BroadWorks Call Center Agent / Supervisor

User Guide

Release 16.sp1

Document Version 3

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Document Revision History

Release	Version	Reason for Change	Date	Author
13.1	1	Created document.	September 18, 2007	Natasha Jayasinghe
13.1	1	Updated SSL Certificate information in section *4.5.2 Display LDAP Directory* according to EV 48263.	November 14, 2007	Natasha Jayasinghe
13.1	1	Edited section *4.5.3 Display Personal Directory* and section *4.5.5 Display Speed Dials Directory* for EV 49473.	November 15, 2007	Natasha Jayasinghe
13.1	1	Edited section *5.5 Escalating Calls* for EV 49402.	November 15, 2007	Natasha Jayasinghe
13.1	1	Added section *4.5.4 Display Outlook Directory* and section *5.1.7 Dial from Outlook Directory* for EV 49287.	November 15, 2007	Natasha Jayasinghe
13.1	1	Made changes to section *5.5 Escalating Calls* for EV 48553.	November 15, 2007	Natasha Jayasinghe
13.1	1	Edited section *4.2.8 Web Screen Pop Menu Item* for EV 48244.	November 15, 2007	Natasha Jayasinghe
13.1	1	Added section *6.6.4 Reorder – Position Call in Queue* for EV 48229.	November 15, 2007	Natasha Jayasinghe
13.1	1	Edited section *4.4 Changing Your ACD State (Agent)* for EV 48227.	November 15, 2007	Natasha Jayasinghe
13.1	1	Fixed Barge-In button images and links for EV 48190.	November 15, 2007	Natasha Jayasinghe
13.1	1	Made relevant changes for EV 39919.	November 15, 2007	Natasha Jayasinghe
13.1	1	Fixed broken link for EV 48237.	November 15, 2007	Natasha Jayasinghe
13.1	1	Made minor editorial changes.	November 16, 2007	Patricia Renaud
13.1	1	Edited and published document.	November 19, 2007	Andrea Fitzwilliam
14.sp3	1	Made changes for Release 14.sp3.	December 6, 2007	Natasha Jayasinghe
14.sp3	1	Added information on conferences for EV 57427.	January 24, 2008	Natasha Jayasinghe
14.sp3	1	Added section *7.2 Reports* for EV 58074 and EV 57766.	January 24, 2008	Natasha Jayasinghe
14.sp3	1	Added information on enterprise scenarios for EV 58146.	January 24, 2008	Natasha Jayasinghe
14.sp3	1	Added notes on Remote Office for EV 58187.	January 24, 2008	Natasha Jayasinghe
14.sp3	1	Updated section *6 Monitoring (Supervisor)* for EV 58856.	February 18, 2008	Wendell Keuneman
14.sp3	1	Added ACD Call Forwarding Always state.	February 19, 2008	Wendell Keuneman
14.sp3	1	Edited changes and published document.	February 20, 2008	Andrea Fitzwilliam

Release	Version	Reason for Change	Date	Author
14.sp3	2	Modified section *7.2.7 Queue Performance Analysis Report* for EV 60131.	March 13, 2008	Wendell Keuneman
14.sp3	2	Edited changes and published document.	March 13, 2008	Andrea Fitzwilliam
14.sp3	3	Modified section *7.2.6.3 Table Information for Agent Utilization Report* for EV 61012.	April 7, 2008	Natasha Jayasinghe
14.sp3	3	Modified section *6 Monitoring (Supervisor)* for EV 59717.	April 7, 2008	Natasha Jayasinghe
14.sp3	3	Edited changes and published document.	April 8, 2008	Andrea Fitzwilliam
14.sp3	4	Modified several sections including section *7.2 Reports* for EV 61105.	April 17, 2008	Wendell Keuneman
14.sp3	4	Edited changes and published document.	April 20, 2008	Patricia Renaud
14.sp6	1	Updated document for Release 14.sp6.	April 24, 2008	Natasha Jayasinghe
14.sp6	1	Added index.	May 20, 2008	Roberta Boyle
14.sp6	1	Reviewed changes.	May 21, 2008	Wendell Keuneman
14.sp6	1	Modified selected notes for EV 61998.	May 22, 2008	Wendell Keuneman
14.sp6	1	Edited changes and published document.	May 23, 2008	Andrea Fitzwilliam
14.sp6	2	Corrected section *4.2.1 General* language synchronize label to actual value.	May 28, 2008	Wendell Keuneman
14.sp6	2	Corrected sections *4.1 Main Interface*, *6 Monitoring*, *6.6 Manage Queued Calls*, *5.2 Receiving Call*, *6.3 Supervisor Barge-in*, and *6.4 Supervisor Call Pickup*.	December 10, 2008	Goska Auerbach
14.sp6	2	Made minor update to section *7.2.7.3 Table Information for Queue Performance Report* for EV 68282. Made minor update to section *4.1 Main Interface* (call history dialog description) for EV 65022.	December 11,2008	Milind Joshi
14.sp6	2	Edited changes and published document.	January 20, 2009	Andrea Fitzwilliam
16.0	1	Updated document for Release 16.0.	January 23, 2009	Goska Auerbach
16.0	1	Removed Agents Ringing from section *7.1.2 Dashboard* for EV 89309.	February 4, 2009	Roberta Boyle
16.0	1	Made minor editorial changes.	February 6, 2009	Patricia Renaud
16.0	1	Changed an image in section *5.2.4.1 Open URL* for EV 91542.	May 21, 2009	Goska Auerbach
16.0	1	Edited changes for EV 91542.	June 5, 2009	Andrea Fitzwilliam
16.0	1	Updated sections *7.1.3 Queue Summary Table Information* and *7.2.7.3 Table Information for Queue Performance Report* for EV 95974.	July 7, 2009	Goska Auerbach

Release	Version	Reason for Change	Date	Author
16.0	1	Edited document for EV 95974 only.	July 10, 2009	Andrea Fitzwilliam
16.0	1	Updated section *7.2.8.3 Table Information for Service Level Report* for the EV 96662.	July 13, 2009	Milind Joshi
16.0	1	Updated document with additional functionality for Release 16.0.	July 14, 2009	Goska Auerbach
16.0	1	Updated section *7.2.5 Agent Activity Report (Supervisor and Agent)* and section *7.2.6 Agent Utilization Report* for EV 96380.	July 31, 2009	Martin Perron
16.0	1	Edited document for EVs 96662 and 96380 only.	August 3, 2009	Andrea Fitzwilliam
16.0	1	Edited and published document.	August 24, 2009	Patricia Renaud
16.0	2	Updated document for EV 98624.	September 2, 2009	Goska Auerbach
16.0	2	Updated section *7.2.6.3 Table Information for Agent Utilization Report* for EV 99566.	September 30, 2009	Roberta Boyle
16.0	2	Edited changes and published document.	October 6, 2009	Andrea Fitzwilliam
16.0	3	Removed update from section *7.2.6.3 Table Information for Agent Utilization Report* for EV 99566.	October 29, 2009	Roberta Boyle
16.0	3	Updated document to incorporate changes made in the Release 14.sp6 version of the document to clarify statistical information.	November 18, 2009	Goska Auerbach
16.0	3	Updated section *4.1.5 Status Bar* for EV 101339.	November 19, 2009	Goska Auerbach
16.0	3	Updated section *7.2.7 Queue Performance Analysis Report* for EV 103219.	November 25, 2009	Goska Auerbach
16.0	3	Edited changes and published document.	November 30, 2009	Andrea Fitzwilliam
16.sp1	1	Created Release 16.sp1 version of the document and updated for EV 99566.	January 29, 2010	Goska Auerbach
16.sp1	1	Updated sections *7.2.5 Agent Activity Report (Supervisor and Agent)* and *7.2.6 Agent Utilization Report* for EV 104375.	February 11, 2010	Goska Auerbach
16.sp1	1	Edited changes and published document.	March 6, 2010	Patricia Renaud
16.sp1	2	Updated section *7.2.7.3 Table Information for Queue Performance Report* for EV 103219.	May 25, 2010	Goska Auerbach
16.sp1	2	Edited changes and published document.	July 14, 2010	Andrea Fitzwilliam
16.sp1	3	Updated sections *3.3 Call Center Setup*, *4.2.1 General Menu Item*, *6.2 Monitor Agents (Team Panel),* and *8.2 ACD States*.	September 27, 2010	Goska Auerbach
16.sp1	3	▪ Added section *7.2.4 Reporting Time Period* for EV 110049. ▪ Updated section *6.5 Monitor Queues (Call Centers Panel)* for EV 118936.	October 10, 2010	Goska Auerbach

Release	Version	Reason for Change	Date	Author
16.sp1	3	Updated sections *7.1.3 Queue Summary Table Information*, *7.2.7.3 Table Information for Queue Performance Report*, and *7.2.8.3 Table Information for Service Level Report* for EV 123991.	December 15, 2010	Goska Auerbach
16.sp1	3	Edited changes and published document.	January 4, 2010	Andrea Fitzwilliam

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1 Summary of Changes

This section describes the changes to this document for each release and document version.

1.1 Changes for Release 16.sp1, Document Version 3

This version of the document includes the following changes:

- Updated information about alerts in sections *3.3 Call Center Setup* and *4.2.1 General Menu Item*.
- Updated sections *6.2 Monitor Agents (Team Panel)* and *8.2 ACD States* with a note about ACD states for agents who are not joined in.
- Added section *7.2.4 Reporting Time Period* for EV 110049.
- Updated section *6.5 Monitor Queues (Call Centers Panel)* for EV 118936.
- Updated sections *7.1.3 Queue Summary Table Information*, *7.2.7.3 Table Information for Queue Performance Report*, and *7.2.8.3 Table Information for Service Level Report* for EV 123991.

1.2 Changes for Release 16.sp1, Document Version 2

This version of the document includes the following changes:

- Updated section *7.2.7.3 Table Information for Queue Performance Report* for EV 103219.

1.3 Changes for Release 16.sp1, Document Version 1

This version of the document includes the following changes:

- Updated section *7.2.6 Agent Utilization Report* for EV 99566.
- Updated sections *7.2.5 Agent Activity Report (Supervisor and Agent)* and *7.2.6 Agent Utilization Report* for EV 104375.

1.4 Changes for Release 16.0, Document Version 3

This version of the document includes the following changes:

- Removed update from section *7.2.6.3 Table Information for Agent Utilization Report* for EV 99566.
- Incorporated changes made to Release 14.sp6 version of this document to clarify statistical information.
- Updated section *4.1.5 Status Bar* for EV 101339.
- Rearranged sections to group agent and supervisor functions.
- Updated section *7.2.7 Queue Performance Analysis Report* for EV 103219.

1.5 Changes for Release 16.0, Document Version 2

This version of the document includes the following changes:

- Updated and restructured the login and setup information for EV 98624.

- Updated section *7.2.6.3 Table Information for Agent Utilization Report* for EV 99566.

1.6 Changes for Release 16.0, Document Version 1

This version of the document includes the following changes:

- Created section *4.3 Tools – Call History* for the *Delete Single Entry Call Logs Functional Specification* and moved information about viewing call logs to this section.
- Changed an image in section *5.2.4.1 Open URL* for EV 91542.
- Updated sections *7.1.3 Queue Summary Table Information* and *7.2.7.3 Table Information for Queue Performance Report* for EV 95974.
- Updated section *7.2.8.3 Table Information for Service Level Report* for EV 96662.
- Updated sections on logging in for the *Web-based/Web-Services-based Receptionist and Call Center Client Applications Feature Description*.
- Updated sections *4.1 Main Interface*, *4.2.5 Call Center – Supervisor* , *6 Monitoring (Supervisor)*, *5.1 Dialing Calls*, and updated images throughout the document to match the interface for the *Call Center Enhancements Feature Description*.
- Updated section *7.2.5 Agent Activity Report (Supervisor and Agent)* and section *7.2.6 Agent Utilization Report* for EV 96380.
- Updated document for EV 98412.

2 Introduction

2.1 About This Guide

This guide provides step-by-step procedures and reference information for BroadWorks Call Center Release 16.sp1.

BroadWorks Call Center herein is referred to as Call Center, Call Center client, or client.

2.2 Overview

BroadWorks Call Center is a carrier-class, lightweight desktop communications management product for Call Center agents and supervisors 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:

- Efficient call handling and Automatic Call Distribution (ACD) state management by Call Center agents
- Integration of online directories with Click-To-Dial capability
- Real-time monitoring of agent and queue activity by Call Center supervisors
- Historical reporting on agent and queue activity by Call Center supervisors

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

2.3 Audience

This document is intended for Call Center agents and supervisors who use the BroadWorks Call Center desktop client.

NOTE 1: The functionality available to you through BroadWorks Call Center client application depends on your Call Center function (agent or supervisor), your Call Center license, the queues you are part of, your Call Center, and your own services and settings. For more information, ask your group administrator about the capabilities and services assigned to you.

NOTE 2: The Call Center functions available only to Agents, Supervisors, or Premium queues are identified as such throughout the document.

2.4 Additional Resources

For more information on Call Center and on Application Server procedures used by group administrators, department administrators, and users, see the following BroadWorks guides:

- *Call Center Quick Reference Guide*
- *BroadWorks Call Center Agent/Supervisor Administration Guide*
- *BroadWorks Deployment Studio for Call Center Agent/Supervisor User Guide*

- *BroadWorks Call Center Statistics Guide*
- *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*.

3 Starting and Setting Up Call Center

You log in to the Call Center from your web portal, or alternatively, if your service provider has configured that option, you can also log in from your desktop.

The login procedure is the same for agents and supervisors.

3.1 Web Portal Login

1) Log in to your BroadWorks web portal.

2) From the Launch drop-down list at the top right of the BroadWorks logo pane, select Call Center. The name depends on the Call Center.

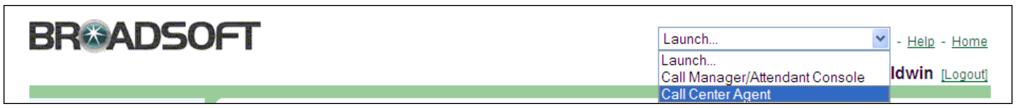


Figure 1 BroadWorks Web Portal Logo Pane – Launching Call Center as Agent

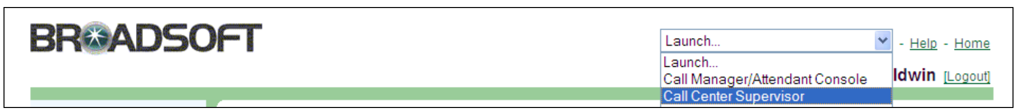


Figure 2 BroadWorks Web Portal Logo Pane – Launching Call Center as Supervisor

Call Center starts and you are automatically logged in.

3.2 Desktop Login

If your service provider has configured the Call Center client application to create a desktop shortcut on first launch, you can subsequently start Call Center from your desktop.

1) Click the **Call Center** shortcut on your desktop or select it from the Start menu.

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

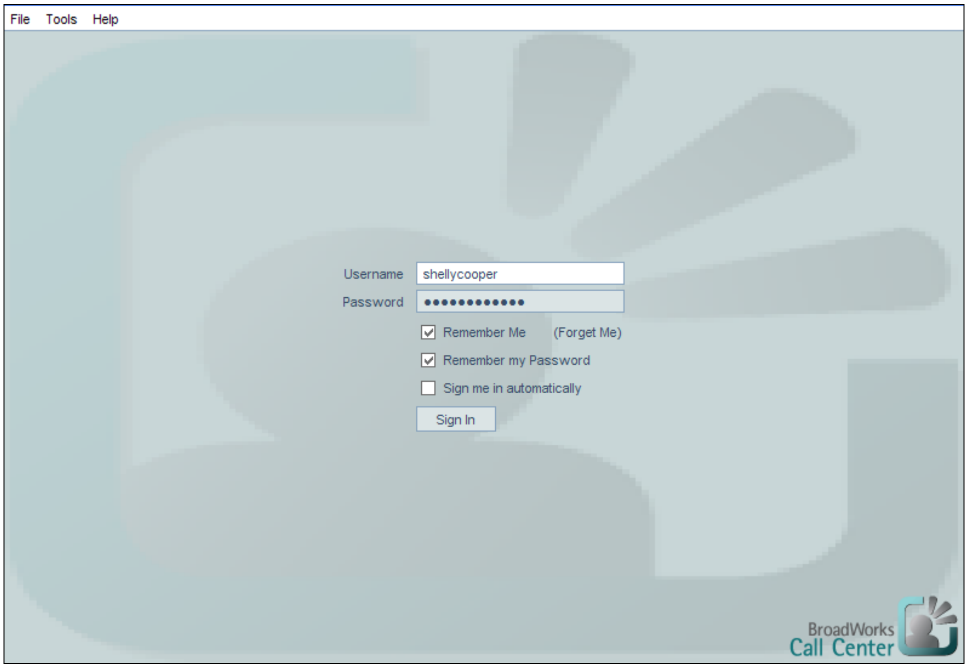


Figure 3 Login Interface

2) Enter your service provider user name and password. If you are unsure of your user name and password, contact your service provider.

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

3) Check *Sign me in automatically* to log in to BroadWorks Call Center automatically when you click the Call Center shortcut. You also have to check *Remember Me* and *Remember my Password* for automatic sign in to work.

4) Click **Sign In**.

NOTE: If you launch Call Center from a shortcut within five minutes of launching it from the web portal or if you have previously selected *Remember Me*, *Remember my Password,* and *Sign me in automatically*, you are automatically logged in after clicking the shortcut.

3.3 Call Center Setup

It is recommended that you configure the Call Center as follows when you first log in:

1) From the Tools menu, select *Options*.

   The *BroadWorks Call Center - Options* dialog box opens on the *General* screen.

NOTE: To save your changes at any time, click Apply. Apply saves your changes without leaving the screen. OK saves your changes and quits the Options menu.

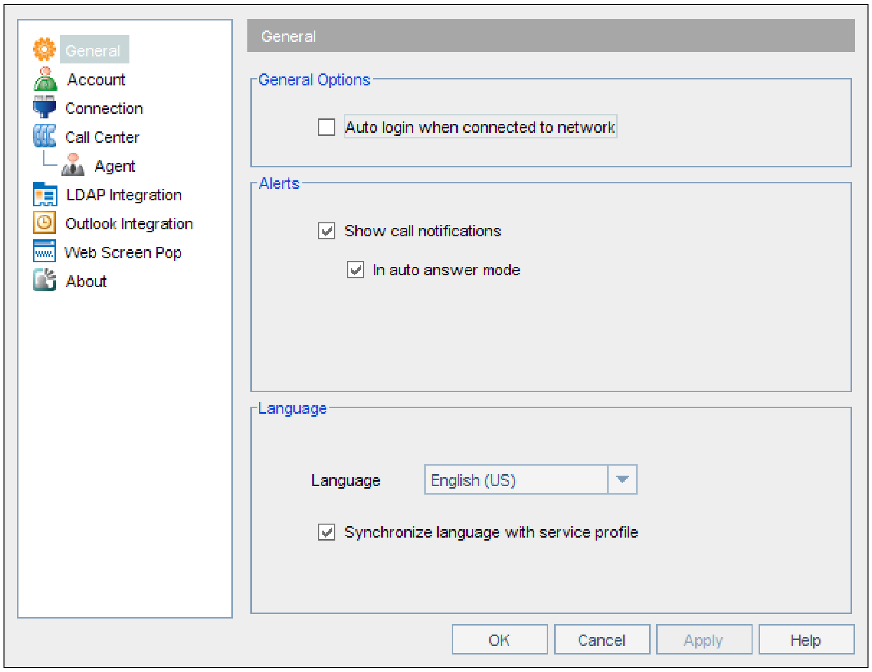


Figure 4 Options Dialog – General Screen

2) From the *General* screen, set the following options:

General Options

Check *Auto login when connected to network* to enable the client to automatically connect and log in to the server when it detects a network connection.

This should generally be enabled to help mitigate intermittent internet connections. When disabled, the client signs out the user when the connection is lost.

Alerts

– Check *Show call notifications* if you want visible notifications when there are incoming calls.

– Check *In auto answer mode* if you want visible notifications when answering calls automatically.

NOTE: Auto Answer requires the use of an Advanced Call Control (ACC)-compliant phone.

Language

– To change the language from the default English (U.S.), select the new language, from the *Language* drop-down list. The available language options are:

  – English (U.S.)
  – 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

NOTE: The language option is applied the next time you restart Call Center. If you want to apply it right away, click OK, restart Call Center, and continue the setup.

– Check *Synchronize language with service profile* to enable Call Center to automatically match the application language to the language set within your BroadWorks subscriber's profile after signing in.

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

3) If you are an agent or if you are a supervisor assigned as an agent in a Call Center, in addition to your supervisor role, click **Agent**. The *Call Center – Agent* screen appears.

Otherwise, go to step 5).

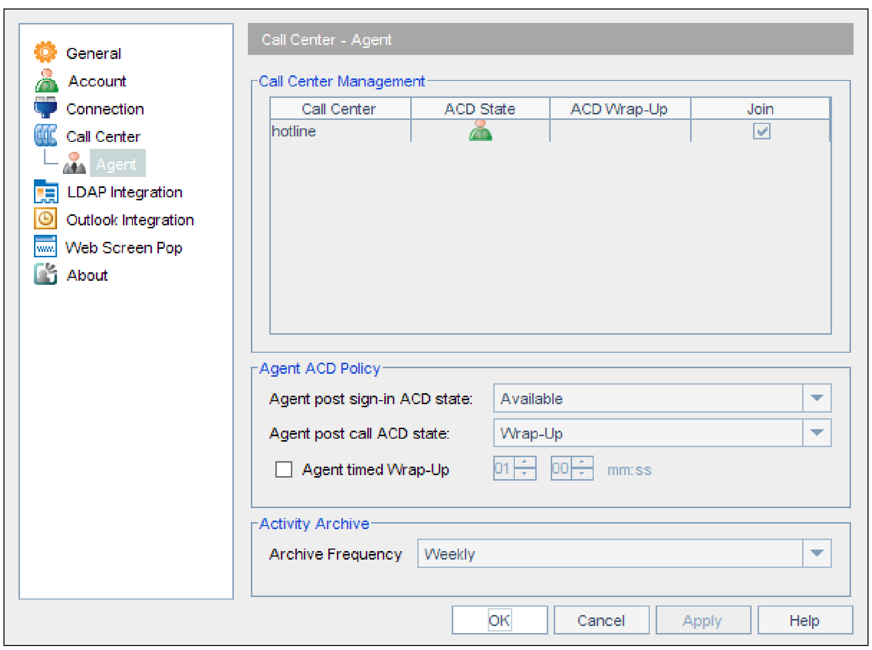


Figure 5 Options Dialog – Call Center – Agent Screen

4) Configure your Agent options as follows:

Call Center Management

– Check *Join* in the row of each Call Center for which you want to participate in the Automatic Call Distribution (ACD).

Agent ACD Policy

– Set the *Agent post sign-in ACD state* option. Select from the following options:

  – *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.

– Set the *Agent post-call ACD state*. Select from the following options:

  – *Wrap-up* configures your status as *Wrap-up* on completion of a call. When using *Wrap-up*, check *Agent timed wrap-up* 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.

– Set your *Agent timed Wrap-Up*. This option allows you to specify your post-call wrap-up time in minutes and seconds. *Agent timed Wrap-Up* may be overridden if the *Enable maximum ACD Wrap-up timer* on the *Call Center Profile* page is checked and configured as a smaller value than the setting on this page. *Call Center Profile* is configured on a per-Call Center basis.

  For more information on the ACD states, see section *8 Glossary and Definitions*.

Activity Archive

– Set the archive frequency. The *Archive Frequency* can be set to "Daily", "Weekly", "Monthly", or "Do Not Archive". The default is "Weekly".

  For additional information on the archived data, see section *4.2.4 Call Center – Agent Menu Item*.

5) If you are a supervisor, click **Supervisor**. The *Call Center – Supervisor* screen appears.

Otherwise, go to step 7).

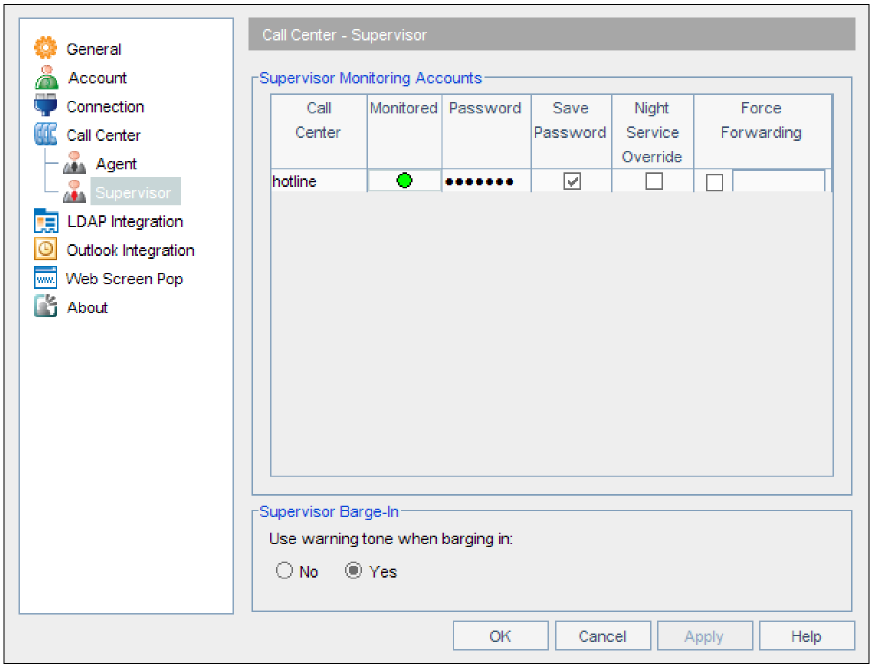


Figure 6 Options Dialog – Call Center – Supervisor Screen

6) Configure your Supervisor options as follows:

Supervisor Monitoring Accounts

– To start monitoring a Call Center, enter the Call Center password in the row for the Call Center and click **Apply**. Password information is available from your service provider.

– To remember the password and automatically start monitoring the Call Center on future sign-in, check *Save Password*.

Supervisor Barge-In

– For silent barge-in, select *No* for *Use warning tone when barging in* and go on mute when you join the call. The agent is not aware that you have joined the call. You can join the call (Three-Way Call) by going off mute.

You can barge in on active calls by selecting a call on the *Monitoring* tab and clicking the *Barge-in* button in the *Call Control* panel.

NOTE: Supervisors must have the Directed Call Pickup with Barge-in feature assigned to them to enable this feature.

7) Click **OK** to save your changes and leave the *Options* dialog.

4 Using Call Center

This section helps you navigate the Call Center. It presents the various elements of the Call Center interface and explains how they are used.

4.1 Main Interface

Figure 7 and *Figure 8* show the main interface of the Call Center when logged in as an agent and when logged in as a supervisor, respectively.

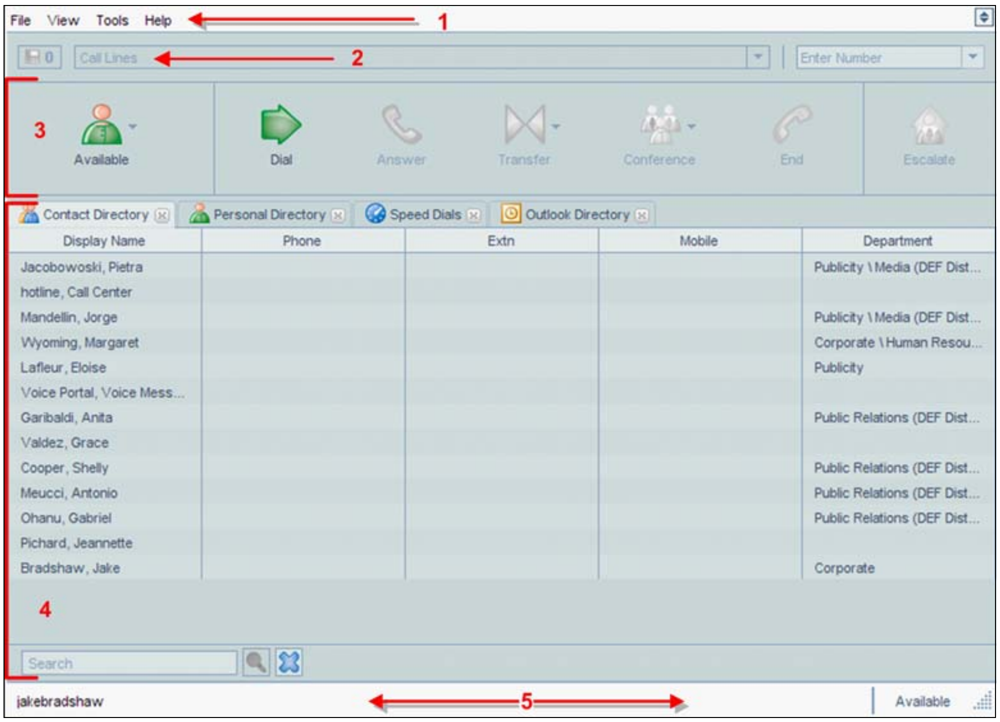


Figure 7 Main Interface – Agent

The *Main Interface* contains the following areas, described in more detail in the following sections:

1. Menu Bar
2. Calls Panel
3. ACD/Call Control Panel
4. Content Panel
5. Status Bar

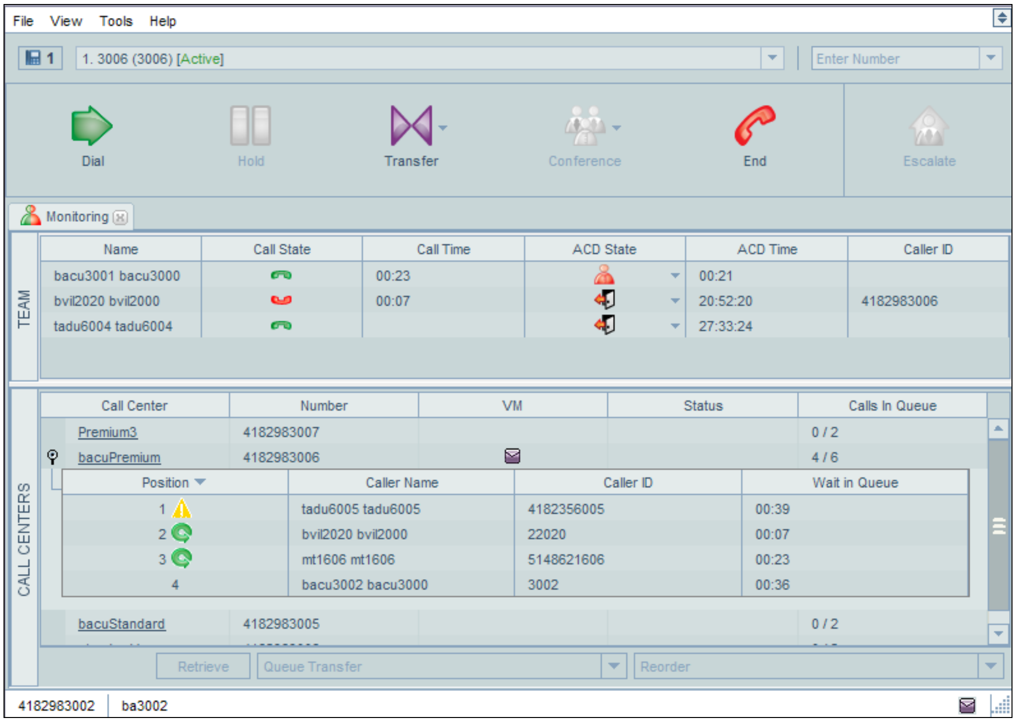


Figure 8 Main Interface – Supervisor

The following subsections describe the different areas of the main interface in more detail.

4.1.1 Menu Bar

Located at the top of the main interface, the Menu bar displays a list of options to configure the Call Center.

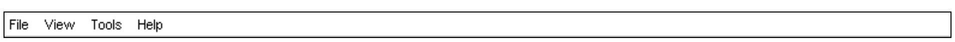


Figure 9 Menu Bar

- The File menu contains the following items:
  - *Sign out* signs you out of the Call Center.
  - *Exit* logs you out of the Call Center and displays the *Login* screen.
- The View menu contains the following 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.
  - The *Reports* list launches the *Agent Activity, Agent Utilization, Queue Performance*, and *Service Level Reports*. Reports are only available to supervisors, with the exception of the Agent Activity report, which can be used by agents to view their own statistics only.
  - *Monitoring* (**Supervisor**) makes the teams and Call Centers you are monitoring visible. To make the *Monitoring* tab visible, check the *Monitoring* box.

- *Dashboard* (**Supervisor**) 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 the 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 the history of calls for the user logged in to the Call Center client. It is split up into three sections: *Dialed Calls, Received Calls*, and *Missed Calls*. For a detailed description, see section *4.3 Tools – Call History Dialog*.
- The *Options* dialog allows you to configure your Call Center. For more information, see section *4.2 Tools – Options Dialog*.

4.1.2 Calls Panel

Located directly below the Menu bar, the *Calls* panel displays the current calls associated with the agent, including active calls, alerting calls, and held calls. It also includes the *Outgoing Calls* box (on the right).

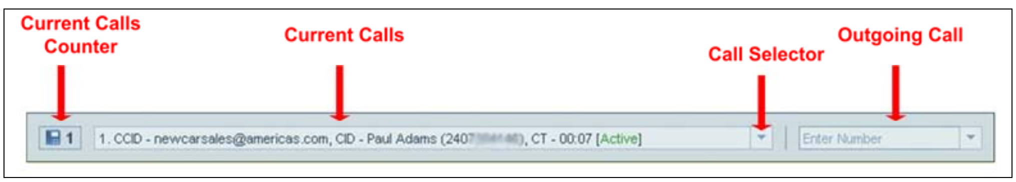


Figure 10 Calls Panel

■ *Current Calls Counter* – This icon, located on the left of the panel, displays the number of calls currently being handled by the agent. The number includes active calls, (incoming and outgoing) alerting calls, and held calls. A Three-Way Conference counts as a single call.

■ *Current Calls* bar – The bar in the center provides information about the calls being handled by the agent.

■ *Call Selector* – When clicked, Call Selector displays the list of current calls, with each call instance on a separate line, including the following information:

- Call Center ID (for example, CCID - newcarsales@broadsoft.com)
- Calling Party Name and Number
(for example, CID – John Smith [301-555-1212])
- Call time (duration) and current state (for example, CT - 01:23 [On Hold])

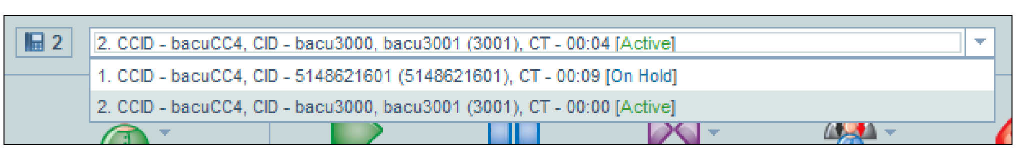


Figure 11 Current Calls

To manage a call, use *Call Selector* to display all current calls, and then click the call you want to manage. The call appears in the *Current Calls* bar. Call control functions, such as *Answer*, *Transfer*, and *End* are applied to the selected call instance.

- *Outgoing Call* box – The *Outgoing Call* box, on the right, is used to initiate outgoing calls. To initiate a call, in the *Outgoing Call* box, type the phone number to call, and then press the RETURN key. Alternatively, select a previously dialed number from the drop-down list.

Agents can provide appropriate greetings to callers by looking at the Call Center ID (CCID) of the call. The CCID is defined when the Call Center is created and is attached to the calls received in that Call Center. It can represent a department name (for example, newcarsales), a campaign name (for example, july_magazine_ad), a skill group (for example, tier1_widget_support), or any other appropriate naming convention.

The CCID includes a domain name (xxx@mycompany.com) to allow for additional differentiation within an enterprise. An enterprise may choose to use multiple domains and use the same ID within each domain (for example, sales@buick.com and sales@cadillac.com.)

4.1.3 ACD/Call Control Panel

The *ACD/Call Control* panel is the second panel of the main interface.

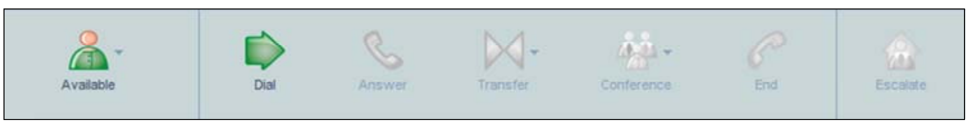


Figure 12 ACD/Call Control Panel

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

- ACD State (**Agent**)

  The ACD State combination button ("combo button") shows your current availability status and when clicked, displays a list of states you can change your status to:

  – The *Available* item, when selected, changes your availability status to *Available* to receive calls.

  – The *Unavailable* item, when selected, changes your availability status to *Unavailable* to receive calls.

  – The *Wrap-Up* item, when selected, changes your status to *Wrap-up*. Time allocated to the wrap up is captured in agent statistics.

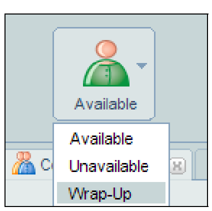


Figure 13 ACD State Button

For information on changing your ACD state, see section *4.4 Changing Your ACD State.* For additional information on ACD states and the agent's availability to accept incoming call information, see section *8 Glossary and Definitions*.

- Call Control

  For information on using Call Control buttons, see section *5 Managing Calls*.

  – The Dial button, when clicked, displays the dial pad, allowing you to enter the phone number to call.

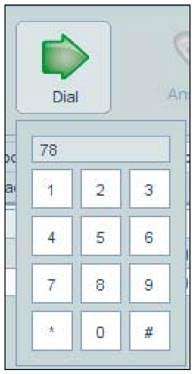


Figure 14 Dial Pad

  – 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 current call. For more information, see section *5.3 Transferring Calls*.

  – 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 (**Supervisor**) when clicked, allows you to barge in on the active call. For more information, see section *6.3 Supervisor Barge-in (Supervisor)*.

  – The Call Pick-Up (**Supervisor**), when checked, allows you to pick up an unanswered call. For more information, see section *6.4 Supervisor Call Pickup (Supervisor)*.

NOTE: You must be assigned the BroadWorks Directed Call Pickup with Barge-in feature to use the Barge-In button. To activate this service, contact your administrator.

4.1.4 Content Panel

The *Content* panel is the third panel of the main interface. The content of the *Content* panel changes depending on the tab you select.

It may contain the following tabs (depending on your setup):

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

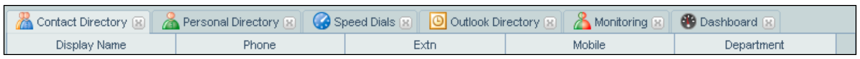


Figure 15 Contact Directory Tab

  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.

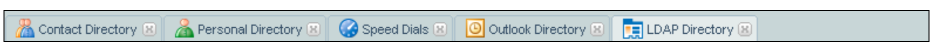


Figure 16 LDAP Directory Tab

  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.

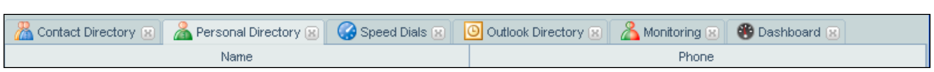


Figure 17 Personal Directory Tab

  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.

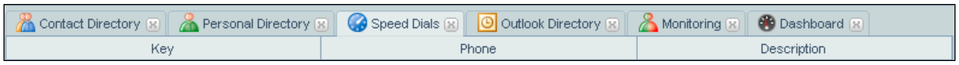


Figure 18 Speed Dial Tab

The following list describes the columns on the *Speed Dials* 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 (**Supervisor**) displays the real-time status of each queue being managed as well as an overview of the current status and availability of agents.

  The *Dashboard* includes a bar chart of the queue status (queued calls, remaining queue capacity, and abandoned calls) along with a per-queue summary table. You can toggle through the data and resize it using a horizontal splitter bar. For more information, see section *7.1 Real-time Measurements*.

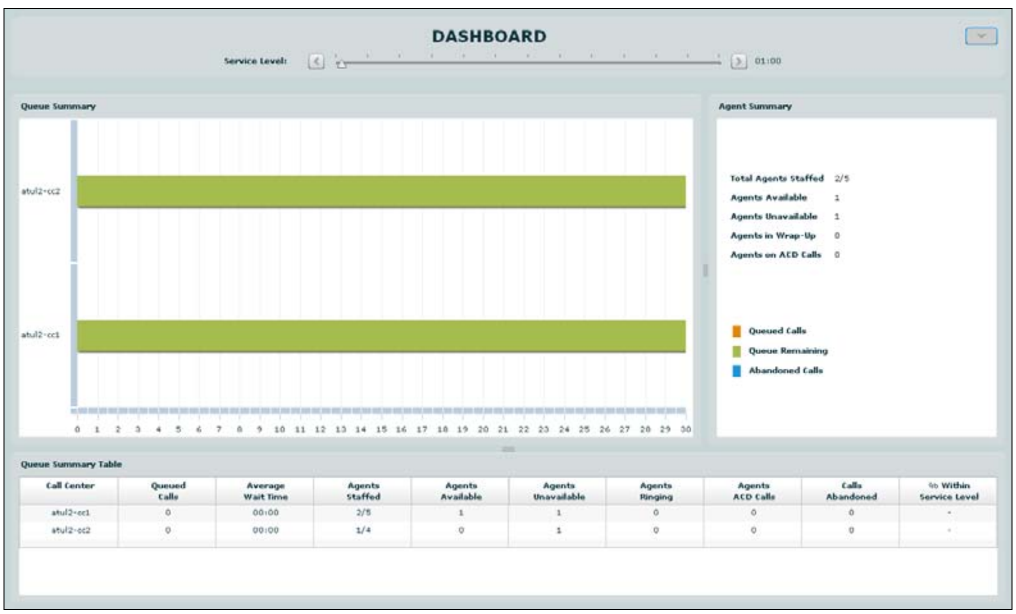


Figure 19 Dashboard Tab

- The *Monitoring* tab (**Supervisor**) displays a real-time detailed view of the agents and Call Centers assigned to the supervisor.

  The *Monitoring* tab includes detailed information on an agent's current status (line state, ACD state, active calls) and detailed information on calls that are in the queue waiting for an agent. To view queued calls, the Call Centers can be expanded by clicking on the left-hand plus the icon corresponding to each Call Center.

  Supervisors can manage calls and manipulate queued calls from this screen. For more information, see section *6 Monitoring (Supervisor)*.

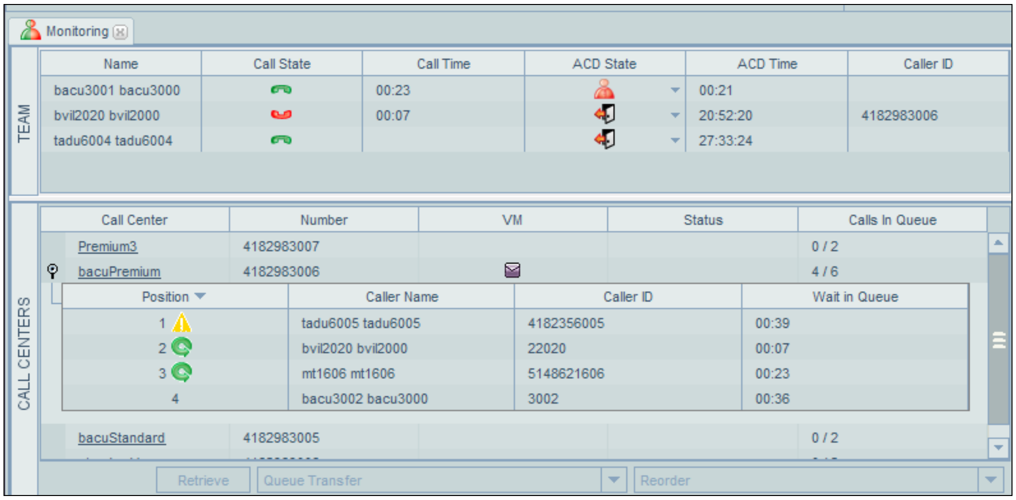


Figure 20 Monitoring Tab

- The *Agent Activity Report* displays real-time and historical information about the calls the agents have handled and their availability to handle calls. The report can be run for all agents or for a specific agent.

  This report is available to both the supervisor and agents. When an agent generates the report, it only contains their information.

  For more information, see section *7.2.5 Agent Activity Report (Supervisor and Agent)*.

Figure 21 Agent Activity Report

- The *Agent Utilization Report* (**Supervisor**) displays historical information on how agents are being used, and allows the supervisor to view charts and data that compare the performance of supervised agents. The report can be run for all agents or for a specific agent.

  For more information, see section *7.2.6 Agent Utilization Report*.

Figure 22 Agent Utilization Report

- The *Queue Performance Analysis Report* (**Supervisor**) displays real-time and historical 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 *7.2.7 Queue Performance Analysis Report*.

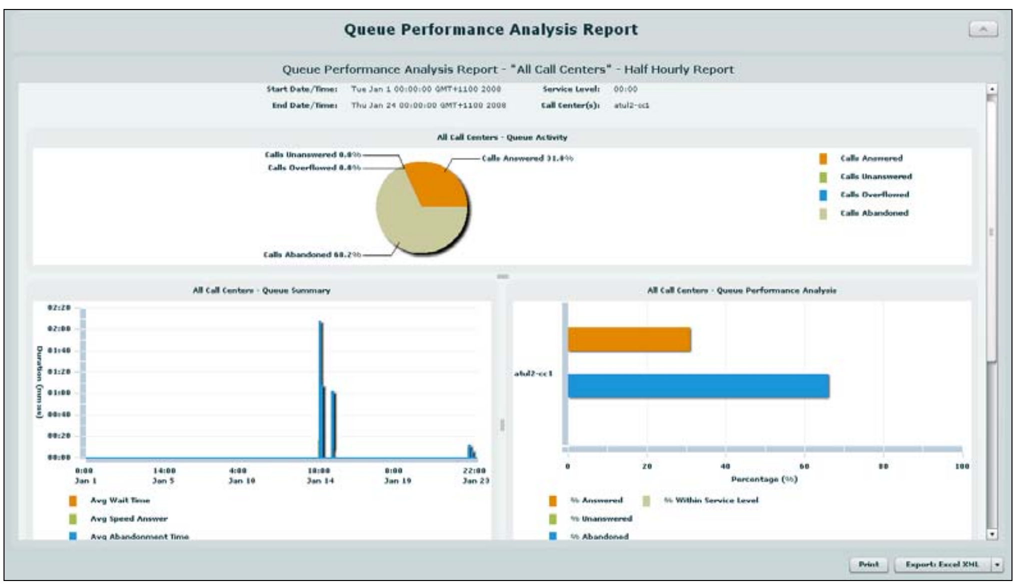
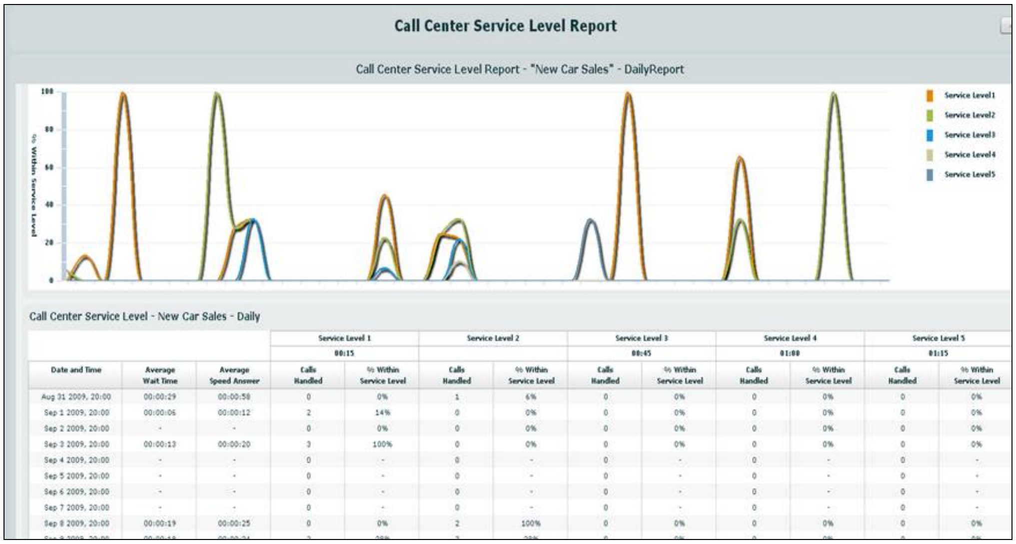


Figure 23 Queue Performance Report

- The *Service Level Report* (**Supervisor**) displays historical information about the grade of service for the Call Center, illustrating trends on how long it took for the calls offered to be answered. Real-time reports are shown in a viewer and are refreshed at regular intervals.

  For more information, see section *7.2.8 Service Level Report*.



			Service Level 1		Service Level 2		Service Level 3		Service Level 4		Service Level 5	
			00:15				00:45		01:00		01:15	
Date and Time	Average Wait Time	Average Speed Answer	Calls Handled	% Within Service Level	Calls Handled	% Within Service Level	Calls Handled	% Within Service Level	Calls Handled	% Within Service Level	Calls Handled	% Within Service Level
Aug 31 2009, 20:00	00:00:29	00:00:58	0	0%	1	6%	0	0%	0	0%	0	0%
Sep 1 2009, 20:00	00:00:06	00:00:12	2	14%	0	0%	0	0%	0	0%	0	0%
Sep 2 2009, 20:00	-	-	0	0%	0	0%	0	0%	0	0%	0	0%
Sep 3 2009, 20:00	00:00:13	00:00:20	3	100%	0	0%	0	0%	0	0%	0	0%
Sep 4 2009, 20:00	-	-	0	-	0	-	0	-	0	-	0	-
Sep 5 2009, 20:00	-	-	0	-	0	-	0	-	0	-	0	-
Sep 6 2009, 20:00	-	-	0	-	0	-	0	-	0	-	0	-
Sep 7 2009, 20:00	-	-	0	-	0	-	0	-	0	-	0	-
Sep 8 2009, 20:00	00:00:19	00:00:25	0	0%	2	100%	0	0%	0	0%	0	0%

Figure 24 Service Level Report

4.1.5 Status Bar

This is located at the bottom of the main interface and displays your phone (if available), your user ID, your status for Do Not Disturb, Call Waiting, and Auto Answer (if enabled), and your current availability status to take calls (**Agent**).

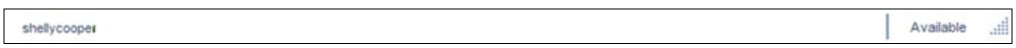


Figure 25 Status Bar

Clicking the availability status brings up the *Call Center – Agent* screen. For information about your *Call Center – Agent* settings, see section *4.2.4 Call Center – Agent Menu Item*.

Figure 26 Status Bar with Do Not Disturb, Call Waiting, and Auto Answer Icons Visible

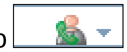
When Do Not Disturb, Call Waiting, and Auto Answer service are configured (using Deployment Studio) to be available in the Call Center, this bar contains the Do Not Disturb, Call Waiting, and Auto Answer icons. This allows you to easily change your settings for these services.

To enable or disable Do Not Disturb, Call Waiting, or Auto Answer, click the corresponding icon and check or uncheck the box next to the service name. The icon color changes to show the status of the service (enabled or disabled).

The icons are:

- Call Waiting: 
- Do Not Disturb: 
- Auto Answer: 

For example, to enable the Auto Answer service, click the Auto Answer icon and then check *Auto Answer*. 

The icon changes to  showing that the Auto Answer service is on.

4.2 Tools – Options Dialog

The *Options* dialog box is used to configure user/service provider settings and preferences. It can be displayed from the Menu bar by selecting *Tools – Options*. It is available on both the *Login* and *Main Interface* screens. The dialog includes the items described in the following subsections.

4.2.1 General Menu Item

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

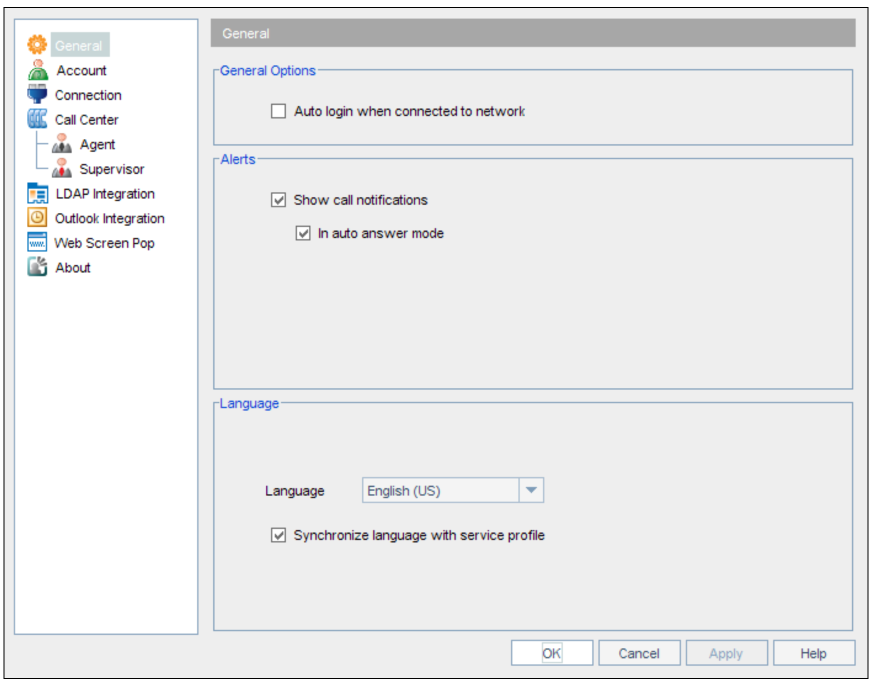


Figure 27 Options Dialog – General Screen

- General Options

  Auto login when connected to network enables the client to automatically connect and log in to the server when it detects a network connection. This should generally be enabled to help mitigate intermittent Internet connections. When disabled, the client signs out the user when connectivity is lost.

- Alerts

  – *Show call notifications* enables the client to appear visible when there are incoming calls. This allows you to answer a call, launch a caller's Microsoft Outlook contact record, or launch the web pop-up notification, which is configured in the client application.

- *In auto answer mode* enables the client to display call notifications automatically when answering calls.

NOTE: Auto answer requires the use of an Advanced Call Control (ACC)-compliant phone.

Language

- The *Language* drop-down list allows the user to change the language from the default, which is English (U.S.). The language options are:
  - English (U.S.)
  - 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
- When *Sync language with service profile* is checked, it enables the Call Center to automatically match the application language to the language set in the BroadWorks subscriber's profile (after signing in).

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

4.2.2 Account Menu Item

The *Account* screen allows you to change your password.

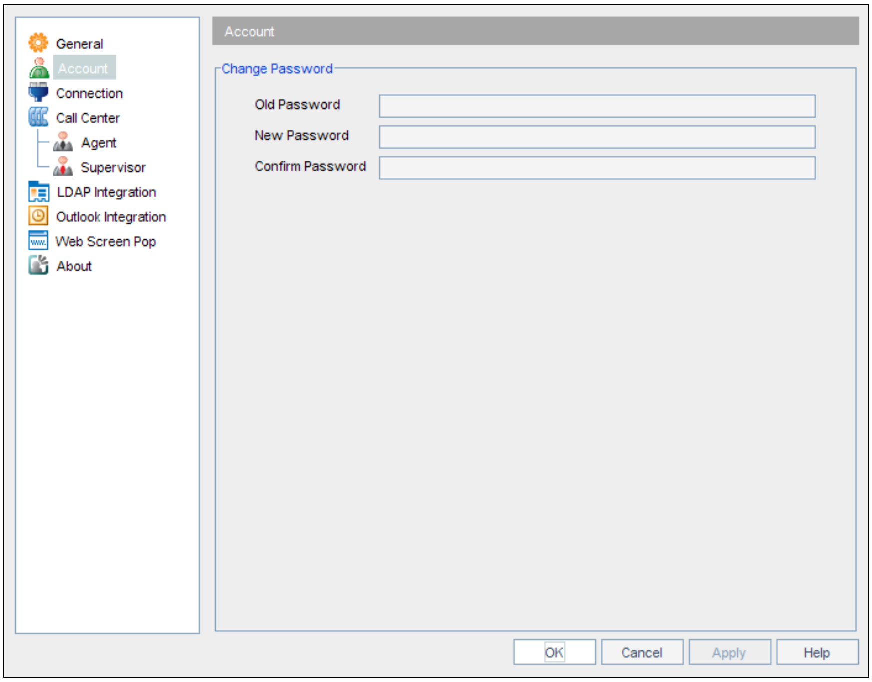


Figure 28 Options Dialog – Account Screen

At login, you may be forced on to this dialog for the following reasons:

- First login
- Password expired

In such a case, you must successfully change the password to use the application.

You can also change your password at any time.

The *Change Password* information is as follows:

- *Old Password* is the password you are about to change and is used to confirm that you are the owner of this account.
- *New Password* is where you to enter your new password.
- *Confirm Password* is where you reenter your new password to make sure that it is what you intended it to be.

4.2.3 Connection Menu Item

Click on **Connection** to view information about the connection to your service provider.

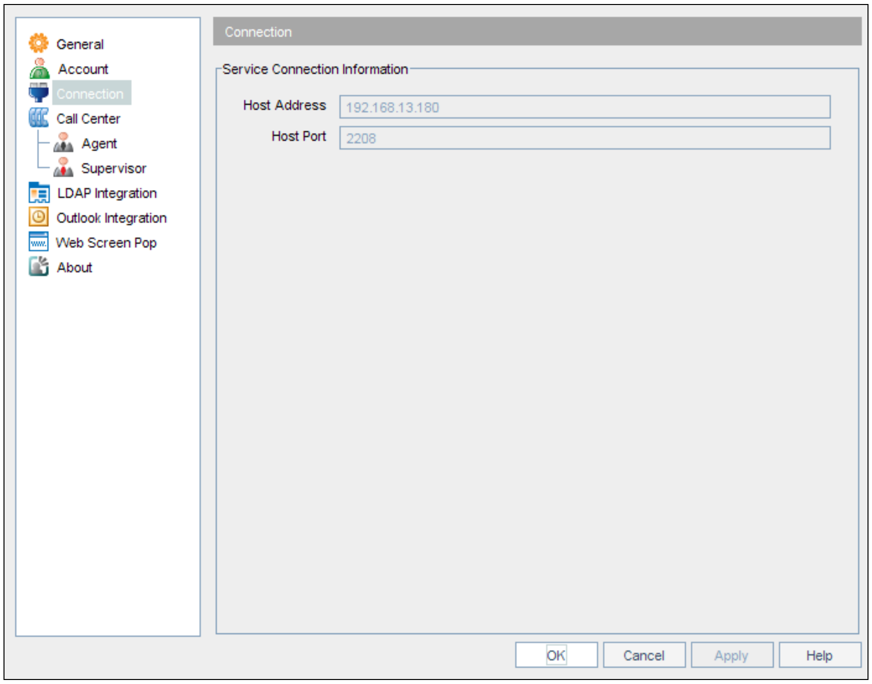


Figure 29 Options Dialog – Connections Screen

The *Service Connection Information* is as follows:

- The *Host Address* (server URL) is the host name/IP address for service.
- The *Host Port* (server Port) is the port number for service.

NOTE: This information is read-only.

4.2.4 Call Center – Agent Menu Item

The **Call Center – Agent** allows you to see and configure your settings as a Call Center agent.

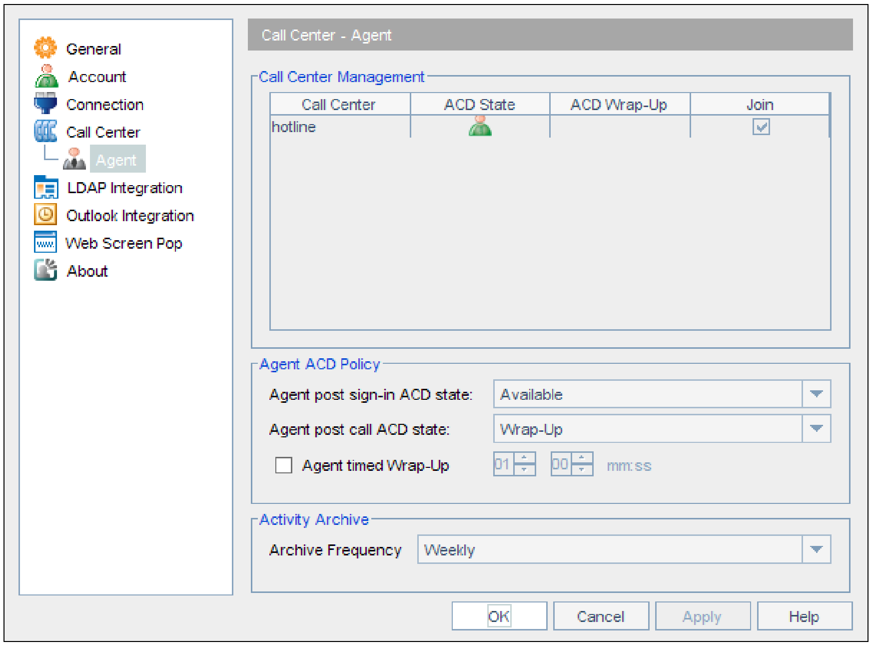


Figure 30 Options Dialog – Agent Screen

- Call Center Management
  - *Call Center* is read-only and displays the Call Centers you are assigned to. Contact the group administrator if your Call Centers do not appear.
  - *ACD State* is read-only and displays your availability in that Call Center. The ACD states are as follows: Green is Available. Red means Unavailable. Grey indicates you have not joined the Call Center.
  - *ACD Wrap-Up* is read-only and displays the time allowed for a wrap-up in that Call Center.
  - *Join*, when checked, ensures that you are active in that Call Center.
- Agent ACD Policy
  - 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 the 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).

- Activity Archive
  - *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
BroadWorks 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	The personality of the call. It indicates whether the user originated this call or whether the call was placed to the user.	Integer (0, 1, 2) 0 = BroadWorks Originator 1 = Originator 2 = Terminator	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.

4.2.5 Call Center – Supervisor Menu Item (Supervisor)

Use **Call Center – Supervisor** to configure your supervisor settings.

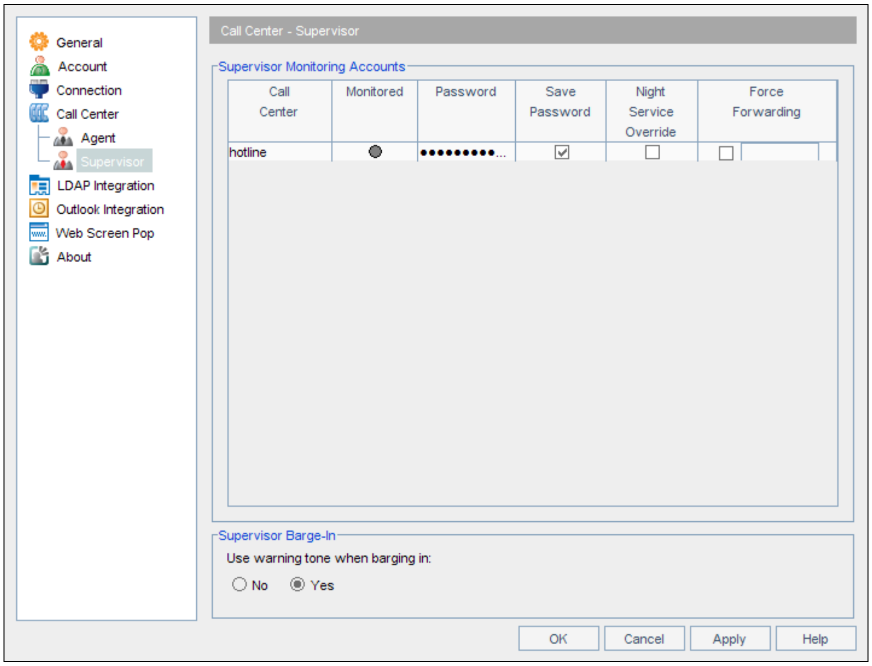


Figure 31 Options Dialog – Supervisor Screen

- Supervisor Monitoring Accounts
  - *Call Center* displays the Call Centers assigned to you. For information on assigning Call Centers, see 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 a Call Center. This password must correspond to the password of Call Center on the BroadWorks web portal. After you enter the password, click **Apply**.
  - If you want to save your password for future logins, check *Save Password*.
  - Check *Night Service Override* to override the time schedule and manually initiate *Night Service* for the Call Center queue (**Premium queues**).
  - Check *Force Forwarding* to temporarily divert calls to a configured destination (**Premium queues**).

NOTE: If both Night Service Override and Force Forwarding are set, then Night Service Override has precedence.

- Supervisor Barge-In
  - *Use warning tone when barging in* has the options of Yes or No. If you want to notify agents when barging in on a call, select "Yes". Otherwise, select "No".

4.2.6 LDAP Integration Menu Item

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

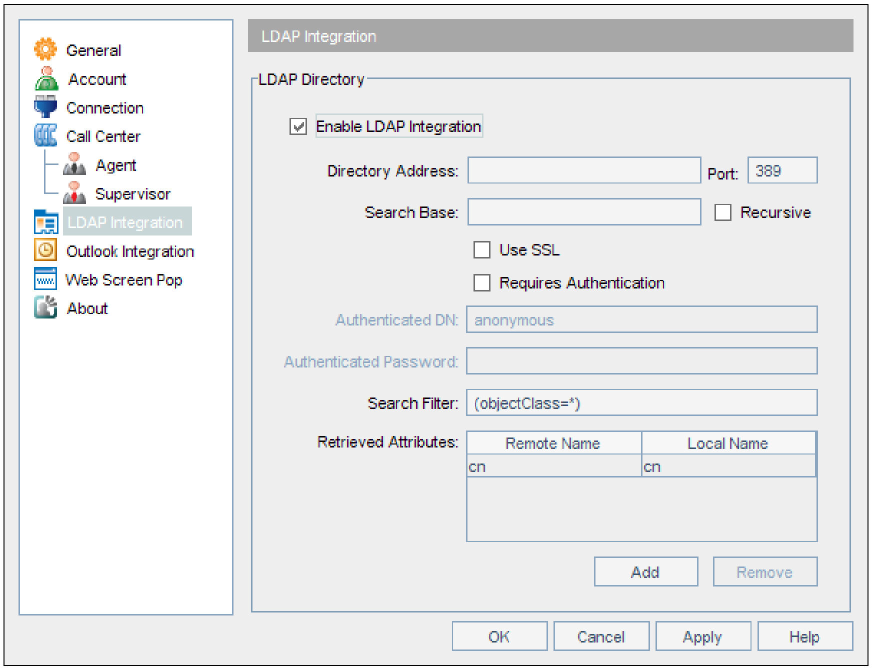


Figure 32 Options Dialog – LDAP Integration Screen

If you do not know the appropriate settings, contact your system administrator.

> 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** and then 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** and select *Run…*.
2) Type "cmd" and click **OK**.
3) Type "<Java Runtime Path>\bin\keytool -printcert -file <path><certificate file name>".

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".

4.2.7 Outlook Integration Menu Item

Click on **Outlook Integration** to enable and disable the use of Microsoft Outlook with Call Center. When enabled, an Outlook directory menu item is available on the client, which includes all of the agent's Outlook contacts. The Outlook directory supports all capabilities of other directories, including the ability to sort columns and perform Click To Dial on a contact's directory numbers.

NOTE: As of Outlook 2007, you are unable to dial a contact in your "in" box using the right click-to-dial function.

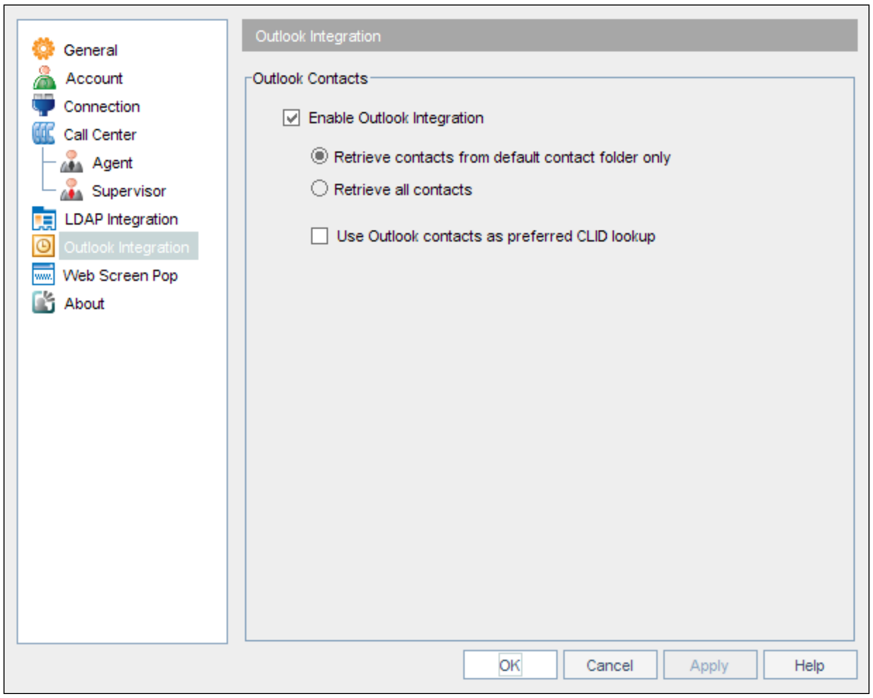


Figure 33 Options Dialog – Outlook Integration Screen

- The *Enable Outlook Integration* check box, when checked, makes sure that the Outlook integration features are activated. When unchecked, *Outlook* is unavailable as a *Directory* option in the client.
- 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. Selecting this option may increase the time necessary for the client to start up.
- *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.

4.2.8 Web Screen Pop Menu Item

The *Web Screen Pop* screen allows you to configure a web screen to open when calls are received.

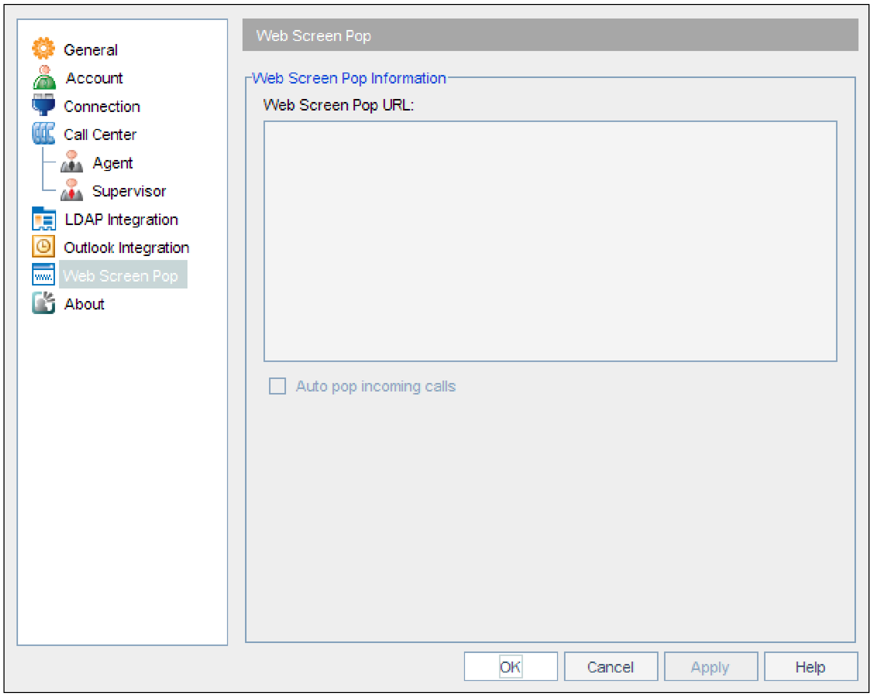


Figure 34 Options Dialog – Web Screen Pop Screen

The *Web Screen Pop URL* defines the URL that Call Center Agent/Supervisor opens using the default browser when you click **Web Screen Pop** in the Call Notification pop-up window.

The URL can point to any URL address, but typically points to a web application that parses optional call parameters and passes them to a Customer Relationship Management (CRM) application or other database. For example:

http://www.mysite.com/webapp.php?remoteNumber=__REMOTE_PHONE__&sp=__SERVICE_PROVIDER__

This URL passes the incoming calling number and the service provider ID to the web application at www.mysite.com. The web application formats the data for the applicable database and launches the web page on your PC.

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, launches the *Web Screen Pop URL* automatically without your being required to click the Web Screen Pop-up icon in the Call Notification pop-up window for each incoming call.

BroadSoft Professional Services is available to design web applications that can interface with different databases.

4.2.9 About

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

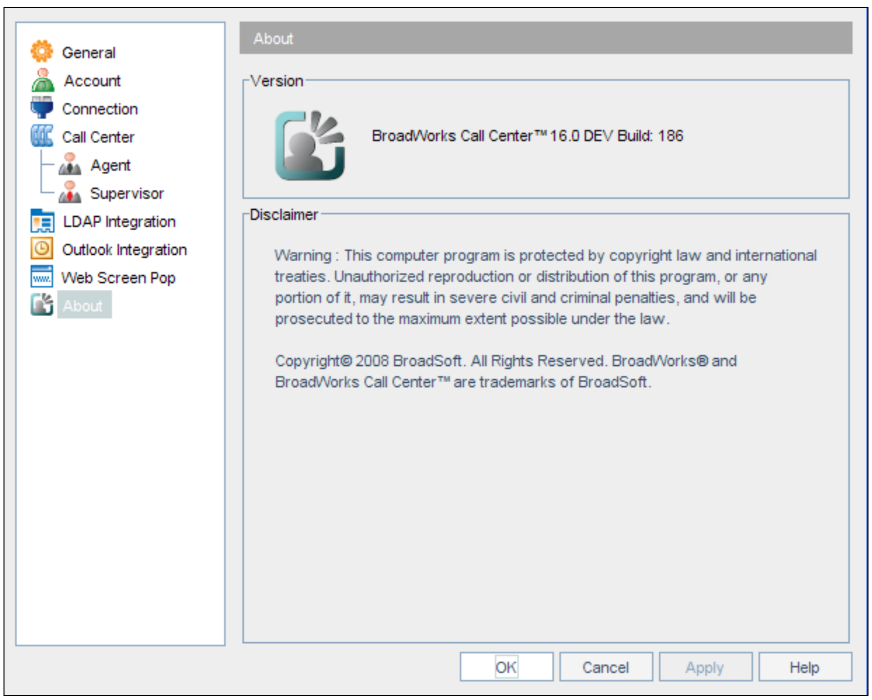


Figure 35 Options Dialog – About Screen

The information displayed is as follows:

- BroadWorks Call Center Version
- BroadWorks Call Center Disclaimer

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

4.3 Tools – Call History Dialog

Use the *Tools – Call History* dialog box to view and delete old calls logs. You can also dial any number in the call history. The viewing and deleting capabilities are described in the following subsections; the dialing function is described in section *5.1.4 Dial from Call History*.

The *Call History* dialog box is available from the Tools menu on the main interface screen by selecting *Tools – Call History*. It shows the call history associated with the user, including dialed calls, received calls, and missed calls.

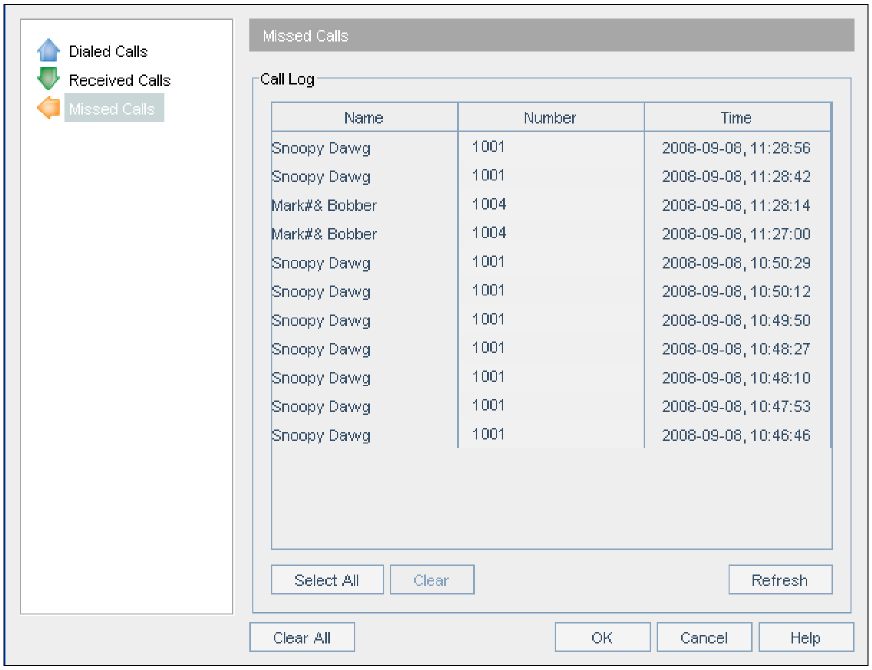


Figure 36 Call History Tab

The following describes the columns under *Call History*:

- *Name* displays the name of the caller.
- *Number* is the number of the caller.
- *Time* displays the date and time of the call in year, month, and day, followed by hours, minutes, and seconds.

ACD and direct-dialed calls that are answered by the agent show the name of the calling party.

ACD and direct-dialed calls that are not answered by the agent show in the *Missed Calls* section.

4.3.1 View Call History

1) From the *Call History* dialog, select the type of log entries you want to view by clicking **Dialed Calls** (default), **Received Calls**, or **Missed Calls**.

2) Click **OK** to leave the dialog.

4.3.2 Delete Call History

You can delete selected or all entries under *Call History*, available by selecting Tools and then Call History from the Menu bar.

To delete selected call logs:

1) In the *Call History* dialog, select the call log from which you want to delete log entries by clicking **Dialed Calls**, **Received Calls**, or **Missed Calls**.
2) Select the entries you want to delete.
   - To delete one entry, click the entry.
   - To delete several consecutive entries, click the first entry and then hold the SHIFT key and click the last entry you want to delete.
   - To delete several nonconsecutive entries, hold the CRTL key, while clicking the entries.
3) Click **Clear**.

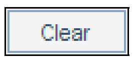


Figure 37 Clear Button

A warning message appears, asking you to confirm your action.

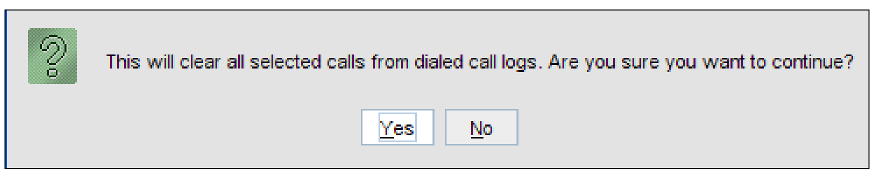


Figure 38 Call History – Confirmation Message for Clearing Selected Logs

4) Click **Yes**.

The selected call log entries are now cleared.

To delete all dialed (received or missed) call logs:

1) In the *Call History* dialog box, select the call log from which you want to delete all log entries by clicking **Dialed Calls, Received Calls**, or **Missed Calls**.
2) Click **Select All**.

Figure 39 Select All Button

A warning message appears, asking you to confirm your action.

3) Click **Yes**.

All the call entries in the selected call log are now cleared. For example, if you selected *Dialed* call log, all dialed call log entries are cleared.

To delete all call log entries in all call logs:

1) In the *Call History* dialog-box, click **Clear All**.

Figure 40 Clear All Button

A warning message appears, asking you to confirm your action.

2) Click **Yes.**

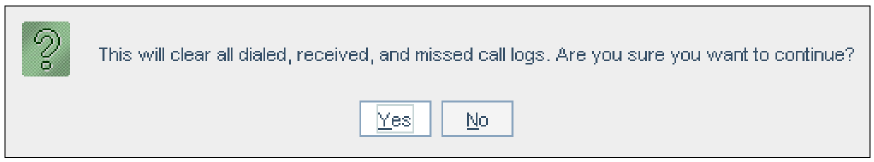


Figure 41 Call History – Confirmation Message for Clearing All Call Logs

All log entries in the *Missed*, *Dialed*, and *Received* call logs are now cleared.

4.4 Changing Your ACD State (Agent)

To change your ACD availability state, use the *Availability* "combo button". Use the *Options – Agent* dialog to configure your initial ACD state as well as your post-call ACD state.

NOTE: If the *Available* and *Unavailable* states 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.

To change your status, click the **Availability** button and select the status you want to change to from the drop-down list.

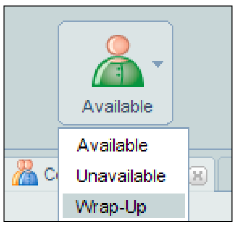


Figure 42 Availability "Combo Button"

Your status changes to the one you selected.

- If you selected *Available*, you are now available to receive calls in the Call Center.

  For information about the rules for presenting calls to an agent, see section *8 Glossary and Definitions*.

Figure 43 Available ACD State

- If you selected *Unavailable*, you are now unavailable to receive calls in the Call Center.

Figure 44 Unavailable ACD State

- If you selected *Wrap-Up*, your call status has changed to *Wrap-Up* (performing post-call activities). If your *Agent timed Wrap-Up* option in the *Options – Agent* dialog is checked, then your state automatically changes to *Available* after the configured time.

Figure 45 Wrap-Up ACD State

NOTE: You may receive calls in the *Wrap-Up* state if your administrator has set up this option for your queue (Premium queues).

4.5 Managing Directories

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

4.5.1 Display Contact 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.

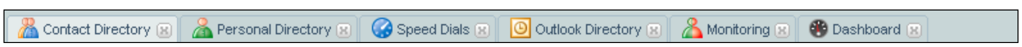


Figure 46 Contact Directory Tab

4.5.2 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.

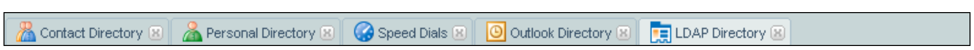


Figure 47 LDAP Directory Tab

4.5.3 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.

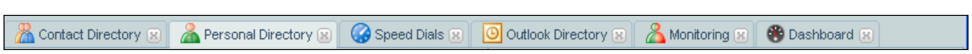


Figure 48 Personal Directory Tab

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

4.5.4 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.

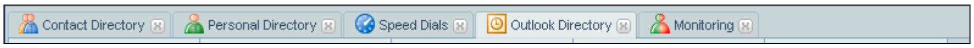


Figure 49 Outlook Directory Tab

4.5.5 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.

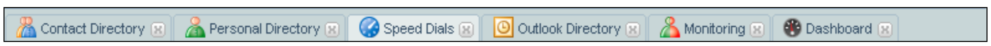


Figure 50 Speed Dials Directory Tab

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

4.5.6 Order Directory

You can order directory entries by any column.

Figure 51 Order Directory

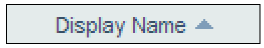
To order a directory:

1) Select the directory by clicking its tab.

2) Click the header of the column by which you want to order the entries. The directory is ordered by that column in ascending order. An arrow appears showing the order.

3) Click again the same column header to toggle the sort order between ascending and descending.

   – Ascending 

– Descending 

4.5.7 Search Directory

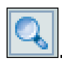
To search for a contact within the directory, do the following:

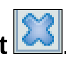
1) Select the directory by clicking its tab.

2) Type the contact information you want to search for in the *Search* text box.

Figure 52 Search Text Box

The text you enter is matched against every column in that directory. You can enter partial information, such as part of a name or phone number. For example, if you do not remember whether Mary's last name is spelled "Shelley" or "Shelly", you can enter "Shell", and either name is returned.

3) Click the **Search** icon . The directory displays the contacts that match the information you entered.

4) To display the complete and unfiltered directory, click **Reset** .

5 Managing Calls

This section describes the functions and procedures used by agents to manage calls.

5.1 Dialing Calls

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

5.1.1 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) Click the **Dial** button and enter the number you want to call either by typing the number on the keyboard or by selecting each number in turn from the dial pad using your mouse.

Figure 53 Dial Button

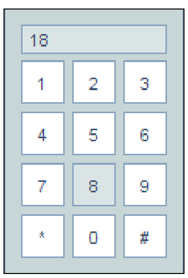


Figure 54 Dial Pad

Alternatively, click in the *Dial Number* text field and type the number on the keyboard.

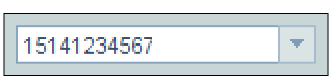


Figure 55 Dian Number Text Field

2) Press **Enter** to place the call.

3) To end the call, click the **End** button.

Figure 56 End Button

5.1.2 Re-dial Number

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

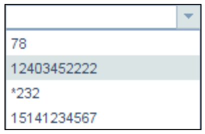


Figure 57 Dial Number "Combo Box"

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

5.1.3 Dial from Search

Use the *Search* function to find for a contact.

Figure 59 Search Box

Your search returns all contacts that match your criteria in any field. For example, if you enter "sa" as your criteria, your search may return contacts with the first name "Samuel", contacts with the last names such as "Sawyer" or "Bourassa", and contacts in the department "Sales". You can also search for contacts by phone number.

To search for a user:

1) Type your search criteria in the *Search* box.
2) Press **Enter** or click the **Search** button to execute the search.

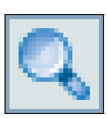


Figure 60 Search Button

3) Click the phone number you want to dial.
4) To end the call, click the **End** button.

5.1.4 Dial from Call History

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

To use the Call History Directory to make a call:

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

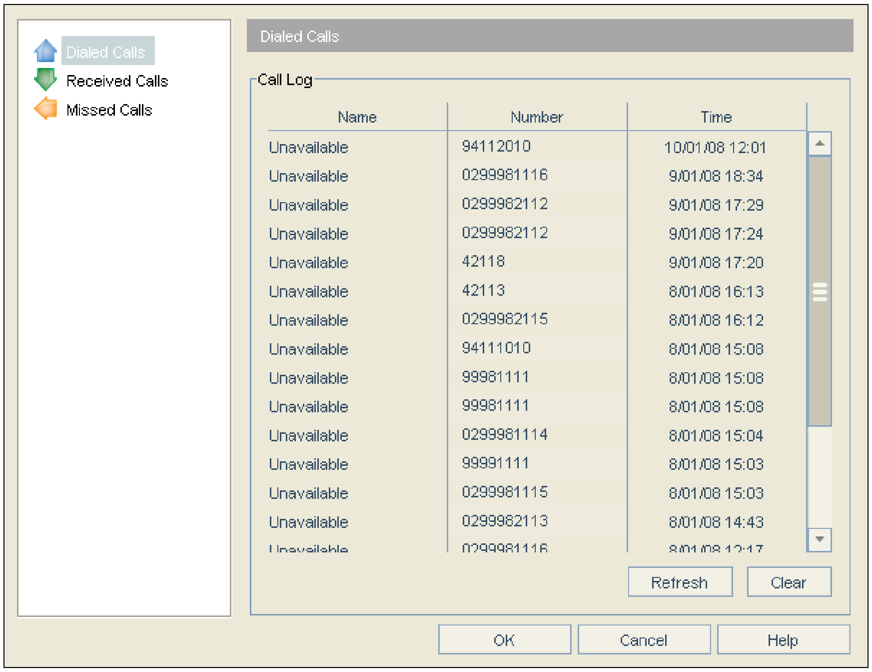


Figure 61 Call History

2) This list can also be printed using the host application.

3) Click the desired phone number. The call is placed.

4) To sort the Call History log, 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.

5.1.5 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.

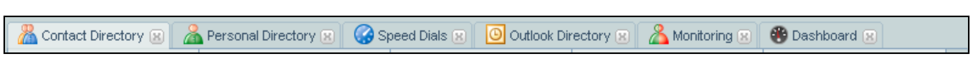


Figure 62 Contact Directory Tab

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.

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

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

5.1.6 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.

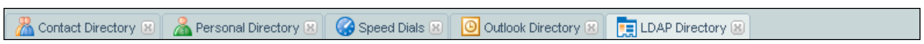


Figure 63 LDAP Directory Tab

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

3) 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.

5.1.7 Dial from Outlook Directory

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

To use the Outlook Directory to make a call:

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

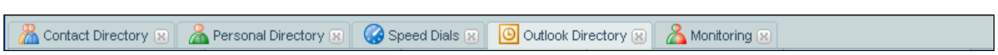


Figure 64 Outlook Directory Tab

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

3) 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.

5.1.8 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) Select the *Personal Directory* tab.

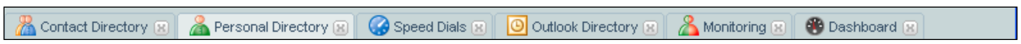


Figure 65 Personal Directory Tab

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

3) 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.

5.1.9 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) Select the *Speed Dials Directory* tab. The following should be displayed.

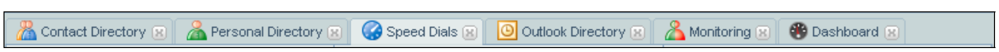


Figure 66 Speed Dials Directory Tab

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

3) 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.

5.2 Receiving Calls

This section contains detailed instructions on receiving calls.

5.2.1 Answer Calls

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

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

To answer a call manually:

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

Figure 67 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*.

5.2.2 Forced Delivery of Calls (Premium Queues)

This policy is only available to queues of type *Premium*.

If your administrator has set this option, your calls are automatically answered and rendered over the device's speaker and microphone.

NOTE: This feature only works if your device supports the Remote Control Talk Event package.

5.2.3 Hold Calls

Use the following method to hold an active call.

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

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

NOTE 2: When in Remote Office, the Answer and Hold/Unhold buttons are disabled.

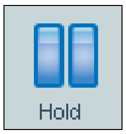


Figure 68 Hold Button

5.2.4 Unhold Calls

Use the following method to unhold an active call.

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

Figure 69 Unhold Button

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

NOTE 2: When in Remote Office, the Answer and Hold/Unhold buttons are disabled.

5.2.4.1 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 70 Pop-up Notification

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

5.2.5 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.

5.3 Transferring Calls

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

5.3.1 Blind Transfer Calls

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, dial the destination number or select the number from one of the contact directories. This automatically puts the first call on hold.
2) Immediately click **Transfer** before the call is answered. Select the destination number from the drop-down list.

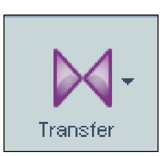


Figure 71 Transfer Button

5.3.2 Transfer Call with Consultation

Use this method to transfer a call 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 contact from one of the directories. This automatically puts the customer on hold. Wait until the called party accepts your call. Speak to the called party.
2) Click **Transfer** and select the destination number from the drop-down list.

5.3.3 Transfer Call to Queue

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 **Transfer**.

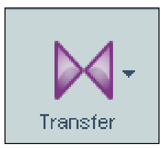


Figure 72 Transfer Button

5.4 Managing 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 *7.2.8 Service Level Report*. Your active call is put on hold.
2) Click **Conference** and select *Start* from the drop-down list.

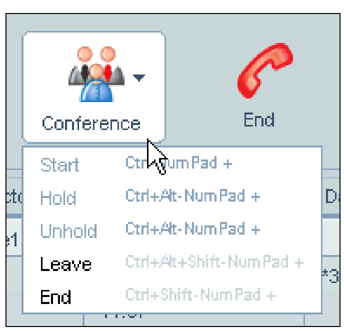


Figure 73 Conference Button Drop-down List

– 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.

5.5 Escalating Calls

This section describes the different methods to escalate calls.

5.5.1 Blind Escalate Calls

Use this method to blind escalate a call to a supervisor.

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

Figure 74 Escalate Button

3) To connect the parties, click **Transfer** immediately.

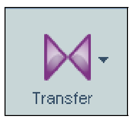


Figure 75 Transfer Button

5.5.1.1 Escalate Call with Conference

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

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

Figure 76 Escalate Button

3) When the supervisor accepts your call, speak to the supervisor about the issue.
4) Connect the parties by clicking **Conference**.

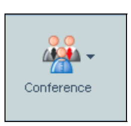


Figure 77 Conference Button

5) To drop a 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.

5.5.2 Escalate Call with Hand Over

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

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 78 Escalate Button

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

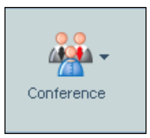


Figure 79 Conference Button

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.

5.5.3 Escalate Call with Hold

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

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

1) While on a call, click **Escalate**.
2) Select the supervisor's name from the drop-down list. The original 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 **Conference**.

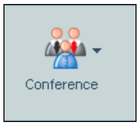


Figure 81 Conference Button

5) Select the call to hold from the *Call Lines* drop-down list and click **Hold**. This puts the party on hold and allows you to consult with the other party.

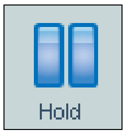


Figure 82 Hold Button

6) To drop a specific party from the conference, select their name in the *Call Line/Info* drop-down list and click **End**.

7) To leave the call, select *Leave* from the *Conference* drop-down list.

5.5.4 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.

1) While on a call, click **Escalate**.

2) Select the supervisor's name from the drop-down list. The first call is automatically put on hold.

Figure 83 Escalate Button

3) Wait until the supervisor accepts your call and speak to the supervisor about the issue.

4) Connect the parties by clicking **Conference**.

Figure 84 Conference Button

5) Click **Conference Hold**. This puts both calls on hold but allows the customer and the supervisor to continue their conversation.

6) To drop a specific party from the conference, select their name from the *Call Lines* drop-down list and click **End**.

7) Leave the call by selecting *Leave* from the *Conference* drop-down list.

5.5.5 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 on your phone.

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

Figure 85 Escalate Button

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

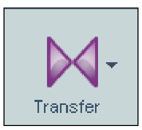


Figure 86 Transfer Button

5.6 End Calls

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

Figure 87 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.

![BroadSoft logo]

6 Monitoring (Supervisor)

The *Monitoring* tab shows real-time information on the agents and Call Centers that are assigned to you.

This tab is designed to provide you with a detailed view of the current status of the agents, as well as the current backlog of calls in the queues. From this tab, you can barge in or monitor active calls, and view and manage individual queued calls, including retrieving calls, reordering calls in a queue, and transferring calls to alternate queues.

A Message Waiting Indicator (MWI) is also provided on this tab when a voice message has been left in the mailbox for one of the Call Centers.

The tab can be detached from the Main Interface window and displayed as a stand-alone window on your desktop or on a display in the Call Center.

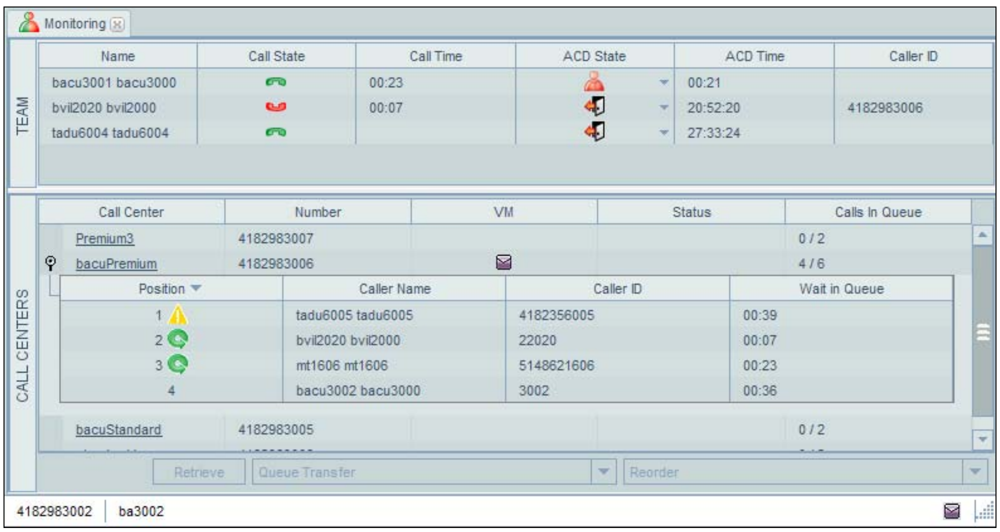


Figure 88 Monitoring Tab

6.1 Display Monitoring Tab

1) To make the *Monitoring* tab visible, click **View** on the Menu bar.

2) From the drop-down list, select *Monitoring.*

   The *Monitoring* tab is now visible.

3) To display the information in the *Monitoring* tab, click the tab.

If you are unable to see the calls in the queue and “Not Monitored” is displayed, follow the instructions detailed in section *4.2.5 Call Center – Supervisor Menu Item (Supervisor)*.

For information on repositioning callers in a queue, see section *6.6.2 Transfer Call between Queues*.

6.2 Monitor Agents (Team Panel)

The *Team* panel is located at the top of the *Monitoring* tab. It shows real-time information on the agents managed by the supervisor (as well as the supervisor if they are assigned as an agent in the Call Center).

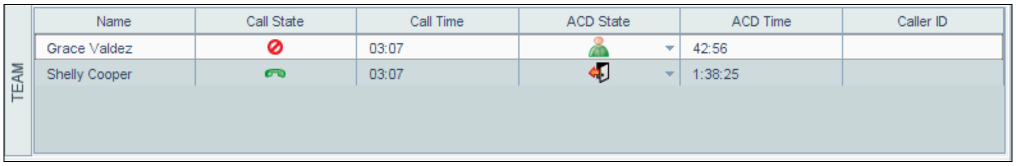


Figure 89 Team Panel

This panel provides the current status of the agents, including the following information:

- *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).
Red Handset Up		Agent phone is off-hook (talking, busy).
Orange Handset Down		Agent phone is ringing.
Do Not Disturb		Agent has status set to “Do Not Disturb (DND)”.
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” *(*pointing the mouse over this icon displays the Call Forward Always number).

- *Call Time* is the time the agent has spent in the current call or line state. For example, if the agent’s line state is off-hook, the time reflects how long the agent has been on the current call. If the line state is on-hook, the time most probably reflects how long the agent has been idle.
- *ACD State* is the ACD state of the agent. This following icons represent the different ACD states:

ACD State	Icon	Description
Sign In		Agent is signing in. This 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).

ACD State	Icon	Description
Wrap Up		Agent is performing post-call work.
Sign Out		Agent is signed out.

NOTE 1: When an agent is not joined in a call center, their ACD state appears in grey.

NOTE 2: The agent's ACD state is blank if the agent cannot set their ACD state using either the client or the web portal. An agent who is merely *Joined* to a call center is included on the list of agents, but does not show an ACD state.

For additional information about ACD states and their effect on incoming calls, see section *8 Glossary and Definitions*.

- *ACD Time* is the time the agent has been in the current ACD state.
- *Caller ID* is the caller identification number of the party the agent is in ringing, talking, or held state with.

The information can be sorted via any column by clicking on the column heading.

6.3 Supervisor Barge-in (Supervisor)

Supervisor Barge-in allows the supervisor to barge in on an agent's call. This is useful 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: By default, Supervisor Barge-in is only supported if the agent and supervisor are in the same group. In an enterprise, this function can be disabled.

Effective in Release 14.sp7 and higher, activation of feature EV 64936 allows the Barge-in feature to work across groups within an enterprise.

To barge in on an agent's call:

1) Select the agent on call from the *Team* panel in the *Monitoring* tab. The agent must have a red handset up icon to indicate that they are on a call.

   The Conference button changes to the Barge-In button.

2) Click **Barge-In**. The supervisor is now bridged to the agent.

Figure 90 Barge-In Button

3) Click **Conference** 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**.

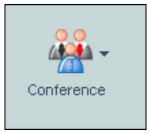


Figure 91 Conference Button

6.4 Supervisor Call Pickup (Supervisor)

Supervisor Call Pickup 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 Pickup 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 Pickup:

1) Select the unanswered call from the *Team* panel in the *Monitoring* tab. The agent must have an orange handset down icon to indicate that their phone is ringing.
2) The Conference button should change to the Call Pick-Up button. Click **Call Pick-Up**. The supervisor is now answering the agent.

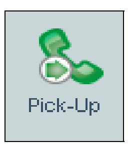


Figure 92 Call Pick-Up Button

6.5 Monitor Queues (Call Centers Panel)

The *Call Centers* panel is located at the bottom of the *Monitoring* tab. It shows real-time information on the Call Centers the supervisor is managing. The horizontal splitter bar can be moved to resize the panel.

The panel includes information about the Call Centers and detailed information on queued calls within each Call Center. The supervisor can expand the Call Centers by clicking the plus icon. The expanded row displays the first 25 calls in the queue.

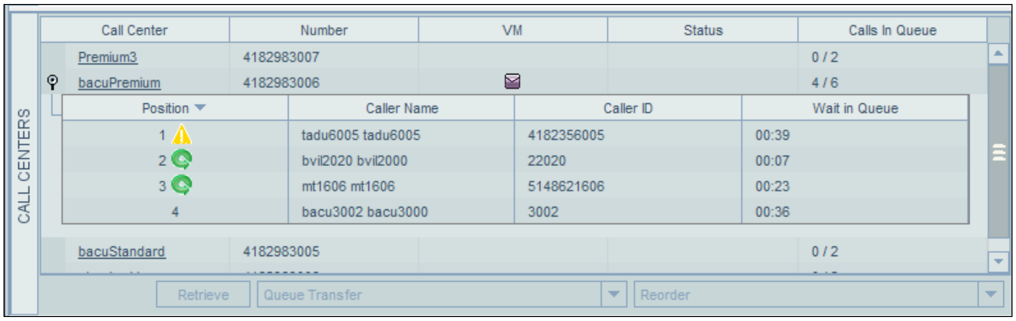


Figure 93 Call Centers Panel

The *Call Centers* panel columns are:

- *Call Center* is the name of the Call Center or ACD group.
- *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 unread voice mail messages left. The envelope icon is also displayed at the bottom of the *Main* interface when there is an unread voice mail for any monitored Call Center. Clicking the icon opens the *Monitoring* tab, allowing the supervisor to see which Call Center has voice mail. The supervisor can then quickly retrieve the voice mail by dialing into the *Voice Portal* via one of the *Directory* tabs.
- *Status* (**Premium queues**) displays the status of the Call Center, which can be one of the following:
  - *Night Service* – The Call Center is processing calls according to the Night Service schedule and policy.
  - *Night Service Override* – The Call Center has been manually forced to follow the Night Service policy.

NOTE: The Night Service or Night Service Override status appears only if the Night Service policy is triggered, either by the *Night Service* schedule or by a manual override, and if the action to apply to incoming calls is set to either “Perform busy treatment” or “Transfer to phone number/SIP-URI” by a BroadWorks administrator. If the action is set to “None”, it acts as if the Night Service policy was not triggered and the Night Service/Night Service Override status is not displayed on the *Monitoring* tab.

  - *Holiday Service* – The Call Center is processing calls according to the Holiday Service schedule and policy.

NOTE: The Holiday Service status appears only if the Holiday Service policy is triggered and if the action to apply to incoming calls is set by a BroadWorks administrator to either “Perform busy treatment” or “Transfer to phone number/SIP-URI”. If the action is set to “None”, it acts as if the Holiday Service policy was not triggered and the Holiday Service status is not displayed on the *Monitoring* tab.

  - *Forced Forward* – All calls to this Call Center are forwarded to a specified destination.

– ** (which indicates none of the above)

For more information on these Call Center settings, see *BroadWorks Application Server Group Web Interface Administration Guide* (Parts 1 and 2)

- *Calls In Queue* shows the number of calls queued as a ratio of the total queue capacity for that Call Center. For example, 6/10 means that there are six calls in the queue, which can queue a maximum of ten calls.

When calls are queued within a Call Center, a "plus" (+) symbol is displayed to the left of the Call Center name. Clicking the "plus" symbol expands the Call Center to show detailed information about each queued call. The expanded table columns are:

- *Position* displays the position of the call in queue (for example, 1, 2, 3, and so on).

  A triangle in the *Position* column indicates a bounced call; an arrow indicates a reordered call.

NOTE: A bounced call is a call that was rerouted to the agent but for some reason (agent does not answer the call, they change to unavailable, their device is not registered, and so on) the call is not answered.

For information or reordering calls, see section *6.6.4 Reorder – Position Call in Queue*.

- Caller *Name* is the network name of the caller in the queue (if provided).

  A loudspeaker icon in the *Caller Name* column indicates that the caller is being played an announcement.

- *Caller ID* is the network number of the caller in the queue (if provided).
- *Wait In Queue* is the amount of time the caller has been waiting in the queue.

6.6 Manage Queued Calls

At the bottom of the *Call Centers* panel there are three options. The supervisor can select a queued call and perform the following functions by applying these options:

- *Retrieve* retrieves a call to the supervisor's device. When a call is manually retrieved via this action, the call is reported as an *Incoming* call rather than an *ACD* call in the reports.
- *Queue Transfer* transfers a queued call to an alternate queue. The supervisor can select from a list of queues using a drop-down list.
- *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).

6.6.1 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 *Content* panel's *Monitoring* tab. To make this visible, check the box in the *View* drop-down list.

2) Click **Retrieve**.

Figure 94 Retrieve Button

6.6.2 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 *Content* 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 *Content* panel's *Monitoring* tab. This only allows transfers to the back of the queue.

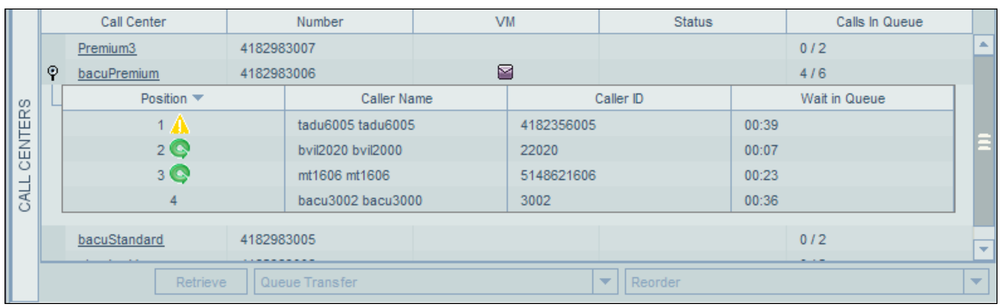


Figure 95 Monitoring Tab

6.6.3 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 *Content* panel's *Monitoring* tab. To make this visible, check the box in the *View* drop-down list.

2) Click **Retrieve**.

Figure 96 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 from a directory.

5) Click **Transfer**. From the drop-down list, select the destination number.

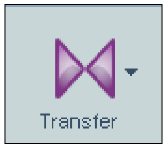


Figure 97 Transfer Button

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

6.6.4 Reorder – 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 at the bottom of the *Monitoring* tab.

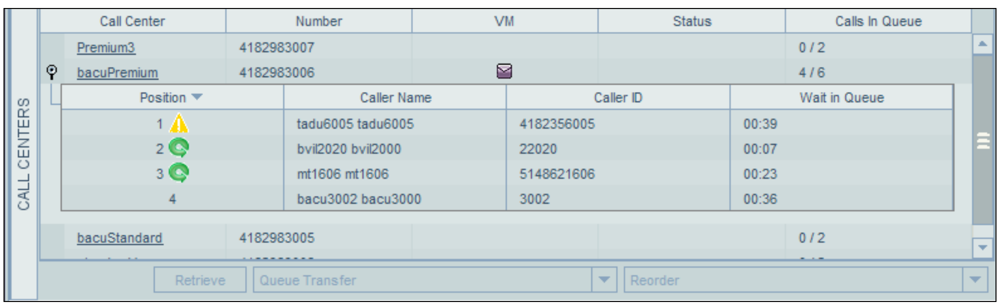


Figure 98 Monitoring Tab

3) Click the desired position.

NOTE: You cannot place a call ahead of a bounced call.

7 Measurements and Reports (Supervisor)

This section describes real-time measurements and performance reports provided by the Call Center.

7.1 Real-time Measurements

The *Dashboard* tab shows a summary of real-time measurements on the monitored Call Centers and agents.

7.1.1 Display Dashboard

1) To make the dashboard visible, go to **View** on the *Menu* panel.

2) From the drop-down list, select *Dashboard*. It is now visible as a tab.

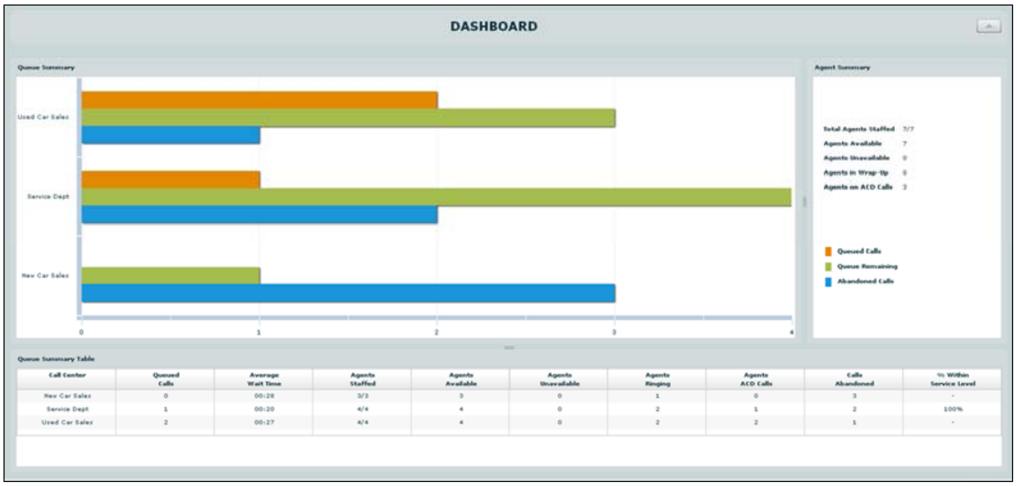


Figure 99 Dashboard Tab

The Dashboard contains the components in the following subsections.

7.1.2 Dashboard Chart Information

- 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 signed-in agents managed by the supervisor compared to the total number of agents managed by the supervisor for this Call Center.	Count of all agents managed by the supervisor that are in *Sign-In*, *Available*, *Unavailable*, or *Wrap-Up* ACD state, over the count of all agents managed by the supervisor.
Agents Available	The number of agents currently showing *Available* as their ACD state.	Count of all agents managed by the supervisor that are in *Available* ACD state.
Agents Unavailable	The number of agents currently showing *Unavailable* as their ACD state.	Count of all agents managed by the supervisor that are in *Unavailable* ACD state.
Agents in Wrap-Up	The number of agents currently showing *Wrap-Up* as their ACD state.	Count of all agents managed by the supervisor that are in *Wrap-Up* ACD state.
Agents on ACD Calls	The number of agents in *Talking phone* state on calls distributed from the ACD.	Count of all agents managed by the supervisor that are in *Talking* state on ACD calls.

Table 1 Dashboard Agent Summary

7.1.3 Queue Summary Table Information

The Queue Summary Table provides the following information:

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 of calls that are currently queued, waiting for agents.
Average Wait Time	The average time a caller has been waiting in the queue.	Calculation of the average amount of time a caller spends in the queue before the call is offered to an agent.
Agent Staffed	The ratio of signed-in agents managed by the supervisor, compared to the total number of agents managed by the supervisor for this Call Center.	Count of all agents managed by the supervisor that are in *Sign-In*, *Available*, *Unavailable*, or *Wrap-up* ACD state, over the count of all agents managed by the supervisor.
Agents Available	The number of agents in *Available* ACD state.	Count of all agents managed by the supervisor that are in *Available* ACD state.
Agents Unavailable	The number of agents currently in *Unavailable* ACD state.	Count of all agents managed by the supervisor that are in *Unavailable* ACD state.
Agents Ringing	The number of agents in *Ringing phone* state.	Count of all agents managed by the supervisor that are currently in *Ringing* state (call is being offered to an agent).
Agents ACD Calls	The number of agents in *Talking phone* state on calls distributed from the ACD.	Count of all agents managed by the supervisor that are currently in *Talking* state on an ACD call. Agents on direct dialed inbound or outbound calls are not included.

Statistic	Description	Calculation
Calls Abandoned	The number of callers who have terminated the call while waiting in the queue.	Count of the number of calls that were abandoned while waiting in the queue. This measurement starts at zero when the supervisor signs in to the Call Center client.
% Within Service Level	The percentage of calls that were answered within a pre-defined period of time. This is shown in minutes and seconds (mm:ss). The period of time is defined using the slide bar at the top of the tab. A typical *Service Level* use case is as follows: Let us suppose that the goal is to answer 80% of calls within 20 seconds. The supervisor defines the period of time at 00:20 (20 seconds) on the slide bar. This measurement then reflects the percentage of calls that were answered within 20 seconds. So if the measurement is less than 80%, the supervisor knows they are outside of their target *Service Level*.	Calculation of the percentage of calls that are answered within the designated *Service Level* time. % Within Service Level = Number of calls answered within service level/Number of calls answered in the interval + number of calls abandoned in the interval.

Table 2 Dashboard Queue Summary

7.2 Reports

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 eXtensible Markup Language (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.

7.2.1 Export to Excel XML

The *Export to Excel XML* option prompts the user to save the XML file in a location on their machine. This file can be opened using Microsoft Excel.

The report is preformatted, providing easy-to-use *Excel* tabs for each table in the original report. All header information, values, and calculations are included in the exported report, using separate *Excel* tabs for each table within the original report.

Queue Performance Analysis Report - "New Car Sales" - Daily Report					
Start Date/Time:	Fri May 1 00:00:00 GMT-0400 2009		End Date/Time:	Tue May 26 18:00:00 GMT-0400 2009	
Call Center:	New Car Sales		Service Level:	00:00:30	
Call Center Number:	240-555-2233		Oldest Call Waiting:	00:00:50	
Queue Activity - New Car Sales - Daily					
Date and Time	Calls Received	Calls Answered	Calls in Queue	Calls Abandoned	Calls Overflowed
Apr 30, 20:00	22	22	0	0	0
May 1, 20:00	24	23	0	1	0
May 2, 20:00	0	0	0	0	0
May 3, 20:00	0	0	0	0	0
May 4, 20:00	38	32	0	4	2
May 5, 20:00	22	22	0	0	0
May 6, 20:00	26	24	0	1	1
May 7, 20:00	22	22	0	0	0
May 8, 20:00	14	14	0	0	0
May 9, 20:00	0	0	0	0	0
May 10, 20:00	0	0	0	0	0
May 11, 20:00	40	35	1	2	3
May 12, 20:00	23	23	0	0	0
May 13, 20:00	20	20	0	0	0
May 14, 20:00	29	24	0	4	1
May 15, 20:00	27	26	0	0	1
May 16, 20:00	0	0	0	0	0
May 17, 20:00	0	0	0	0	0
May 18, 20:00	42	37	2	1	4
May 19, 20:00	23	23	0	0	0
May 20, 20:00	18	18	0	0	0
May 21, 20:00	20	20	0	0	0
May 24, 20:00	22	20	0	0	2
May 25, 20:00	0	0	0	0	0
Summary	432	405	3	13	14

Queue Activity / Queue Summary / Queue Performance

Figure 100 Export to Excel XML Sample File

7.2.2 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:

```
"Start Date/Time:","Thu Apr 17 00:00:00 GMT+1000 2008"
"End Date/Time:","Fri Apr 18 01:07:47 GMT+1000 2008"
"Call Center(s):","myACD1"
"Service Level:","00:10"

Queue Activity - All Call Centers - Hourly
"Call Center","Calls Received","Calls Answered","Calls in Queue","Calls Abandoned","Calls Overflowed"
"myACD1","20","9","0","11","0"
"Summary","20","9","0","11","0"

Queue Summary - All Call Centers - Hourly
"Call Center","Avg Wait Time","Avg Speed Answer","Avg Abandonment Time","Avg Staff"
"myACD1","00:28","00:36","00:34","1"
"Summary","00:28","00:36","00:34","1"

Queue Performance - All Call Centers - Hourly
"Call Center","% Answered","% Calls in Queue","% Abandoned","% Within Service Level"
"myACD1","47%","0%","52%","23%"
"Summary","47%","0%","52%","23%"
```

Figure 101 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.

7.2.3 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:

Average Summary = $(Avg_1 + Avg_2)/2$

-or-

Percentage Summary = $(Perc_1 + Perc_2 + Perc_3)/3$

Activation of EV 92681 - Effective with client Release 14.sp6 Maintenance Build (MB) 4, the average summary calculations are modified to reflect the aggregate summary, as follows:

Average Summary = Σ (value 1 + value 2 + value 3)/Σ (total instances)

For example, the Average ACD Time, for all agents, in the *Agent Utilization Report* is calculated as follows:

Summary Average ACD Time = Σ (Agent 1 ACD time + Agent 2 ACD time + Agent 3 ACD time)/Σ Total ACD calls by all agents

NOTE 3: In all reports, if there is no agent data for a particular interval (for example, the user selects a half-hourly report and the agent had no calls for a particular half-hour interval), then that interval is excluded from the report.

7.2.4 Reporting Time Period

When requesting a report, the user specifies the time period of the report and the reporting interval. Depending on the granularity of the report and the time zone differences between the reporting server and the requesting client, the requested time period may be adjusted by the reporting server.

When the requested time period does not align with interval boundaries, the time period is adjusted as follows:

- If the start time does not align with an interval boundary, it is adjusted to the previous sampling period boundary. For example, if the sampling period is hourly and the requested start time is July 11, 2010, 12:16:00 GMT, the start time is adjusted to July 11, 2010, 12:00:00 GMT.
- If the end time does not align an interval boundary, then it is adjusted to the next sampling period boundary. For example, if the sampling period is hourly and the requested end time is July 11, 2010, 12:16:00 GMT, the end time is adjusted to July 11, 2010, 13:00:00 GMT. Also if the next sampling period boundary occurs in the future, then the current time is used.

In addition, daily interval statistics are maintained according to the time zone of the reporting server, and for daily and monthly reports, the reporting time period is adjusted according to that time zone. The following example illustrates a scenario in which the time zone of the requesting client is GMT-0600 and the time zone of the reporting server is GMT-0500.

Interval	Requested Time Period	Adjusted Time Period	Comment
Daily	Start Time: July 11, 2010, 0:00:00 GMT-0600 End Time: July 12, 2010, 0:00:00 GMT-0600	Start Time: July 10, 2010, 0:00:00 GMT-0500 End Time: July 12, 2010, 0:00:00 GMT-0500	The requested start time is July 10, 2010, 23:00:00 GMT-0500 when expressed in the time zone of the reporting server. The start time is adjusted to the previous interval boundary, which is July 10, 2010, 0:00:00 GMT-0500. Similarly, the requested end time is July 11, 2010, 23:00:00 GMT-0500 when expressed in the time zone of the reporting server. The end time is adjusted to the next interval boundary, which is July 12, 2010, 0:00:00 GMT-0500.
Monthly	Start Time: June 1, 2010, 0:00:00 GMT-0600 End Time: July 1, 2010, 0:00:00 GMT-0600	Start Time: May 1, 2010, 0:00:00 GMT-0500 End Time: July 1, 2010, 0:00:00 GMT-0500	The requested start time is May 31, 2010, 23:00:00 GMT-0500 when expressed in the time zone of the reporting server. The start time is adjusted to the previous interval boundary, which is May 1, 2010, 0:00:00 GMT-0500. Similarly, the requested end time is June 30, 2010, 23:00:00 GMT-0500 when expressed in the time zone of the reporting server. The end time is adjusted to the next interval boundary, which is July 1, 2010, 0:00:00 GMT-0500.

7.2.5 Agent Activity Report (Supervisor and Agent)

NOTE: Agents can use the Agent Activity Report to view their own statistics only.

The Agent Activity Report displays metrics related to a selected agent's call handling activity for all call centers for which the agent is a member. The heading for this report is Agent Activity – Agent Full Name – Interval, for example, *Agent Activity – Agent X – Half Hourly Report*. This report can also be set to view summary data for all agents.

To view an Interval report (half-hourly, hourly, and so on), the report must be requested for an individual agent.

Figure 102 Agent Activity Report

7.2.5.1 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. *Agent Activity* 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 show data from the assigned start date to the assigned end date. ▪ Real-time reports show data from the assigned start date to the present, with the current interval refreshed with real-time data. Real-time reports for individual agents contain data for each time interval (half-hourly, hourly, and so on), with the last interval reflecting real-time data, if requested (subject to the refresh rate). When the interval switches over, the final data for the last time period is captured and shown as historical data, and real-time data is reflected in the new time interval. The default refresh time for real-time reports is five minutes and can be changed to a minimum of one minute using Deployment Studio. For more information, see *BroadWorks Deployment Studio for Call Center Agent/Supervisor User Guide*.	Historical or Real-time	Historical
Hour Type	This 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 you want the report to start from. It can be set by typing in the text box or clicking the Calendar icon. This is compulsory. The oldest historical date depends on the interval selected: ▪ 180 days of half-hour interval statistics ▪ 365 days of hourly interval statistics ▪ 730 days of daily interval statistics	MMM DD, YYYY	Current Date
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 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	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 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	This determines how you would like the information displayed. The drop-down list options are *Monthly, Daily, Hourly*, and *Half Hourly*. *Daily* and *Monthly* intervals are shown in days, hours, minutes, and seconds (dd:hh:mm:ss). *Hourly* and *Half Hourly* intervals are shown in minutes and seconds (mm:ss). The minimum historical interval is half an hour for the previous hour. Interval reports are only available for reports on individual agents. Reports on *All Agents* do not show intervals, but provide summary data for each agent over the entire time period.	Half Hourly, Hourly, Daily, Monthly	Half Hourly

Input Field	Description	Allowed Value	Default Value
Agent	This allows you to select a specific agent or *All Agents* from the drop-down list. **NOTE**: Agents can only select themselves. However, supervisors have access to *Each Managed Agent* and *All Agents* options.	Each Managed Agent or All Agents	All Agents

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

7.2.5.2 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 answered outbound calls that an agent made during the specified interval. **NOTE**: This includes calls that were made while performing Consultative Transfer, Escalate to Supervisor, and Conference. However, if the agent transfers the call before the third party answers, then the call is not included. In addition, calls resulting from a blind transfer initiated by the agent are not included.
Call Duration by Call State (Pie Chart)	
Wrap-Up	The percentage of time that an agent spent in *Wrap-Up* state during the specified interval.
Unavailable	The percentage of time that an agent spent in *Unavailable* state during the specified interval.
Available	The percentage of time that an agent spent in *Available* state during the specified interval.
Call Duration by Call Type (Vertical Bar Chart)	
ACD	The duration in minutes and seconds that an agent spent on ACD calls during the specified interval. This includes talk time and hold time.
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 Consultative Transfer, Escalate to Supervisor, and Conference. However, if the agent transfers the call before the third party answers, then the call is not included. In the case where the agent transfers the call after the third party answers, then the duration does not account for the call time of the other parties after transfer. Calls resulting from a blind transfer initiated by the agent are not included.

7.2.5.3 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 *Available* state.
Unavailable	The time during the specified interval that an agent was in the *Unavailable* state.
Wrap-Up	The time during the specified interval that an agent was in the *Wrap-Up* state.
Talk	The time during the specified interval that an agent spent on ACD calls in the *Talking* state.
Hold	The time during the specified interval that an agent spent on ACD calls in the *Hold* state.
Idle	The time during the specified interval that an agent spent idle in the *Available* 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 *Signed-Out* state. This includes *Signed-In*, *Available*, *Unavailable*, and *Wrap-up* states.
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 answered outbound calls an agent made during the specified interval. **NOTE**: This includes calls that were made while performing Consultative Transfer, Escalate to Supervisor, and Conference. However, if the agent transfers the call before the third party answers, then the call is not included. In addition, calls resulting from a blind transfer initiated by the agent are not included.
Call Duration 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 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. **NOTE**: This includes calls that were made while performing Consultative Transfer, Escalate to Supervisor, and Conference. However, if the agent transfers the call before the third party answers, then the call is not included. In the case where the agent transfers the call after the third party answers, then the duration does not account for the call time of the other parties after transfer. Calls resulting from a blind transfer initiated by the agent are not included.

7.2.6 Agent Utilization Report

The Agent Utilization Report displays metrics related to a selected agent's call handling activity for all call centers for which the agent is a member. The heading for this report is Agent Utilization – Agent Full Name – Interval, for example, *Agent Utilization – Agent X – Half Hourly Report*. This can also be set to view all agents.

Figure 103 Agent Utilization Report

7.2.6.1 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. *Agent Utilization* 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 *Monthly, Daily, Hourly,* and Half Hourly. *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. Interval reports are only available for reports on individual agents. Reports on *All Agents* do not show intervals, but reflect summary data for each agent over the entire time period.	Half Hourly, Hourly, Daily, Monthly	Half Hourly
Agent	This allows you to select a specific agent or *All Agents* from the drop-down list.	Each Managed Agent or All Agents	All Agents

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

7.2.6.2 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 were 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 answered outbound calls that an agent made during the specified interval. **NOTE**: This includes calls that were made while performing Consultative Transfer, Escalate to Supervisor, and Conference. However, if the agent transfers the call before the third party answers, then the call is not included. In addition, calls resulting from a blind transfer initiated by the agent are not included.
Held Calls	The percentage of ACD calls that an agent placed on hold during the specified interval.
Agent Call Summary by Call Type (Pie Chart)	
Avg ACD Duration	The duration percentage that an agent spent on ACD calls during the specified interval.
Avg Inbound Duration	The duration percentage that an agent spent on direct non-ACD calls.

Statistic	Description
Avg Outbound Duration	The duration percentage that an agent spent on outbound calls. **NOTE**: This includes calls that were made while performing Consultative Transfer, Escalate to Supervisor, and Conference. However, if the agent transfers the call before the third party answers, then the call is not included. In the case where the agent transfers the call after the third party answers, then the duration does not account for the call time of the other parties after transfer. Calls resulting from a blind transfer initiated by the agent are not included.
Agent Performance (Line Chart)	
Avg ACD Time	The average time in minutes and seconds that an agent spent on ACD calls during the specified interval.
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 talking on ACD calls.
Avg Hold Time	The average time in minutes and seconds that an agent spent on hold on ACD calls.
Avg Handle Time	The average time in minutes and seconds that an agent spent handling a call. Handle time = Talk time + Hold time +Wrap-up time *Wrap-up* time is associated with the agent's previous ACD call.

7.2.6.3 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 answered outbound calls that an agent made during the specified interval. **NOTE**: This includes calls that were made while performing Consultative Transfer, Escalate to Supervisor, and Conference. However, if the agent transfers the call before the third party answers, then the call is not included. In addition, calls resulting from a blind transfer initiated by the agent are not included.
Held Calls	The number of ACD calls that an agent placed on hold 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.

Statistic	Description
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 answered 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 Consultative Transfer, Escalate to Supervisor, and Conference. However, if the agent transfers the call before the third party answers, then the call is not included. In the case where the agent transfers the call after the third party answers, then the duration does not account for the call time of the other parties after transfer. Calls resulting from a blind transfer initiated by the agent are not included.
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.
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 spent in *Sign-in*, *Available*, *Unavailable,* and *Wrap-Up* ACD states during the specified interval. Avg Signed-In Time = Staffed Time/Number of Sign-Ins by that agent in that interval. **NOTE 1**: The Staffed Time is defined as follows: Sum of time in [Sign-In + Available + Unavailable + Wrap-up]. For definitions of various terms used in measurements, see section *8 Glossary and Definitions*. **NOTE 2**: When ACD states are used as recommended, this value reflects the amount of time the agent spent on their "shift".
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 For more information, see section *7.2.3 Time Allocation Matrix*.

7.2.7 Queue Performance Analysis Report

The Queue Performance Analysis Report displays metrics related to the performance of a Call Center ACD groups. 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".

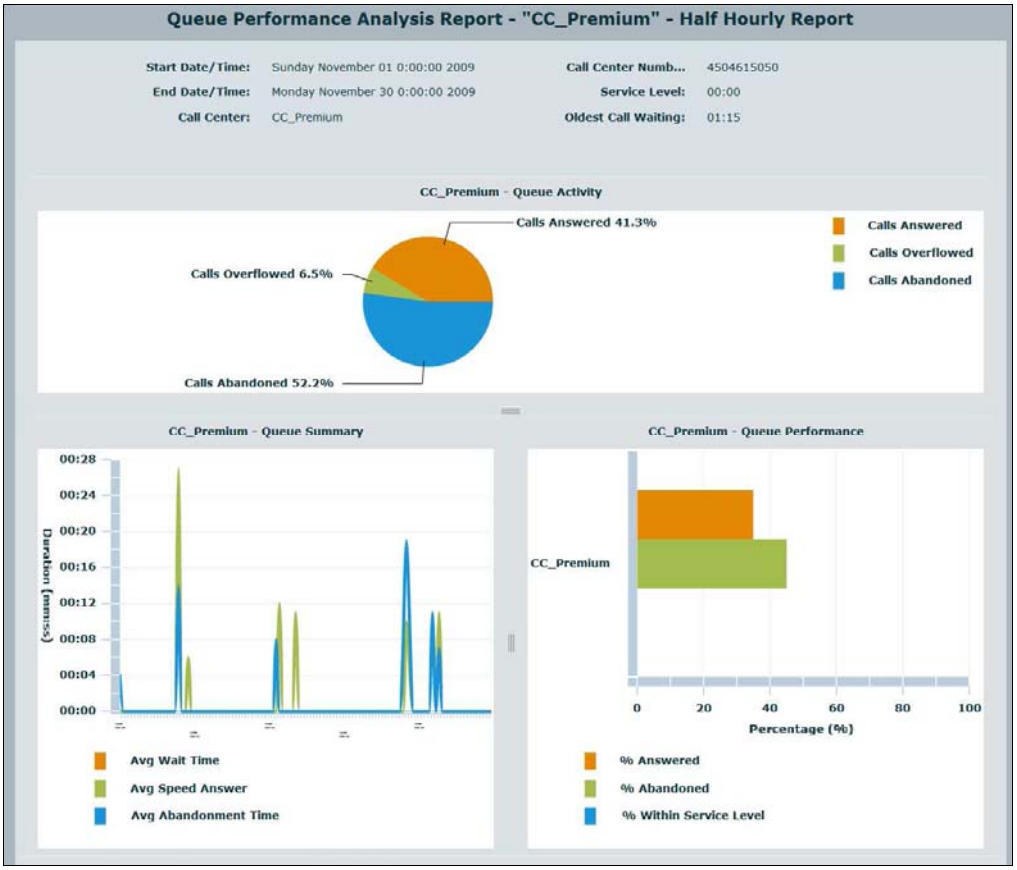


Figure 104 Queue Performance Analysis Report – Chart

Queue Performance - CC_Premium - Half Hourly

Date and Time	% Answered	% Calls in Queue	% Abandoned	% Within Service Level
Nov 10 2009, 14:30	0%	-	100%	0%
Nov 10 2009, 15:00	-	-	-	-
Nov 10 2009, 15:30	-	-	-	-
Nov 10 2009, 16:00	-	-	-	-
Nov 10 2009, 16:30	-	-	-	-
Nov 10 2009, 17:00	-	-	-	-
Nov 10 2009, 17:30	-	-	-	-
Nov 10 2009, 18:00	-	-	-	-
Nov 10 2009, 18:30	-	-	-	-
Nov 10 2009, 19:00	-	-	-	-
Nov 10 2009, 19:30	-	-	-	-
Nov 10 2009, 20:00	-	-	-	-
Nov 10 2009, 20:30	-	-	-	-
Nov 10 2009, 21:00	-	-	-	-
Nov 10 2009, 21:30	-	-	-	-
Nov 10 2009, 22:00	-	-	-	-
Nov 10 2009, 22:30	-	-	-	-
Nov 10 2009, 23:00	-	-	-	-
Nov 11 2009, 9:30	60%	-	40%	0%
Nov 11 2009, 10:00	-	-	-	-
Nov 11 2009, 10:30	-	-	-	-
Nov 11 2009, 11:00	100%	-	0%	0%
Nov 11 2009, 11:30	-	-	-	-

Figure 105 Queue Performance Analysis Report – Table (Fragment)

7.2.7.1 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* 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 show data from the assigned start date to the assigned end date. ▪ Real-time reports show data from the assigned start date to the present, with the current interval refreshed with real-time data. Real-time reports for individual queues show data for each time interval (half-hourly, hourly, and so on, with the last interval reflecting real-time data, if requested (subject to the refresh rate). When the interval switches over, the final data for the last time period is captured and reflected as historical data, and real-time data is reflected in the new time interval. The default refresh time for real-time reports is five minutes and can be changed to a minimum of one minute using Deployment Studio. For more information, see *BroadWorks Deployment Studio for Call Center Agent/Supervisor User Guide*.	Historical or Real-time	Historical
Hour Selection Type	Allows you to specify 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 *Monthly, Daily, Hourly,* and Half Hourly. *Daily* and *Monthly* intervals are shown in days, hours, minutes, and seconds (dd:hh:mm:ss). *Hourly* and *Half Hourly* intervals are shown in minutes and seconds (mm:ss). The minimum historical interval is half an hour for the previous hour. Interval reports are only available for individual queues. Reports on *All Queues* do not show intervals, but present summary data for each queue over the entire time period.	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.

7.2.7.2 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 Overflowed	The percentage of calls that exceeded the configured maximum 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)	

Statistic	Description
Avg Wait Time	The average time in minutes and seconds that answered calls were in the queue of the Call Center.
Avg Speed Answer	The average time in minutes and seconds that it took for calls to be answered in the Call Center. *Avg Speed of Answer* includes queue time and alerting time.
Avg Abandonment Time	The average time in minutes and seconds before a call was abandoned while waiting in the Call Center queue. Abandonment time does not include transferred or overflowed calls.
Queue Performance (Horizontal Bar Chart)	
% Answered	The percentage of calls that was answered by the Call Center.
% 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.

7.2.7.3 Table Information for Queue Performance Report

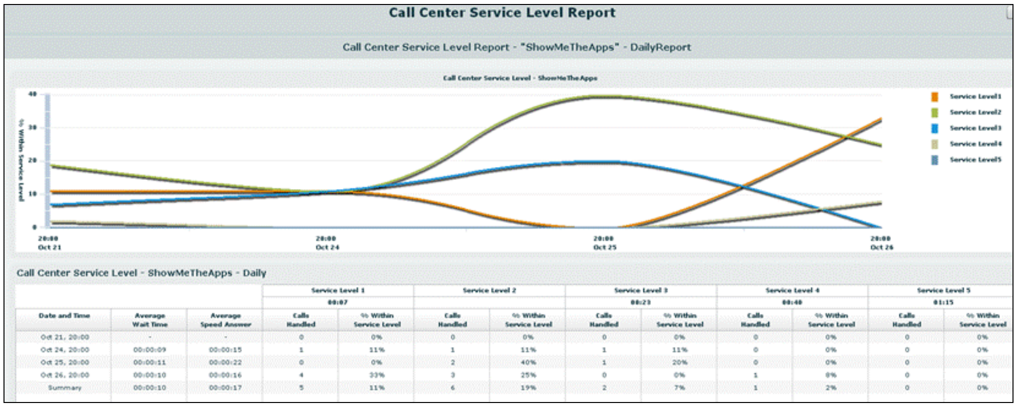
The following table describes the columns in the Queue Performance Analysis Report:

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 delivered to the Call Center. **NOTE**: Calls Received = Calls Answered + Calls In Queue* + Calls Abandoned. **Calls in Queue* is a transient state, so a real-time report increments both the Calls Received and the Calls in Queue until the call is answered, abandoned, or transferred, at which point the Calls in Queue decrement and the other values increment. Overflowed calls are not included in Calls Received since the calls are immediately diverted to another location. Calls transferred into the queue are counted as Calls Received, even when the call is initially answered by an agent in the queue and transferred by the agent back into the same queue.
Calls Answered	The total calls answered by agents.
Calls In Queue	The number of calls that are in the queue. ▪ Historical report – This value reflects the number of calls in the queue when the interval changed. ▪ Real-time report – The last interval listed in the report reflects the current number of calls in the queue, subject to the refresh rate. The summary row always shows "–".
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).

Statistic	Description
Calls Overflowed	The number of calls that exceeded the maximum queue length. These calls may be transferred or diverted to voice mail. This value is not included in the number of Calls Received since the calls are immediately diverted to another location.
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. Avg Time In Queue = Total Queue Time/Calls Answered
Avg Speed Answer	The average time in queue including ring time displayed in minutes and seconds. Avg Speed = (Total Queue Time + Total Ring Time)/Calls Answered
Avg Abandonment Time	The average time a caller is in the queue before hanging up displayed in minutes and seconds. Avg Abandonment Time = Total Abandonment Time/Calls Abandoned
Avg Staff	The average number of agents who are in *Sign-In*, *Available*, *Unavailable*, or *Wrap-up* ACD state for the queue during the reporting interval. Avg Staff = Staff Time/Specified Interval
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
% Calls in Queue	The percentage of calls that is in the queue. % Calls in Queue = Calls In Queue/Calls Received The summary row is not applicable to this column and always shows "–".
% 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 were answered within the designated service level of the call center. % Within Service Level = Number of calls answered within service level/Number of calls answered in the interval + number of calls abandoned in the interval.

7.2.8 Service Level Report

The Service Level Report is also known as a Grade of Service Report and displays metrics related to how long callers wait before being connected to an agent. The heading for this report is Service Level – Call Center Name – Interval Report, for example, Service *Level – Support – Half Hourly Report*. This can be changed to view All Call Centers.



			Service Level 1		Service Level 2		Service Level 3		Service Level 4		Service Level 5	
			00:07				00:23		00:40		01:15	
Date and Time	Average Wait Time	Average Speed Answer	Calls Handled	% Within Service Level	Calls Handled	% Within Service Level	Calls Handled	% Within Service Level	Calls Handled	% Within Service Level	Calls Handled	% Within Service Level
Oct 21, 20:00	-	-	0	0%	0	0%	0	0%	0	0%	0	0%
Oct 24, 20:00	00:00:09	00:00:15	1	11%	1	11%	1	11%	0	0%	0	0%
Oct 25, 20:00	00:00:11	00:00:22	0	0%	2	40%	1	20%	0	0%	0	0%
Oct 26, 20:00	00:00:10	00:00:16	4	33%	3	25%	0	0%	1	8%	0	0%
Summary	00:00:10	00:00:17	5	11%	6	19%	2	7%	1	2%	0	0%

Figure 106 Service Level Report

7.2.8.1 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. *Service Level Report* 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
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

Input Field	Description	Allowed Values	Default Values
Interval	How you would like the information displayed. The drop-down list options are *Monthly, Daily, Hourly,* and *Half Hourly*. *Daily* and *Monthly* intervals are shown in days, hours, minutes, and seconds (dd:hh:mm:ss). *Hourly* and *Half Hourly* intervals are shown in minutes and seconds (mm:ss). The minimum historical interval is half an hour for the previous hour. Interval reports are only available for individual queues. Reports on *All Queues* do not show intervals, but reflect summary data for each queue over the entire time period.	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 or *All Call Centers* from the drop-down list.	Each managed Call Center or All Call Centers	All Call Centers

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

7.2.8.2 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).

7.2.8.3 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.
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

Statistic	Description
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 during the specified interval. This is repeated for each service level. The number increments when the call is answered.
% Within Service Level	The percentage of ACD calls that were answered by an agent within each defined service level. % Within Service Level = Number of calls answered within service level/Number of calls answered in the interval + number of calls abandoned in the interval. **NOTE**: The service level time starts when a call enters the queue, including time listening to a greeting.

8 Glossary and Definitions

8.1 Line States

Line states show the state of the agent's line.

Name	Icon	Description
Off Hook		The phone is off-hook, which means that the agent is on a call. Whether calls MAY be delivered to the agent depends on their call waiting settings and the Call Center's call waiting settings.
On Hook		The phone is on-hook, which means the agent is not on a call. Whether calls MAY be delivered to the agent depends on their ACD state.
Ringing		The phone is currently in alerting state (ringing); a call is currently being delivered to the agent.
Do Not Disturb		The agent has enabled Do Not Disturb. ACD calls are not delivered to the agent. This state is NOT RECOMMENDED for Call Center agents. Agents should use the *Unavailable ACD* state when they need to temporarily block new incoming calls.
Privacy		The agent has set their phone state as "Private" and their line state is not being reported. Enabling this feature also blocks the ACD state of the agent. Whether calls MAY be delivered to the agent depends on their line and ACD states. This is a separately assigned BroadWorks service and is NOT RECOMMENDED for Call Center agents. It may be appropriate for Call Center supervisors.
Call Forward Always		User has set their phone to forward all calls to an alternate number. Calls are delivered to the alternate number, but are not properly tracked in reports. This state is NOT RECOMMENDED for Call Center agents. Agents should use the Remote Office or BroadWorks Anywhere service to route calls to an alternate location. With these services, call details are captured in the Call Center reports.

8.2 ACD States

ACD states specify the agent's availability to take calls.

Name	Icon	Description
Sign-In		The *Sign-In* state is equivalent to a "clock in", meaning that the agent is at their work location, but not yet ready to accept incoming calls. Calls are not delivered to the agent in that state. It is recommended that agents only use this ACD state between the time they arrive at work and the time they become available to accept calls.
Sign-Out		The *Sign-Out* state is equivalent to a "clock out", meaning that the agent's workday or shift is done and they are leaving. Calls are not delivered to the agent in this state. It is recommended that agents do not use this ACD state when they leave for lunch or breaks during the day. They should use the *Unavailable* state for that.
Available		The *Available* state is the primary ACD state of an agent during the work day. It indicates that the agent is at their workstation and either available to take a call or on an active call. Calls MAY be delivered to an agent that is in *Available* state. BroadWorks uses both the ACD state AND the line state of the agent (on-hook, off-hook) to determine whether to route a call to the agent. By default, agents receive calls when they are *Available* AND on-hook (not on an active call). However, this behavior can be overridden if the *Allow call waiting on agents* option is checked on the *Call Center Profile* page, which allows for new calls when the agent is *Available* AND *off-hook* (on an active call).
Unavailable		The *Unavailable* state is used when the agent is away from their workstation and not available to take calls. Calls are not delivered to agents in *Unavailable* state. This state should be used when the agent is at lunch, break, in a meeting, or engaged in some other activity while they are at work, but unavailable to take calls.
Wrap-Up		The *Wrap-Up* state is designed to allow an agent to complete paperwork or other post-call procedures associated with the last call. Whether calls MAY be delivered to agents in *Wrap-Up* state depends on the Call Center configuration. By default, calls are not routed to agents in *Wrap-Up* state, except when the Call Center is configured to *Enable calls to agents in wrap-up state* on the *Call Center Profile* page.

NOTE: When an agent is not joined in a call center, their ACD state appears in grey.

8.3 Call Types

This section defines different types of calls measured in Call Center statistics.

Name	Description
ACD Call	A call delivered to a Call Center pilot number that is directed to an agent via the ACD function.
Inbound Call	A direct call to an agent. Other calls treated as Inbound calls include: ▪ Calls that a supervisor retrieves from a queue ▪ Calls that an agent receives due to a transfer from another agent. (Note that they may have originated as ACD calls.)
Outbound Call	An outbound call made by an agent.
Held Call	An ACD call that was placed on hold by an agent.
Transferred Call	An ACD call that was transferred to another number. Transfers can be the result of manual transfers by agents, transfers to voice mail because the calls exceed the maximum wait time, and transfers by supervisors to alternate queues. **NOTE**: A *Timed Out* call, is a call that is transferred due to exceeding the maximum wait time in a queue.
Answered Call	An ACD call that was answered by an agent.
Abandoned Call	Denotes an ACD call that entered the queue, but the caller hung up before the call was answered or transferred.
Received Call	Denotes an ACD call that was received and either answered or abandoned. Overflowed calls are not included.
Overflowed Call	Denotes an ACD call that was received, but immediately transferred to another destination due to exceeding the configured maximum queue size.
Queued Call	An ACD call that is waiting for an agent goes into a queue. Calls only enter a queue if no agents are available to take the call when the call is initially received. A call that is immediately offered to an agent (alerts their device) is not counted as a queued call.
Bounced Call	A call that has been transferred back to queue because it was not answered by an agent in the specified time.

8.4 Other Terms used in Statistics Measurements

This section defines various terms used in Call Center statistics measurements.

Name	**Description**
Wait Time	The amount of time a caller waits in the queue. The Average Wait Time is the average of the wait times for all answered calls during the specified time period. Abandoned calls and transferred calls are not included.
Speed of Answer	The amount of time a caller waits before being answered. Speed of Answer = Wait Time + Alerting Time The Average Speed of Answer is the average time of the speed of answer times of all answered calls during the specified time period.

Name	Description
Service Level	The time limit, in seconds, during which an ACD call should be answered. The Service Level is set using slide bars on the *Dashboard* tab, the Queue Performance Report, and the Service Level Report. The *Percent within Service Level* calculates the percentage of calls that were answered within the specified interval. For example, to monitor a Service Level target of answering 80% of incoming ACD calls within 20 seconds, the Service Level is set at 20 seconds, and the supervisor monitors the *% Within Service Level* fields to ensure the value is 80% or higher.
Agents Staffed	The number of agents that are in the ACD states of *Sign-In, Available, Unavailable,* and *Wrap-Up*. Agents that are only "Joined" to a Call Center and cannot set their ACD state are not counted as Agents Staffed.
Staffed Time	The amount of time an agent spent in an ACD state other than Sign-Out. Staffed Time = Sign-In + Available + Unavailable + Wrap-Up Time
Sign-In Time	The amount of time the agent spent in the *Sign-In* state. When using the desktop client, this value is typically 00:00 since the client immediately moves the agent to either the *Available* or *Unavailable* state. This value may be higher for phone-based agents that manually set their ACD state from the phone or web portal.
Talk Time	The amount of time the agent spent on an ACD call, excluding the hold time.
Handle Time	The amount of time spent on a particular ACD call. Handle Time = Talk Time + Wrap-Up Time
Idle time	The amount of time an agent spent in the *Staffed* state and not on ACD calls.

9 Keyboard Shortcuts

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

9.1 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 *Wrap up* on completion of a call.
<NumPad 0…9)		Allows to you to dial an ad hoc number.

9.2 Menu Bar Control Keys

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

9.3 Directories Control Keys

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

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

9.4 Control Keys

Keystrokes	Equivalent Mouse Action	Function
ENTER	Click **Dial**.	Dials the selected number.
<NumPad+>	Click **Transfer**.	Transfers the selected call.
<NumPad.>	Click **End**.	Ends the selected call.
F1…F10	Click **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 **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 **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 **Conference**.	Initiates a conference with linked call lines. Performs Barge-in on selected contact.
Ctrl + Alt + <Number Pad +>	Click **Conference Hold/Conference Unhold**.	Toggles a conference from *Held* to *Active* state.
Ctrl + Alt + Shift + <Number Pad +>	Click **Leave Conference**.	Leaves a conference. Releases yourself from the active conference.
Ctrl + Shift + <Number Pad +>	Click **End Conference**.	Ends a conference. Releases all parties from the conference.

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