the main interface.

It has the following components (from left to right):

- The *Contact Directory* tab displays a list of all users in your BroadWorks enterprise or group.



Figure 19 Contact Directory Tab

The following list describes the columns on the *Contact Directory* tab:

- *Name* displays the name appearing in your BroadWorks Group Directory.
- *Extension* is the number appearing in your Group Directory.

- *Department* is the department appearing in your Group Directory.
- *Phone* is the telephone number appearing in your Group Directory.
- *Mobile* is the mobile number appearing in your Group Directory.
- The *LDAP Directory* tab displays information from your Lightweight Directory Access Protocol (LDAP) Directory. If the group you belong to has not been assigned the LDAP Integration service, or the service is assigned but is turned off, the tab does not display any entries.



Figure 20 LDAP Directory Tab

The following list describes the columns on the *LDAP Directory* tab:

- *Name* is the name appearing in your LDAP Directory.
- *Title* is the title appearing in your LDAP Directory.
- *Phone* is the telephone number appearing in your LDAP Directory.
- The *Personal Directory* tab displays information from your Personal Directory in CommPilot Web Portal.



Figure 21 Personal Directory Tab

The following list describes the columns on the *Personal Directory* tab:

- *Name* is the name appearing in your CommPilot Web Portal Personal Directory.
- *Phone* is the telephone number appearing in your CommPilot Web Portal Personal Directory.
- The *Speed Dials* tab displays information from your Speed Dial Directory in Call Center.

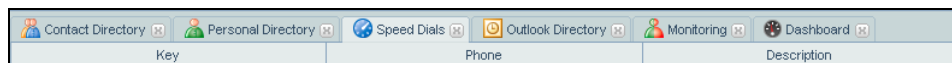


Figure 22 Speed Dial Tab

- *Speed Code* is the code associated with the speed dial.
- *Phone* is the telephone number associated with the speed code.
- *Description* is the description of the speed dial.
- The *Dashboard* tab displays a bar chart of all Call Center queue status along with a per-queue summary table. This is only available to supervisors. The Dashboard presents the health of each automatic call distribution (ACD) or queue they are managing as well as their agents. You can toggle through the data and resize it using a horizontal splitter bar.

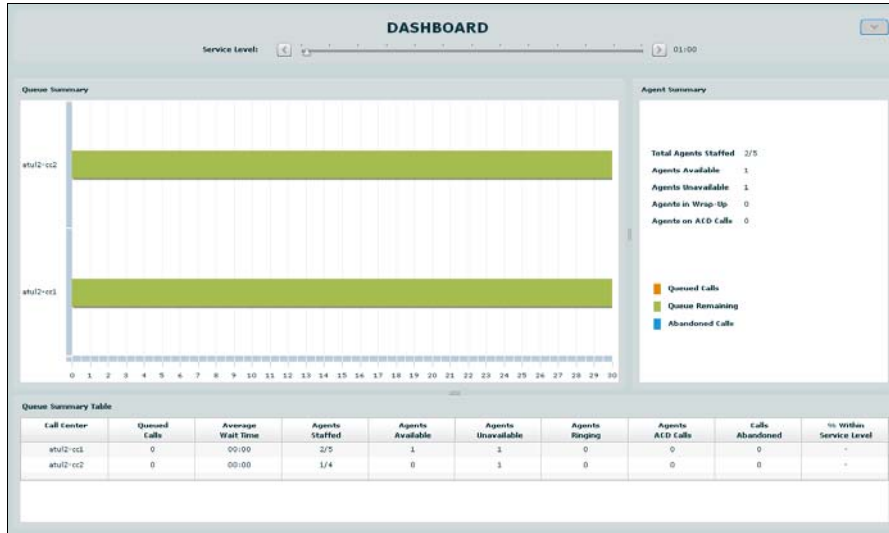


Figure 23 Dashboard Tab

- The *Monitoring* tab displays a real-time view of the teams and Call Centers assigned to you. This is only available to supervisors. The Call Centers can be expanded by clicking on the left-hand plus icon corresponding to each Call Center.

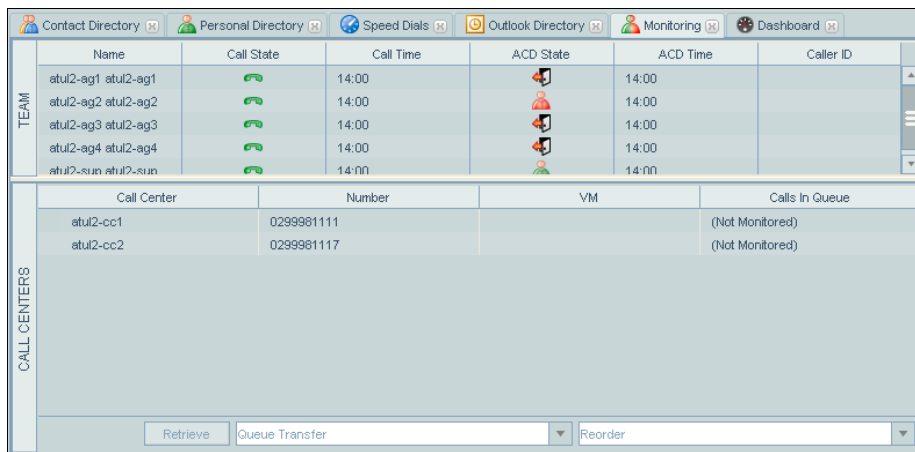


Figure 24 Monitoring Tab

- The Agent Activity Report displays information about the grade of service or the measure of how long it took for the call offered to be answered. This can be set for all agents. If an agent has made the report, it only contains their information. For more information, see section [2.8.3 Agent Activity Report](#).

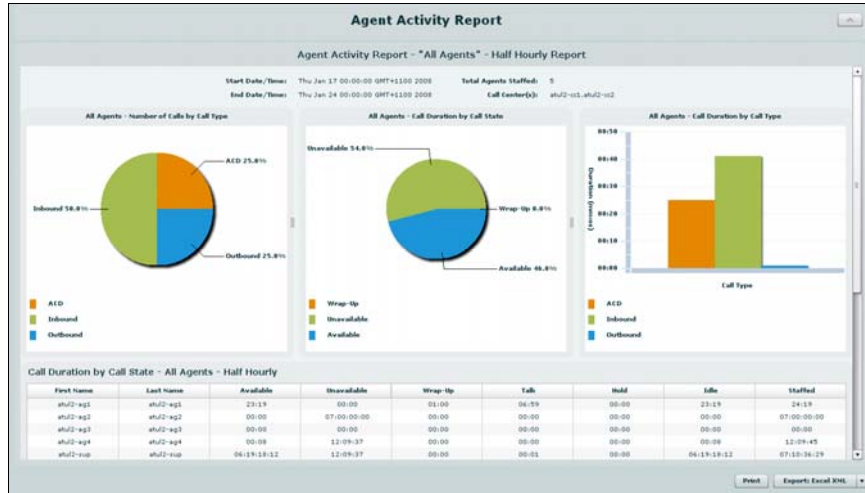


Figure 25 Agent Activity Report

- The Agent Utilization Report displays information about the agents' call handling activity. This can be set to "All Agents". For more information, see section [2.8.4 Agent Utilization Report](#).

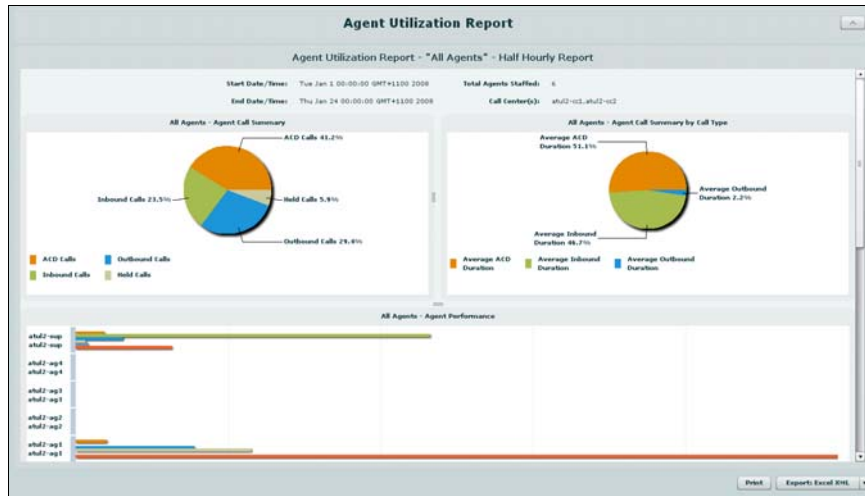


Figure 26 Agent Utilization Report

- The Queue Performance Analysis Report displays information about the performance of the queue. Real-time reports are shown in a viewer and refreshed at regular intervals. For more information, see section [2.8.5 Queue Performance Analysis Report](#).

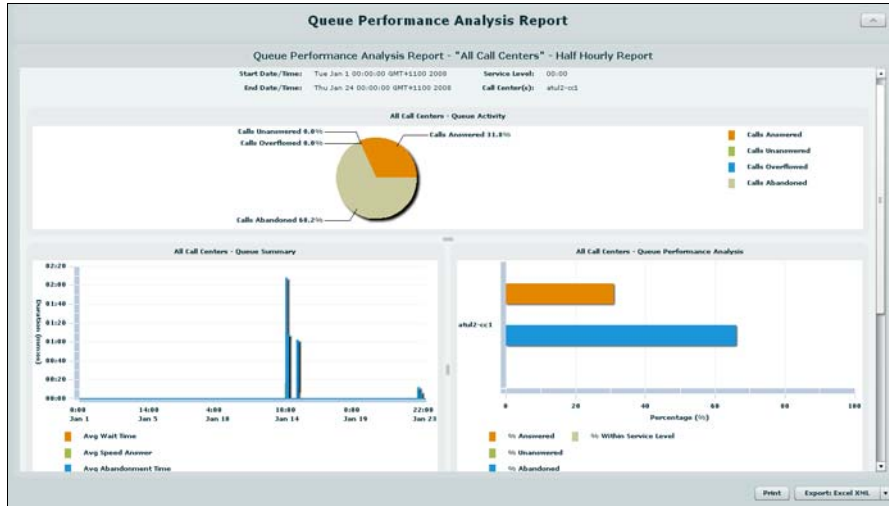


Figure 27 Queue Performance Report

- The Service Level Report displays information about the grade of service or the measure of how long it took for the calls offered to be answered. Real-time reports are shown in a viewer and refreshed at regular intervals. For more information, see section [2.8.6 Service Level Report](#).



Figure 28 Service Level Report

2.2 Tools Dialog

The *Tools* dialog box is used to configure user/service provider settings and preferences. The dialog box can be displayed from the Tools menu by selecting *Tools – Options*. It is available on both the login and main interface screens. The dialog box displays the tabs shown in the following sub-sections:

2.2.1 General Tab

The *General* tab contains miscellaneous features that improve the usability of Call Center.

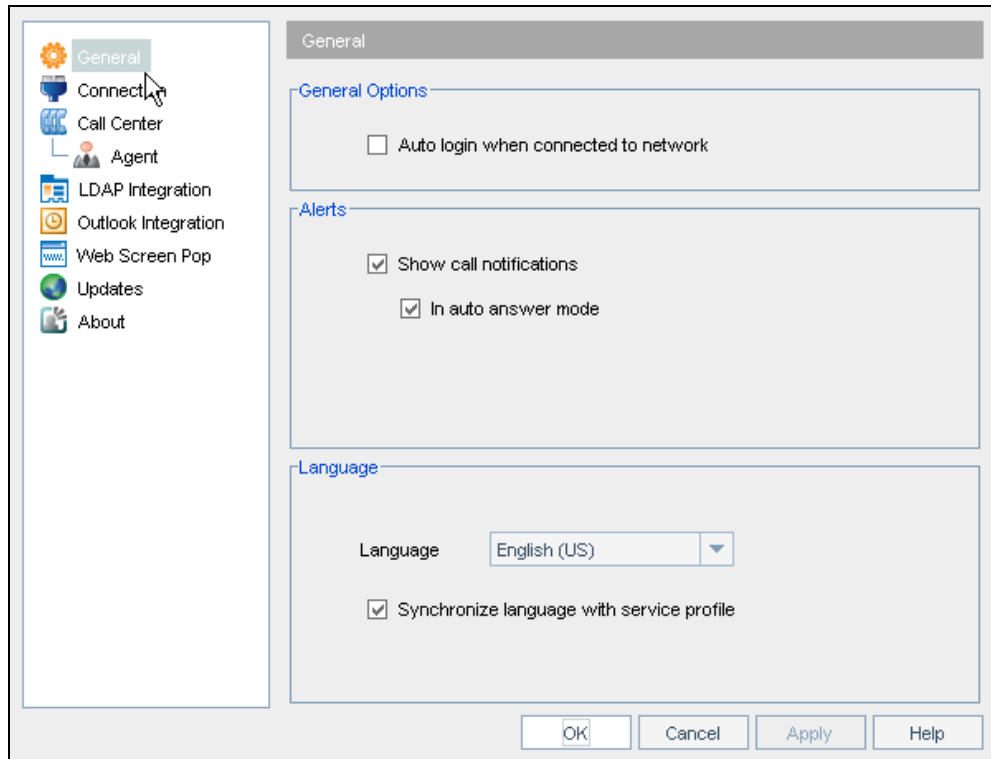


Figure 29 Options Dialog – General Screen

The *General Option* is as follows:

- *Auto login when connected to network* connects you to Call Center as soon as the network is detected.
- *Show call notifications* ensures notifications are visible when there is an incoming call.
- *In auto answer mode*, when checked, ensures that notifications are visible when there is an incoming call, despite it being automatically answered.

The *Language* options are as follows:

- The *Language* drop-down list allows the option of changing the language from the default English (US). The language options are:
 - English (US)
 - French (France)

- German (Germany)
- Italian (Italy)
- Spanish (Spain)
- Spanish (CALA), for Central and Latin America
- Simplified Chinese (PRC), for People's Republic of China
- Any custom language the administrator has specified

Selecting the desired language, click **OK** and restart Call Center for the changes to take place.

- *Synchronize language with service provider*, when checked, enables Call Center to automatically match the application language to the language set within the subscribers' BroadWorks profile after signing-in.

NOTE: If no profile match is found, the language will remain set to the current language.

2.2.2 Connection Tab

Click on the *Connection* tab to configure the connection information required to connect to your service provider.

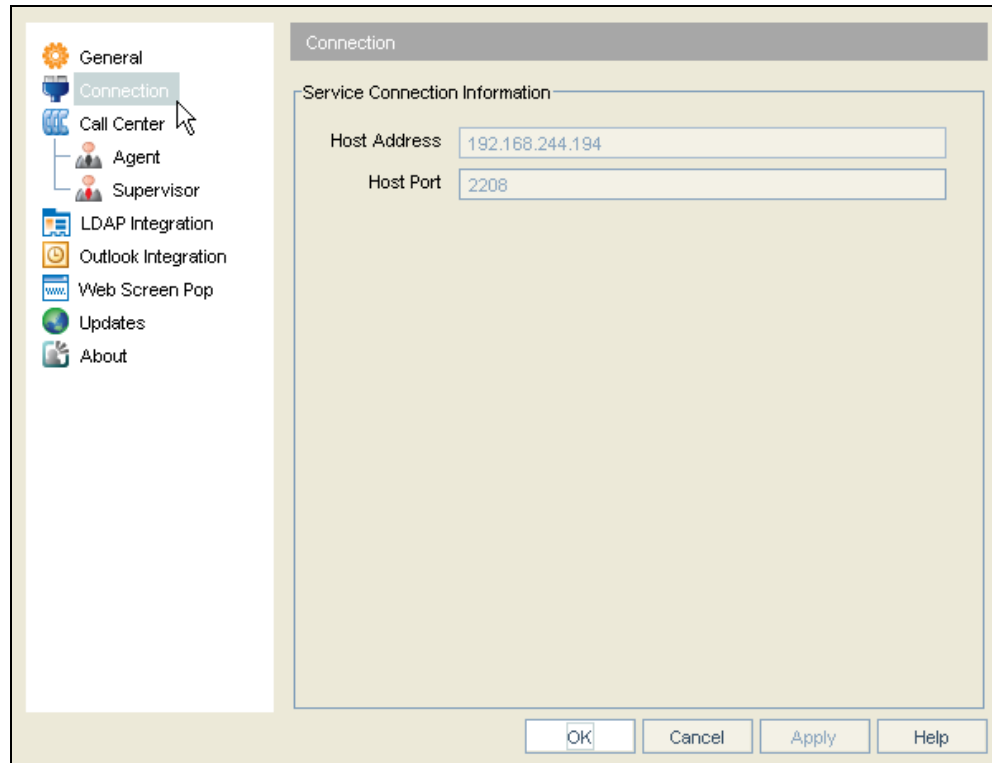


Figure 30 Options Dialog – Connections Screen

The *Server Connection Information* is as follows:

- The *Host Address* (Server URL) is the host name/IP address for service. This is compulsory and can be obtained from the service provider.
- The *Host Port* (Server Port) is the port number for service. This is compulsory and can be obtained from the service provider.

2.2.3 Call Center – Agent Tab

Click on the *Call Center – Agent* tab to see your settings as a Call Center agent.

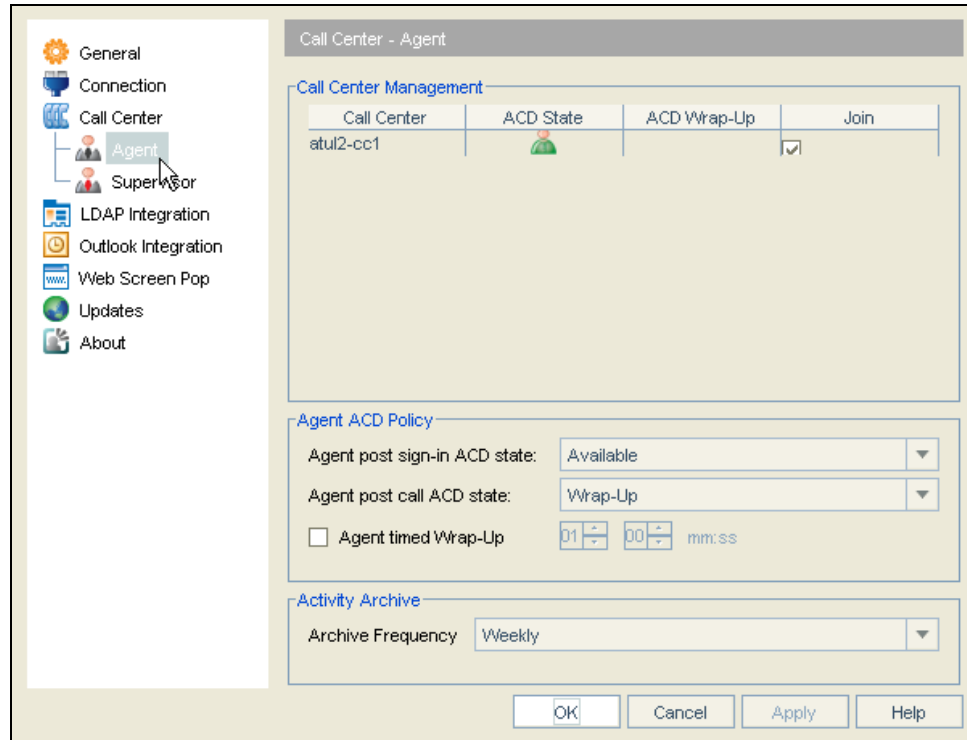


Figure 31 Options Dialog – Agent Screen

The *Call Center Management* options are as follows:

- *Call Center* is required. Contact the group administrator if your Call Centers do not appear.
- The *ACD State* displays your availability. The login states are as follows: **Green** is logged in. **Red** means your last login failed. **Grey** indicates you are not logged in.
- *ACD Wrap-Up* defines the time allowed for a wrap-up in that Call Center.
- *Join*, when checked, ensures that you are a member of Call Center.

The *Agent ACD Policy* options are as follows:

- The *Agent post sign-in ACD state* is compulsory. Select the login state from the drop-down list. The two possible states are *Available* and *Unavailable*.
- The *Agent post call ACD state* is required. Select the post call state from the drop-down list. The three possible states are *Wrap-up*, *Available*, and *Unavailable*.
- *Agent timed Wrap-Up* should be checked if you want to indicate that a wrap-up state is bound in time. Select the time allotted to the wrap-up state from the drop-down list in minutes and seconds (mm:ss).

The *Activity Archive* option is as follows:

- *Archive Frequency* allows you to allocate how frequently the Agent/Supervisor client call and ACD event records are archived. The options from the drop-down list are *Do Not Archive*, *Daily*, *Weekly*, and *Monthly*.

The archive is saved at the desired interval as a comma separated value (CSV) file in the following path:

`<Drive>:\Documents and Settings\<Windows_Username>\Application Data\BroadSoft\BW Call Center\profiles\<BW_UserID>\statistics` where:

- *Drive* is the drive letter where your profile is stored (typically C)
- *Windows_Username* is your Windows user name
- *BW_User_ID* is your BroadWorks user ID

The following events are captured based on activity that occurs on the Agent/Supervisor client (irrespective of ACD or direct inbound or outbound calls):

Statistic	Description	Allowed Values	Example Value
BW User ID	BroadWorks user ID	String	jsmith@abc.net
Call Center ID	Call Center ID for inbound ACD calls only	String, null	ABCSales
Availability	Agent's joined state	Joined, Not Joined, null	Joined
ACD State	Agent's ACD state	Sign-On, Available, Unavailable, Wrap-Up, Sign-Out, null	null
Call ID	ID of the call	String, null	192.168.1.5:1
Call State	State of the call	Idle, Incoming, Outgoing, Active, Held, Remote Held, Detached, Released, null	Incoming
Personality	Originator flag of the call	Integer (0, 1, -1) 0 = BroadWorks 1 = User -1 = null	0
Remote Name	External caller name	String or null	null
Remote Number	External caller number	String or null	5555551234
Last Redirected Name	Last redirected name	String or null	Jane Doe
Last Redirected Number	Last redirected number	String or null	null
Time	Date stamp of record	Long Date/Time Format	2008-04-03 12:08:17.859

NOTE: Each row in the archive file records a *single* event change and as such, columns like Availability, ACD State, and Call State may contain null values since an alternate column value caused the event change. For example, Wrap-Up is stored in ACD State while Call State (and other columns) store null.

2.2.4 Call Center – Supervisor Tab

Use the *Call Center – Supervisor* tab to configure your settings as a Call Center supervisor.

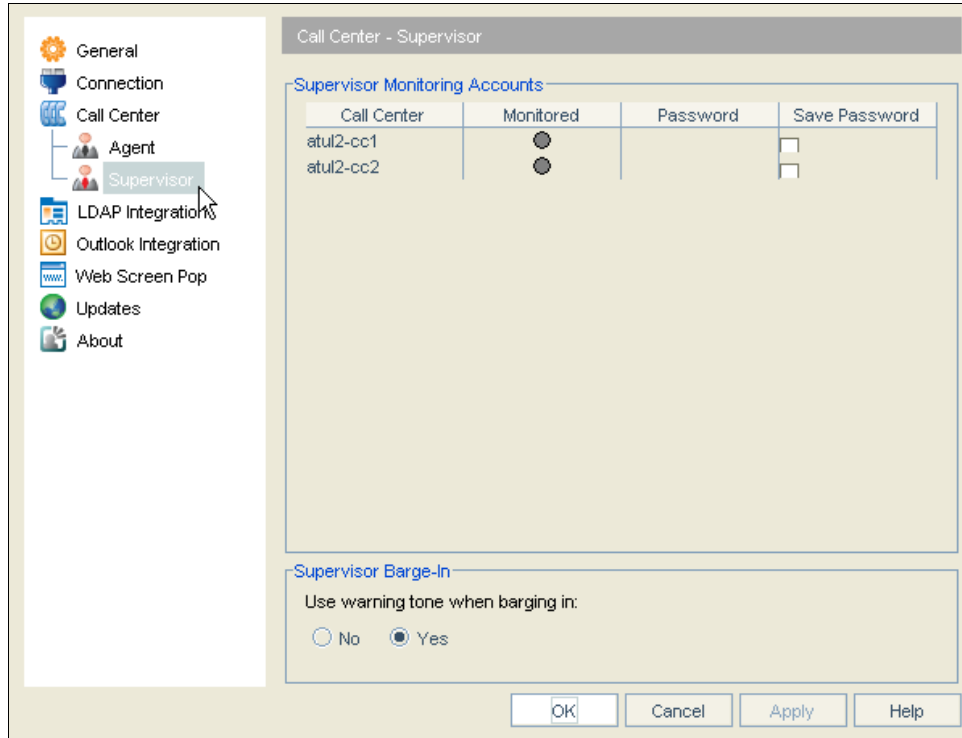


Figure 32 Options Dialog – Supervisor Screen

The following *Supervisor Monitoring Accounts* labels correspond with the columns:

- *Call Center* displays the phone number of Call Center assigned to you. For information on assigning Call Centers, refer to the *BroadWorks Application Server Group Web Interface Administration Guide (Parts 1 and 2)*.
- *Monitored* is your status in Call Center. The login states are as follows: **Green** is logged in. **Red** means your last login failed. **Grey** indicates you are not logged in.
- *Password* is the text field where you type the password used to log in to Call Center. This password must correspond to the password of Call Center on the BroadWorks web portal.
- Check *Save password* if you wish to save your password for the next logins.

Following is the *Supervisor Barge-In* option.

Use warning tone when barging in has the options of Yes or No. If you wish to notify agents when a supervisor is barging in on a call, select “Yes”. Otherwise, select “No”.

2.2.5 LDAP Integration Tab

Use the *LDAP Integration* tab to configure your LDAP settings.

Contact your system administrator if you do not know the appropriate settings.

NOTE: Make sure you have correctly imported a valid certificate in the Java Key Store (JKS) with the *keytool* using the following procedure:

1. Click **Start** button and select "Run...".
2. Type "cmd" and click **OK**.
3. Type "<Java Runtime Path>\bin\keytool -import -alias <aliasname> -file <path><certificate file name> -keystore %JAVA_HOME%\jre\lib\security\cacerts".

To verify the certificate:

1. Click **Start** button and select "Run...".
2. Type "cmd" and click **OK**.
3. Type "<Java Runtime Path>\bin\keytool -printcert -file <path><certificate file name>".

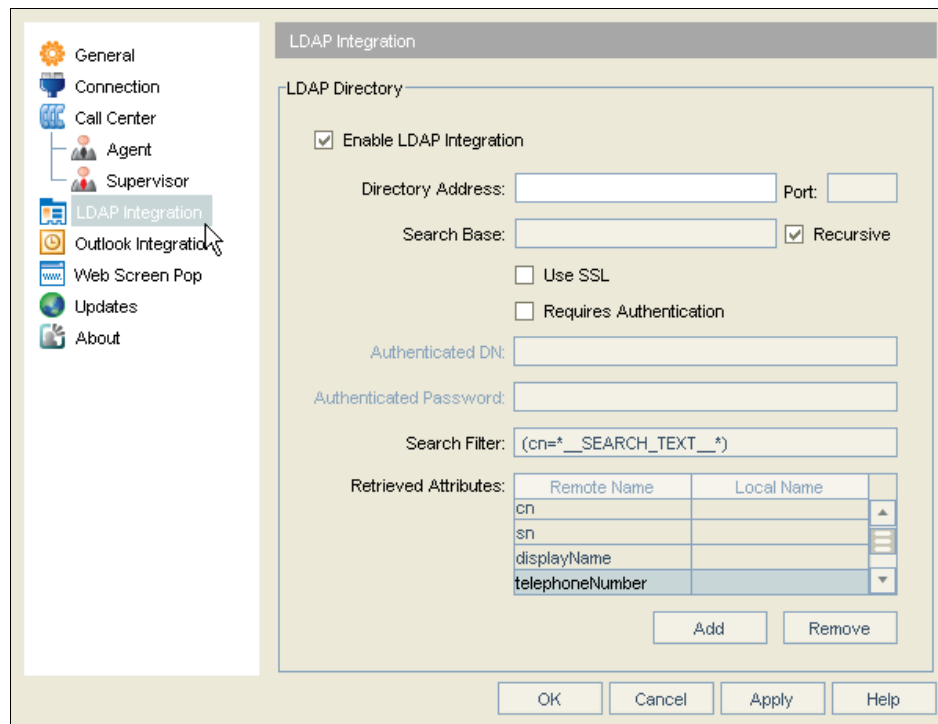


Figure 33 Options Dialog – LDAP Integration Screen

The *LDAP Directory* options are as follows:

- *Enable LDAP Integration* determines whether Call Center provides LDAP directory lookup services. Checking this box enables the controls on the *Directory* page.
- *Directory Address* specifies the network address of the LDAP Directory server.
- *Port* is the port number for the LDAP server. This is compulsory and can be obtained from your system administrator.
- *Search Base* determines the location in the directory server tree that Call Center looks in when executing a search.
- *Recursive*, when checked, searches all sub-trees within the search base until the specifications are found.
- *Use SSL (Secure Sockets Layer)* determines whether Call Center uses SSL to connect to the directory server. Note that enabling SSL may require the use of a different port.
- *Requires Authentication* indicates whether Call Center must provide a user name and password to the directory server to conduct searches.
- *Authenticated DN* is the user name Call Center uses when connecting to the directory server when *Requires Authentication* is checked.
- *Authenticated Password* corresponds to the *Authentication DN*.
- *Search Filter* specifies an additional search filter to apply to all directory searches. For example, to include the search criteria in the filter you must include (cn=*_SEARCH_TEXT_*). Alternatively, in another example, "(telephoneNumber=*)" restricts search results to users who have a telephone number assigned.
- *Retrieved attributes* is a table that controls the way that Call Center maps attributes returned from the directory server to columns displayed in the list of search results.
- In each row of the table, enter an *LDAP* attribute in the *Remote Name* column. In the *Local Name* column, enter a corresponding local attribute. Typical *Remote Name* values are: "cn", "sn", "telephoneNumber", "mobile", "homePhone", "mail".

2.2.6 Outlook Integration Tab

Click on the *Outlook Integration* tab to enable and disable the use of Microsoft Outlook with Call Center. As of Outlook 2007 you are unable to dial a contact in your “in” box using the right click-to-dial function.

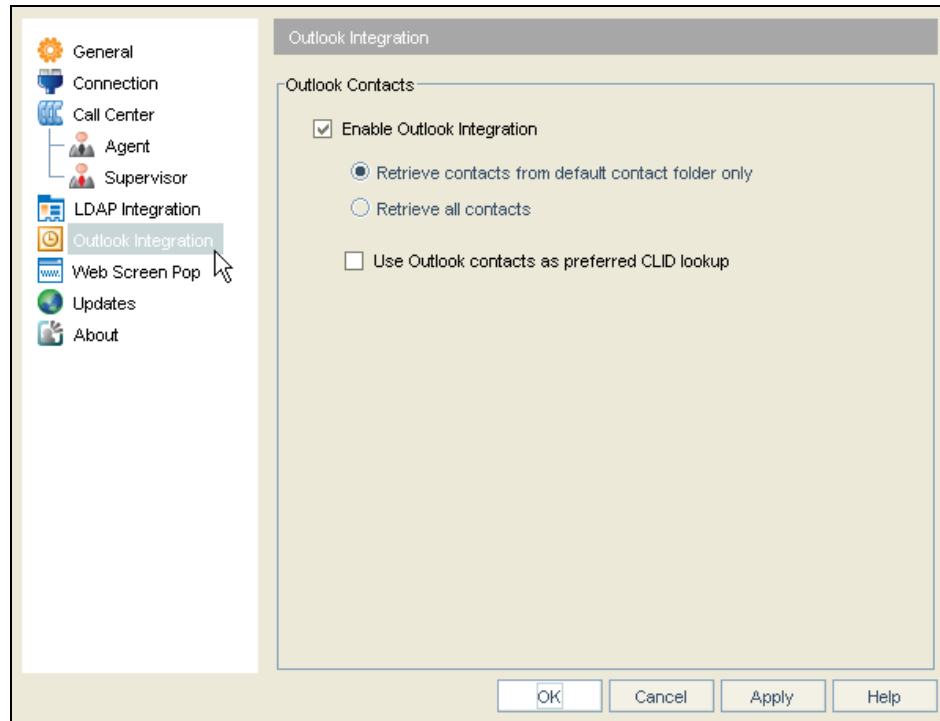


Figure 34 Options Dialog – Outlook Integration Screen

- The *Enable Outlook Integration* check box, when checked, makes sure that the Outlook integration features are activated. When unchecked, the toolbar is unavailable within Outlook and you are unable to dial contacts directly.
- The *Retrieve contacts from default contact folder only* option searches for and retrieves contacts stored in the default *Contacts* folder within Outlook.
- The *Retrieve all contacts* option searches for and retrieves contacts stored in any Outlook folder.
- *Use Outlook contacts as preferred CLID lookup* (for incoming calls) when checked, uses the information saved in your Outlook contact list when displaying information about callers, instead of using group settings or other calling line ID information.

2.2.7 Web Screen Pop Tab

The *Web Screen Pop* screen allows you to configure a web screen that you can open from the *Call Notification* window.

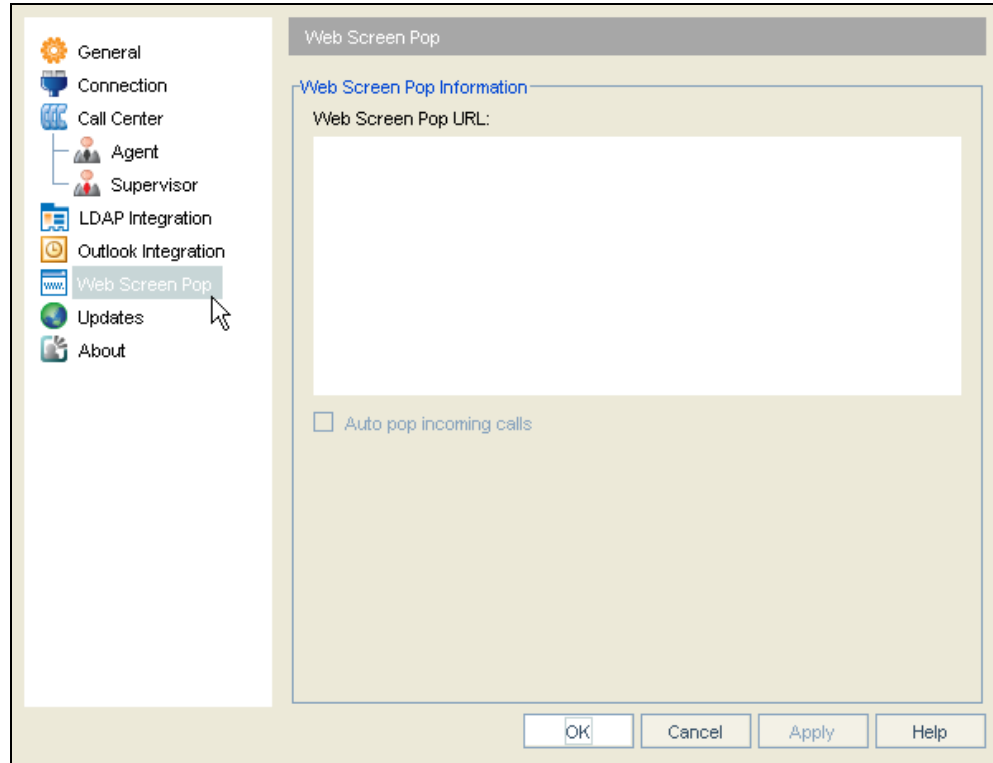


Figure 35 Options Dialog – Web Screen Pop Screen

The *Web Screen Pop URL* determines the URL that Call Center Agent/Supervisor opens using the default browser when you click **Web Screen Pop** in the call notification popup window. In addition to the URL, there are a number of optional parameters that the client can pass to the browser. The following list summarizes these parameters:

- **__USER__**: The user's BroadWorks ID. (Note that in this case the "user" is the BroadWorks subscriber.)
- **__FIRST__**: The first name of the user.
- **__LAST__**: The last name of the user.
- **__EMAIL__**: The e-mail address of the user.
- **__GROUP__**: The name of the BroadWorks group the user belongs to.
- **__SERVICE_PROVIDER__**: The name of the BroadWorks service provider the user belongs to.
- **__PHONE__**: The phone number of the user.
- **__REMOTE_PHONE__**: The phone number of the remote party.
- **__REMOTE_NAME__**: The name of the remote party (when available).
- **__CALL_TYPE__**: "Incoming" or "Outgoing".

Auto pop incoming calls when checked, will launch the default browser web screen pop automatically, without the user being required to click the web screen pop-up icon in the call notification popup window for each incoming call.

2.2.8 Updates Tab

Click on the *Updates* tab to configure the proxy information required to connect to a proxy server.

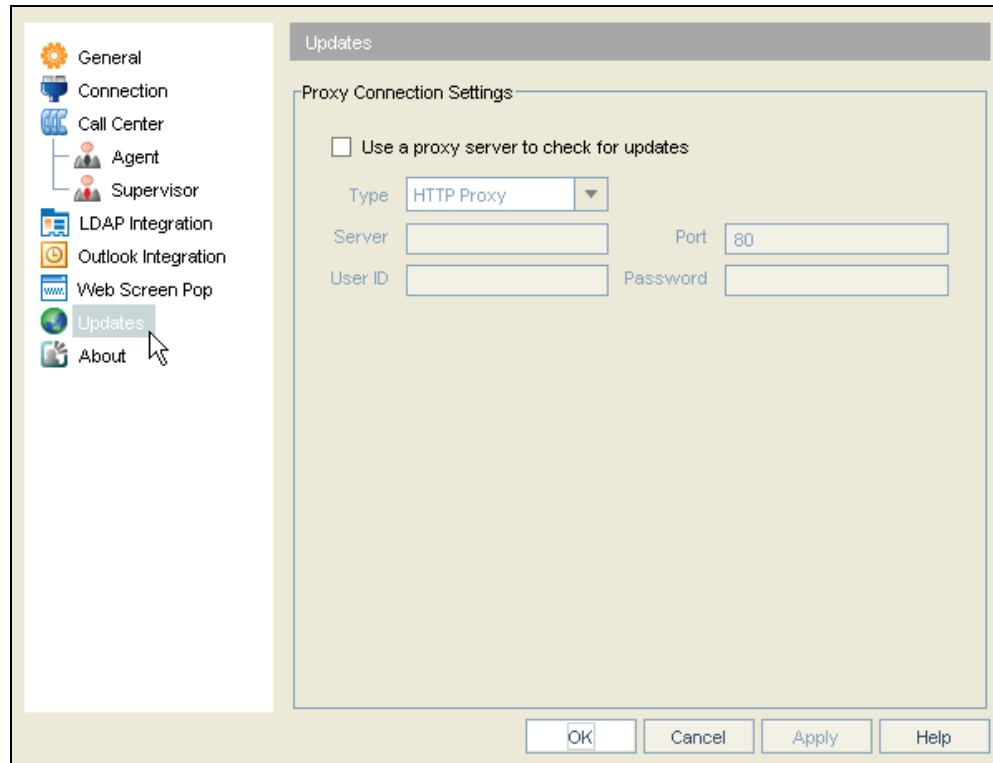


Figure 36 Options Dialog – Updates Screen

The *Proxy Connection Settings* options are as follows:

- *Use a proxy server to check for updates* check box ensures that updates are automatically checked by a proxy server.
- *Type* is the compulsory proxy server type. Hypertext Transfer Protocol (HTTP) is the accepted form.
- *Server* is the compulsory proxy server URL and can be obtained from the network administrator.
- *Port* is the proxy server connection port number. It is compulsory and can be obtained from the network administrator.
- *User ID* is the authentication user ID that is required if user authentication is required by the proxy server.
- *Password* is the authentication password that is required if user authentication is required by the proxy server.

2.2.9 About Tab

Click on the *About* tab to find version information and read the general disclaimer for Call Center.

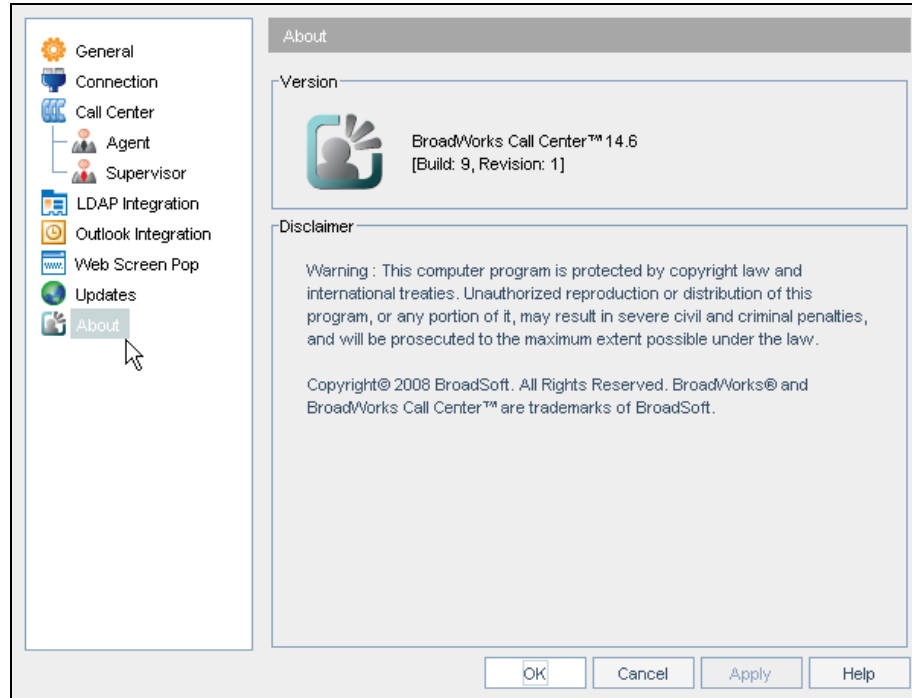


Figure 37 Options Dialog – About Screen

The information displayed is as follows:

- BroadWorks Call Center Version
- BroadWorks Call Center Disclaimer

The About information is important in providing information for the purpose of technical support.

2.3 Change ACD States

To change your availability status use the Available/Unavailable/Wrap-up buttons. You can change your ACD states for each Call Center queue. Click the *Options – Agent* dialog box to configure your initial ACD state as well as your ACD states for post calls.

NOTE: If the Available and Unavailable buttons are grayed out, contact your group administrator. The group administrator may need to check the *Allow Agent Logon* check box on the BroadWorks Call Center web portal.

2.3.1 Change Status to Available

To change your status to available, click **Available**. You are now available to receive calls in the Call Center.



Figure 38 Available Button

2.3.2 Change Status to Unavailable

To change your status to unavailable, click **Unavailable**. You are now unavailable to receive calls in the Call Center.



Figure 39 Unavailable Button

2.3.3 Change Status to Wrap-Up

To change your status to wrap-up, click **Wrap-Up**. Your call status has changed to wrap-up (ending). Wrap-up is only available if your previous state was *Available*.



Figure 40 Wrap-Up Button

2.4 Display Call Center Activity

You can display Agent status and monitor contacts by completing the following instructions.

2.4.1 Display Agent Status

To display information about the status of Agents:

Click **View** on the Menu panel. From the drop-down list, select *Monitoring*.

On the Team panel the agent's name is listed as well as their Call State, Call Time, ACD State, ACD Time, and Caller ID.

This information changes according to the Agent's status.

NOTE: To de-select a queue, click the check box to remove the check mark.

2.4.2 Monitor Queues

To display information about the callers in a queue:

Click **View** on the Menu panel. From the drop-down list, check *Monitoring*.

On the Call Center panel is a list of the queues. If you are unable to see the calls in the queue and "Not Monitored" is displayed, follow the instructions detailed in section [2.2.4 Call Center – Supervisor Tab](#).

For information on repositioning callers in a queue, see section [2.11.1 Transfer Call to Queue](#).

2.5 Display Directories

You can display the following directories. For specific directions, refer to the corresponding sections.

2.5.1 Display Call History

Use the *Tools* drop-down list and click on **Call History**.

The *Call History* tab appears.

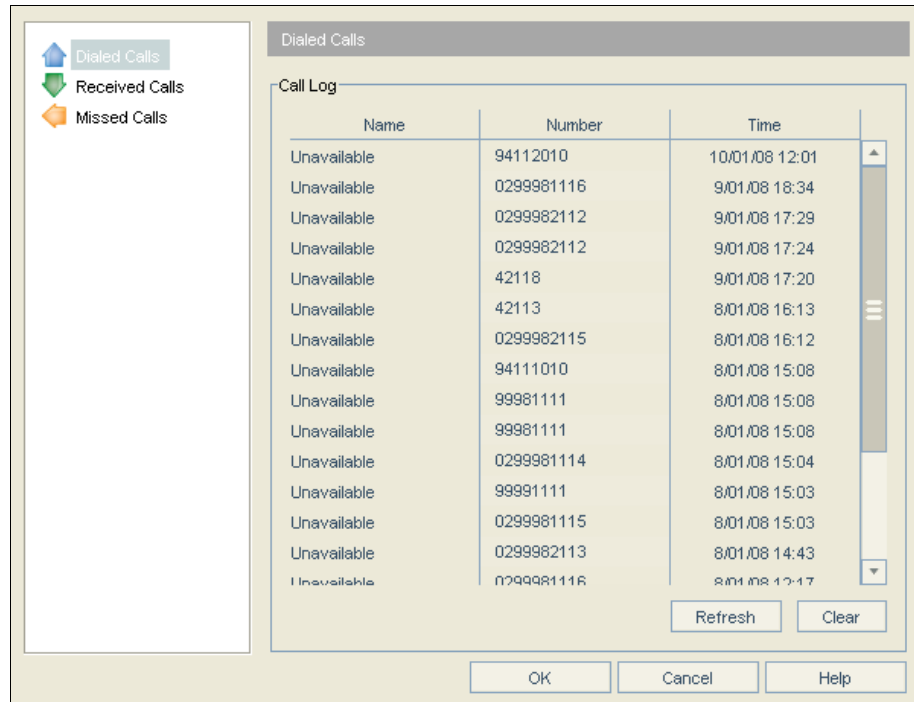


Figure 41 Call History Tab

2.5.1.1 Delete Call History

You can delete all entries in the *Call History* tab. To delete the call logs, do the following:

Click the **Clear** button.

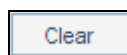


Figure 42 Clear Button

- 1) A warning message asks for your confirmation. Select **Yes**.

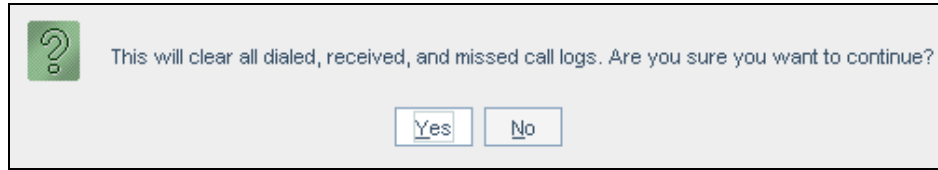


Figure 43 Call History Confirmation Message

The entries are now cleared.

2.5.2 Display Contacts Directory

Use the *Directory* drop-down list to make the *Directory* options visible.

Select the *Contacts Directory* from the *Directory* drop-down list. The *Contact Directory* tab is now visible.



Figure 44 Contact Directory Tab

2.5.3 Display LDAP Directory

Use the *Directory* drop-down list to make the *Directory* options visible.

Select the *LDAP Directory* from the *Directory* drop-down list. The *LDAP Directory* tab is now visible.



Figure 45 LDAP Directory Tab

2.5.4 Display Personal Directory

Use the *Directory* drop-down list to make the *Directory* options visible.

Select *Personal Directory* from the *Directory* drop-down list and check it. The *Personal Directory* tab appears.



Figure 46 Personal Directory Tab

If the *Personal Directory* is not visible in the drop-down list or if you wish to add or edit entries, do this in the web portal. For more information, see the *BroadWorks Application Server User Web Interface Administration Guide*.

2.5.5 Display Outlook Directory

Use the *Directory* drop-down list to make the *Directory* options visible.

Select *Outlook Directory* from the *Directory* drop-down list and check it. The *Outlook Directory* tab appears.



Figure 47 Outlook Directory Tab

2.5.6 Display Speed Dials Directory

Use the *Directory* drop-down list to make the *Directory* options visible.

Select *Speed Dials Directory* from the *Directory* drop-down list and check it. The *Speed Dials Directory* tab appears.



Figure 48 Speed Dials Directory Tab

If the *Speed Dials Directory* is not visible in the drop-down list or if you wish to add or edit entries, do this in the web portal. For more information, see the *BroadWorks Application Server User Web Interface Administration Guide*.

2.5.7 Search Directory

To search for a contact within the directory, do the following:

- 1) Type the contact information you want to search for in the text box. Available criteria filters are: Full name – a combination of the first and last name (default option), First name, Last name, Department, Phone number, or Notes. The *Phone number* option searches for a matching contact's extension number or mobile number.
- 2) Click **Search**. The directory displays the contacts that match the search criteria.

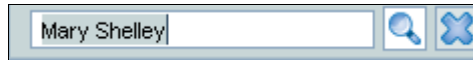


Figure 49 Search Text Box

NOTE: To display the complete and unfiltered directory, click **Reset (X)**.

2.6 Monitoring

You can display the *Monitoring* tab. This is only available to supervisors. The Team panel shows real-time states of the agents managed by the supervisor as well as the supervisor's own status.

The screenshot shows the Monitoring Tab interface with the following data:

TEAM						
Name	Call State	Call Time	ACD State	ACD Time	Caller ID	
atul2-ag1 atul2-ag1		14:00		14:00		
atul2-ag2 atul2-ag2		14:00		14:00		
atul2-ag3 atul2-ag3		14:00		14:00		
atul2-ag4 atul2-ag4		14:00		14:00		
atul2-sun atul2-sun		14:00		14:00		

CALL CENTERS			
Call Center	Number	VM	Calls In Queue
atul2-cc1	0299981111		(Not Monitored)
atul2-cc2	0299981117		(Not Monitored)

Buttons: Retrieve, Queue Transfer, Reorder

Figure 50 Monitoring Tab






The following is detailed information about the panels:

- The Team panel is located at the top of the tab. It shows real-time states of the agents managed by the supervisor.
 - *Name* is the full name of the agent.
 - *Call State* is the call status of the agent. The following icons represent each different state:

Call State	Icon	Description
Green Handset Down		Agent phone is on-hook (idle, free) (previously this was a green triangle).
Red Handset Up		Agent phone is off-hook (talking, busy) (previously this was a red triangle).
Orange Handset Down		Agent phone is ringing (previously this was a blue triangle).
Do Not Disturb		Agent has status set to DND (previously this was an orange triangle).
Grey Handset Down		Agent call state is currently unavailable or unknown (previously there was no triangle or it was blank).
Private		Agent phone monitoring state is set to private.
Call Forward Always		Agent has status set to Call Forward Always (hovering the mouse over this icon displays the Call Forward Always number).

- *Call Time* is the time elapsed since monitoring in the current call state.

- *ACD State* is the ACD state of the agent. The following icons represent each different state:

ACD State	Icon	Description
Sign In		Agent is signing in. This state is a temporary state while logging into the Call Center Agent client. However it may be selected as a permanent state if using the Call Center Express Agent (via web portal). This is not recommended.
Available		Agent is available to receive ACD calls (agents can also receive direct calls).
Unavailable		Agent is unavailable to receive ACD calls (agent can still receive direct calls).
Wrap Up		Agent is performing post-call work.
Sign Out		Agent is signed out.

- *ACD Time* is the time elapsed since monitoring in the current ACD state.
- *CLID* is the Caller ID number of the party the agent is in ringing, talking, or held state with.

NOTE: In some cases the agent's ACD state could be blank if the agent did not initially update their status or has not changed it for some time.

- The Call Centers panel is located at the bottom of the window. It shows the Call Centers the supervisor is managing. This is resizable.

The supervisor of each Call Center can expand the Call Centers they manage by clicking the plus icon. The expanded row displays the first 25 calls in the queue.

NOTE: If you are a supervisor of Call Center A but not of Call Center B, you can only expand Call Center A. You can only expand the Call Centers you manage.

The expanded table columns are:

- *Caller Name* is the network name of the caller in the queue (if provided).
- *Caller ID* is the network number of the caller in the queue (if provided).
- *Wait In Queue* is the ACD state of the agent.

The Call Center panel columns are:

- The *Call Center Name* is the name of the Call Center.
- *Number* is the phone number of the Call Center.
- *VM* displays an envelope icon if that particular Call Center has voice mail messages. The envelope is visible until there are no voice mail messages left.
- *Calls In Queue* shows the amount of calls queued as a ratio of the total queue capacity for that Call Center.

At the bottom of the Call Center panel there are three options. These are:

- *Retrieve* retrieves a call to the supervisor’s device.
- *Queue Transfer*, when clicked, provides a drop-down list of other Call Centers managed by the supervisor that the current call can be transferred to.
- *Reorder* provides a drop-down list of positioning options for reordering the caller in the queue. You can select *Send to front* which sends the call to the front of the queue or the nearest position. *Send to back* sends the call to the back of the queue or the nearest position. *Range of 1-n* sends the call to a specific position in the queue (n is the number of calls in the queue).

2.7 Dashboard

You can display the *Dashboard* tab. This shows a summary of statistics on a per-Call Center basis. Each ACD or queue is monitored as well as agents. You must be a supervisor for this option.

2.7.1 Display Dashboard

To make the dashboard visible:

Go to **View** on the Menu panel. From the drop-down list, check *Dashboard*. It is now visible as a tab.

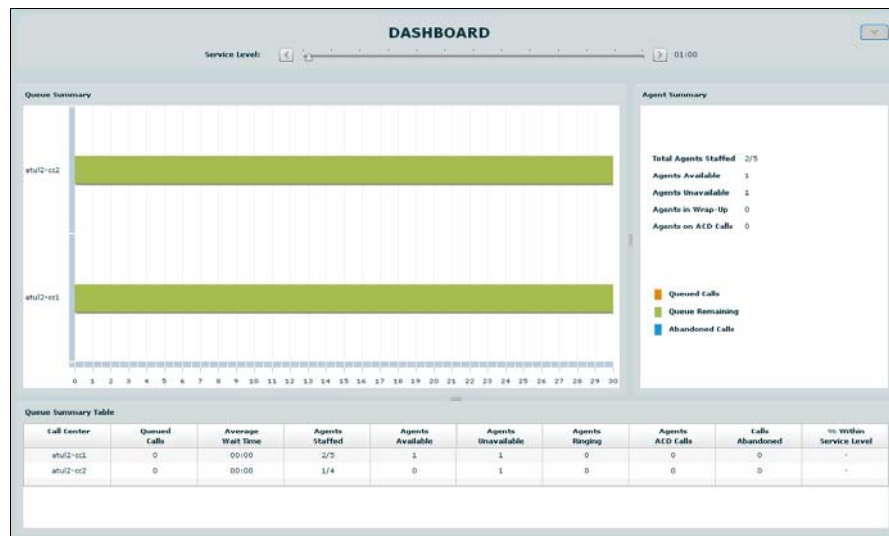


Figure 51 Dashboard Tab

The Dashboard contains the components in the following sub-sections.

2.7.2 Chart Information for Dashboard

The *Queue Summary* shows the key performance indicators for each Call Center the supervisor manages.

NOTE: It is recommended that all the agents for the Call Center are assigned to the supervisor so the Queue Summary table is more accurate. Only metrics for agents assigned to the supervisor are shown in the table.

The *Agent Summary* shows the real-time key performance indicators for the supervised team of agents. The statistical measures are shown in the following table:

Statistic	Description	Calculation
Total Agents Staffed	The ratio of logged-in agents managed by the supervisor divided by the total number of agents managed by the supervisor for this Call Center.	count(All managed agents <i>not</i> in {ACD State is Sign-Out}) over total managed agents
Agents Available	The number of agents currently showing Available as their ACD state	count(All agents in {ACD State is Available})
Agents Unavailable	The number of agents currently showing Unavailable as their ACD state.	count(All agents in {ACD State is Unavailable})
Agents in Wrap-Up	The number of agents currently showing Wrap-Up as their ACD state.	count(All agents in {ACD State is Wrap-Up})
Agents Ringing	The number of agents in Ringing phone state.	count(All agents in {Call State is Alerting})
Agents on ACD Calls	The number of agents in Talking phone state on calls distributed from the ACD.	count(All agents in {Where callCenterUserID is not null})

Table 1 Dashboard Agent Summary

2.7.3 Queue Summary Table Information

The *Queue Summary Table* has the following columns:

Statistic	Description	Calculation
Call Center	The names of the Call Centers the supervisor has access to.	Not applicable
Queued Calls	The number of calls that are queued in that Call Center.	count(Calls In Queue) as ratio of Queue Length
Average Wait Time	The average time a caller has been waiting in the queue.	sum(Calls In Queue Time)/count(Call In Queue)
Agent Staffed	The ratio of logged in agents managed by the supervisor, divided by the total number of agents managed by the supervisor for this Call Center.	count(All managed agents <i>not</i> in {ACD State is Sign-Out}) over total managed agents for Call Center
Agents Available	The number of agents in Available ACD state.	count(All agents in {ACD State is Available})
Agents Unavailable	The number of agents currently in Unavailable ACD state.	count(All agents in {ACD State is Unavailable})
Agents Ringing	The number of agents in Ringing phone state.	count(All agents in {Where Call State is Alerting })

Statistic	Description	Calculation
Agents ACD Calls	The number of agents in Talking phone state on calls distributed from the ACD.	count(All agents in {Where <i>callCenterUserID</i> is not null})
Calls Abandoned	The number of callers who have terminated the call while waiting in queue.	count(Where <i>updateReason</i> equals <i>CallAbandoned</i>)
% Within Service Level	The percentage of calls that was answered within a pre-defined period of time. This is shown in minutes and seconds (mm:ss).	count(Where <i>updateReason</i> equals <i>CallAnswered</i> AND (Where Calls In Queue Time are less than Service Level Time)/count(Calls to Queue)

Table 2 Dashboard Queue Summary

2.8 Reports

The following reports are made visible to supervisors only, unless stated otherwise. For detailed information, refer to the corresponding sections.

From the bottom section of each report you are able to:

- Click **Print** to print the report. This opens a new browser and includes charts and tables.
- Click **Reset** to reset the report criteria.
- Click **Refresh** to refresh the report with the most current data. This is only available on real-time reports.
- Click **Export to Excel** to export the report to a Microsoft Excel compatible XML spreadsheet file. No charts are exported in this file. By clicking on the button's drop-down list you can also select **Export to CSV**, which exports the data to a semi-colon separated file.

2.8.1 Export to CSV

The Export to CSV option prompts the user to save the CSV file in a location on their machine. This file can be opened using Microsoft Excel or a text editor.

All statistic labels and corresponding values are encapsulated in double quotes as shown in the following sample CSV output:

```

1  "Start Date/Time:", "Thu Apr 17 00:00:00 GMT+1000 2008"
2  "End Date/Time:", "Fri Apr 18 01:07:47 GMT+1000 2008"
3  "Call Center(s):", "myACD1"
4  "Service Level:", "00:10"
5
6  Queue Activity - All Call Centers - Hourly
7  "Call Center", "Calls Received", "Calls Answered", "Calls in
Queue", "Calls Abandoned", "Calls Overflowed"
8  "myACD1", "20", "9", "0", "11", "0"
9  "Summary", "20", "9", "0", "11", "0"
10
11 Queue Summary - All Call Centers - Hourly
12 "Call Center", "Avg Wait Time", "Avg Speed Answer", "Avg Abandonment
Time", "Avg Staff"
13 "myACD1", "00:28", "00:36", "00:34", "1"
14 "Summary", "00:28", "00:36", "00:34", "1"
15
16 Queue Performance - All Call Centers - Hourly
17 "Call Center", "% Answered", "% Calls in Queue", "% Abandoned", "% Within
Service Level"
18 "myACD1", "47%", "0%", "52%", "23%"
19 "Summary", "47%", "0%", "52%", "23%"

```

Figure 52 Export to CSV Sample File

The following key elements are used in the sample above:

- Report header information is provided in lines 1 through 4
- Table group headers are used (without double quotes) in lines 6, 11, and 16
- Table column headers are used in lines 7, 12, and 17
- Data for each column header is listed under each corresponding column.

2.8.2 Time Allocation Matrix

Statistical measures are calculated based on the following logic:

ACD State	Call State	State/Time Allocation	Handle Time
Available	Idle	Available Time	
	Talking	Talk Time	Handle Time
	Hold	Hold Time	
Wrap-up	Idle	Wrap-up Time	
Unavailable	Any	Unavailable Time	

Table 3 Time Allocation Matrix for Agent Statistics

NOTE 1: In report data, if there is a dash, this means there is no time documented. "0:00" means the task took zero seconds to complete.

NOTE 2: The average and percentage summary in the Reports tables is the mean of all values in that particular column and not an aggregate. However for all other statistics, the summary represents the sum of the values for that column.

For example:

$$\text{Average Summary} = (\text{Avg}_1 + \text{Avg}_2) / 2$$

OR

$$\text{Percentage Summary} = (\text{Perc}_1 + \text{Perc}_2 + \text{Perc}_3) / 3$$

2.8.3 Agent Activity Report

The Agent Activity Report displays metrics related to agents' call handling activity for a given Call Center. The heading for this report is Agent Activity – Agent Full Name – Interval, for example, Agent Activity – All Agents – Half Hourly Report. This can also be set to view an individual agent.

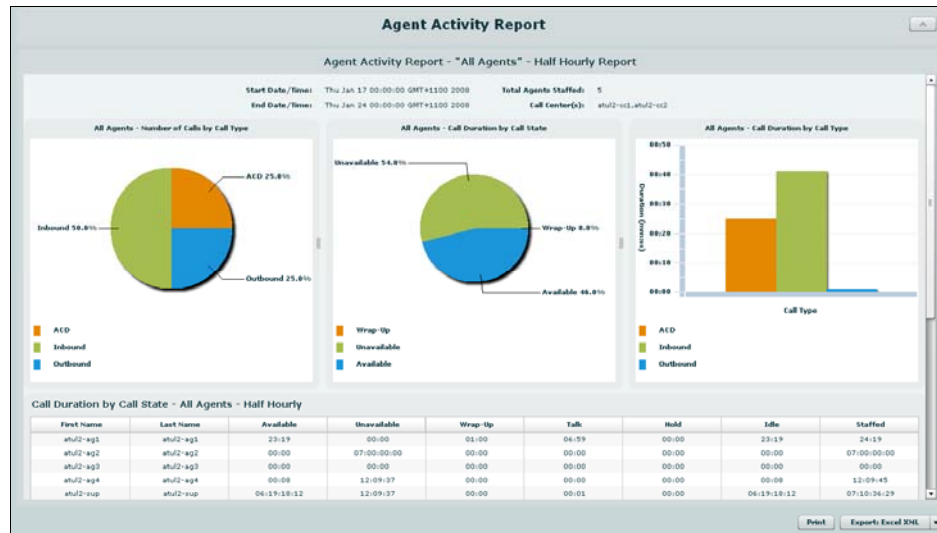


Figure 53 Agent Activity Report

2.8.3.1 Display Agent Activity Report

To display the Agent Activity Report, complete the following procedure:

- 1) Click on the **View** menu. Use the *Reports* drop-down list to display the reports.
- 2) Select the *Agent Activity Report* from the drop-down list and click on it. The *Agent Activity* tab appears.
- 3) Fill in the following details:

Input Field	Description	Allowed Value	Default Value
Report Type	This can be checked as Historical or Real Time. Historical reports are a summary of the assigned start date to the assigned end date. Real-time reports are refreshed at regular intervals and show a summary from the start date to the present. The default refresh time is five minutes and can be changed to a minimum of one minute using Deployment Studio. For more information, see <i>BroadWorks Deployment Studio User Guide for Call Center</i> .	Historical or Real-time	Historical
Hour Type	Allows you to check how you would like to see the time, either in A.M., P.M., or Military style.	AM/PM or 24hrs	AM/PM
Start Date	This is the date when you want the report to start from. It can be set by typing in the text box or clicking on the Calendar icon. This is compulsory. The maximum historical date is 179 days prior.	MMM DD, YYYY	Current Date

Input Field	Description	Allowed Value	Default Value
Start Time	This is the time when you want the report to start from. You can select the hour format (A.M., P.M., or Military time) from the <i>Hour Selection Type</i> . Time is applicable for hourly and minute intervals only.	1-12 AM/PM or 00-23 hr, 00-59mins	12am or 00
End Date	This is the date when you want the report to end. It can be set by typing in the text box or clicking on the Calendar icon. This is compulsory when a Historical report is selected.	MMM DD, YYYY	Current Date
End Time	This is the time when you want the report to end. You can select the hour format (A.M., P.M., or Military time) from the <i>Hour Selection Type</i> . Time is applicable for hourly and minute intervals only. This is compulsory if a Historical report is selected.	1-12 AM/PM or 00-23 hr, 00-59mins	12am or 00
Interval	This determines how you would like the information displayed. The drop-down list options are <i>Monthly</i> , <i>Daily</i> , <i>Hourly</i> , and <i>Half Hourly</i> . Daily and Monthly intervals are shown in days, hours, minutes, and seconds (dd:hh:mm:ss). Hourly and Half Hourly are shown in minutes and seconds (mm:ss). The minimum historical interval is half an hour for the previous hour.	Half Hourly, Hourly, Daily, Monthly	Half Hourly
Agent	Allows you to select a specific agent from the drop-down list or all Call Centers. NOTE: An agent can only select themselves from this drop-down list. However a supervisor has access to <i>Each Managed Agent</i> and <i>All Agents</i> options.	Each Managed Agent or All Agents	All Agents

4) Click **Display** to expand and reset the report.

2.8.3.2 Chart Information for Agent Activity Report

The following table describes the graph information on the Agent Activity Report, from left to right:

Statistic	Description
Number of Calls by Call Type (Pie Chart)	
ACD	The percentage of ACD calls that an agent has answered during the specified interval.
Inbound	The percentage of direct non-ACD calls that an agent answered during the specified interval.
Outbound	The percentage of outbound calls that an agent made during the specified interval. NOTE: This includes calls that were made while performing Consult Transfer, Escalate, and Conference.
Call Duration by Call State (Pie Chart)	
Wrap-Up	The percentage of call duration that an agent spent in <i>Wrap-Up</i> state during the specified interval.
Unavailable	The percentage of call duration that an agent spent in <i>Unavailable</i> state during the specified interval.
Available	The percentage of call duration that an agent spent in <i>Available</i> state during the specified interval.

Statistic	Description
Call Duration by Call Type (Vertical Bar Chart)	
ACD	The duration of time in minutes and seconds that an agent spent answering ACD calls during the specified interval.
Inbound	The duration of time in minutes and seconds that an agent spent answering direct non-ACD calls during the specified interval.
Outbound	The duration of time in minutes and seconds that an agent spent making outbound calls during the specified interval. NOTE: This includes calls that were made while performing Consult Transfer, Escalate, and Conference.

2.8.3.3 Table Information for Agent Activity Report

The following table describes the columns on the Agent Activity Report, from left to right. Where applicable, calculations are provided for statistics that are derived from other fields:

Statistic	Description
Call Duration by Call State	
First Name	The first name of an agent. This is not the CLID name.
Last Name	The last name of an agent. This is not the CLID name.
Available	The time during the specified interval that an agent was in the <i>Available</i> state.
Unavailable	The time during the specified interval that an agent was in the <i>Unavailable</i> state.
Wrap-Up	The time during the specified interval that an agent was in the <i>Wrap-Up</i> state.
Talk	The time during the specified interval that an agent spent in the <i>On Call</i> state.
Hold	The time during the specified interval that an agent spent in the <i>Hold</i> state.
Idle	The time during the specified interval that an agent spent idle in the <i>Available</i> state. The agent is considered idle if they are not on an ACD call.
Staffed	The time during the specified interval that an agent spent not in the <i>Signed-Out</i> state.
Number of Calls by Call Type	
First Name	The first name of an agent. This is not the CLID name.
Last Name	The last name of an agent. This is not the CLID name.
ACD	The number of ACD calls that were answered by an agent during the specified interval.
Inbound	The number of direct non-ACD calls answered by an agent.
Outbound	The number of outbound calls an agent made during the specified interval.
Call Duration by Call Type	
First Name	The first name of an agent. This is not the CLID name.

Statistic	Description
Last Name	The last name of an agent. This is not the CLID name.
ACD	The duration of ACD calls answered by an agent during the specified interval.
Inbound	The duration of direct non-ACD calls an agent answered during the specified interval.
Outbound	The duration of outbound calls an agent spent making during the specified interval.

2.8.4 Agent Utilization Report

The Agent Activity Report displays metrics related to agents' call performance for a given Call Center. The heading for this report is Agent Utilization – Agent Full Name – Interval, for example, Agent Utilization – All Agents – Half Hourly Report. This can also be set to view an individual agent.



Figure 54 Agent Utilization Report

2.8.4.1 Display Agent Utilization Report

To display the Agent Utilization Report, complete the following procedure:

- 1) Click on the **View** menu. Use the *Reports* drop-down list to display the reports.
- 2) Select *Agent Utilization* from the *Report* drop-down list. The *Agent Utilization* tab appears.
- 3) Fill in the following details:

Input field	Description	Allowed Values	Default Value
Report Type	Can be checked as Historical. Historical reports are a summary of the assigned start date to the assigned end date.	Historical	Historical
Hour Type	Allows you to check how you would like to see the time, either in A.M./P.M. or in Military time.	AM/PM or 24hrs	AM/PM
Start Date	When you want the report to start from. It can be set by typing in the text box or clicking on the Calendar icon. This is compulsory. The maximum historical date is 179 days prior to this date.	MMM DD, YYYY	Current Date
Start Time	When you want the report to start from. You can select the hour format (A.M./P.M. or Military time) from the Hour Selection Type. Time is applicable for hourly and minute intervals only.	1-12 AM/PM or 00-23 hr, 00-59mins	12am or 00

Input field	Description	Allowed Values	Default Value
End Date	When you want the report to end. It can be set by typing in the text box or clicking on the Calendar icon. This is compulsory if a Historical report is selected.	MMM DD, YYYY	Current Date
End Time	When you want the report to end. You can select the hour format (A.M./P.M. or Military time) from the Hour Selection Type. Time is applicable for hourly and minute intervals only. This is compulsory if a Historical report is selected.	1-12 AM/PM or 00-23 hr, 00-59mins	12am or 00
Interval	How you would like the information displayed. The drop-down list options are <i>Monthly</i> , <i>Daily</i> , <i>Hourly</i> , and <i>Half Hourly</i> . Daily and Monthly intervals are shown in days, hours, minutes, and seconds (dd:hh:mm:ss). Hourly and Half Hourly are shown in minutes and seconds (mm:ss). The minimum historical interval is half an hour for the previous hour.	Half Hourly, Hourly, Daily, Monthly	Half Hourly
Agent	Allows you to select a specific agent from the drop-down list or all agents.	Each Managed Agent or All Agents	All Agents

- 4) Click the **Display** button to display and expand the report.

2.8.4.2 Chart Information for Agent Utilization Report

The following table describes the graph information in the Agent Utilization Report, from left to right:

Statistic	Description
Agent Call Summary (Pie Chart)	
ACD Calls	The percentage of ACD calls that was answered by an agent during the specified interval.
Inbound Calls	The percentage of direct non-ACD calls that were answered by an agent during the specified interval.
Outbound Calls	The percentage of outbound calls that an agent made during the specified interval. NOTE: This includes calls that were made while performing Consult Transfer, Escalate, and Conference.
Held Calls	The percentage of ACD calls that an agent held during the specified interval.
Agent Call Summary by Call Type (Pie Chart)	
Avg ACD Duration	The duration percentage that an agent spent answering ACD calls during the specified interval.
Avg Inbound Duration	The duration percentage that an agent spent answering direct non-ACD calls.
Avg Outbound Duration	The duration percentage that an agent spent making outbound calls. NOTE: This includes calls that were made while performing Consult Transfer, Escalate, and Conference.
Agent Performance (Line Chart)	
Avg ACD Time	The average time in minutes and seconds that an agent spent answering ACD calls during the specified interval.

Statistic	Description
Avg Sign-in Time	The average time in minutes and seconds that an agent took to sign in to a Call Center.
Avg Wrap-Up Time	The average time in minutes and seconds that an agent took to wrap up ACD calls.
Avg Talk Time	The average time in minutes and seconds that an agent spent on calls.
Avg Hold Time	The average time in minutes and seconds that an agent spent on hold.
Avg Handle Time	The average time in minutes and seconds that an agent spent handling a call.

2.8.4.3 Table Information for Agent Utilization Report

The following table describes the columns in the Agent Utilization Report, from left to right. Where applicable, calculations are provided for statistics that are derived from other fields:

Statistic	Description
Agent Call Summary	
First Name	The first name of an agent. This is not the CLID name.
Last Name	The last name of an agent. This is not the CLID name.
ACD Calls	The number of ACD calls that an agent answered during the specified interval.
Inbound Calls	The number of direct non-ACD calls that an agent answered during the specified interval.
Outbound Calls	The number of outbound calls that an agent made during the specified interval. NOTE: This includes calls that were made while performing Consult Transfer, Escalate, and Conference.
Held Calls	The number of ACD calls that an agent held during the specified interval.
Agent Call Summary by Call Type	
First Name	The first name of an agent. This is not the CLID name.
Last Name	The last name of an agent. This is not the CLID name.
Avg ACD Time	The average length of ACD calls during the specified interval. Avg ACD Time = Total ACD Call Time/ACD Calls
Avg Inbound Time	The average length of direct non-ACD during the specified interval. Avg Inbound Time = Total Inbound Call Time/Inbound Calls
Avg Outbound Time	The average length of outbound calls that an agent made during the specified interval. Avg Outbound Time = Total Outbound Call Time/Outbound Calls NOTE: This includes calls that were made while performing Consult Transfer, Escalate, and Conference.
Agent Performance	
First Name	The first name of an agent. This is not the CLID name.
Last Name	The last name of an agent. This is not the CLID name.

Statistic	Description
Avg ACD Time	The average duration of an agent's ACD calls that includes the ring time, talk time, and hold time of each ACD call during the specified interval. Avg ACD Time = Total ACD Call Time/ACD Calls
Avg Sign-In Time	The average time in minutes and seconds that an agent took to sign into a Call Center during the specified interval. Avg Sign-In Time = Total Signed In Time/Num Sign-In
Avg Wrap-Up Time	The average time in minutes and seconds it took an agent to wrap up during the specified interval. Avg Wrap-Up Time = Total Wrap-Up Time/Num Wrap-Up
Avg Talk Time	The average of an agent's talk time in minutes and seconds that excludes ring time during the specified interval. Avg Talk Time = Total Talk Time/ACD Calls
Avg Hold Time	The average of an agent's hold time in minutes and seconds during the specified interval. Avg Hold Time = Total Hold Time/ACD Calls
Avg Handle Time	This is the average of an agent's handle time, in minutes and seconds, during the specified interval. Avg Handle Time Handle = Total Talk Time + Total Hold Time + Total Wrap-Up Time)/ACD Calls NOTE: For more information see, section 2.8.2 Time Allocation Matrix .

2.8.5 Queue Performance Analysis Report

The Queue Performance Analysis Report displays metrics related to the performance of a Call Center ACD. The heading for this report is Queue Performance Analysis – Call Center Name – Interval Report, for example, Queue Performance Analysis – Support – Half Hourly Report. This can be changed to view “All Call Centers”.

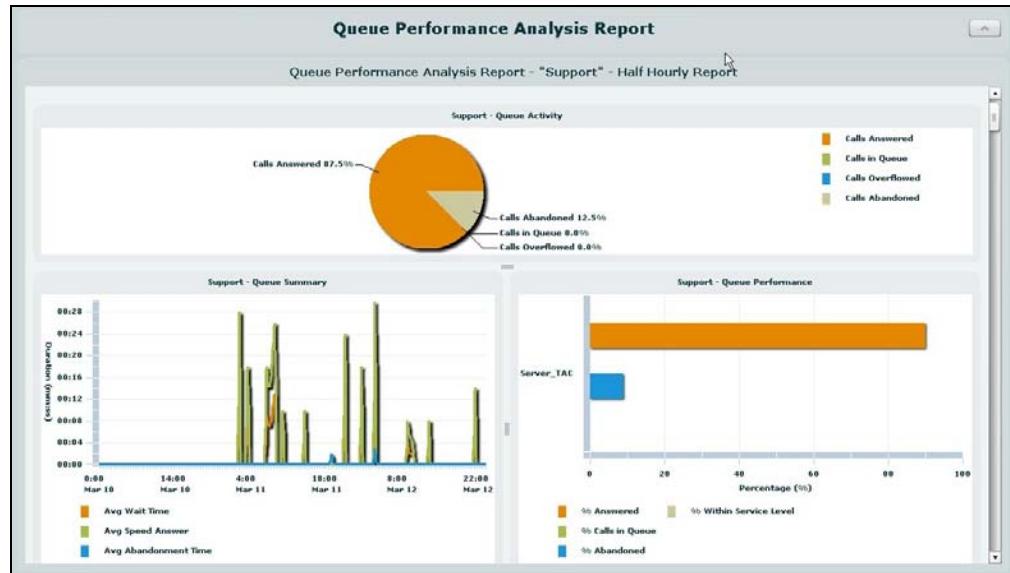


Figure 55 Queue Performance Report

2.8.5.1 Display Queue Performance Analysis Report

To display the Queue Performance Analysis Report, complete the following procedure:

- 1) Click on the **View** menu. Use the *Reports* drop-down list to display the reports.
- 2) Select the *Queue Performance Analysis Report* from the drop-down list and click on it. The *Queue Performance Analysis Report* tab appears.
- 3) Fill in the following details:

Input Field	Description	Allowed Value	Default Value
Report Type	This can be checked as Historical or Real Time. Historical reports are a summary of the assigned start date to the assigned end date. Real-time reports are refreshed at regular intervals and show a summary from the start date to the present. The default refresh time is five minutes and can be changed to a minimum of one minute using Deployment Studio. For more information, see <i>BroadWorks Deployment Studio User Guide for Call Center</i> .	Historical or Real-time	Historical
Hour Selection Type	Check how you would like to see the time, either in A.M./P.M. or in Military time.	AM/PM or 24hrs	AM/PM

Input Field	Description	Allowed Value	Default Value
Start Date	When you want the report to start from. It can be set by typing in the text box or clicking on the Calendar icon. This is compulsory. The maximum historical date is 179 days prior to this date.	MMM DD, YYYY	Current Date
Start Time	When you want the report to start from. You can select the hour format (A.M./P.M. or Military time) from the Hour Selection Type. Time is applicable for hourly and minute intervals only.	1-12 AM/PM or 00-23 hr, 00-59mins	12am or 00
End Date	When you want the report to end. It can be set by typing in the text box or clicking on the Calendar icon. This is compulsory if a Historical report is selected.	MMM DD, YYYY	Current Date
End Time	When you want the report to end. You can select the hour format (A.M./P.M. or Military time) from the Hour Selection Type. Time is applicable for hourly and minute intervals only. This is compulsory if a Historical report is selected.	1-12 AM/PM or 00-23 hr, 00-59mins	12am or 00
Interval	How you would like the information displayed. The drop-down list options are <i>Monthly, Daily, Hourly</i> , and <i>Half Hourly</i> . Daily and Monthly intervals are shown in days, hours, minutes, and seconds (dd:hh:mm:ss). Hourly and Half Hourly are shown in minutes and seconds (mm:ss). The minimum historical interval is half an hour for the previous hour.	Half Hourly, Hourly, Daily, Monthly	Half Hourly
Acceptable Service Level	This can be dragged to the acceptable amount of time that calls must be answered by. This is defined in seconds. The slider has a range of 0 to 3600 seconds. The slider converts this to minutes and seconds (mm:ss).	mm:ss	00:00
Call Center	Allows you to select a specific Call Center from the drop-down list or all Call Centers.	Each Managed Call Center or All Call Centers	All Call Centers

4) Click **Display** to expand and reset the report.

2.8.5.2 Chart Information for Queue Performance Report

The following table describes the graph information on the Queue Performance Analysis Report, from left to right:

Statistic	Description
Queue Activity (Pie Chart)	
Calls Answered	The percentage of calls that were answered by the Call Center.
Calls In Queue	The percentage of calls that were in the Call Center queue.
Calls Overflowed	The percentage of calls that exceeded the queue length of the Call Center.
Calls Abandoned	The percentage of calls that were abandoned while waiting in the Call Center queue.
Queue Summary (Line Chart)	
Avg Wait Time	The average wait time or delay in minutes and seconds a call was in the queue of the Call Center.

Statistic	Description
Avg Speed Answer	The average time in minutes and seconds that a call was answered in the Call Center.
Avg Abandonment Time	The average time in minutes and seconds that a call was abandoned while waiting in the Call Center queue.
Queue Performance (Horizontal Bar Chart)	
% Answered	The percentage of calls that was answered by the Call Center.
% In Queue	The percentage of calls in the Call Center queue.
% Abandoned	The percentage of calls that was abandoned while waiting in the Call Center queue.
% Within Service Level	The percentage of calls that was within the designated service level of the Call Center.

2.8.5.3 Table Information for Queue Performance Report

The following table describes the columns in the Queue Performance Analysis Report:

Statistic	Description
Queue Activity	
Call Center	The list of Call Centers that the supervisor is monitoring and managing.
Calls Received	The number of calls that were placed to the queue. NOTE: Total Calls = Calls Received + Calls Overflowed = (Calls Answered + Calls In Queue + Calls Abandoned) + Calls Overflowed.
Calls Answered	The total calls answered by agents.
Calls In Queue	The number of calls that are in the queue.
Calls Abandoned	The number of calls that are abandoned by the caller when calls are in queue or when calls are ringing for agent. NOTE: Calls Abandoned includes calls that are forwarded to voice mail if the caller decides to press "0" to leave a message (as configured for the Call Center, Voice Messaging User settings) and calls that are forwarded from the queue after waiting X seconds (as configured for the Call Center Profile, No Answer settings).
Calls Overflowed	The number of calls that were transferred to voice mail or given a busy tone because the queue overflowed.
Queue Summary	
Call Center	The list of Call Centers that the supervisor is monitoring and managing.
Avg Time In Queue	The average wait time or delay in queue excluding ring time displayed in minutes and seconds. $\text{Avg Time In Queue} = \text{Total Queue Time} / \text{Calls Answered}$
Avg Speed Answer	The time between alerting and talking states in minutes and seconds. $\text{Avg Speed} = (\text{Total Queue Time} + \text{Total Ring Time}) / \text{Calls Answered}$
Avg Abandonment Time	The average time a caller is in the queue before hanging up displayed in minutes and seconds. $\text{Avg Abandonment Time} = \text{Total Abandonment Time} / \text{Calls Abandoned}$
Avg Staff	The average number of agents who are not signed out of the queue during the reporting interval. $\text{Avg Staff} = \text{Staff Time} / \text{Specified Interval}$

Statistic	Description
Queue Performance	
Call Center	The list of Call Centers that the supervisor is monitoring and managing.
% Answered	The percentage of calls that was answered by the Call Center. % Answered = Calls Answered/Calls Received
% In Queue	The percentage of calls that are in the Call Center queue. % In Queue = Calls In Queue/Calls Received
% Abandoned	The percentage of calls that was abandoned while waiting in the Call Center queue. % Abandoned = Calls Abandoned/Calls Received
% Within Service Level	The percentage of calls that was within the designated Service Level of the Call Center. % Within Service Level = Calls Answered In Service Level N/Calls Answered

2.8.6 Service Level Report

The Service Level Report is also known as a Grade of Service Report and displays metrics related to the speed of answer for ACD calls. The heading for this report is Service Level – Call Center Name – Interval Report, for example, Service Level – All Call Centers – Half Hourly Report. This can be changed to view a single Call Center.

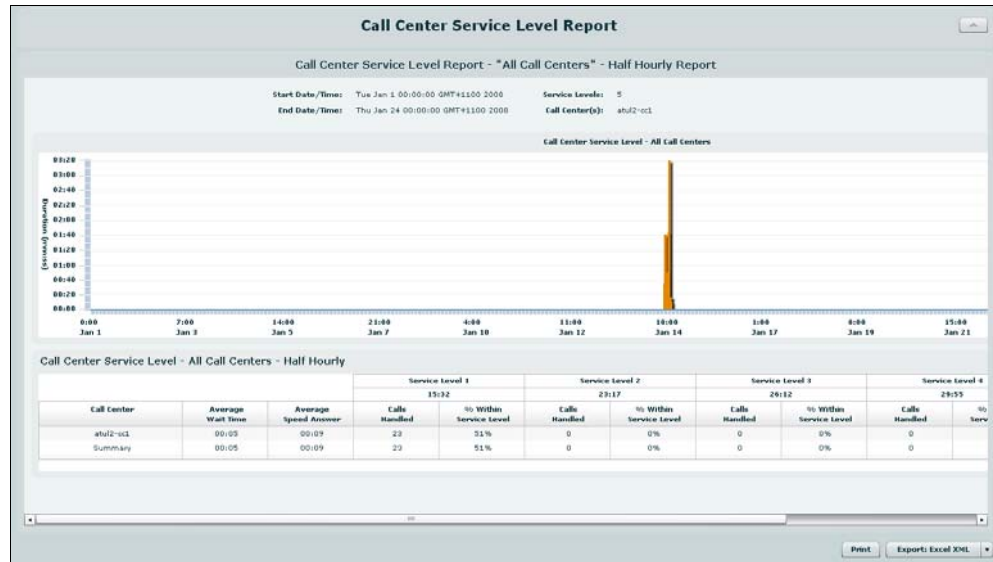


Figure 56 Service Level Report

2.8.6.1 Display Service Level Report

To display the Service Level Report, complete the following procedure:

- 1) Click on the **View** menu. Use the *Reports* drop-down list to display the reports.
- 2) Select the *Service Level Report* from the drop-down list and click on it. The *Service Level Report* tab appears.
- 3) Fill in the following details:

Input Field	Description	Allowed Values	Default Values
Report Type	Can be checked as Historical. Historical reports are a summary of the assigned start date to the assigned end date.	Historical	Historical
Hour Type	Check how you would like to see the time, either in A.M./P.M. or in Military time.	AM/PM or 24hrs	AM/PM
Start Date	When you want the report to start from. It can be set by typing in the text box or clicking on the Calendar icon. This is compulsory. The maximum historical date is 179 days prior to this date.	MMM DD, YYYY	Current Date
Start Time	When you want the report to start from. You can select the hour format (A.M./P.M. or Military time) from the Hour Selection Type. Time is applicable for hourly and minute intervals only	1-12 AM/PM or 00-23 hr, 00-59mins	12am or 00

Input Field	Description	Allowed Values	Default Values
End Date	When you want the report to end. It can be set by typing in the text box or clicking on the Calendar icon. This is compulsory if a Historical report is selected.	MMM DD, YYYY	Current Date
End Time	When you want the report to end. You can select the hour format (A.M./P.M. or Military time) from the Hour Selection Type. Time is applicable for hourly and minute intervals only. This is compulsory if a Historical report is selected.	1-12 AM/PM or 00-23 hr, 00-59mins	12am or 00
Interval	How you would like the information displayed. The drop-down list options are <i>Monthly, Daily, Hourly, and Half Hourly</i> . Daily and Monthly intervals are shown in days, hours, minutes, and seconds (dd:hh:mm:ss). Hourly and Half Hourly are shown in minutes and seconds (mm:ss). The minimum historical interval is half an hour for the previous hour.	Half Hourly, Hourly, Daily, Monthly	Half Hourly
Number of Service Levels	The number of service levels you would like to specify for the Call Center. You can select from a range of one to five.	1-5	5
Service Level 1 – 5	This can be dragged to the acceptable amount of time that calls must be answered by. This is defined in seconds. The slider has a range of 0 to 3600 seconds. The slider converts this to minutes and seconds (mm:ss). The default settings are “15”, “30”, “45”, “60”, and “75” seconds	mm:ss	00:15 00:30 00:45 1:00 1:15
Call Center	Select a specific Call Center from the drop-down list or all Call Centers.	Each Managed Call Center or All Call Centers	All Call Centers

5) Click **Display** to expand and reset the report.

2.8.6.2 Chart Information for Service Level Report

The following list describes the graph information in the Service Level Report, from left to right:

Statistic	Description
Service Level (Line Chart)	
% Within Service Level	The percentage of ACD calls that were answered by an agent within each service interval (this is the acceptable service level).

2.8.6.3 Table Information for Service Level Report

The following table describes the columns in the Service Level Report. The columns are repeated according to the number of Service Levels selected:

Statistic	Description
Service Level	
Call Center	The list of Call Centers that the supervisor is monitoring and managing.

Statistic	Description
Average Wait Time	The average wait time in queue during the specified interval. This is repeated for each service level. Average Wait Time = Total Queue Time/Calls Answered
Average Speed Answer	The average speed to answer during the specified interval. This is repeated for each service level. Average Speed Answer = (Total Queue Time + Total Ring Time)/Calls Answered
Calls Handled	The number of ACD calls answered by an agent between each service level interval. This is repeated for each service level.
% Within Service Level	The percentage of ACD calls that were answered by an agent within each service interval. % Within Service Level = Calls Answered In Service Level N/Calls Answered

2.9 Manage Calls

You can make calls from an ad hoc number or the directories by using the workflow detailed in the following sub-sections.

2.9.1 Dial Ad Hoc Number

To make a call to an ad hoc number (a person not listed in your Contact Directory), do the following:

- 1) Open the *Dial Number* text field. Enter the number you wish to call either by typing the number on the keyboard or by selecting each number in turn from the dial pad using your mouse.
- 2) Press **Enter** to place the call.
- 3) To end the call, click the **End** button.



Figure 57 End Button

2.9.2 Re-Dialing Number

Use the *Dial Number* combo box to select a previously dialed number:

- 1) Select a number by clicking on the arrow at the right-hand side of the *Dial Number* box. A list of up to 10 previously dialed numbers is displayed.
- 2) Select a number in the list.
- 3) Press **Enter** to place the call.
- 4) To end the call, click the **End** button.



Figure 58 End Button

2.9.3 Dial from Search

Use the *Search* drop-down list to search for a user or contact.

Your search returns all users that match your criteria in any field. For example, if you enter “sa” as your criteria, your search might return users with the first name “Samuel” or “Sally”, users with the last name “Sawyer” and users in the department “Sales”. You can also search for users by phone number.

To search for a user:

- 1) Type your search criteria in the *Search* box.
- 2) Press **Enter** to execute the search.
- 3) Click the phone number you want to dial.
- 4) To end the call, click the **End** button.

To re-execute a previous search:

- 1) Select a previous search criterion by clicking on the arrow at the right-hand side of the *Search* box. A list of previous search criteria is displayed. Select an item in the list.
- 2) Click the phone number you want to dial.
- 3) To end the call, click the **End** button.



Figure 59 End Button

2.9.4 Dial from Call History Directory

You can dial any number stored in the Call History Directory.

To use the Call History Directory to make a call:

- 1) Select the *Call History* tab in the *Tools* drop-down menu. The following should be displayed.

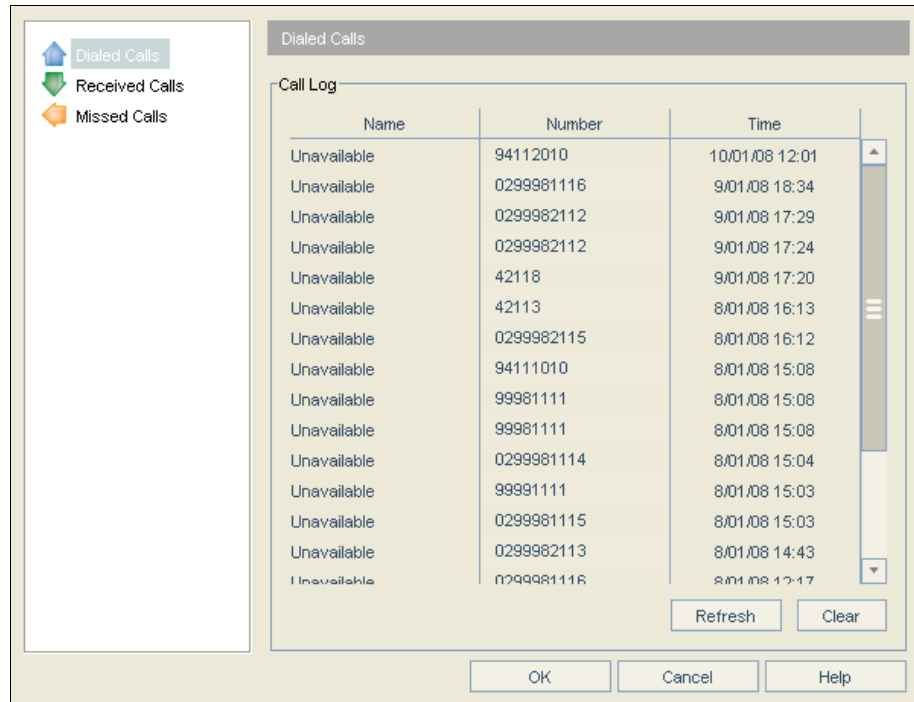


Figure 60 Call History Tab

This list can also be printed using the host application.

- 2) Click the desired phone number. The call is placed.

To sort the Call History Directory search results, click a column header. The table is sorted according to the information in the column you selected, in descending order. Click again on the same column header to toggle the sort order between descending and ascending.

NOTE: Users with Microsoft Windows XP Service Pack 2 (SP2) installed may encounter a warning when opening the Call History Directory.

2.9.5 Dial from Contact Directory

You can dial any number stored in your Contact Directory provider with Call Center.

To use the Contact Directory to make a call:

- 1) Select the *Contact Directory* tab. The following should be displayed.



Figure 61 Contact Directory Tab

This list can also be printed using the host application.

- 2) Click the desired phone number. The call is placed.
- 3) To refresh the directory, click **Refresh**.

To sort the Contact Directory, click a column header. The table is sorted according to the information in the column you selected, in descending order. Click again on the same column header to toggle the sort order between descending and ascending.

NOTE: Users with Microsoft Windows XP Service Pack 2 (SP2) installed may encounter a warning when opening the Contact Directory.

2.9.6 Dial from LDAP Directory

You can directly dial any number stored in the LDAP Directory server.

To use the LDAP Directory to make a call:

- 1) Select the *LDAP Directory* tab. The following should be displayed.



Figure 62 LDAP Directory Tab

This list can also be printed using the host application.

- 2) Click the desired phone number. The call is placed.

To sort the LDAP Directory, click a column header. The table is sorted according to the information in the column you selected, in descending order. Click again on the same column header to toggle the sort order between descending and ascending.

NOTE: Users with Microsoft Windows XP Service Pack 2 (SP2) installed may encounter a warning when opening the LDAP Directory.

2.9.7 Dial from Outlook Directory

You can dial any number stored in your Outlook Directory, which integrates your Outlook contacts with Call Center.

To use the Outlook Directory to make a call:

- 1) Click the *Outlook Directory* tab. The following should be displayed.



Figure 63 Outlook Directory Tab

This list can also be printed using the host application.

- 2) Click the desired phone number. The call is placed.

To sort the Outlook Directory, click a column header. The table is sorted according to the information in the column you selected, in descending order. Click again on the same column header to toggle the sort order between descending and ascending.

NOTE: Users with Microsoft Windows XP Service Pack 2 (SP2) installed may encounter a warning when opening the Outlook Directory.

2.9.8 Dial from Personal Directory

You can dial any number stored in your Personal Directory, which integrates your personal contacts with the Call Center.

To use the Personal Directory to make a call:

- 1) Click the *Personal Directory* tab. The following should be displayed.



Figure 64 Personal Directory Tab

This list can also be printed using the host application.

- 2) Click the desired phone number. The call is placed.

To sort the Personal Directory, click a column header. The table is sorted according to the information in the column you selected, in descending order. Click again on the same column header to toggle the sort order between descending and ascending.

NOTE: Users with Microsoft Windows XP Service Pack 2 (SP2) installed may encounter a warning when opening the Personal Directory.

2.9.9 Dial from Speed Dials Directory

You can dial any number stored in your Speed Dials Directory.

To use the Speed Dials Directory to make a call:

- 1) Click the *Speed Dials Directory* tab. The following should be displayed.

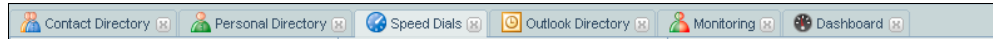


Figure 65 Speed Dials Directory Tab

This list can also be printed using the host application.

- 2) Click the desired phone number. The call is placed.

To sort the Speed Dials Directory, click a column header. The table is sorted according to the information in the column you selected, in descending order. Click again on the same column header to toggle the sort order between descending and ascending.

NOTE: Users with Microsoft Windows XP Service Pack 2 (SP2) installed may encounter a warning when opening the Speed Dials Directory.

2.10 Manage Conference Calls

To start a conference call:

- 1) Dial a number on your phone or select a number using any of the methods described in section [2.8.6 Service Level Report](#). Your active call is put on hold.
- 2) Click **Conference** and select *Start* from the drop-down list.

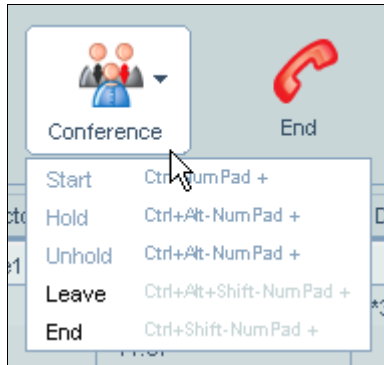


Figure 66 Conference Button Drop-down List

NOTE: When in Remote Office the Answer, Hold, and Escalate buttons are disabled.

- To hold your phone on the conference call, select *Hold* from the *Conference* drop-down list.
- To return from the hold, select *Unhold* from the *Conference* drop-down list.
- To leave the conference call, select *Leave* from the *Conference* drop-down list.
- To terminate the conference call, select *Terminate* from the *Conference* drop-down list.

2.11 Manage Queues

Using the instructions in the following sub-sections, you can transfer a call in and out of a queue, retrieve a call from a queue, and transfer a call between queues.

2.11.1 Transfer Call to Queue

You must be an agent to use this function. To transfer a call into a queue:

- 1) While on a call, select the destination queue from the drop-down list.
- 2) Position the call in the queue by clicking the **Transfer** button.



Figure 67 Transfer Button

- 3) Select the placement of the call from the *Reorder* drop-down list located on the bottom panel.

Monitoring Tab						
	Name	Call State	Call Time	ACD State	ACD Time	Caller ID
TEAM	atui2-ag1 atui2-ag1		14:00		14:00	
	atui2-ag2 atui2-ag2		14:00		14:00	
	atui2-ag3 atui2-ag3		14:00		14:00	
	atui2-ag4 atui2-ag4		14:00		14:00	
	atui2-sun atui2-sun		14:00		14:00	
CALL CENTERS						
	Call Center	Number	VM	Calls In Queue		
	atui2-cc1	0299981111		(Not Monitored)		
	atui2-cc2	0299981117		(Not Monitored)		

Retrieve Queue Transfer Reorder

Figure 68 Monitoring Tab

- 4) Transfer the call by clicking the *Transfer* option on the *Transfer button* drop-down list.

2.11.2 Position Call in Queue

To change a call's position in a queue:

- 1) Select the call in the queue.
- 2) Select the placement of the call from the *Reorder* drop-down list located on the bottom panel. Click on the desired position.

2.11.3 Retrieve Call from Queue

You must be a supervisor to use this option. To transfer a call from a queue to your phone:

- 1) Select the queued call from the Queue Detail sub-table located in the Call Center panel's *Monitoring* tab. To make this visible, check the box in the *View* drop-down list.
- 2) Click the **Retrieve** button.

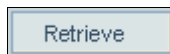


Figure 69 Retrieve Button

2.11.4 Transfer Call between Queues

You must be a supervisor to use this option. To transfer a call between queues:

- 1) Select the queued call from the Queue Detail sub-table located in the Call Center panel's *Monitoring* tab. To make this visible, check the box in the *View* drop-down list.
- 2) Select the target queue from the *Queue Transfer* drop-down list in the Call Center panel's *Monitoring* tab. This only allows transfers to the back of the queue.

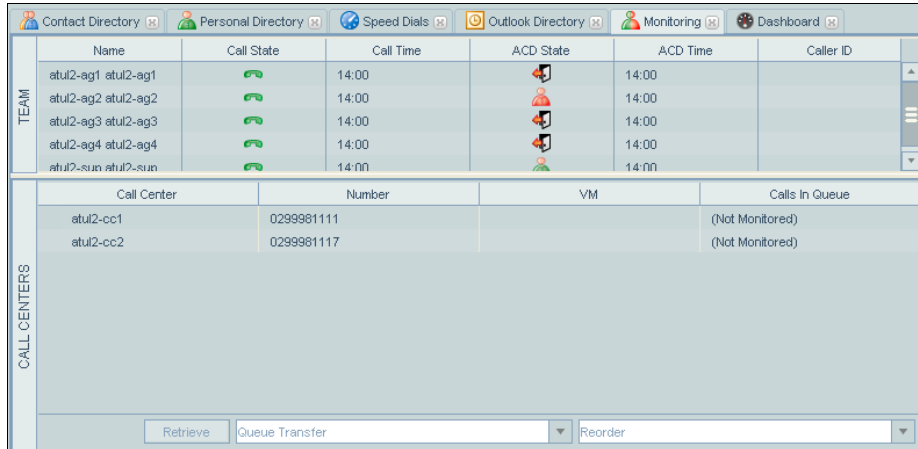


Figure 70 Monitoring Tab

2.11.5 Transfer Call Out of Queue to New Number

You must be a supervisor to use this option. To transfer a call out of a queue to a new number:

- 1) Select the queued call from the Queue Detail sub-table located in the Call Center panel's *Monitoring* tab. To make this visible, check the box in the *View* drop-down list.
- 2) Click the **Retrieve** button.



Figure 71 Retrieve Button

- 3) The call is now visible on the switchboard. Answer the retrieved call.
- 4) Dial the destination number on your phone or select a number using any of the methods described in section [2.8.6 Service Level Report](#).
- 5) Click the **Transfer** button. From the drop-down list, select the destination number.

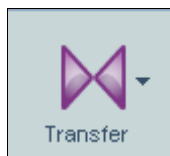


Figure 72 Transfer Button

NOTE: When in Remote Office the Answer, Hold, and Escalate buttons are disabled.

2.12 Receive a Call

This section contains detailed instructions on how to receive a call. For more information on answering a call, doing a blind or consulted transfer, holding a call, saving a vCard, or opening a URL, refer to the corresponding sections.

2.12.1 Answer Call

Use the following methods to answer a call manually or automatically.

NOTE: When in Remote Office the Answer button is disabled.

To answer a call manually:

- 1) Select the incoming call from the switchboard.
- 2) Click **Answer**.



Figure 73 Answer Button

To answer a call automatically:

NOTE: This feature only works if your device is Advanced Call Control (ACC)-compliant.

- 1) To perform this function, you must select Auto Answer from the menu in the status bar. When checked, the Answer button is disabled. Each call from here on is automatically answered.
- 2) The call is automatically answered. Your state changes from *Altering* to *Active*.

2.12.2 Blind Transfer Call

Use this method to transfer a call to another specified number without providing an introduction to the destination party. Calls may be transferred this way while active, held, or ringing (in) on your phone. In the latter case, the system redirects the call before it is answered.

- 1) While on a call, specify the destination number. To do this, dial a number on your phone or select a number using any of the methods described in section [2.8.6 Service Level Report](#). This automatically puts the customer on hold.
- 2) Immediately click the **Transfer** button before the call is answered. Select the destination number from the drop-down list.

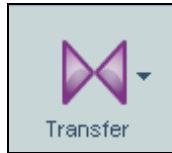


Figure 74 Transfer Button

2.12.3 Transfer Call with Consultation

Use this method to transfer a call to another specified number with an introduction to the destination party. Calls may be transferred this way while active, held, or ringing (in) on your phone.

- 1) While on a call, specify the destination number. To do this, dial a number on your phone or select a number using any of the methods described in section [2.8.6 Service Level Report](#).
- 2) This automatically puts the customer on hold. Wait until the called party accepts your call. Speak to the called party.
- 3) Click the **Transfer** button and select the destination number from the drop-down list.

2.12.4 Hold Call

Use the following method to hold an active call.

- 1) Select the active call to hold from the switchboard.
- 2) Click the **Hold** button.

NOTE 1: The Answer button changes to the Hold button depending on the context.

NOTE 2: When in Remote Office the Answer Hold/Unhold button is disabled.



Figure 75 Hold Button

2.12.5 Unhold Call

Use the following method to unhold an active call.

- 1) Select the held call from the switchboard.
- 2) Click the **Unhold** button.



Figure 76 Unhold Button

NOTE 1: The Hold button changes to Unhold when selecting an already held call.

NOTE 2: When in Remote Office the Answer/Hold/Unhold button is disabled.

2.12.6 Open URL

When you receive a call, a notification window on top of the system tray is visible. You can click a button in this notification to open a screen in your browser window. This screen contains information about the calling party encoded in its URL. This feature can be configured in the *Options – Web Pop URL* dialog.

To open a URL in your browser, click the **Web Pop URL** button in the pop-up notification.

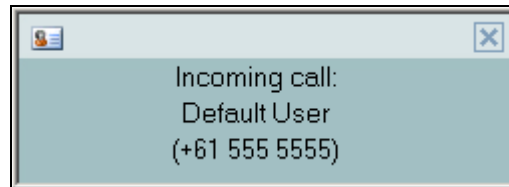


Figure 77 Pop-up Notification

NOTE: You can also answer the call or save a vCard for the caller directly from the pop-up notification.

2.12.7 Save vCard

When you receive a call, a notification window on top of the system tray is visible. You can click a button in this notification to save the caller's phone number and personal information as a vCard in Microsoft Outlook.

To save a vCard, click the **Add vCard** button in the pop-up notification window. This button is present only when Outlook is running.

2.13 Escalate Calls

You manage calls using a combination of the panels in a top-to-bottom workflow style. You should be able to distribute calls typically using this workflow for most of the activities in the following sub-sections.

2.13.1 Blind Escalate Call

NOTE: When in Remote Office the Escalate button is disabled.

Use this method to escalate a call to a supervisor.

- 1) While on a call, click the **Escalate** button.
- 2) Select the required supervisor's name from the drop-down list. Your call is automatically put on hold.



Figure 78 Escalate Button

- 3) To connect the parties before the call is answered, click the **Transfer** button immediately.

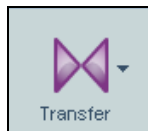


Figure 79 Transfer Button

2.13.2 Escalate Call with Conference

Use this method to escalate a call to a supervisor through a conference call.

NOTE: When in Remote Office the Hold and Escalate buttons are disabled.

- 1) While on the phone, dial the supervisor by clicking **Escalate**.
- 2) Select the supervisor's name from the drop-down list. Your call is automatically put on hold.



Figure 80 Escalate Button

- 3) Wait until the supervisor accepts your call and speak to the supervisor about the issue.
- 4) Connect the parties by clicking the **Conference** button.

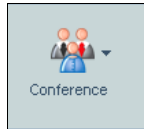


Figure 81 Conference Button

- 5) To drop a specific party from the conference, select their name in the drop-down list and click **End**.
- 6) To leave the conference, select *Leave* from the *Conference* drop-down list.

2.13.3 Escalate Call with Hand Over

Use this method to escalate a call to a supervisor through a conference call and then leave the call.

NOTE: When in Remote Office the Hold and Escalate buttons are disabled.

- 1) While on the call, dial the supervisor by clicking **Escalate**.
- 2) Select the supervisor's name from the drop-down list. Your call is put on hold.



Figure 82 Escalate Button

- 3) Wait until the supervisor accepts your call and speak to the supervisor about the issue.
- 4) Connect the parties by clicking the **Conference** button.

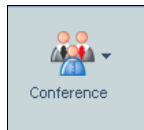


Figure 83 Conference Button

- 5) To drop a specific party from the conference, select their name in the drop-down list and click **End**.
- 6) Leave the call by selecting *Leave* from the *Conference* drop-down list.

2.13.4 Escalate Call with Hold

Use this method to hold a call and then escalate it to a supervisor.

NOTE: When in Remote Office the Hold and Escalate buttons are disabled.

- 1) While on a call, dial the supervisor by clicking **Escalate**.
- 2) Select the supervisor's name from the drop-down list. Your call is automatically put on hold.



Figure 84 Escalate Button

- 3) Wait until the supervisor accepts your call and speak to the supervisor about the issue.
- 4) Connect the parties by clicking the **Conference** button.

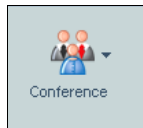


Figure 85 Conference Button

- 5) Select the call to hold from the *Call Line/Info* drop-down list and click **Hold**.

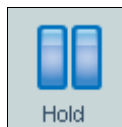


Figure 86 Hold Button

- 6) To drop a specific party from the conference, select their name in the drop-down list and click **End**.
- 7) Leave the call by selecting *Leave* from the *Conference* drop-down list.

2.13.5 Escalate Call with Mid-conference Hold

Use this method to escalate a call to a supervisor through a conference call and provide an opportunity for the customer to speak to the supervisor on hold.

NOTE: When in Remote Office the Escalate button is disabled.

- 1) While on the phone, dial the supervisor by clicking **Escalate**.
- 2) Select the supervisor's name from the drop-down list. Your call is automatically put on hold.



Figure 87 Escalate Button

- 3) Wait until the supervisor accepts your call and speak to the supervisor about the issue.
- 4) Connect the parties by clicking the **Conference** button.

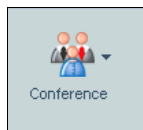


Figure 88 Conference Button

- 5) Click **Conference Hold**. The customer and supervisor can continue their conversation.
- 6) To drop a specific party from the conference, select their name in the drop-down list and click **End**.
- 7) Leave the call by selecting *Leave* from the *Conference* drop-down list.

2.13.6 Escalate Call with Consultation

Use this method to escalate a call to a supervisor and provide an introduction beforehand. Calls may be escalated this way while active, held, or ringing out on your phone.

NOTE: When in Remote Office the Escalate button is disabled.

- 1) While on a call, dial the supervisor by clicking **Escalate**.
- 2) From the drop-down list, select the supervisor's name. Your call is automatically put on hold.



Figure 89 Escalate Button

- 3) Wait until the supervisor accepts your call and speak to the supervisor about the issue.
- 4) Connect the parties by clicking the **Transfer** button.



Figure 90 Transfer Button

- 5) Leave the call by selecting *Leave* from the *Conference* drop-down list. To drop a specific party from the conference, select their name in the drop-down list and click **End**.

2.14 Transfer Call

There are a number of ways in which you can transfer a call to another contact.

2.14.1 Blind Transfer Call

A blind transfer occurs when a call is transferred without an introduction. Calls may be blind transferred while active, held, or ringing (in) on your phone. If a call is ringing (in), the blind transfer activity allows the call to be redirected before it is answered.

To transfer a call to another agent without consultation:

- 1) Dial the agent you wish to transfer the call to. This automatically puts your active call on hold.
- 2) Click the **Transfer** button and select *Phone Transfer* to <party> option.

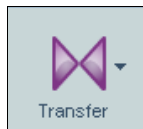


Figure 91 Transfer Button

2.14.2 Consulted Transfer Call

A consulted transfer allows the operator to announce or introduce the call to the called party. A call may be consult-transferred while active, held, or ringing (out).

To transfer a call with consultation to another agent:

- 1) Dial the agent you wish to consult. This automatically puts your active call on hold.
- 2) Consult with the other agent once the agent picks up.
- 3) Click the **Transfer** button and select *Phone Transfer* to <party> option.



Figure 92 Transfer Button

2.14.3 Transfer Call to Queue

To transfer a call to a queue:

- 1) Select the call to transfer from the switchboard.
- 2) Click the **Transfer** button on the Call Control panel.

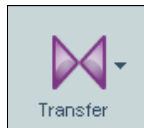


Figure 93 Transfer Button

- 3) Click the target queue from the **Transfer** button drop-down list.
- 4) Hold down the Shift key while clicking the queue from the drop-down list to transfer the customer to the front of the queue.

2.15 Supervisor Barge-In

Supervisor Barge-In allows the supervisor to barge in on an agent's call. This is useful for when you want to enter an already established call between two other people. This functionality is only available if you have been assigned this service by your group/system administrator.

NOTE: Supervisor Barge-In is only supported if the agent and supervisor are in the same group. In an enterprise, this function can be disabled.

To barge in on an agent's call:

- 1) Select the agent on call from the Team panel in the *Monitoring* tab. This is made visible by selecting *View* and checking the *Monitoring* box. The agent must have a red phone icon to indicate that they are on a call.
- 2) The Conference button should change to the Barge-In button. Click the **Barge-In** button. The supervisor is now in a three-way conference with the agent and the customer.

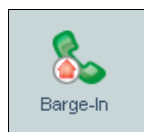


Figure 94 Barge-In Button

- 3) Click the **Conference** button to leave the conference. The call is still active between the agent and the customer. Alternatively, to drop a specific party from the conference, select their name in the drop-down list and click **End**.

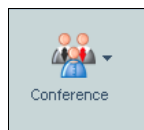


Figure 95 Conference Button

2.16 Supervisor Call Pick-Up

Supervisor Call Pick-Up allows the supervisor to pick up an unanswered agent's call. This is useful for when you want to answer a ringing call that is in the queue. This functionality is only available if you have been assigned this service by your group/system administrator.

NOTE: Supervisor Call Pick-Up is only supported if the agent and supervisor are in the same group. In an enterprise, this function can be disabled.

To perform a Supervisor Call Pick-Up:

- 1) Select the unanswered call from the Team panel in the *Monitoring* tab. This is made visible by selecting *View* and checking the *Monitoring* box. The agent must have a green phone icon to indicate that they are on a call.
- 2) The Conference button should change to the Call Pick-Up button. Click the **Call Pick-Up** button. The supervisor is now answering the agent.



Figure 96 Call Pick-Up Button

- 3) To drop a specific party from the conference, select their name from the drop-down list and click the **End** button. Alternatively, click the **Conference** button to end the call.

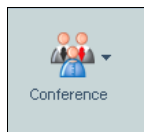


Figure 97 Conference Button

2.17 End Call

This section contains detailed instructions on how to end a call. For more information on answering a call, receiving a call, doing a blind or consulted transfer, holding a call, saving a vCard, or opening a URL, refer to the corresponding sections.

To end a call, select the active call from the switchboard and click **End**.



Figure 98 End Button

When in a conference, the End button allows you to drop specific parties from the call. Select the party from the *Conference* drop-down list and click **End**. The party is no longer in the conference.

3 Glossary

Name	Description
Active Call	This is the call you are currently talking to or dealing with.
Ringling (In)	This is the equivalent to a phone ringing locally.
Calling Party	This is the party who you are receiving a call from.
Called Party	This is the party that you have dialed.
Music on Hold	This is music that is streaming from the service provider for a held call.
Ringling (Out)	This is equivalent to a phone ringing on the called party's phone.

4 Keyboard Shortcuts

The following is a listing of keystrokes (shortcut keyboard entries) that are available in Call Center.

4.1 General Control Keys

Keystrokes	Equivalent Mouse Action	Function
ESCAPE	Click OK/CANCEL/EXIT .	Exits from the active window.
CTRL+A	Click on Available .	States that you are available to take calls when you log in.
CTRL+A	Click on Unavailable .	States that you are unavailable to take calls when you log in.
CTRL+W	Click on Wrap-Up .	States your status as <i>Wrap up</i> on completion of a call
<NumPad 0...9)		Allows to you to dial an ad hoc number.

4.2 Menu Bar Control Keys

Keystrokes	Equivalent Mouse Action	Function
Alt + O	Select <i>Tools</i> and then <i>Options</i> .	Displays <i>Options</i> dialog box.
Alt + R	Select <i>Tools</i> and then <i>Call History</i> .	Displays <i>Call History</i> dialog box.
Alt + H	Select <i>Help</i> and then <i>User Guide</i> .	Opens <i>BroadWorks Call Center User Guide</i> .
Alt + L	Select <i>File</i> and then <i>Sign In</i> .	Logs the user into Call Center. If the user is already logged in, performing the keystroke shortcut logs you out.
ALT+L	Select <i>File</i> and then <i>Sign Out</i> .	Logs out current user from Call Center and returns to login screen.
ALT+F4	Select <i>File</i> and then <i>Exit</i> .	Exits the user from Call Center.
F11	Click on Full Screen or Compact .	Toggles between full screen mode and compact mode for the application window.

4.3 Directories Control Keys

Keystrokes	Equivalent Mouse Action	Function
ALT+1	Click on <i>Contact Directory</i> tab.	The <i>Enterprise/Group Directory</i> tab is brought to the front.
ALT+2	Click on <i>Personal Directory</i> tab.	The <i>Personal Directory</i> tab is brought to the front.
ALT+3	Click on <i>Speed Dials Directory</i> tab.	The <i>Speed Dials Directory</i> tab is brought to the front.

Keystrokes	Equivalent Mouse Action	Function
ALT+4	Click on <i>LDAP Directory</i> tab.	The <i>LDAP Directory</i> tab is brought to the front.
ALT+5	Click on <i>Outlook Directory</i> tab.	The <i>Outlook Directory</i> tab is brought to the front.
ALT-M	Click on <i>Monitoring</i> tab.	The <i>Monitoring</i> tab is brought to the front.
ALT-D	Click on <i>Dashboard</i> tab.	The <i>Dashboard</i> tab is brought to the front.

4.4 Control Keys

Keystrokes	Equivalent Mouse Action	Function
ENTER	Click on Dial .	Dials the selected number.
<NumPad+>	Click on Transfer .	Transfers the selected call.
<NumPad.>	Click on End .	Ends the selected call.
F1...F10	Click on Answer after selecting a call in the queue, or double-click an active call.	Designates a call to you. F1 applies to the first call listed; F2 applies to the second call, and so on.
F1...F10	Click on Hold after selecting a call in the queue, or double-click an active call in the queue panel.	Sets a call to "On Hold". F1 applies to the first call listed in the queue; F2 applies to the second call, and so on.
F1...F10	Click on Unhold after selecting a call in the queue, or double-click an active call in the queue panel.	Sets a call to "On Hold". F1 applies to the first call listed in the queue; F2 applies to the second call, and so on.
Ctrl + <Number Pad +>	Click on Conference .	Initiates a conference with linked call lines. Performs Barge-In on selected contact.
Ctrl + Alt + <Number Pad +>	Click on Conference Hold/Conference Unhold .	Toggles a conference from <i>Held</i> to <i>Active</i> state.
Ctrl + Alt + Shift + <Number Pad +>	Click on Leave Conference .	Leaves a conference. Releases yourself from the active conference.
Ctrl + Shift + <Number Pad +>	Click on End Conference .	Ends a conference. Releases all parties from the conference.

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