# Clearspan® Hosted Thin Call Center Agent/Supervisor User Guide

RELEASE 20.0.32

April 2015

Mitel®

**NOTICE**

The information contained in this document is believed to be accurate in all respects but is not warranted by Mitel Networks™ Corporation (MITEL®). The information is subject to change without notice and should not be construed in any way as a commitment by Mitel or any of its affiliates or subsidiaries. Mitel and its affiliates and subsidiaries assume no responsibility for any errors or omissions in this document. Revisions of this document or new editions of it may be issued to incorporate such changes.

No part of this document can be reproduced or transmitted in any form or by any means - electronic or mechanical - for any purpose without written permission from Mitel Networks Corporation.

TRADEMARKS

Clearspan and Mitel are trademarks of Mitel Networks Corporation.

Other product names mentioned in this document may be trademarks of their respective companies and are hereby acknowledged.

Clearspan Hosted Thin Call Center Agent/Supervisor User Guide
Release #20.0.32
2850-005
April 2015

®,™ Trademark of Mitel Networks Corporation
© Copyright 2015 Mitel Networks Corporation
All rights reserved

REVISION HISTORY ..... 1

ABOUT THIS DOCUMENT ..... 2

Audience ..... 2

Additional Resources ..... 2

INTRODUCTION TO CALL CENTER ..... 3

Call Center – Agent ..... 3

Call Center – Supervisor ..... 5

GETTING STARTED ..... 8

Launch Call Center from Web Portal ..... 8

Sign in from Web Browser ..... 9

Hot Desk Sign-in ..... 11

Sign-in Restrictions ..... 11

Get Help ..... 12

Sign Out ..... 12

Set Up Call Center ..... 13

Change Your Password ..... 14

Change Your ACD State (Agents) ..... 15

Change Your Instant Messaging and Presence State ..... 15

Enable or Disable Services ..... 17

EXPLORE WORKSPACE ..... 18

Logo Pane ..... 20

Global Message Area ..... 20

Links to Other Interface Elements and Functions ..... 20

Logged User Information ..... 20

Call Console ..... 21

Header Bar ..... 22

Dialer ..... 23

Current Calls ..... 23

Conference Call ..... 24

Call States and Actions ..... 26

Contacts Pane ..... 26
Search Panel ..... 28
Enterprise/Group Panel ..... 29
Common Panel ..... 29
Personal Panel ..... 29
Agents Panel (Supervisors) ..... 30
Supervisors Panel (Agents) ..... 30
Speed Dial Panel ..... 31
Queues Panel ..... 31
Custom Directories Panels ..... 31
Instant Message Panel ..... 32
Outlook Panel ..... 32
Directories Panel ..... 33
Call History ..... 33
Controls ..... 34
Call Action Buttons ..... 37
MANAGE CALLS ..... 40
Call Management Operations Quick Reference ..... 40
Drag and Drop Call onto Contact ..... 43
View Calls ..... 43
View Current Calls ..... 43
Group Calls ..... 44
View Incoming Call Details ..... 45
Assign Disposition Codes (Premium Call Center) ..... 46
Assign Disposition Codes to Current Call ..... 47
Assign Disposition Codes in Wrap-Up ..... 47
Generate Call Trace ..... 47
Generate Call Trace for Selected Call ..... 48
Generate Call Trace for Last Released Call ..... 48
Record Calls ..... 48
Manually Record Call ..... 48
Automatically Record Calls ..... 49
View and Change Security Classification of Calls ..... 49
Change Security Classification ..... 49
Receive, Answer, and End Calls ..... 50
Answer Call ..... 50
Auto Answer Calls ..... 50

Open URL ..... 51
Save vCard ..... 51
End Call ..... 52
Make Outbound Calls ..... 52
Set Your Outgoing Calling Line Identity (Premium Call Center) ..... 52
Dial Ad Hoc Number ..... 52
Redial Number ..... 54
Dial Contact ..... 54
Dial from Search ..... 55
Dial from History ..... 55
Place Calls on Hold, Resume, and Camp Calls ..... 57
Place Call on Hold ..... 57
Resume Held Call ..... 57
Conduct Busy Camp On ..... 57
Transfer Calls ..... 58
Blind Transfer ..... 58
Transfer with Consultation ..... 58
Transfer to Queue ..... 59
Escalate Calls ..... 59
Make Emergency Call ..... 59
Blind Escalate Call ..... 60
Escalate with Consultation ..... 61
Escalate with Conference or Handover ..... 61
Escalate with Mid-Conference Hold ..... 62
Manage Conference Calls ..... 62
Start Three-Way Conference ..... 63
Add Participant to Conference ..... 64
Hold Conference ..... 64
Resume Conference ..... 64
Hold Participant ..... 64
Take Participant Off Hold ..... 65
Leave Conference ..... 65
End Participant ..... 65
End Conference ..... 65
MANAGE CALL HISTORY ..... 66
View Call History ..... 66
Delete Call History ..... 66

E-MAIL CONTACTS ..... 68

Send E-mail Message to Contact ..... 68

MANAGE CONTACTS ..... 69

View Contacts ..... 70

Show or Hide Directories ..... 71
Display Directory Below Call Console ..... 72
Show or Hide Directory Content ..... 73
Show Contact Details ..... 74
Select Display Order ..... 75

Organize Contacts ..... 76

Sort Contacts ..... 76

Search for Contacts ..... 77

Perform Contact Search ..... 77

Manage Personal Contacts ..... 79

Add Personal Contact ..... 79
Delete Personal Contact ..... 80

Manage Speed Dial Numbers ..... 80

Add Speed Dial Entry ..... 81
Modify Speed Dial Entry ..... 81
Delete Speed Dial Entry ..... 82

MONITOR IM&P CONTACTS AND CHAT WITH CONTACTS ..... 83

Monitor IM&P Contacts ..... 83

Subscribe to Contact ..... 83
Add Contact to Instant Message Directory ..... 84
Modify Contact Name ..... 85
Unsubscribe from Contact ..... 86
Accept or Reject Subscription Request ..... 86
View Unified Presence State of Contacts ..... 87

Chat with IM&P Contacts ..... 88

Start Instant Messaging Session ..... 89
Place Call from Chat Window ..... 90
Establish Multiuser Chat Session ..... 90
Manage Instant Messaging Sessions ..... 92

MONITOR SUPERVISORS (AGENT) ..... 94

Select Supervisors to Monitor ..... 94

Supervisor Phone States ..... 95

MONITOR CALL CENTERS (AGENT) ..... 96

Dashboard Pane ..... 96

Select Call Centers to Monitor ..... 98

Select Information to Display ..... 99

Order Call Centers ..... 100

MANAGE AGENTS (SUPERVISOR) ..... 101

Select Agents to Monitor ..... 101

Make Agents Join Queues ..... 102

Agent Phone and ACD States ..... 103

View Agent's Details ..... 105

Change Agent ACD State ..... 105

Silently Monitor Agent's Call ..... 106

Barge in on Agent's Call ..... 107

Pick Up Agent's Ringing Call ..... 108

MANAGE QUEUED CALLS (SUPERVISOR) ..... 109

Queued Calls Pane ..... 109

Select Call Centers to Monitor ..... 111

Modify Number of Calls to Display ..... 113

Show or Hide Call Center Panels ..... 113

View Queued Calls ..... 114

Group Queued Calls ..... 114

Order Queued Calls ..... 114

Monitor Next Call ..... 115

Enable Night Service Override or Forced Forwarding (Premium Call Center) ..... 115

Retrieve Call from Queue ..... 116

Promote Call in Queue (Premium Call Center) ..... 116

Transfer Call to Another Queue ..... 117
Transfer Call from Queue to Agent ..... 117
Transfer Call to Ad Hoc Number ..... 117
Change Position of Call in Queue ..... 118
Transfer Call to Top of Queue (Premium Call Center) ..... 118

VIEW REAL-TIME STATISTICS (SUPERVISOR) ..... 120

Display Dashboard ..... 120
Queue Information ..... 121
Agent Information ..... 122
Select Information to Display ..... 123
Navigate to Agent in Agent Directory or Queue in Queued Calls Pane ..... 124

GENERATE REPORTS ..... 126

Run Report ..... 126
Schedule Report ..... 132
Manage Scheduled Reports ..... 137

CONFIGURE CALL CENTER ..... 138

Settings – General ..... 138
Account ..... 139
Hotel/Flexible Seating Host ..... 140
Language ..... 140
Screen Pop ..... 140
Date Format ..... 142
Time Format ..... 142
Workspace ..... 142
Settings – Application ..... 143
Queue Memberships (Agent) ..... 144
Agent Policies (Agent) ..... 144
Barge-In & Monitor (Supervisor) ..... 145
Settings – Services ..... 146
Settings – Plug-ins ..... 147
Notification ..... 149
Microsoft Outlook ..... 149
LDAP v3 ..... 150

Program Shortcuts ..... 151
Call Event Log ..... 151
Settings – Messaging ..... 151
E-mail Messaging ..... 152
Instant Messaging and Presence ..... 152
Settings – Report ..... 153
Default Thresholds ..... 153
Default Start Day of the Week ..... 153
Default Service-level Calculations ..... 154
Settings – About ..... 154
CONFIGURE WEB BROWSER ..... 156
Internet Explorer Settings for Full Screen Mode ..... 156
Firefox Settings Quick Link Navigation ..... 157
APPENDIX A: GLOSSARY AND DEFINITIONS ..... 159
ACD States ..... 159
Agent Skill Levels (Premium Call Centers) ..... 160
Phone States ..... 161
Unified Instant Messaging Presence States ..... 162
Call States ..... 163
Call Types ..... 163
APPENDIX B: DIAGNOSTIC TOOL ..... 165
Launching Diagnostic Tool ..... 165
Diagnostic Tool GUI ..... 165
Session Tab ..... 166
Long Polling Tab ..... 166
Calls Tab ..... 167
Service Tab ..... 168
Monitoring Tab ..... 168
Support Tab ..... 169
Known Issues ..... 170

APPENDIX C: KEYBOARD SHORTCUTS ..... 171

INDEX ..... 173

# REVISION HISTORY

The following represents the revision history of this publication.

| REVISION NUMBER | DATE COMPLETED | POINT OF CONTACT | DESCRIPTION |
|---|---|---|---|
| 2838-005 | 03/2015 | Velvet Moore | Updated for R20.0.32; Added Diagnostic Tool appendix |
| 2838-004 | 08/2014 | Velvet Moore | R20 |
| 2838-003 | 10/21/13 | Bev Marsh | R19.0 |
| 2838-002 | 07/28/12 | Bev Marsh | R17.sp4 |
| 2838-001 | 11/9/2011 | Bev Marsh | New Document for R17.0 |

# ABOUT THIS DOCUMENT

This user guide provides step-by-step procedures and reference information for using Clearspan Hosted Thin Call Center Release 20.0.32 client application.

## AUDIENCE

This document is intended for Call Center agents and supervisors who use the Clearspan Hosted Thin Call Center client.

## ADDITIONAL RESOURCES

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

- Clearspan Call Center Solution Guide
- Clearspan Call Center Reports Guide
- Clearspan Getting Started Web Interface Administration Guide
- Clearspan Application Server Group Web Interface Administration Guide Part 1
- Clearspan Application Server Group Web Interface Administration Guide Part 2
- Clearspan Application Server Enterprise Web Interface Administration Guide

# INTRODUCTION TO CALL CENTER

Clearspan Call Center is a carrier-class, communications management product for Call Center agents and supervisors used with the Clearspan® telephony softswitch platform, on which call centers are hosted.

Clearspan 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, Clearspan Call Center employs the latest technology platforms and communications facilities.

The Hosted Thin Call Center, introduced in Release 17.sp2, is an SaaS Rich Internet Application (RIA) hosted on Clearspan that allows you to manage call center activity from a web browser.

**Note**: For information about the web browsers supported by Call Center, see the *Clearspan Hosted Thin Call Center Agent/Supervisor Configuration and Administration Guide* or ask your administrator.

This document describes the Clearspan Hosted Thin Call Center client.

Clearspan Hosted Thin Call Center client application herein is referred to as Call Center, Call Center client, Call Center application, or client.

The Call Center functionality available to you depends on your Call Center function (agent or supervisor), the types of queues you are staffing or monitoring (Standard or Premium), and your own services and settings. For more information about the capabilities and services assigned to you, ask your group or enterprise administrator.

The following sections provide an overview of Call Center – Agent and Call Center – Supervisor functions and refer you to other sections for more information.

**Note**: Call Center functionality available in specific contexts is identified throughout the document.

## CALL CENTER – AGENT

The Call Center – Agent client is designed to support the needs of Call Center agents in any environment. It supports the full set of call handling functions, ACD state management, integration of multiple directories, Outlook integration, and other features required in large call centers.

*Figure 1* shows the main interface of the Call Center – Agent.

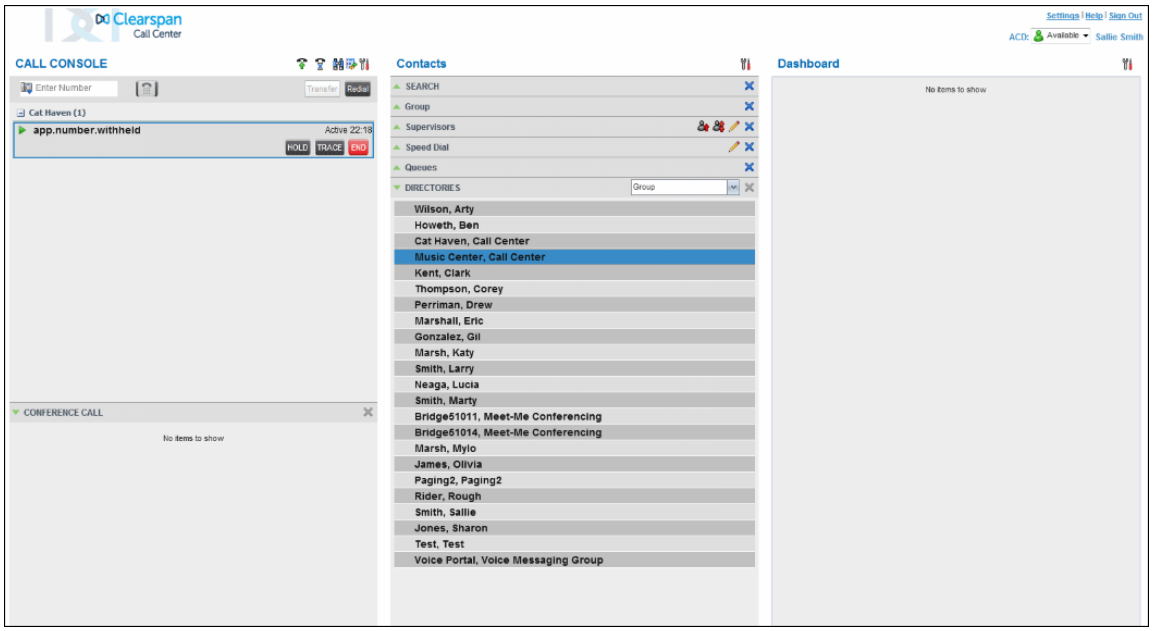



**Figure 1 Call Center – Agent Main Interface**

The interface contains the following work areas:

- **Logo pane** – The *Logo* pane displays information about you and contains links to other pages and functions.
- **Call Console** – You use the *Call Console* to view and manage your current calls.
- **Contacts pane** – The *Contacts* pane contains your contact directories, the list of your supervisors, and the list of the call centers to which you belong. It allows you to use your contacts to make and manage your calls.
- **Dashboard pane** – The *Dashboard* pane provides real-time summary information about up to 50 call centers selected from the list of call centers to which you are assigned.
- **Call History dialog box** – You use the *Call History* dialog box to view your past calls and make calls from history.
- **Chat windows** – You use *Chat* windows to chat with your IM&P contacts.
- **Report window** – You use the *Report* window, accessed via the Reporting link, to generate reports about your activity and performance in the call centers you are staffing.

- **Settings pages** – You use the *Settings* pages, accessed via the Settings link, to configure various aspects of Call Center.

For more information about the Call Center user interface, see section Explore Workspace.

Call Center functionality available to agents is described in the following sections:

- Getting Started
- Manage Calls
- Manage Call History
- E-mail Contacts
- Manage Contacts
- Monitor IM&P Contacts and Chat with Contacts
- Monitor Supervisors (Agent)
- Monitor Call Centers (Agent)
- Configure Call Center

## CALL CENTER – SUPERVISOR

The Call Center – Supervisor client is designed to support the needs of call center supervisors in any environment. It supports agent monitoring, queue management, real-time and historical reporting, and other features required in large call centers.

*Figure 2* shows the main interface of the Call Center – Supervisor.

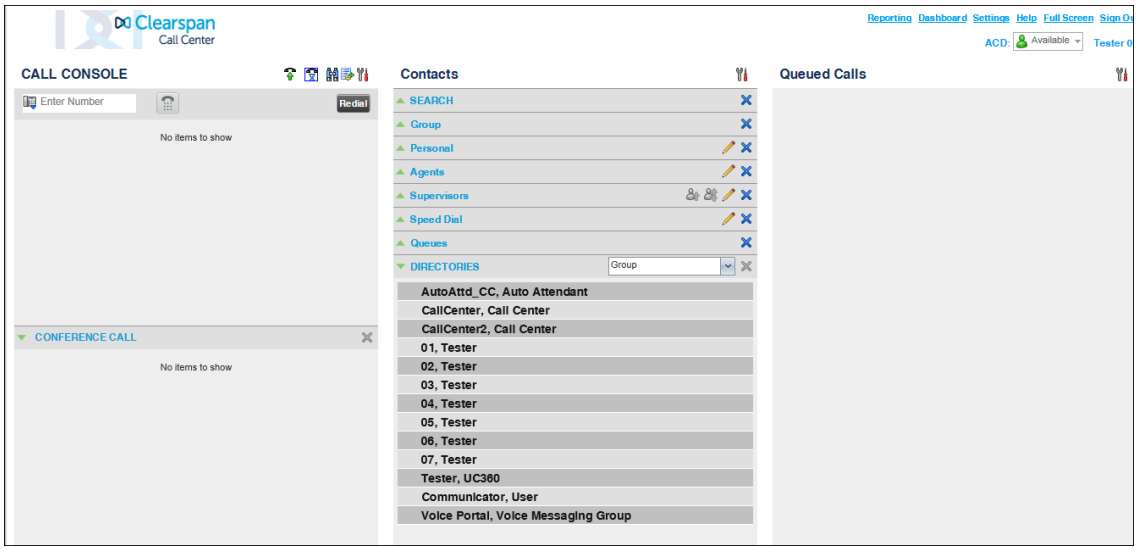



**Figure 2 Call Center – Supervisor Main Interface**

The Call Center interface contains the following work areas:

- **Logo pane** – The *Logo* pane displays information about you and contains links to other pages and functions.
- **Call Console** – You use the *Call Console* to view and manage your current calls.
- **Contacts pane** – The *Contacts* pane contains your contact directories and provides you with real-time call and ACD state of the agents you are monitoring.
- **Queued Calls pane** – You use the *Queued Calls* pane to manage queued calls.
- **Call History dialog box** – You use the *Call History* dialog box to view your past calls and make calls from history.
- **Chat windows** – You use *Chat* windows to chat with your IM&P contacts.
- **Dashboard** – The *Dashboard* provides real-time summary information for up to 50 queues and allows you to monitor key performance indicators for monitored call centers and supervised agents.
- **Report window** – You use the *Report* window, accessed via the Reporting link, to generate reports about the activity and performance of call centers and agents you manage.
- **Settings pages** – You use the Settings pages, accessed via the Settings link, to configure various aspects of Call Center.

For more information, see section Explore Workspace.

For information on Call Center functions performed by supervisors, see the following sections:

- Manage Agents (Supervisor)
- Manage Queued Calls (Supervisor)
- View Real-Time Statistics (Supervisor)

In addition, for information about other functions available to you, see the following sections:

- Getting Started
- Manage Calls
- Manage Call History
- E-mail Contacts
- Manage Contacts
- Monitor IM&P Contacts and Chat with Contacts
- Configure Call Center

# GETTING STARTED

Call Center is hosted on Clearspan and you access it over the network either from your web portal or from a web browser. The sign-in procedure is the same for agents and supervisors.

In addition, agents can sign in to Call Center using hot desk functionality, that is, sign in from any available desk configured for that purpose. Upon login, a desk's phone is associated with a certain agent and behaves as if it were the permanent phone of the agent for the duration of the login session. This allows agents to use a single login ID to perform their work independently of their location.

**Notes**: The minimum screen resolution required for the Call Center is 1024 x 768 pixels.

Call Center does not support logging in as different users from the same machine at the same time.

When using the Outlook Integration feature with Microsoft Outlook 2010 or Outlook 2013 (32- or 64-bit edition), make sure Outlook is running before Call Center is launched; otherwise, the Outlook Integration functionality does not work.

## LAUNCH CALL CENTER FROM WEB PORTAL

Clearspan has a Single Sign-On feature. When you access the Call Center client from the web portal, you do not need to provide your credentials since you are already logged in to the web portal.

To launch Call Center:

1. Log in to your Clearspan web portal.
2. From the Laun*ch* drop-down list at the top right-hand side of the Clearspan logo pane, select the *Call Center* service.

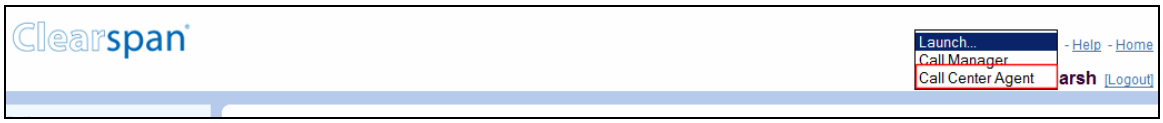



**Figure 3 Clearspan Web Portal Logo Pane – Launching Call Center as Agent**

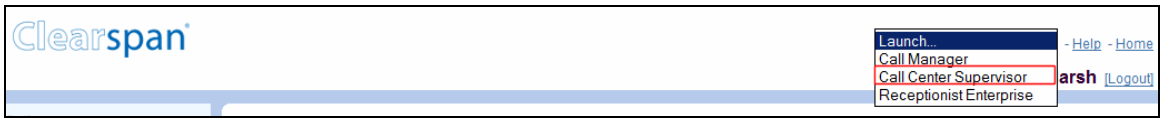



**Figure 4 Clearspan Web Portal Logo Pane – Launching Call Center as Supervisor**

Call Center starts and you are automatically signed in.

## SIGN IN FROM WEB BROWSER

To sign in to the Call Center client, use the same credentials that you use to connect to the web portal.

To sign in to Call Center:

1. In your web browser, enter the Uniform Resource Locator (URL) of the Call Center client. The *Call Center Sign-in* page appears.

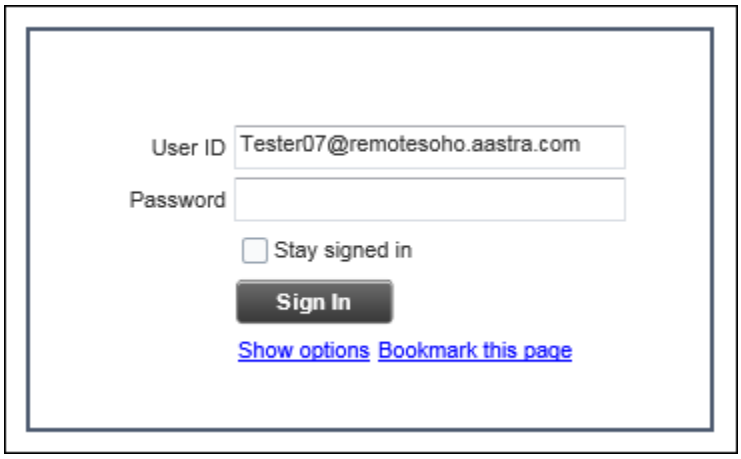



**Figure 5 Call Center Sign-in Page**

2. Enter your Clearspan user ID in *user@domain* format and enter your password.

   If you are unsure of your user ID or password, contact your administrator.

You can also enter just the *user* part of your ID. The system then appends the default domain to it before authenticating you. However, if your domain is different from the default domain, you have to enter your user ID with the domain name.

Optionally, if your system has been configured to allow it, you can configure your domain name.

3. Check *Stay signed in* to instruct the client to automatically reconnect and sign 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.

4. To configure your domain name or the Call Center language, click **Show options**. The area expands, displaying advanced options.

**Figure 6 Call Center Sign-in Dialog Box – Advanced Options**

5. To configure your domain, in the *Append Domain* text box, enter your domain name. When you enter your user ID without a domain, the system appends the configured domain instead of the system-wide default domain.

6. To change the language, from the *Language* drop-down list, select a new language.

7. To add a bookmark to this page in your browser, click **Bookmark this page** and follow the instructions of your browser.

8. Click **Sign In**.

   Call Center starts and you are signed in.

**Note**: In some browser/operating system combinations, when you press ENTER instead of the **Sign In** button, a blank page appears instead of the Call Center main interface.

## HOT DESK SIGN-IN

If you are a Call Center agent, you can automatically associate yourself with a Hoteling Host or Flexible Seating Host phone device when you sign in to the Call Center client. This is commonly used in a shared workspace environment where users working different shifts share a single computer and phone.

To use hot desk functionality, you must have your Hoteling Guest or Flexible Seating Guest service assigned. You turn on your Hoteling Guest or Flexible Seating Guest service using the Clearspan web portal or voice portal.

To sign in to Call Center as a hot desk user:

1. At the assigned workstation, start a web browser and enter the URL of the Call Center client. *The Call Center Sign-in* page appears.
2. Enter your Clearspan user ID and password.
3. Click **Show options**. The area expands, displaying advanced options.
4. In the *Hotel/Flexible Seating Host* text box, enter the user ID of the Hoteling Host or Flexible Seating Host that corresponds to the desk/device you are using, for example, “station_224@acme.com”.
5. To change the language of the user interface, from the *Language* drop-down list, select a new language.
6. Click **Sign In**.

   You are signed in and Call Center associates that desk’s phone with your user account for the duration of the session.

**Notes**: When you sign out from the Call Center client, the guest session with the host device at the desk is terminated. After sign-out, the host user ID you entered is saved and can be reused on the next sign-in.

The host/guest association can be configured with a time limit. If the association/session expires while you are signed in to the client, you are automatically signed out from the client. The association time limit can be specified both for hosts and for guests. You can configure your association time limit for your Hoteling Guest or Flexible Seating Guest service on the Clearspan web portal. The host association time limit is usually configured by your administrator.

## SIGN-IN RESTRICTIONS

You can only have one active Call Center session at a time. When you sign in from a second location, you are automatically signed out from the original location with the following message: "You have been signed out as you have signed in from another location."

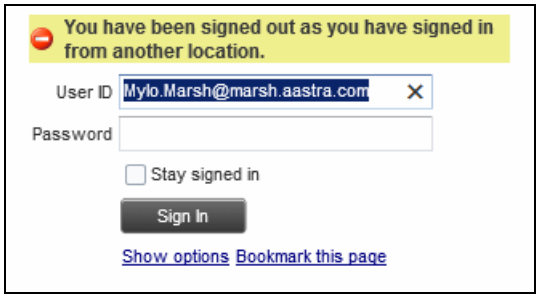



**Figure 7 Sign-in Dialog Box with Error Message**

You may also be automatically signed out if you signed in from a Hoteling Host or Flexible Seating Host and your session expired.

## GET HELP

Call Center provides you with online access to a portable document format (PDF) version of this guide.

**Figure 8 Logo Pane with Help Link**

To access the document, click the **Help** link in the top right-hand side of the main interface.

## SIGN OUT

1. To sign out of Call Center, click **Sign Out** at the top right-hand side of the main interface.

   If you are the last agent to sign out of a call center, a message appears, providing the details of queues in which you are the last agent to sign out and asking you to confirm that you want to sign out.

**Note**: This functionality is not available when you close the application using the browser's Close button or when you refresh (F5) the browser.

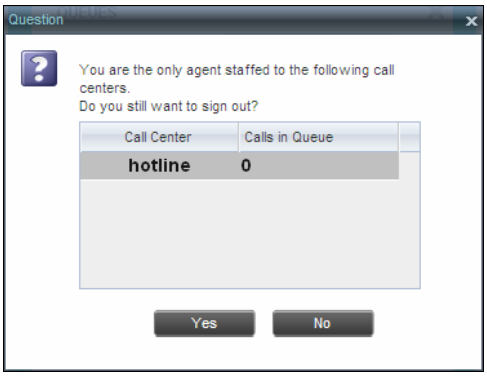



**Figure 9 Dialog Box – Signing Out Last**

**2.** To stay signed in, click **No**. You are returned to the application.

To continue signing out, click **Yes**.

A message appears asking whether you would like to save your current workspace.

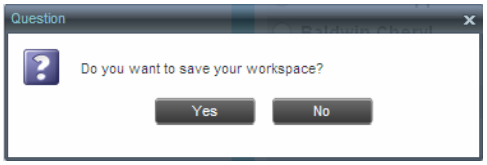



**Figure 10 Dialog Box – Saving Workspace on Sign Out**

To save your current workspace, click **Yes**. This allows you to retain the same interface setup at your next session. For information about the elements of the Call Center workspace that can be customized and retained between sessions, see section Workspace.

If you are signing out from a hot desk, your account is dissociated from the hot desk where you were signed in.

## SET UP CALL CENTER

When you sign in to Call Center for the first time, it is recommended that you configure the following settings:

If you are an agent:

- Configure the queues you want to join on sign-in.
- Configure your post sign-in and post call ACD states.

For information, see section *Settings – Application*.

- Configure the supervisors whose call status you want to monitor. For information, see section *Select Supervisors to Monitor*.
- Make sure that your web browser is set up to use all the features of Call Center. For information, see section *Configure Web Browser*.

If you are a supervisor:

- Configure agents you want to monitor. For more information, see section *Select Agents to Monitor*.
- Configure queues you want to monitor. For more information, see section *Select Call Centers to Monitor*.

For more information about the settings you can configure in Call Center, see section *Configure Call Center*.

## CHANGE YOUR PASSWORD

You can change your password when you are signed in to Call Center.

1. To change your password, click the **Settings** link at the top right-hand side of the main page.
2. Click the **General** tab and then click **Change Password**.

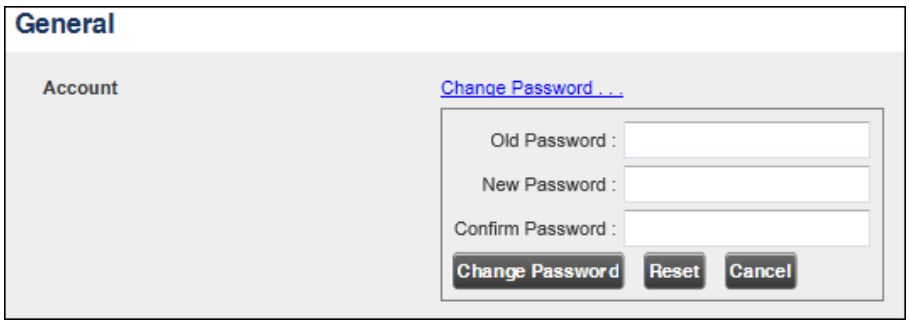



**Figure 11 Changing Password**

3. Enter your old and new password in the provided text boxes and click **Change Password**.

   Note that the Reset button does not reset your password. It only clears the input boxes.

**Note:** This password is shared with your web portal and other client applications that share Clearspan Single Sign-On feature. It must meet the password requirements set on Clearspan.

# CHANGE YOUR ACD STATE (AGENTS)

When you sign in to Call Center, your ACD state is set to the post sign-in ACD state set on the *Settings* page.

To change your ACD state:

1. At the top right-hand side of the main window, select your ACD state from the *ACD* drop-down list.

**Figure 12 Logo Pane – ACD State Control**

2. If you selected *Unavailable* and your company requires you to provide a reason for your unavailability, select an *Unavailable Code* from the drop-down list.

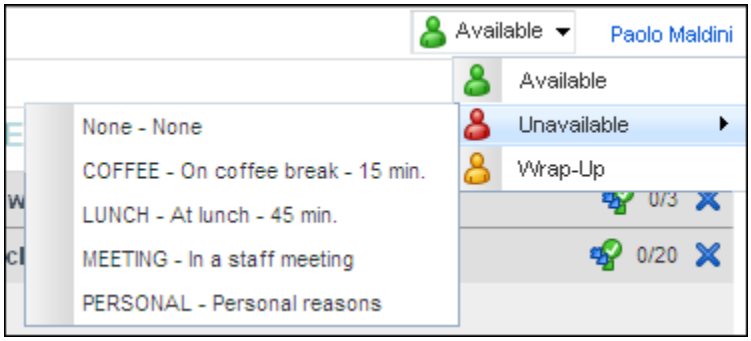



**Figure 13 Logo Pane – Unavailable Codes**

# CHANGE YOUR INSTANT MESSAGING AND PRESENCE STATE

When you sign in to Call Center, Call Center connects to the Instant Messaging and Presence (IM&P) server and sets your presence state to *Available*.

Subsequently Call Center displays your unified instant messaging presence, which reflects your presence in various instant messaging clients when you are logged in through several devices and applications.

Your unified presence state can change either when you manually change it or when Call Center receives information about your presence state change from other clients.

The possible states are *Available*, *Busy*, *Away*, and *Offline*. When you are in *Available*, *Busy*, or *Away* state you are considered to be online.

Call Center also allows you to provide a status message to display to your contacts.

IM&P capabilities are only available when you have an IM&P service assigned on Clearspan and are online. For more information about the IM&P capabilities of Call Center, see section *Monitor IM&P Contacts and Chat with Contacts*.

To change your IM&P state:

At the top right-hand side of the main window, select a new state from the *Presence* drop-down list. Your presence state is updated as soon as you select a new value.

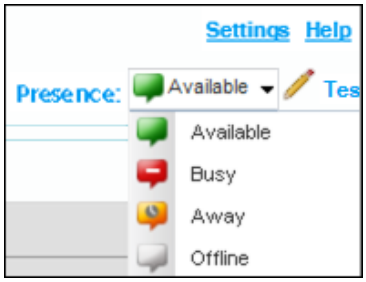



**Figure 14 IM&P State Drop-down List**

When you are online, you can also specify a status message to display to your contacts.

To set the status message:

1. Click the **Edit** button next to the *Presence* box. The *Set IM Status* dialog box appears.

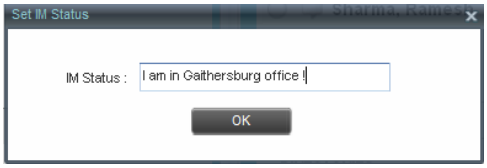



**Figure 15 Set IM Status Dialog Box**

2. Enter your message and click **OK**.

3. To see your message, move the mouse over the Edit button . A ToolTip with your presence massage appears.

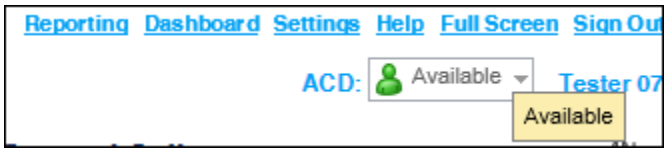



**Figure 16 IM&P Status Message in a ToolTip**

## ENABLE OR DISABLE SERVICES

You can use the following services in Call Center: Call Waiting, Call Forwarding Always, and Do Not Disturb, provided that your administrator has assigned the services to you.

To enable or disable Call Waiting**:**

1. In the *Call Console*, click **Call Waiting** . The button changes to this to indicate that the service is enabled.
2. To disable it, click the button again.

To enable or disable Do Not Disturb or Call Forwarding Always**:**

1. At the top right-hand corner of the main page, click **Settings**. The *Settings* page appears.
2. Click the **Services** tab.
3. On the *Services* page that appears, select the service you want to enable or disable, and check or uncheck the *is Active* box.
4. If you checked the *is Active* box for the Call Forwarding Always service, in the Forward To text box, enter the phone number to forward your call to.
5. Click **Save**.

For more information, see section *Configure Call Center*.

# EXPLORE WORKSPACE

When you sign in to Call Center, the main page appears where you perform most of your call management or monitoring tasks. In addition, the main page provides links to other pages and windows of Call Center, where you perform functions such as configuration and report generation.

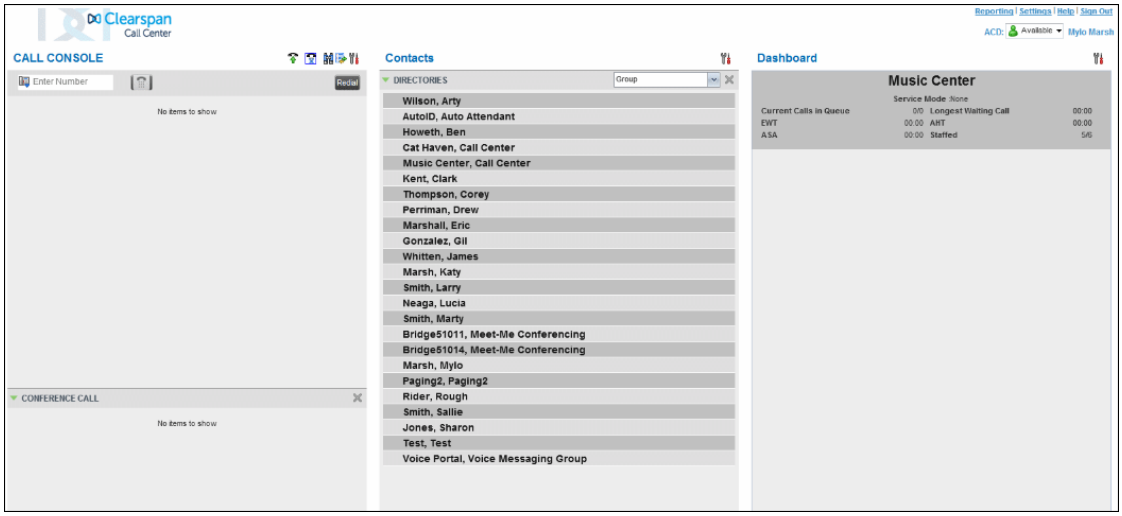



**Figure 17 Call Center – Agent Main Interface**

Many visual aspects of the Call Center workspace are configurable. For example, you can change the size and placement of windows on the screen. You can then save your workspace and retrieve it the next time you sign in. For more information on saving your workspace settings, see section *Workspace*.

To work in full screen mode, click the **Full Screen** link at the top-right corner of the main window. The link changes to *Exit Full Screen*, which you can click to exit full screen mode.

**Notes:** To work in full screen mode, make sure that the main window is in focus and then click **F11**.

The Back, Forward, and Refresh operations of the web browser are not supported by Call Center, and if performed, the results are inconsistent.

When a window is vertically resized, the panes do not always resize to fill the window. To resize a window, drag the window from the bottom right-hand corner or collapse and then expand the panes after resizing to adjust them to the window.

Most call center controls are context-based, which means that they appear only when the action they represent can be taken. Context-based controls that allow you to take actions on calls are called action buttons. For the list of controls available in Call Center, see section *Controls*. The action buttons are described in section *Call Action Buttons*.

The Call Center interface contains the following elements:

| INTERFACE ELEMENT | DESCRIPTION |
|---|---|
| Logo Pane | Located at the top of the main interface, the Logo pane displays global messages, information about the logged user, and links to other Call Center interface elements and functions. |
| Call Console | The Call Console is where you manage your current calls. |
| Contacts Pane | The Contacts pane contains your contact directories and allows you to manage your contacts and use contacts to make calls or take actions, such as transfer to contact or queue, on existing calls. |
| Queued Calls Pane (Supervisors) | The Queued Calls pane, available only to supervisors, allows you to manage queued calls for selected call centers that you supervise. |
| Chat Windows | You chat with your IM&P contacts using Chat windows. |
| Call History Window | The Call History window, accessible from the Call Console via the Call History button, displays your placed, received, and missed calls, and allows you to make calls from history and delete call logs. |
| Report Windows | The Report windows, accessible from the main page via the Reporting link, provide access to Enhanced Reporting, allowing you to generate, schedule, and view reports.<br><br>Agents can only generate reports about themselves. |
| Dashboard (Supervisors) | The Dashboard, accessible from the main page via the Dashboard link, provides you with real-time summary information about the call centers and agents you supervise (up to 50). |
| Dashboard Pane (Agent) | The Dashboard pane allows you to view the current state of the monitored call centers. |
| Settings Pages | The Settings pages, accessible from the main page via the Settings link, allow you to configure various user-level and application settings. |
| Controls | You use controls, such as buttons and drop-down lists to execute actions on calls, contacts, queues, and so on. |

This section describes the following elements of the Call Center interface:

- Logo Pane
- Call Console
- Contacts Pane
- Call History
- Controls

For information about other interface elements, see the following sections:

- *Queued Calls* pane – Section *Queued Calls Pane*
- *Chat windows* – Section *Chat with IM&P Contacts.*
- *Dashboard pane* – Section *Monitor Call Centers (Agent)*
- *Dashboard* – Section *View Real-Time Statistics (Supervisor)*
- *Settings* pages – Section *Configure Call Center*

# LOGO PANE

The Call Center main window interface contains a logo pane that displays the Call Center client or company logo, global messages, links to other interface elements or Call Center functions, and information about the logged-in user.

## GLOBAL MESSAGE AREA

The *Global Message Area,* that is, the center area of the *Logo* pane, is used by Call Center to display various information, warnings, and error messages to the user. A message is displayed for several seconds and then it disappears.

## LINKS TO OTHER INTERFACE ELEMENTS AND FUNCTIONS

The *Logo* pane displays links to the *Report* windows, *Settings* pages, the *Dashboard* (Supervisors), and the Help and Sign Out links.

## LOGGED USER INFORMATION

Information about yourself, that is, your name, your availability to take calls, and your voice mail status, is displayed at the top right-hand side of the main interface.

Your current ACD state and presence state are displayed to the left of your name. You can change your ACD state or presence state by selecting a new state from the drop-down list.

- ACD state

- Presence state


In addition, information about the following services and features is provided:

- Do Not Disturb (DND)
- Call Forwarding Always (CFA)

- Busy phone state
- Voice Messaging

The information is presented in the form of icons to the left of your name in the following format:

<DND/CFA/Busy> <Voice Messaging>

The <DND/CFA/Busy> state is represented by one icon, where Do Not Disturb has precedence over Call Forwarding Always, which has precedence over your Busy Phone State. If none of the services is enabled and your phone state is *Idle*, the icon is not displayed.

The Voice Messaging icon is present only if you have outstanding voice messages.

## CALL CONSOLE

You use the *Call Console* to view and manage your current calls. For information on managing your calls, see section *Manage Calls*.

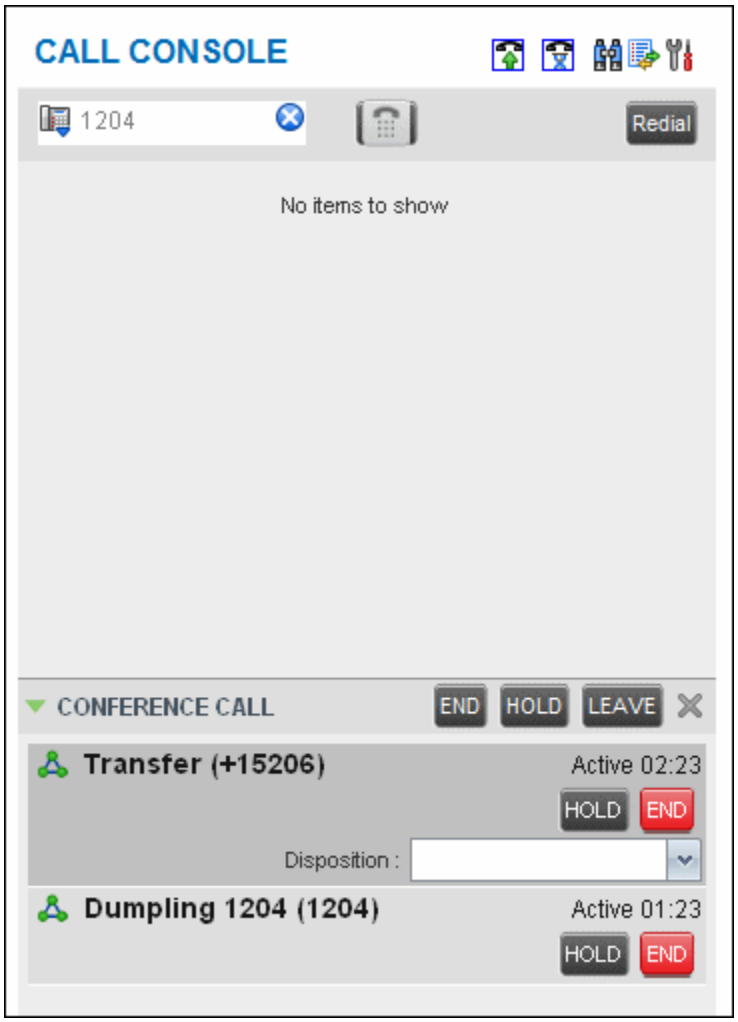



**Figure 18 Call Console**

The *Call Console* contains the following areas:

- Header Bar
- Dialer
- Current Calls
- Conference Call

## HEADER BAR

The header bar contains various controls that allow you to configure your services and perform call and service-related actions.

**Figure 19 Call Console Header Bar**

The header bar can contain the following controls:

- Disposition Code button – This allows you to assign disposition codes to the last call. The button only appears when you are in *Wrap-Up* state.
- Trace Call button – This allows you to attach a trace to the last call.
- Call History button – This allows you to access the list of your previous calls.
- Auto Answer button – This allows you to enable or disable the automatic answering of calls.
- Call Waiting button – This allows you to enable or disable the Call Waiting service.

## DIALER

The *Dialer*, located at the top of the *Call Console*, below the header bar, allows you to make ad hoc calls and set your outgoing calling line identity (CLID) for the next call.

**Figure 20 Dialer**

It contains the following elements:

- The Outbound CLID button , which allows you to configure the number you want to use for outgoing calls.
- The *Enter Number* text box, in which you enter the number to dial.
- Action buttons, which change depending on the context and allow you to perform operations on calls. For more information, see section *Call Action Buttons*.

## CURRENT CALLS

The *Call Console* displays your current calls, both direct and ACD, and allows you to take actions on them. Direct calls are calls placed from or received on your own phone number, whereas ACD calls are calls routed to you from a call center that you are staffing as an agent.

If you are involved in a conference call, its details are displayed in a separate area of the Call Console, called the *Conference Call* panel. The *Conference Call* panel is described in the following section.

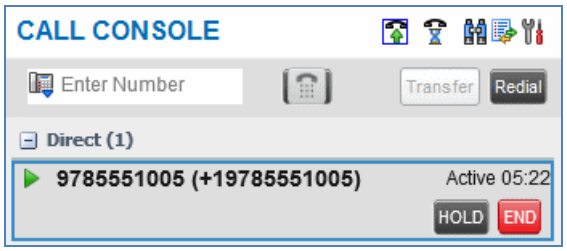



**Figure 21 Call Console – Current Calls**

The following information is displayed for each call:

- Call State icon – This is a visual representation of the current state of the call. For more information, see section *Call States and Actions*.
- Remote CLID – This is the name of the remote party (if available) and the phone number in parenthesis.
- Diversion CLID – This is the name (if available) of the party who diverted (transferred, forwarded) the call before you received the call and the phone number is in parenthesis. If the call was diverted more than once, the last party who diverted the call is listed first; the second to last party is listed second; and so on.
- Call State name – This is the display name of the “call” state the call is currently in.
- Call duration [Held duration] – This is the duration of the call from the time the call was received from Clearspan and it reflects how long the call has been present in the system. In addition, for held calls, the time a call has been on hold is displayed.
- Security Classification (if applicable) – This is the security classification level of the call.

The call entry also displays action buttons for the operations that you can currently take on that call. The actions you can perform depend on the state of the call.

For the list of Call Center action buttons, see section *Call Action Buttons* and for the list of actions that can be taken in each call state, see section *Call States and Actions*.

## CONFERENCE CALL

The *Conference Call* panel displays your current conference and allows you to manage your conference calls.

**Note:** You can only be involved in one conference call at a time.

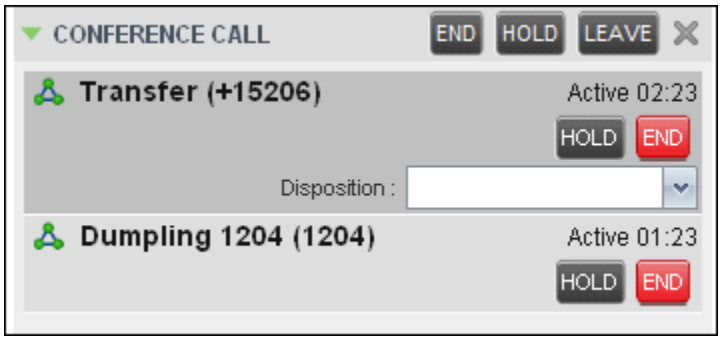



**Figure 22 Call Console – Conference Call**

The header bar contains various controls that allow you to manage the conference:

- END End Conference button – This allows you to end the current conference.
- LEAVE Leave Conference button – This allows you to leave the conference.
- HOLD Hold Conference button – This allows you to place the conference on hold.
- ANS Resume Conference button – This allows you to resume the conference that you previously placed on hold.

The *Conference Call* panel, when expanded, lists the call legs that make up your current conference. Each two-way call is displayed on a separate line. The information displayed for each call leg is the same as the information displayed for two-way calls. For information, see section *Current Calls*.

For information on managing conferences, see section *Manage Conference Calls*.

## CALL STATES AND ACTIONS

The following table lists the possible call states and actions that can be performed on calls in each state.

| CALL STATE | DISPLAY NAME | DISPLAY ICON | CALL PERSONALITY | CALL ACTIONS |
|---|---|---|---|---|
| Ringing In (Local) | Incoming Local | | Click-To-Dial | Answer, End |
| Ringing In (Remote) | Incoming | | Terminator | Answer, Conference, End |
| Ringing Out, Outgoing | Outgoing | | Originator | Conference, End |
| Active | Active | | Any | Transfer, Hold, End, Conference |
| On Hold | Held | | Any | Transfer, Resume, End, Conference |
| On Hold (Remote) | Remote Held | | Any | Transfer, Hold, End, Conference |
| Active (In Conference) | Active | | Conference | Transfer, Hold, End |
| Held (In Conference) | Held | | Conference | Resume, Transfer, End |
| Ringing In (Recalled Call) | Call Recalled | | Terminator | Answer, Conference, End |

# CONTACTS PANE

The *Contacts* pane contains your contact directories and allows you to use your contacts to make or manage calls. For information on using contacts to manage calls, see section *Manage Calls*. For information about organizing and managing your contact directories, see section *Manage Contacts*.

**Figure 23 Contacts Pane**

The *Contacts* pane contains the following panels:

- Search Panel
- Enterprise/Group Panel
- Common Panel
- Supervisors Panel (Agents)
- Speed Dial Panel
- Queues Panel
- Custom Directories Panels
- Instant Message Panel

- Outlook Panel
- Directories Panel

The contact directories you have access to depend on your system configuration as well as the services assigned to you. For more information, contact your administrator.

The directories you see in the *Contacts* pane also depend on your setup. For information on selecting the directories to display in the *Contacts* pane, see section *Show or Hide Directories*.

When you click a contact, the entry expands and the contact's information, such as phone numbers and the action buttons for the operations that you can currently take on that contact appear.

You can only view the details of one contact per directory at a time. When you click another contact in the same directory, the details of the currently expanded contact are automatically hidden.

**Figure 24 Group Panel – Contact in Focus with Action Buttons**

For the list of Call Center action buttons, see section *Call Action Buttons*.

## SEARCH PANEL

You use the *Search* panel to look for specific contacts in your contacts' directories and, if available, in the configured *LDAP* directory. For information about performing contact searches, see section *Search for Contacts*.

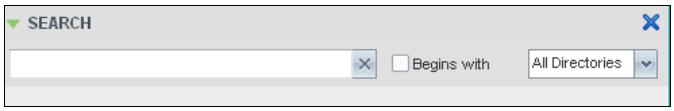



**Figure 25 Contacts Pane – Search Panel**

## ENTERPRISE/GROUP PANEL

The *Enterprise/Group* panel contains the contacts in your Clearspan group directory (if your group is part of a service provider) or enterprise directory (if your group is part of an enterprise. However, if your enterprise administrator restricted your access to the enterprise directory, you can only see the contacts from your group.)

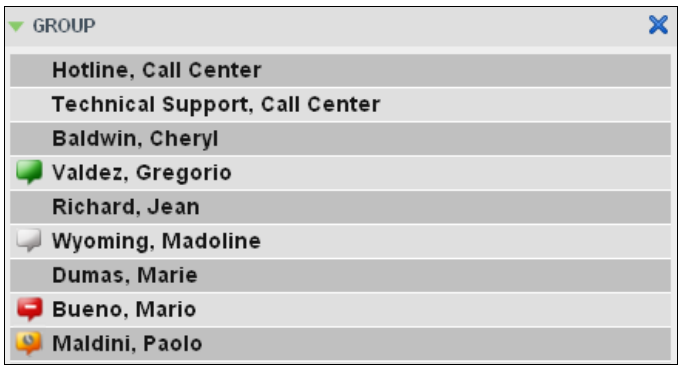



**Figure 26 Contacts Pane – Group Panel**

## COMMON PANEL

The *Common* directory contains the contacts in your group's common phone list configured by your administrator on Clearspan.

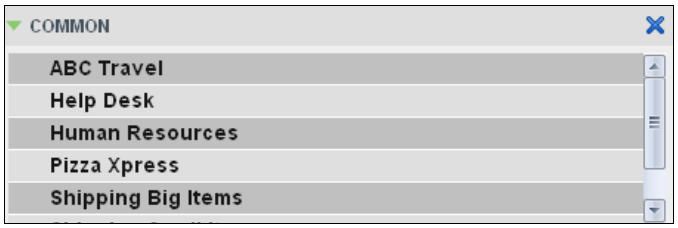



**Figure 27 Contacts Pane – Common Panel**

## PERSONAL PANEL

The *Personal* panel contains the contacts from your Clearspan Personal Phone List. It displays the name/description and phone number of each contact.

For information about managing your personal contacts, see section *Manage Personal Contacts*.

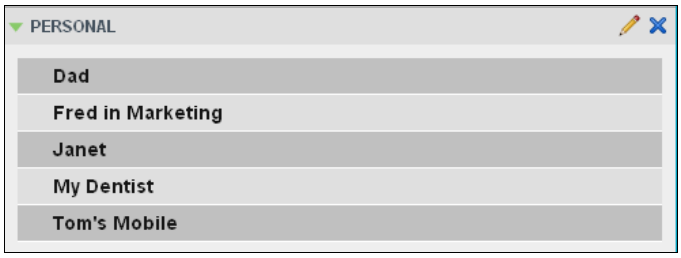



**Figure 28 Contacts Pane – Personal Panel**

## AGENTS PANEL (SUPERVISORS)

The *Agents* panel is used by supervisors to monitor and manage agents under their supervision. For more information, see section *Manage Agents (Supervisor)*.

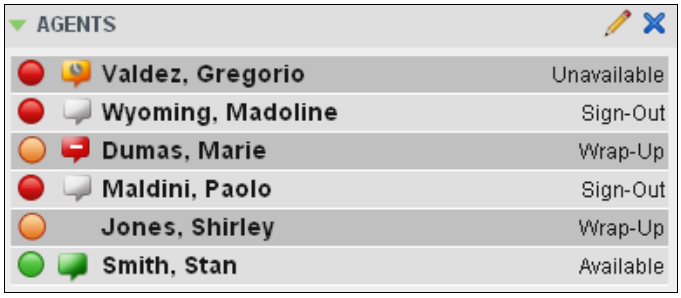



**Figure 29 Contacts Pane – Agents Panel**

## SUPERVISORS PANEL (AGENTS)

The *Supervisors* panel, available to agents, contains the list of your supervisors. The main purpose of this directory is to allow you to contact a supervisor quickly.

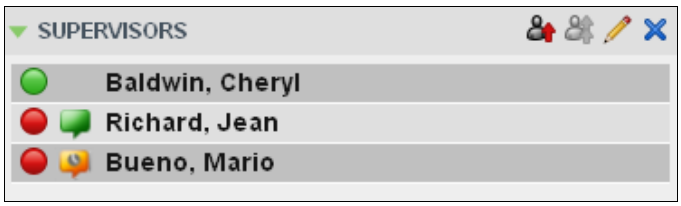



**Figure 30 Contacts Pane – Supervisors Panel**

Selected supervisors have their call status displayed. For more information, see section *Monitor Supervisors*.

## SPEED DIAL PANEL

The *Speed Dial* panel allows you to manage your Speed Dial 8 and Speed Dial 100 contacts. It is available to users who have been assigned Speed Dial 8 and/or Speed Dial 100 services. If you only have one of these services, you only see the entries for that service in your *Speed Dial* directory.

For each configured speed dial number, Call Center displays the speed dial code and description. The description is what you entered when configuring the number.

For information about managing your *Speed Dial* directory in Call Center, see section *Manage Speed Dial Numbers*.

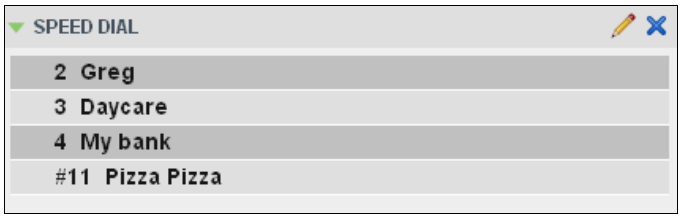



**Figure 31 Contacts Pane – Speed Dial Panel**

## QUEUES PANEL

The *Queues* panel is available to both agents and supervisors. It lists the call centers you are staffing as an agent or monitoring as a supervisor and the associated Dialed Number Identification Service (DNIS) numbers. The primary purpose of this panel is to provide you with a quick way to transfer calls to queues.

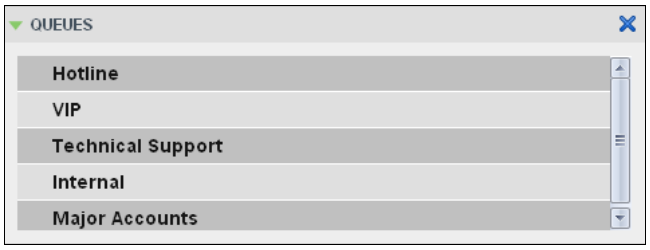



**Figure 32 Contacts Pane – Queues Panel**

## CUSTOM DIRECTORIES PANELS

If your administrator has configured custom contact directories for your group, you can access them from Call Center. A custom directory contains a subset of the contacts in your Clearspan group or enterprise directory.

**Note:** A custom directory has the same properties as the Group/Enterprise directory.

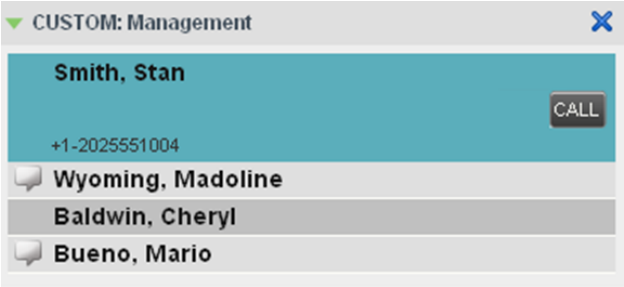



**Figure 33 Contacts Pane – Custom Panel**

## INSTANT MESSAGE PANEL

The *Instant Message* panel displays IM&P contacts you are subscribed to and their presence state. You can chat with any contact that has an IM&P service assigned on Clearspan, but you can only see the presence state of the contacts to which you are subscribed. For information on subscribing to and chatting with IM&P contacts, see section *Monitor IM&P Contacts and Chat with Contacts*.

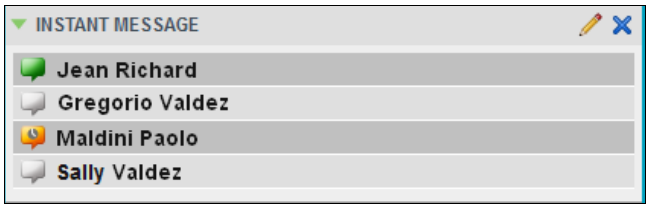



**Figure 34 Contacts Pane – Instant Message Panel**

The *Instant Message* panel appears only if you have been assigned an IM&P service on Clearspan.

When your presence state is set to "Offline", this panel is empty. To change your IM&P presence state, see section *Change Your Instant Messaging and Presence State*.

## OUTLOOK PANEL

The *Outlook* panel contains your Outlook contacts.

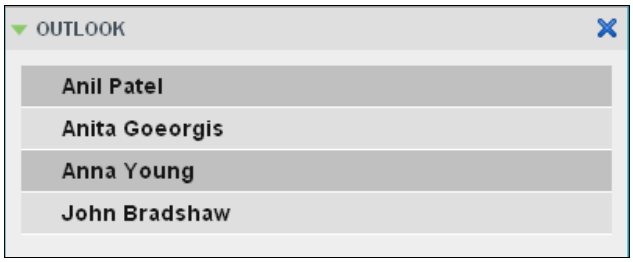



**Figure 35 Contacts Pane – Outlook Panel**

## DIRECTORIES PANEL

The *Directories* panel consolidates the contacts from the following directories: *Enterprise/Group*, *Custom*, *Personal*, *Outlook*, and *Speed Dial.* This panel is always visible. You can choose which directories to display in the *Directories* panel and you can collapse the panel, but you cannot close it.

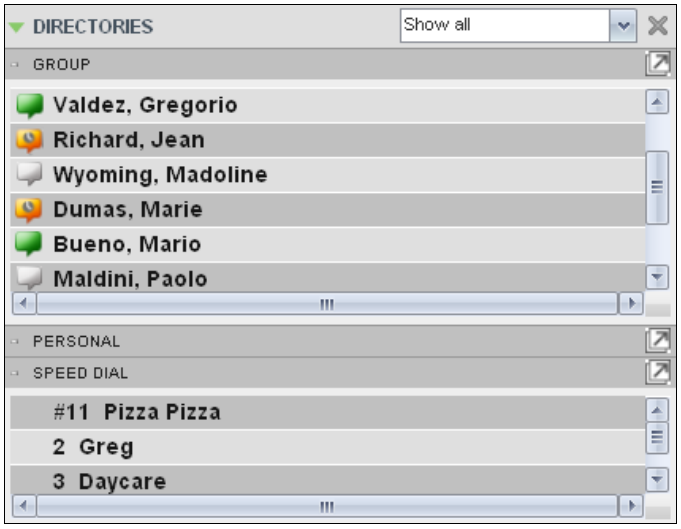



**Figure 36 Contacts Pane – Directories Panel**

You can also place a copy of a directory below the *Call Console*. This allows you to view more than one directory at a time easily. For more information, see section *Manage Contacts*.

# CALL HISTORY

The *Call History* dialog box, accessed from the *Call Console* via the Call History button, allows you to view your past calls. You can place a call to a number from Call History and manage call logs. For information on making calls from Call History, see section *Manage Calls*, and for information on managing your call logs, see section *Manage Call History.*

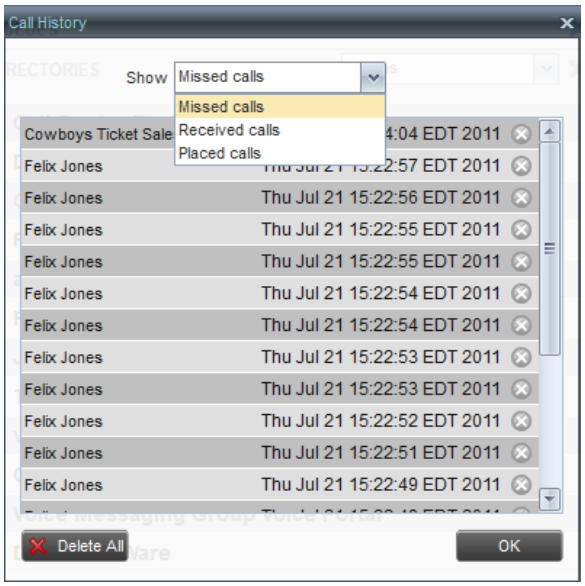



**Figure 37 Call History Dialog Box**

Each call log is displayed on a separate line. Call logs are grouped in three categories: Missed calls, Received calls, and Placed calls. The following information is displayed for each call log:

- The name or phone number of the remote party
- The date and time when the call was initiated

If you also have the Security Classification service assigned, the security classification of calls is displayed.

When you click a call log, the Call Action button appears, allowing you to place a call to the remote party.

**Figure 38 Call History Dialog Box – Call Log with Call Action Button**

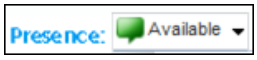
For the list of action buttons available in Call Center, see section *Call Action Buttons.*

## CONTROLS

Call Center controls are designed in a contextual manner, that is, most controls appear only when the action they represent can be taken. For example, when you enter a number or select a contact, a Dial button appears, allowing you to place a call. The contextual controls that correspond to call operations such as dialing, transferring calls,

or putting calls on hold are called action buttons. They appear on the Dialer, in a call entry, in a directory entry (contact), in a call log, or on a queued call (Supervisors).

The following table lists the general controls used in Call Center and the controls displayed on the headers in the panels. For more information on the action buttons, see section *Call Action Buttons*.

| NAME | DESCRIPTION |
|---|---|
| **Common Controls** | |
| Options | This is located in the upper-right corner of a pane or page.<br>When clicked, it displays a drop-down menu of options that control the display of information in that pane/page. The available options depend on the context. |
| Expand/Collapse | This shows or hides the contents of a window or panel. |
| Close | This closes an interface element, such as window, pane, or panel. |
| Edit | This allows you to edit a list of items, such as agents to monitor or speed dials. |
| **Logo Bar, Dialer, Call Console, Directories Panel, and Search Panel Controls** | |
| Web Pop URL | This opens a page in your browser at the configured URL to provide additional information about the caller. |
| Outbound CLID | This allows you to select the phone number to use as your Calling Line ID for the next outgoing call. |
| Disposition Code | This allows you to apply one or more disposition codes to the last call when you are in *Wrap-Up*. |
| | This allows you to apply one or more disposition codes to the selected call. |
| Trace Call | This allows you to attach a trace to the last call. |
| ACD State | This displays your current ACD state and allows you to change it. |
|   Presence State | This displays your current IM&P presence state and allows you to change it using the drop-down list. |
| Call History | This displays Call History. |
| Auto Answer | This allows you to turn Auto Answering on or off. |

| NAME | DESCRIPTION |
|---|---|
| Call Waiting | This allows you to turn Call Waiting on or off. It is available only if you have been assigned the Call Waiting service. |
| END End Conference | This ends a conference call. |
| LEAVE Leave Conference | This disconnects you from the conference while allowing other participants to continue the call. |
| HOLD Hold Conference | This holds the conference call. |
| ANS Resume Conference | This resumes a held conference. |
| BARGE Barge In | This “un-mutes” your Silent Monitoring call, thereby establishing a Three-Way Conference. |
| Pull Out Directory | This places a selected directory below the Call Console. |
| **Call Notification Pop-up Window** | |
| Web Pop URL | This opens a page in your browser at the configured URL to provide additional information about the caller. |
| vCard | This saves the caller’s phone number and personal information as a vCard in Microsoft Outlook. It appears only when Outlook is running. |
| **Chat Window** | |
| Call | This places a call to your chat partner. |
| Add User to Chat | This allows you to select users to add to the chat. |
| INVITE Invite | This invites selected users to the chat. |
| Pop-out | This takes a chat window out of the main interface and makes it a free-floating window. |
| Pop-in | This anchors a free floating chat window inside the main interface. |
| Minimize | This minimizes the chat window. |
| Close | This closes the chat window. |
| **Supervisors Panel (Agents)** | |
| Emergency | This makes an emergency call to a supervisor. |
| Escalate | This escalates a call to a supervisor. |
| **Queued Calls Pane – Call Center Queue Panel (Supervisors)** | |

| NAME | DESCRIPTION |
|---|---|
| Service Mode | This identifies and allows you to change the service mode of a supervised call center. |
| **Scheduled Reports Window** | |
| Load Report | This loads a scheduled report, allowing you to view and modify it. |
| Delete Report | This deletes a scheduled report. |

## CALL ACTION BUTTONS

Action buttons allow you to perform actions on calls, such as answering or transferring a call, or actions that result in a call being placed, such as dialing a number or contact. They appear on the Dialer, on a call line, in a call history log, in a directory entry, or (for supervisors) in a queued call entry.

Action buttons are contextual, that is, they appear on a line/entry when the corresponding action can be performed on that entry.

For example, when you click a contact in the *Group* directory, the contact expands and the Call button appears on the line for that contact, allowing you to call the contact. This is illustrated in *Figure 39*. Note that other buttons may appear on the line for a contact, depending on the call state and the contact's configuration.

**Figure 39 Group Panel – Contact in Focus**

The following table lists the action buttons available in Call Center.

| BUTTON | DESCRIPTION |
|---|---|
| Dial | This dials the number you entered in the *Dialer*. |
| CALL Call | This places a call to the selected contact or to a number from Call History. |
| Redial Redial | This redials the last dialed number. |
| MOB Mobile | This dials the contact's mobile number. |
| EMAIL E-mail | This brings up a new e-mail message window with the contact's e-mail address, allowing you to send a message to the contact. |
| Transfer Transfer | This transfers a call to an ad hoc number entered in the *Dialer*. |
| TXR Transfer | This transfers a call to a selected number or contact. |
| ANS Answer | This answers an incoming call, answers an unanswered call for a contact, or resumes a held call. |
| HOLD Hold | This places a call on hold. |
| END End | This ends a call. |
| TRACE Trace | This generates a call trace on a call. |
| CONF Conference | This establishes a conference call or adds a call to a conference. |
| RECORD Record | Starts call recording or marks a call that is already being recorded to be kept. |
| PAUSE Pause | Pauses call recording. |
| RESUME Resume | Resumes call recording. |
| STOP Stop | Ends call recording. |
| CAMP Camp | This camps a call on a busy contact. |
| ESC Escalate Call | This escalates a call to a selected supervisor. |
| EMER Emergency Call | This places an emergency call to a selected supervisor. |
| CHAT Chat | This opens a chat window allowing you to chat with an IM&P contact. |
| Web Pop URL | This opens a page in your browser at the configured URL to provide additional information about the caller. |

| BUTTON | DESCRIPTION |
|---|---|
| Delete Call Log | This deletes a call log from Call History. |
| **For Supervisors Only** | |
| QUEUE Queue | This allows the supervisor to make an agent join or leave queues. |
| SMN Monitor Next Call | This allows the supervisor to silently monitor the next call for a selected agent or call center. |
| SM Monitor | This allows the supervisor to silently monitor the current call for a selected agent with an active call. |
| ACD ACD State | This allows the supervisor to change a selected agent's ACD state. |
| BARGE Barge In | This allows the supervisor to barge in on an agent's call, by establishing a Three-Way Call between the supervisor and the two parties involved in the call. |
| ANS Answer | This answers an unanswered call for a monitored agent. |
| PROMOTE Promote | This promotes a selected call to the next highest priority bucket within the queue. |
| RETRIEVE Retrieve | This retrieves a call from the queue 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. |
| REORDER Reorder | This changes a call's position in the queue. |

# MANAGE CALLS

This section describes the operations you can perform to make and manage calls.

Your current calls are displayed in the *Call Console* with the calls currently involved in a conference displayed in a separate panel called *Conference Call*.

**Note:** You can only be involved in one conference at a time.

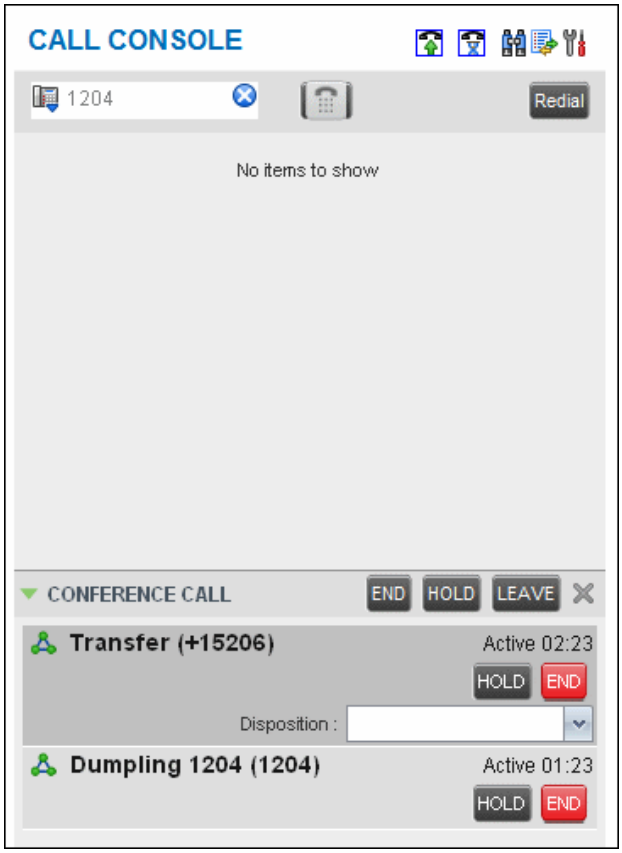



**Figure 40 Call Console**

The following subsection provides a quick reference to call management operations. These operations are described in detail in the rest of this section.

**Note:** For operations on calls that involve a contact, you can drag the call onto the contact and click the button for that contact, which corresponds to the operation you want to perform. For information, see *Drag and Drop Call onto Contact*.

## CALL MANAGEMENT OPERATIONS QUICK REFERENCE

The following table provides a summary of the actions that you can take to manage calls. These actions (operations) are described in more detail in the following sections.

| FUNCTION | STEPS |
|---|---|
| Assign Disposition Code to Selected ACD Call | In the *Call Console*, click the target ACD call and select a code from the drop-down list that appears. |
| Assign Disposition Code while in Wrap-Up | In the *Call Console*, click the **Disposition Code** button and select a code from the list. The code is applied to the last released call. |
| Generate Call Trace for Selected Call | In the *Call Console*, click the **Call Trace** button for the target call. |
| Generate Call Trace for Last Released Call | In the *Call Console*, click the **Call Trace** button. |
| Answer Incoming Call | In the *Call Console*, click **Answer** for the target call. |
| Turn Auto Answer On | In the *Call Console*, click **Auto Answer**. |
| Open URL | In the *Call Notification* dialog box for an incoming call or on any call in the *Call Console*, click the **Web Pop URL** button. |
| Save a vCard | In the *Call Notification* dialog box for an incoming call, click the **Add vCard** button. |
| Place Call on Hold | In the *Call Console*, move the mouse over the call and click **Hold**. |
| Resume Held Call | In the *Call Console*, move the mouse over the call and click **Retrieve.** |
| Blind Transfer Call | Drag the call onto the target contact and click **Transfer** for that contact. Alternatively, enter the target number in the *Dialer* and click **Transfer** on the *Dialer*. |
| Transfer with Consultation | • While on the call, enter a number in the *Dialer* or select a contact in the *Contacts* pane and click **Dial.**<br>• When the new call is connected, consult with the party.<br>• When ready to transfer, select the original call.<br>• Move the mouse over the new call that is not selected call and click **Transfer**. |
| Transfer to Queue | Drag the call onto the target queue in the *Queues* panel and click **Transfer** for that queue. |
| Make Emergency Call to Available Supervisor | In the *Call Console*, select the call to escalate and click the **Emergency** button in the *Supervisors* panel. |
| Make Emergency Call to Selected Supervisor | Drag the call to escalate onto an available supervisor in the *Supervisors* panel and click **Emergency** for that supervisor. |
| Blind Escalate Call | • In the *Call Console*, select the call to escalate.<br>• In the *Supervisors* panel, click **Escalate** or click an available supervisor and click **Escalate** for that supervisor.<br>• In the *Call Console*, move the mouse over the call to the supervisor and click **Transfer** before the |

| FUNCTION | STEPS |
|---|---|
| | supervisor answers the call. |
| Escalate with Consultation | • In the *Call Console*, select the call to escalate.<br>• In the *Supervisors* panel, click **Escalate** or click an available supervisor and click **Escalate** for that supervisor.<br>• Consult with the supervisor.<br>• When ready to transfer, in the *Call Console*, move the mouse over the call to the supervisor and click **Transfer**. |
| Escalate with Conference | • In the *Call Console*, select the call to escalate.<br>• In the *Supervisors* panel, click **Escalate** or click an available supervisor and click **Escalate** for that supervisor.<br>• In the *Call Console*, move the mouse over the new call and click **Conference**. |
| Start Three-Way Conference | In the *Call Console*, select a call.<br>Move the mouse over a call that is not selected and click **Conference**. |
| Add Participant to Conference | In the *Call Console*, move the mouse over a call and click **Conference**. |
| Hold Conference | In the *Conference Call* panel, click **Hold**. |
| Resume Conference | In the *Conference Call* panel, click **Resume**. |
| Hold Conference Participant | In the *Conference Call* panel, select the call to put on hold and click **Hold** for that call. |
| Take Conference Participant Off Hold | In the *Conference Call* panel, select a held call and click **Resume** for that call. |
| Leave Conference | In the *Conference Call* panel, click **Leave Conference**. |
| End Participant | In the *Conference Call* panel, select the target call and click **End**. |
| End Conference | In the *Conference Call* panel, click **End Conference**. |
| Set Outbound CLID | In the *Dialer*, click the **Outbound CLID** button and select the number to use as your calling line identity for the next call from the list. |
| Dial Ad Hoc Number | In the *Dialer*, enter the number to call and click **Dial.** |
| Re-dial Recent Number | In the *Dialer,* click **Redial** and select a number from the list. |
| Dial Recent Number | • In the *Dialer*, start entering the number to dial. A list of numbers starting with the entered digits appears.<br>• Select a number from the list and click **Dial**. |
| Dial Contact | In the *Contacts* pane, click the contact and then click **Call** for that contact. |
| Dial from History | • In the *Call Console*, click the **Call History** button.<br>• Select *Missed calls*, *Received calls*, or *Dialed calls* |

| FUNCTION | STEPS |
|---|---|
| | from the drop-down list.<br>• In the *Call History* dialog box, move the mouse over a call log and click **Call**. |
| Dial from Search | In the *Search* panel, select a contact and click **Dial**. |

# DRAG AND DROP CALL ONTO CONTACT

In Call Center, you can drag a call from the Call Console and drop it on a target contact in one of your contact directories. This provides you with a quick way to perform operations on calls that involve a contact.

As the call is dragged, a green icon is displayed. When the call is dropped onto a contact, no action is taken on the call. The target contact expands and you can select the action button for the operation you want to perform on that call.

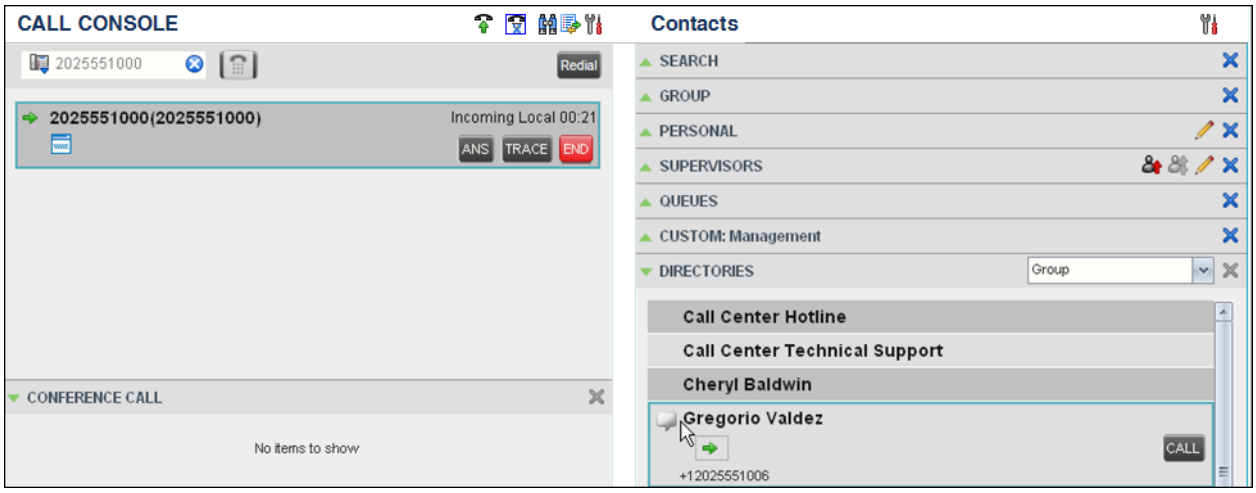



**Figure 41 Dragging Call and Dropping on Contact**

# VIEW CALLS

You can view your current calls and your past calls (Call History). For information about Call History, see section *Manage Call History*.

## VIEW CURRENT CALLS

Your current calls are displayed in the *Call Console* with the calls involved in a conference displayed in a separate pane called *Conference Call*.

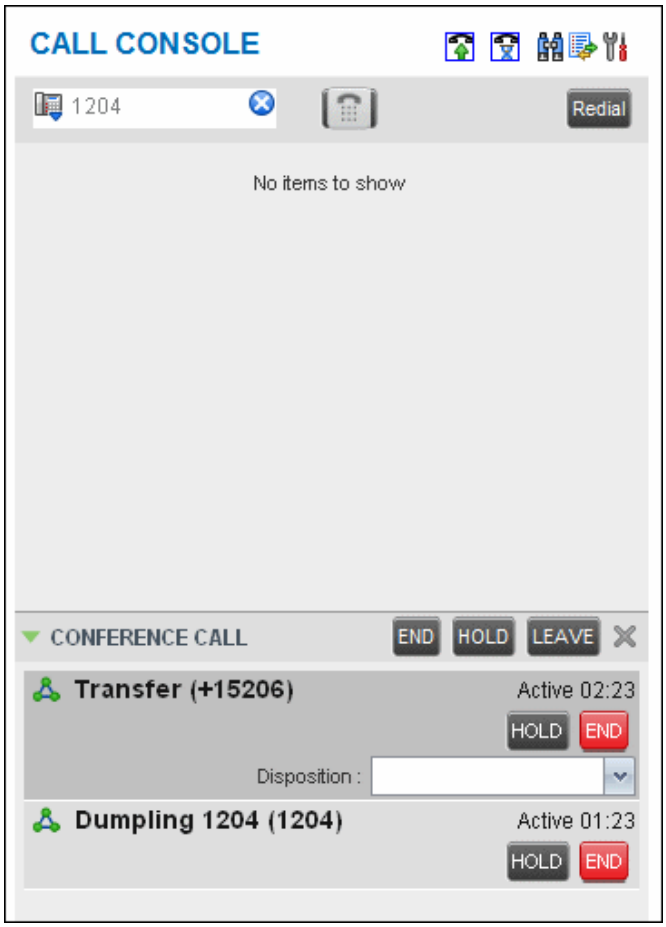



**Figure 42 Call Console – View Current Calls**

## GROUP CALLS

Your current calls can be grouped by the call center they come from. When calls are grouped, direct calls are placed in a separate category.

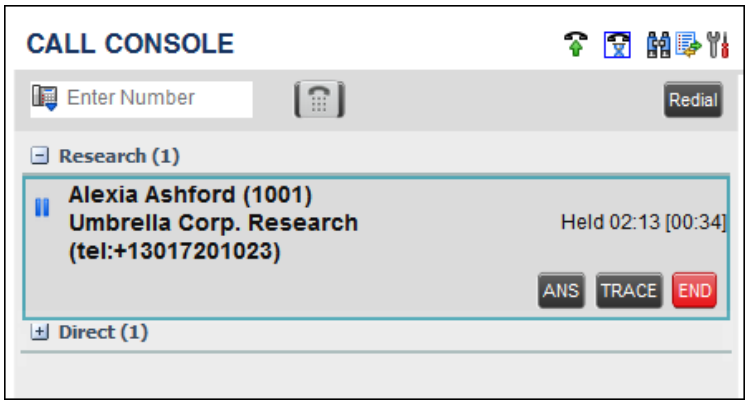



**Figure 43 Call Console – Grouped Calls**

To group or ungroup calls:

1. On the *Call Console* header bar, click **Options** .
2. Select *Group By* and then *Calls From*.
3. To ungroup, repeat the operation by selecting *None* instead of *Calls From*.

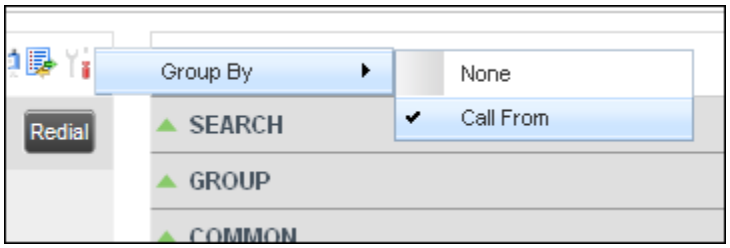



**Figure 44 Grouping Calls in Call Console**

To view or hide calls in a group:

Click the **Show/Hide** button (⊞/⊟) to the left of the group name.

## VIEW INCOMING CALL DETAILS

When you receive a new call, the call appears in the Call Console. If calls are grouped and the corresponding grouping is collapsed, it is expanded to make the call visible.

When the Call Notification feature is enabled, a *Call Notification* pop-up window appears on top of the system tray when you receive an inbound call.

- For calls to your direct number or extension, the following information is displayed:
  - Calling party name
  - Calling party number

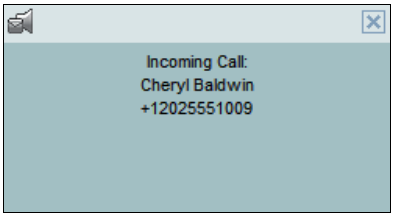



**Figure 45 Call Notification Pop-up Window for Call that is Not ACD Call**

- For calls from a call center, the following information is displayed:
  - Calling party name
  - Calling party number

- Call center name or DNIS name, followed by the time the call has been waiting in queue (wait time)
- Number of calls in queue (queued calls)

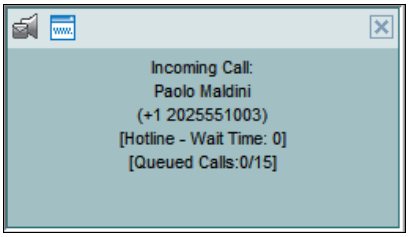



**Figure 46 Call Notification Pop-up Window for ACD Call**

- In addition, for diverted calls, that is, calls that were forwarded or transferred before being delivered to you, the diversion information is also displayed.

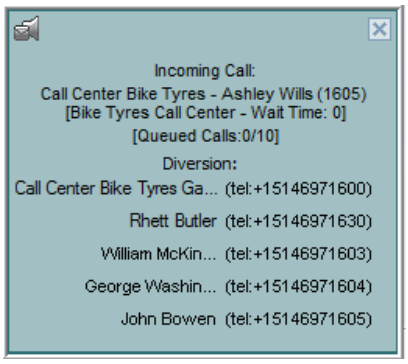



**Figure 47 Call Notification Pop-up Window with Diversion Information**

**Notes:** You must have only one tab open in the browser running Call Center to receive call notifications.

If calls come within eight seconds of each other, the Call Notification pop-up window only appears for the first call of that series.

## ASSIGN DISPOSITION CODES (PREMIUM CALL CENTER)

Disposition codes are additional attributes that can be applied to ACD calls to tag calls with comments, results, and so on. More than one disposition code can be assigned to a call.

You can assign disposition codes to current ACD calls or to the latest released ACD call while you are in the *Wrap-Up* state.

## ASSIGN DISPOSITION CODES TO CURRENT CALL

To assign a disposition code to a current call:

1. From the *Call Console*, select the call and click it. The call line displays the *Disposition* drop-down list.

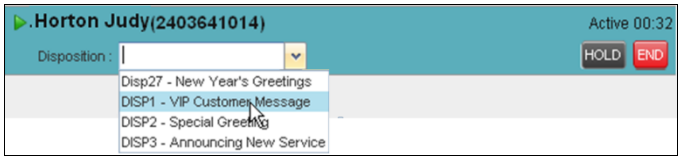



**Figure 48 Call Console – Assigning Disposition Code to Active Call**

2. From the list, select a code.

## ASSIGN DISPOSITION CODES IN WRAP-UP

While you are in *Wrap-Up,* you can assign disposition codes to the last released ACD call.

To assign a disposition code to the last released call:

1. In the *Call Console*, click **Disposition Code** .
2. From the drop-down list that appears, select a code.

**Figure 49 Call Console – Assigning Disposition Code in Wrap-Up**

# GENERATE CALL TRACE

Call Center allows you to generate a trace on active, held, released, or missed calls.

**Note:** You must be assigned the Customer Originated Trace service to use this capability.

A call trace contains the following information:

- The phone number of the user who initiated the trace. When the user does not have a phone number, the group phone number and the extension of the user is provided instead. For intra-group calls, only the caller's extension is used.
- The date and time the call was received.
- The identity (name and number) of the caller, if available.

Issuing more than one call trace request has no effect.

### GENERATE CALL TRACE FOR SELECTED CALL

To generate a trace for a selected call:

Click **Trace** TRACE for that call.

### GENERATE CALL TRACE FOR LAST RELEASED CALL

You can generate a trace for the most recently released or missed call.

To generate a trace for the last released or missed call:

In the *Call Console*, click **Trace** .

## RECORD CALLS

You can record calls manually or have the system automatically record your calls. When a call is being recorded, the *Recording* state message appears on the line for the call.

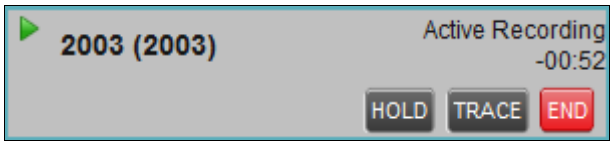



**Figure 50 Call Being Recorded**

### MANUALLY RECORD CALL

To manually record calls, you have to have the Call Recording service assigned and set to "On Demand". For information on configuring your services, see the *Clearspan Application Server User Web Interface Administration Guide*.

To record a call, select the call in the *Call Console* and click **Record** RECORD.

### AUTOMATICALLY RECORD CALLS

To automatically record calls, you have to have the Call Recording service assigned and set to “Always”. For information on configuring your services, see the *Clearspan Application Server User Web Interface Administration Guide*.

## VIEW AND CHANGE SECURITY CLASSIFICATION OF CALLS

Call Center displays the security classification level of your current calls and allows you to change your assigned security classification level if you have the Security Classification service assigned and your security classification level is not “Unclassified”, which is the lowest level.

The security classification level of a call is the lowest security classification level for all call participants. Users who do not have a security level assigned are considered to have the security level of “Unclassified”.

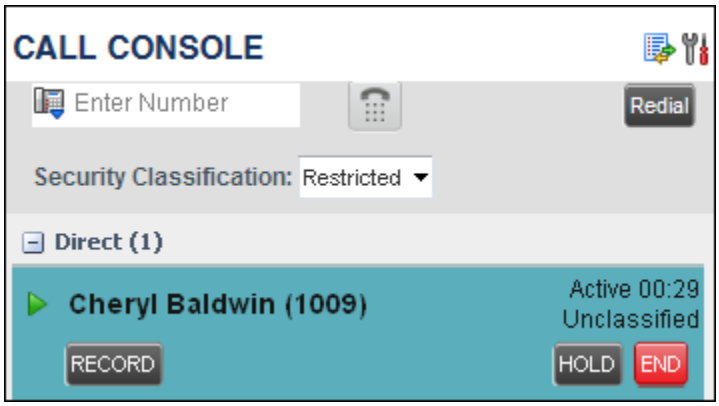



**Figure 51 Security Classification of Calls**

### CHANGE SECURITY CLASSIFICATION

You can change your security classification, but only to a level lower than your assigned level, and you can only do so while in an active call. The security classification level of your calls is then recalculated.

The security classification of a call can also change when other participants change their security classification level or when participants join or leave the call. If the security classification level of a call changes, then the new level is displayed.

After all your calls end, your security classification level is reset to your assigned security classification level.

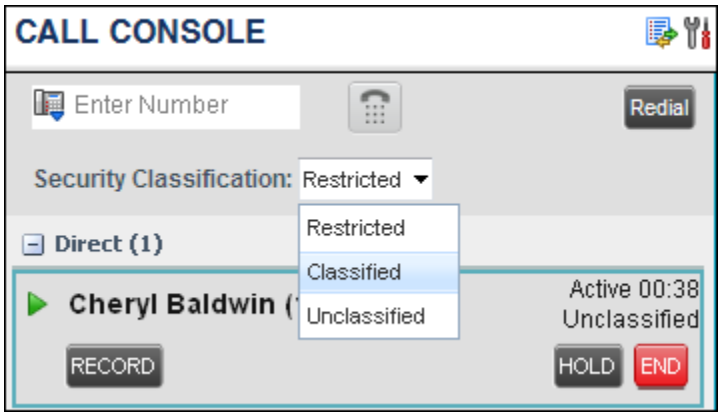



**Figure 52 Security Classification Levels**

To change your security classification:

From the *Security Classification* drop-down list, select a new security classification level.

# RECEIVE, ANSWER, AND END CALLS

You can answer calls manually or have your phone automatically answer incoming calls.

## ANSWER CALL

**Note:** When using the Remote Office service, the Answer button is disabled.

To answer a ringing call:

Click **Answer** ANS for that call.

To answer an incoming call from a *Call Notification* pop-up window:

Click anywhere on the text in the pop-up window.

## AUTO ANSWER CALLS

This feature is typically used by agents who use headsets with their phones and take care of a high volume of calls. It may be enabled either by you in the client or configured in the system by your administrator.

**Note:** Auto Answer only works if your device is compliant with Advanced Call Control (ACC).

To answer calls automatically:

In the *Call Console*, click **Auto Answer** . The button changes to this to indicate that Auto Answer is on.

When Auto Answer is enabled, your phone automatically goes off-hook when it is alerted. This applies to both inbound and Click-To-Dial calls.

The Auto Answer feature may be enabled manually in the Call Center client or by the administrator on Clearspan.

**Note:** If this feature is enabled by your administrator, you must **not** enable the client-based Auto Answer using the Auto Answer button.

## OPEN URL

For any current call, you can open a page in your browser that contains information about the calling party encoded in its URL. This can be done either from the *Call Notification* pop-up window that appears on top of the system tray for an incoming call or from the *Call Console* for any current call.

This feature is configured on the *Settings – General* configuration page. For more information, see section *Screen Pop*.

To open a URL for an incoming call:

In the *Call Notification* pop-up window, click the **Web Pop URL** button .

To open a URL for any call:

In the *Call Console*, click the **Web Pop URL** button for the target call.

## SAVE VCARD

When you receive a call, a *Call Notification* pop-up window appears on top of the system tray. You can click a button in this window to save the caller's phone number and personal information as a vCard in Microsoft Outlook.

To save a vCard:

In the *Call Notification* pop-up window, click the **Add vCard** button . This button is only present when Outlook is running.

### END CALL

To end a call:

Click **End**

for that call.

## MAKE OUTBOUND CALLS

You can make calls to an ad hoc number, to a contact from any of your contacts' directories, or to a number from Call History. You can also specify the calling line identity to use for your outbound calls.

### SET YOUR OUTGOING CALLING LINE IDENTITY (PREMIUM CALL CENTER)

As a Call Center agent, you can specify whether your direct number or a DNIS number assigned to one of your call centers should be used as your calling line identity when you make calls. This allows you to conduct outbound calling campaigns with an appropriate calling line identity presented to the called party.

To set your outgoing call identity for the next call:

In the *Dialer*, click the **Outbound CLID** button and select the number from the drop-down list. The number you select is displayed as your CLID when you make the next call.

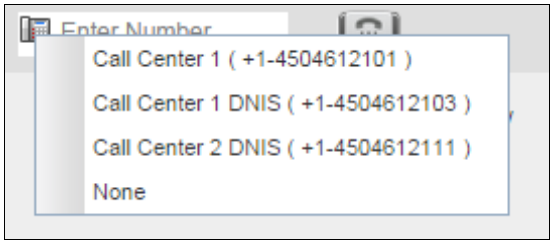



**Figure 53 Dialer – Setting Outbound CLID**

For information on permanently setting your outbound CLID, see section *Agent Policies (Agent)*.

### DIAL AD HOC NUMBER

You use the *Dialer,* located at the top of the *Call Console*, to place a call to an ad hoc number.

**Figure 54 Dialer – Dialing Ad Hoc Number**

To dial an ad hoc number:

In the *Dialer*, enter the phone number and click **Dial** . The client issues a Click-To-Dial attempt to the specified phone number and the call appears in the *Call Console*.

## REDIAL NUMBER

Call Center keeps up to ten most recently dialed numbers, which you can redial using the *Dialer*.

To redial one of the recently dialed numbers:

1. In the *Dialer*, place the cursor in the text box and start entering a number. A list of recently called numbers that start with the entered digits appears.

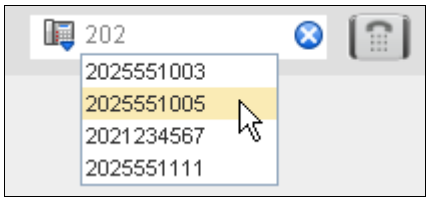



**Figure 55 Dialer – Select Recently Dialed Number**

2. Select the number to dial and click **Dial** .

The client issues a Click-To-Dial attempt to the selected number.

Alternatively, click the **Redial** button and select the number from the list that appears.

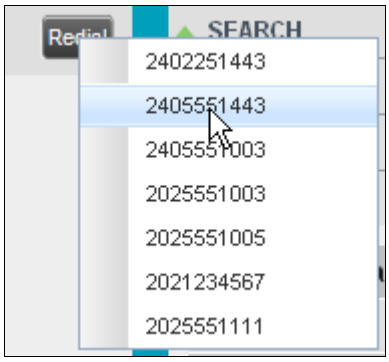



**Figure 56 Dialer – Redialing Number**

## DIAL CONTACT

You can use any directory in the *Contacts* pane to dial a contact.

To dial a contact:

1. In the *Contacts* pane, expand the directory from which you want to dial a contact.

2. Click the target contact to expand it and click **Call** CALL for that contact.

**Figure 57 Group Panel – Expanded Contact with Action Buttons**

Alternatively, to dial the contact's mobile number, click **Mobile** MOB.

The client issues a Click-To-Dial attempt to the specified phone number and the call appears in the *Call Console*.

## DIAL FROM SEARCH

You use the *Search* panel in the *Contacts* pane to search for contacts in your contacts' directories. For more information, see section *Search for Contacts*.

To dial a number from search:

1. Perform a search.

2. Click the target contact to expand it and then click **Call** CALL.

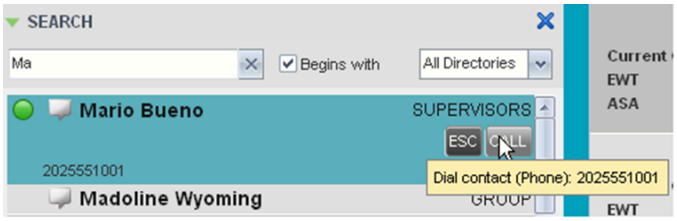



**Figure 58 Dial From Search**

## DIAL FROM HISTORY

You can dial any number that is available in Call History.

To dial from Call History:

1. In the *Call Console*, click **Call History** . The *Call History* dialog box appears.

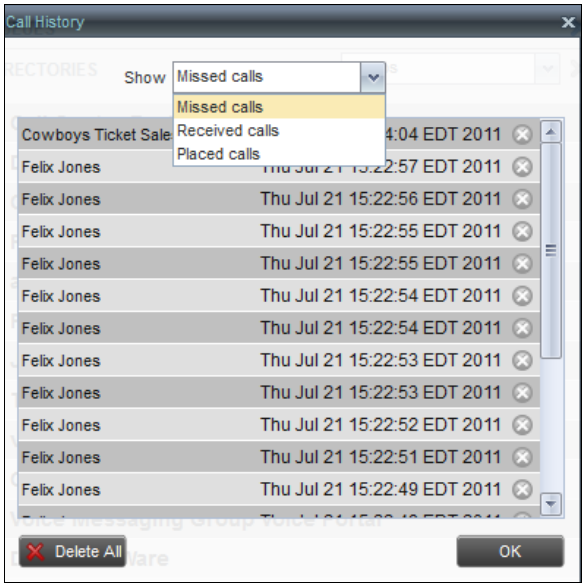



**Figure 59 Call History Dialog Box**

2. From the Show drop-down list, select Missed Calls, Received Calls, or Placed Calls.
3. Click the call log from which you want to dial and then click the **Call** CALL button.

# PLACE CALLS ON HOLD, RESUME, AND CAMP CALLS

You can only put an active call on hold.

**Note:** When using the Remote Office service, Hold/Resume buttons are disabled.

## PLACE CALL ON HOLD

To place a call on hold, click **Hold** HOLD for the target call.

## RESUME HELD CALL

To resume a held call, click **Answer** ANS for the target call.

## CONDUCT BUSY CAMP ON

Busy Camp On allows you to find a temporary parking place for a call by placing the call on hold for a busy contact. The call is automatically transferred to the destination when the contact becomes available. A call to camp must be active or held and the destination contact's phone state must be either *Busy* or *Ringing*.

If the camped call is not answered within the predefined time, the call is recalled and reappears in your *Call Console*.

Agents can camp calls on monitored contacts in their *Supervisors* directory and supervisors can camp calls on monitored contacts in their *Agents* directory. For information on monitoring supervisors, see section *Monitor Supervisors (Agent)*. For information on monitoring agents, see section *Manage Agents (Supervisor)*.

To camp a call on a busy contact:

1. From the *Call* Console, select an active or held call.
2. In your Supervisors or Agents directory, select the contact to camp the call on. The contact's phone state must be Busy or Ringing.
3. Move the mouse over the contact and click **Camp** CAMP.

Once the call is camped, it is removed from the *Call Console*.

If the camped call timer expires before the call is answered, the call reappears in the *Call Console*.

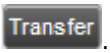
# TRANSFER CALLS

There are a number of ways in which you can transfer a call, including blind transfer, transfer with consultation, and transfer to queue.

## BLIND TRANSFER

Use this method to transfer a call to another 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.

To blind transfer a call to an ad hoc number:

1. From the *Call Console*, select the call to transfer.
2. In the Dialer, enter the destination number and click Transfer 

. The call is transferred and removed from the *Call Console*.

To blind transfer a call to a contact:

1. From the Call Console, select the call to transfer.
2. In the Contacts pane, expand the directory from which you want to select a contact.
3. Click the destination contact and click **Transfer**

for that contact. The call is transferred and removed from the *Call Console*.

## TRANSFER 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. In the latter case, the system redirects the call before it is answered.

To transfer a call with consultation:

1. Make a call to the person to whom you want to transfer the call. If the first call was active, it is put on hold.
2. Wait until the called party accepts your call and speak to the party.
3. When ready to transfer, from the Call Console, select one of the two calls.
4. Move the mouse over the call that is not selected and click **Transfer**

.

The calls are connected and removed from the *Call Console*.

### TRANSFER TO QUEUE

You can transfer a call back to a queue. A transferred call is placed at the bottom of the queue.

To transfer a call to a queue:

1. From the *Call* Console, select the call to transfer.
2. In the Contacts pane, expand the Queues panel.
3. Click the destination queue and click **Transfer** TXR for that queue.

The call is transferred to the selected queue and removed from the *Call Console*.

Alternatively, drag the call onto the target queue and click **Transfer** TXR for that queue.

## ESCALATE CALLS

You can escalate calls to the first available supervisor or to a specific supervisor. You can also make an emergency call, which quickly conferences an available supervisor into your call, without placing the remote party on hold.

You use the *Supervisors* panel located in the *Contacts* pane to escalate calls.

### MAKE EMERGENCY CALL

Use this method to escalate a call to a supervisor in an emergency situation. When you make an emergency call, the caller is not placed on hold; instead, a supervisor is immediately conferenced in to the call. You can let Call Center select the supervisor or you can select the supervisor yourself.

**Note:** To make emergency calls, you must have the Three-Way Call or N-Way Call service assigned.

To make an emergency call to an available supervisor:

1. While on the call, click Emergency in the *Supervisors* panel.

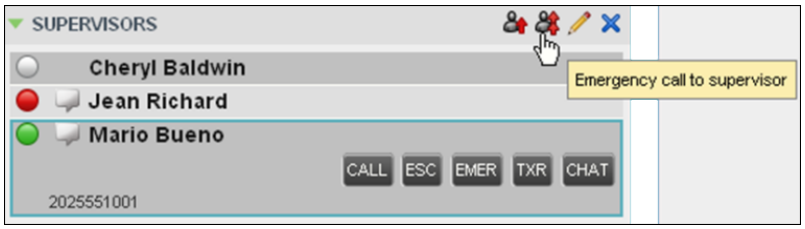



**Figure 60 Supervisors Panel – Making Emergency Calls**

This places the call to the first available supervisor. When the supervisor answers the emergency call, a Three-Way call or an N-Way call is started, without putting the caller on hold.

**2.** To transfer the call to the supervisor, click **LEAVE** in the Conference Call panel after the conference is established.

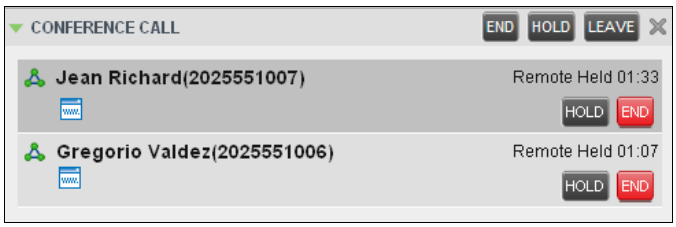



**Figure 61 Conference Call Panel – Leave Conference**

To make an emergency call to a specific supervisor:

**1.** While on a call, expand the *Supervisors* panel.

**2.** Click the target supervisor and click the **Emergency** button EMER for that supervisor. Make sure the supervisor you selected is available.

Alternatively, drag the call onto the target supervisor and click the **Emergency** button EMER for that supervisor.

This places the call to the selected supervisor. When the supervisor answers the emergency call, a Three-Way call or an N-Way call is started, without putting the caller on hold.

**3.** To transfer the call to the supervisor, click **LEAVE** in the Conference Call panel after the conference is established.

## BLIND ESCALATE CALL

Use this method to escalate a call to a supervisor without consulting the supervisor. You can escalate a call to the first available supervisor or select the supervisor yourself.

To blind escalate a call:

1. In the *Supervisors* panel, click **Escalate** to let the system select a supervisor; or, to select the supervisor yourself, click an available supervisor and click the **Escalate** button ESC for that supervisor. Your original call is placed on hold and a call to the supervisor is initiated.
2. Without waiting for the supervisor to answer, in the Call Console, select the original call.
3. Move the mouse over the call to the supervisor and click **Transfer** TXR.

## ESCALATE WITH CONSULTATION

Use this method to escalate a call to a supervisor and provide an introduction beforehand. You can escalate the call to the first available supervisor or select the supervisor yourself.

To escalate a call with consultation:

1. In the *Supervisors* panel, click **Escalate** to let the system select a supervisor; or, to select the supervisor yourself, click an available supervisor and click **Escalate** ESC for that supervisor.
2. Wait until the supervisor accepts your call and speak to the supervisor.
3. When ready to transfer the call, in the Call Console, select the original call.
4. Move the mouse over the call to the supervisor, and click **Transfer** TXR.

## ESCALATE WITH CONFERENCE OR HANDOVER

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

To escalate a call with conference or handover:

1. In the *Supervisors* panel, click **Escalate** to let the system select a supervisor; or, to select the supervisor yourself, click an available supervisor and click **Escalate** ESC for that supervisor.
2. When the supervisor accepts your call, speak to the supervisor about the issue.
3. In the *Call Console*, select the original call.
4. Move the mouse over the call to the supervisor and click **Conference** CONF. A conference call is established and the calls appear in the Conference Call panel.

5. To hand the call over to the supervisor, click **Leave Conference** LEAVE in the *Conference Call* panel.

### ESCALATE 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.

To escalate a call with mid-conference hold:

1. In the *Supervisors* panel, click **Escalate** to let the system select a supervisor; or, to select the supervisor yourself, click an available supervisor and click **Escalate** ESC for that supervisor.
2. When the supervisor accepts your call, speak to the supervisor about the issue.
3. In the *Call Console*, select the original call.
4. Move the mouse over the call to the supervisor and click **Conference** CONF.

   A conference call is established and the calls appear in the *Conference Call* panel.

5. In the Conference Call panel, click **Hold 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 call from the *Conference Call* panel and click **End** END.
7. To leave the call, click **Leave Conference** LEAVE in the *Conference Call* panel.

## MANAGE CONFERENCE CALLS

You manage conferences in the *Call Console*. You use the:

- Current calls area to establish a conference and add participants to it.
- *Conference Call* panel to manage or end an active conference call.

You can only have one active conference at a time.

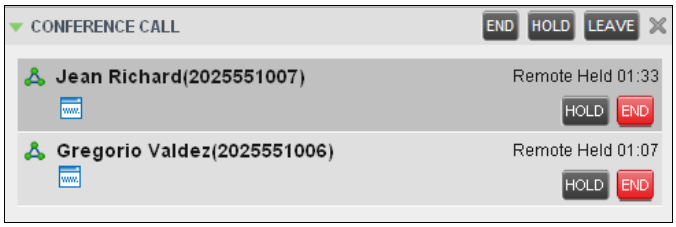



**Figure 62 Call Console – Conference Call Panel**

**Note:** To start conference calls, you must have the Three-Way Call or N-Way Call service assigned.

## START THREE-WAY CONFERENCE

To start a conference call, you must have at least two current calls. The calls can be received or made by you. If required, make calls using any of the methods described in section *Make Outbound Calls*.

To start a conference:

1. In the *Call Console*, select a call.

**Figure 63 Call Console – Starting Conference Call**

2. Move the mouse over a call that is not selected and click **Conference** CONF. A Three-Way Conference is established and the connected calls appear in the *Conference Call* panel.

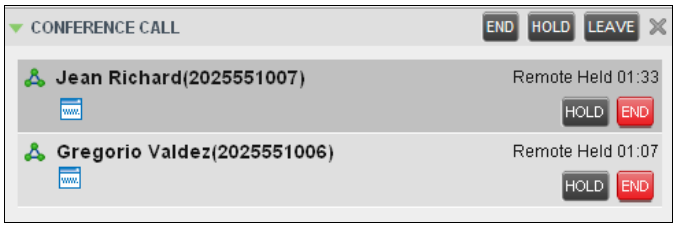



**Figure 64 Conference Call Panel – Conference Call**

## ADD PARTICIPANT TO CONFERENCE

**Note:** To add participants to a conference, you must have the N-Way Calling service assigned.

To add a participant to a conference:

1. If the call you want to add to the conference is not yet established, place the call.
2. In the *Call Console*, move the mouse over the call and click **Conference** CONF. The call is added to the conference.

## HOLD CONFERENCE

To put an active conference on hold:

In the *Conference Call* panel, click **Hold Conference** HOLD. This allows other conference participants to continue their conversation.

## RESUME CONFERENCE

To resume a conference call that you previously put on hold:

In the *Conference Call* panel, click **Resume Conference** ANS. All the calls in the conference become active.

## HOLD PARTICIPANT

To put a specific conference participant on hold:

1. Expand the *Conference Call* panel.
2. Move the mouse over the target call and click **Hold** HOLD.

## TAKE PARTICIPANT OFF HOLD

To resume a participant's held call:

1. Expand the *Conference Call* panel.
2. Move the mouse over the target call and click **Answer** ANS.

## LEAVE CONFERENCE

To leave the conference:

In the *Conference Call* panel, click **Leave Conference** LEAVE. The other parties continue their conversation.

**Note:** This function is only available for Three-Way Conferences.

## END PARTICIPANT

To end a selected call in a conference:

1. Expand the *Conference Call* panel.
2. Move the mouse over the call and click **End** END.

## END CONFERENCE

To end the conference:

In the *Conference Call* panel, click **End Conference** END. This releases all the calls that participated in the conference.

# MANAGE CALL HISTORY

Call Center collects call logs for your placed, received, and missed calls. You can call any number available in Call History. For information on making calls from Call History, see section *Manage Calls*.

This section explains how to view and delete call logs.

## VIEW CALL HISTORY

You can view your placed, received, and missed calls.

To view your call history:

1. In the *Call Console*, click **Call History** . The *Call History* dialog box appears displaying your past calls. The calls are grouped into placed, received, and missed calls. By default, missed calls are displayed.

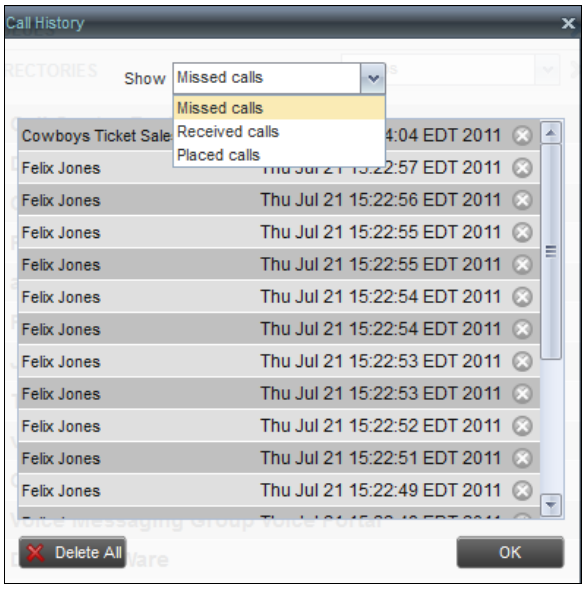



**Figure** 65 **Call History Dialog Box**

2. To show calls in a specific group, select that group from the *Show* drop-down list.

## DELETE CALL HISTORY

You can delete a selected call log or all call logs from Call History.

To delete calls from Call History:

1. In the *Call Console*, click **Call History** . The *Call History* dialog box appears.
2. To delete all call logs, click **Delete All**

.
3. To delete a selected log, move the mouse over the log and click **Delete** .

# E-MAIL CONTACTS

Call Center allows you to send an e-mail message to a contact that has e-mail configured on the system. You must also have messaging enabled within Call Center settings. For information, see section *Settings – Messaging*.

The **EMAIL** button appears when you select a contact that has an e-mail address configured.

## SEND E-MAIL MESSAGE TO CONTACT

To send an e-mail message to a contact:

1. In the Group/Enterprise directory, move the mouse over a contact who has e-mail.
2. Click EMAIL

. This brings up a new e-mail window for the configured Messaging service.
3. Write your message and click **Send**.

# MANAGE CONTACTS

You use the *Contacts* pane to perform call and monitoring operations on your contacts as well as to manage your contacts' directories.

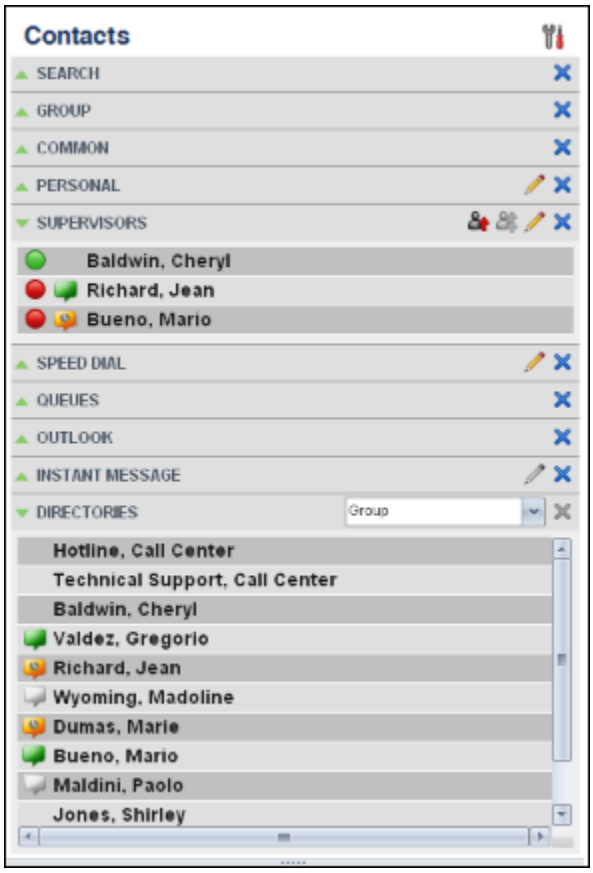



**Figure 66 Contacts Pane**

Call Center provides access to the contacts' directories listed in the following table.

| INTERFACE ELEMENT | DESCRIPTION |
|---|---|
| Enterprise/Group | The *Enterprise/Group* directory contains the contacts in your Clearspan group or enterprise directory. |
| Common | The *Common* directory contains the contacts in the common phone list configured by your administrator on Clearspan. |
| Personal | The *Personal* directory contains all contacts in your Personal Phone List on Clearspan. |
| Supervisors (Agents) | The *Supervisors* directory, available only to agents, contains the list of your supervisors and allows you to view their phone state. |

| INTERFACE ELEMENT | DESCRIPTION |
|---|---|
| Agents (Supervisors) | The *Agents* directory, available only to supervisors, contains the list of agents you supervise and allows you to manage them and view their phone and ACD state. |
| Speed Dial | The *Speed Dial* directory contains the numbers configured for you or by you for your Speed Dial services (Speed Dial 8 and/or Speed Dial 100). |
| Queues | The *Queues* directory lists the call centers and associated DNIS numbers for the call centers you are either supervising or staffing. It allows you to transfer calls to queues quickly. |
| Custom | A *Custom* directory contains selected contacts from your Clearspan group or enterprise directory. You can have access to zero, one, or several custom directories. Custom directories are configured by your administrator. |
| Outlook | The *Outlook* directory contains your Outlook contacts. |
| Instant Message | The *Instant Message* directory lists IM&P contacts to which you are subscribed. |
| LDAP (Search Access Only) | Call Center provides search access to a configured *LDAP* directory. When you make a search on the *LDAP* directory and your search returns results, these results are displayed in the *Search* panel (in the *Contacts* pane). By default, no LDAP contacts are displayed in the *Contacts* pane. |

Access to certain directories depends on your permissions and the system setup. For information, contact your administrator.

The *Contacts* pane also contains the *Directories* panel, which consolidates the contacts from the following directories: *Enterprise/Group*, *Custom*, *Personal*, *Outlook*, and *Speed Dial.* The *Contacts* pane is always visible. You can choose which directories to display in the *Directories* panel and you can collapse the panel, but you cannot close it.

For information about the operations you perform to manage your contact directories, see the following sections:

- View Contacts
- Organize Contacts
- Search for Contacts
- Manage Personal Contacts
- Manage Speed Dial Numbers
- Monitor IM&P Contacts and Chat with Contacts

# VIEW CONTACTS

Call Center allows you to select directories to display in the *Contacts* pane and below the *Call Console*, show or hide directory contents, and select the order of appearance for information in certain directories.

## SHOW OR HIDE DIRECTORIES

You can decide which of the directories that you are allowed to access appear in the *Contacts* pane.

All directories can be displayed individually in the *Contacts* pane.

In addition, you can decide which directories to display in the *Directories* panel (on their own or with other directories), and below the *Call Console*.

To show or hide a directory in the Contacts pane:

1. In the *Contacts* pane, click **Options** .
2. Select *View*, *Directories*, and then select or unselect the directory to display/hide. To display all directories, select *All*.

   To hide a directory, you can also click the **Close** button for that directory.

**Note:** You cannot close the *Directories* panel.

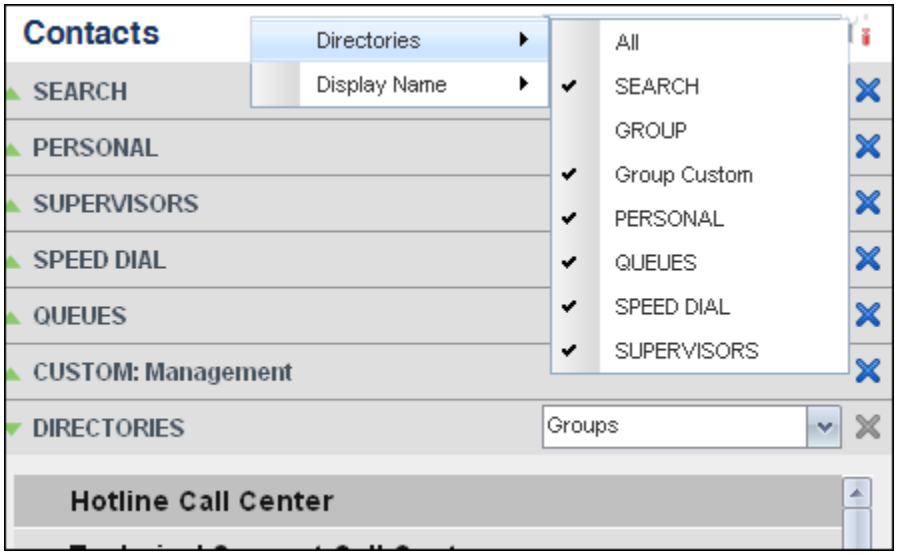



**Figure 67 Contacts Pane – Show/Hide Contact Directories**

To show a directory in the Directories panel:

In the *Directories* panel, select the directory to display from the drop-down list. To display all directories, select *Show all*.

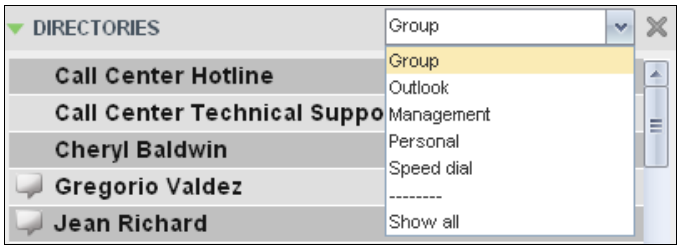



**Figure 68 Directories Panel – Selecting Directory to Display**

## DISPLAY DIRECTORY BELOW CALL CONSOLE

To display a directory below the Call Console:

1. In the *Directories* panel, select *Show all*.

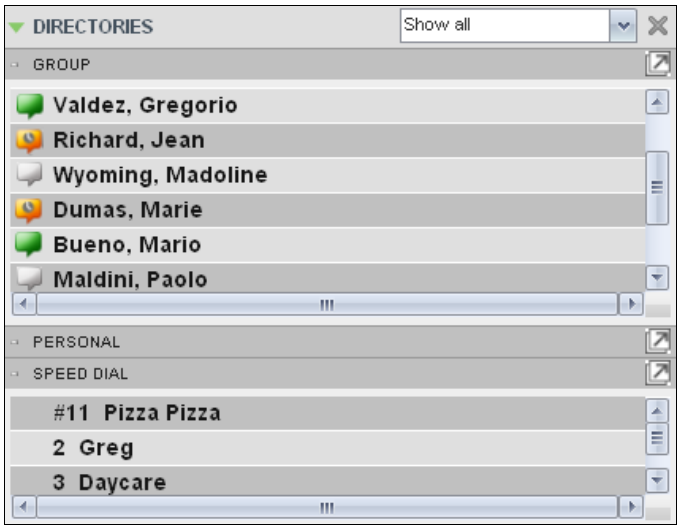



**Figure 69 Directories Panel – Selecting Directory**

2. Click the **Pullout Directory** button for the directory to display.

   The directory appears below the *Call Console*.

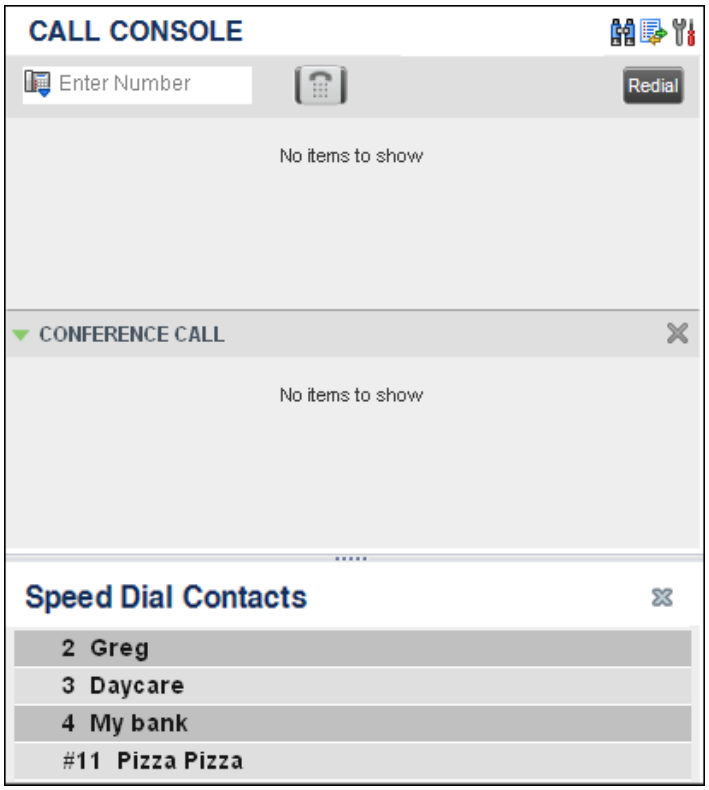



**Figure 70 Custom Directory Displayed Below Call Console**

To close the directory, click the **Close** button .

## SHOW OR HIDE DIRECTORY CONTENT

By default, your directories are collapsed, with only the title bar visible. You can selectively expand the directories that you want to consult or use.

To show or hide contacts in a directory:

In the *Contacts* pane, click the **Expand/Collapse** button for that directory.

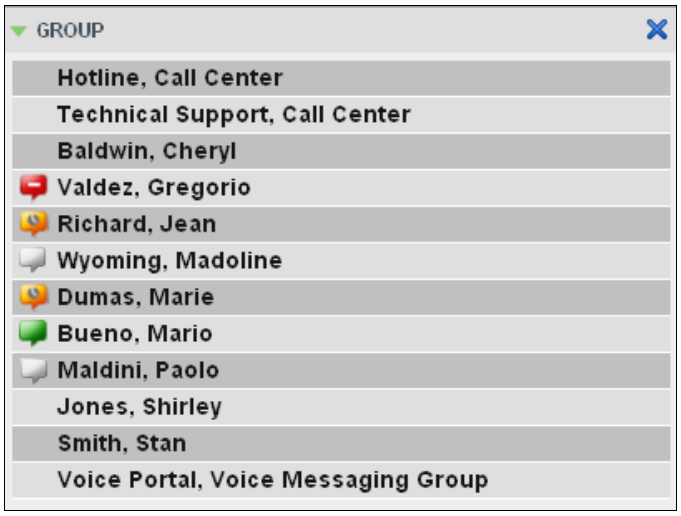



**Figure 71 Group Panel Expanded**

## SHOW CONTACT DETAILS

You can view the details of a contact in any directory.

To view contact details:

1. Expand the target directory.
2. Click the contact. The entry expands, displaying the contact's details. The information depends on the target directory and includes the contact's phone numbers or IDs and action buttons.

   Only one contact per directory can be expanded at a time. When you click a contact, the system automatically hides the details of the previously expanded contact.

**Figure 72 Group Panel – Contact Details**

## SELECT DISPLAY ORDER

Contacts in the *Group/Enterprise*, *Agents*, and *Supervisors* directories can be displayed by either their first name or last name first. Your selection applies to all of these directories. You cannot specify the display order for each directory individually.

To specify the contacts' display order:

1. In the *Contacts* pane, click the **Options** button .
2. Select *View*, then *Display Name*, and then the order in which you want to display the contacts: *Last Name, First Name* -or- *First Name, Last Name*.

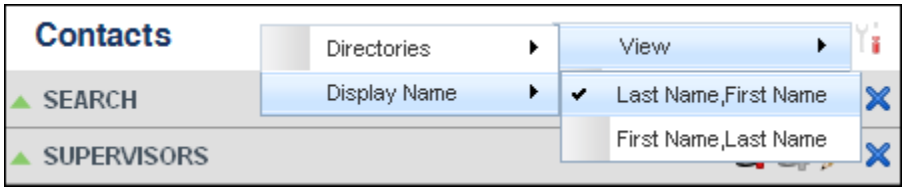



**Figure 73 Contacts Pane – Displaying Contacts by First Name, Last Name**

*Figure 74* shows supervisors displayed by their last name followed by their first name.

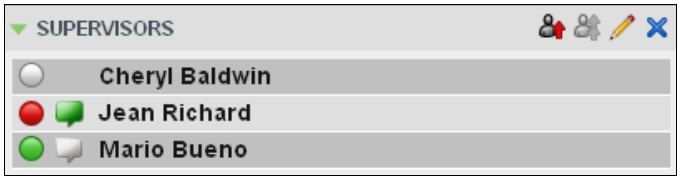



**Figure 74 Supervisors Panel – Supervisors Listed by First Name, Last Name**

# ORGANIZE CONTACTS

## SORT CONTACTS

You can sort contacts in the following directories: *Group/Enterprise*, *Queues*, and *Agents*.

To order contacts in a directory:

1. In the *Contacts* pane, click **Options** .
2. Select *Sort*, followed by the name of the directory in which you want to sort contacts, and then the sorting option.

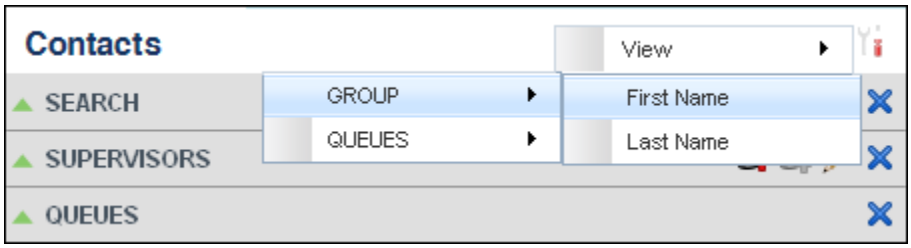



**Figure 75 Contacts Pane – Sorting Contacts**

*Figure 76* shows a *Group* directory sorted by the contact's first name.

**Figure 76 Group Panel – Contacts Sorted by First Name**

**Note:** When agents are sorted by ACD state and there is a change in an ACD state, the agents are not automatically re-sorted.

# SEARCH FOR CONTACTS

Call Center provides you with a search function that allows you to search for specific contacts in your directories.

You use the *Search* panel in the *Contacts* pane to look for contacts.

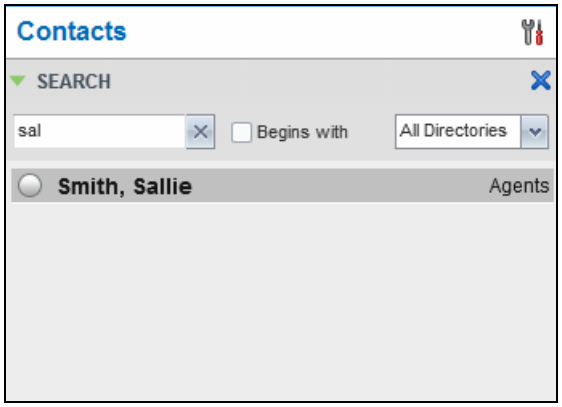



**Figure 77 Contacts Pane – Search Panel**

## PERFORM CONTACT SEARCH

To search for contacts:

1. In the *Search* text box, enter the text you want to search for and press ENTER. 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.

2. To restrict the search to contacts that start with the entered text, check the *Begins with* box.
3. From the drop-down list, select the directories to search.
4. Press **Enter**.

   The text you enter is matched against all attributes of every entry in the selected directories.

**Note:** The search is not case-sensitive; the search for "Ann" and "ann" returns the same results.

Search results are displayed in the *Search* panel, each contact listed with the name of the directory where they were found.

Clearspan directories are searched in the following order: Supervisors, Agents, Group/Enterprise. Duplicate search results in Clearspan directories are not displayed; the first match for a given contact is displayed.

Duplicate search results in other directories are displayed.

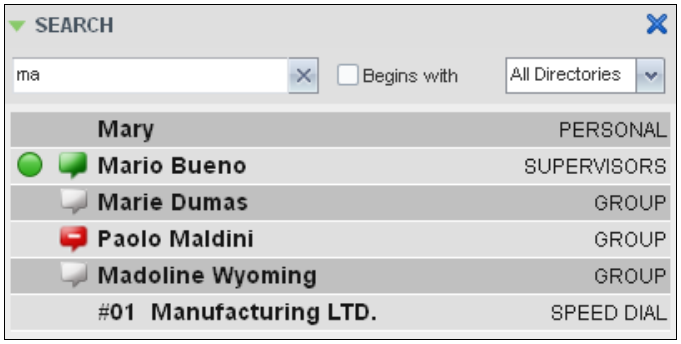



**Figure 78 Contacts Pane – Search Results**

The search returns either all the contacts (in the selected directories) that contain the entered keyword or all the contacts that start with the entered keyword.

In the first case (*Contains*), entering "Ann" and selecting "First Name" from the *Keyword Search Filter* drop-down list returns all contacts with the first name "Ann", but it also returns all contacts with first names such as "Anne", "Marianne", "Marie Ann", "Ann Marie", and so on.

In the second case (*Starts With*), entering “Ann” and selecting “First Name” returns all contacts with first names such as “Ann”, Anne”, and Ann Marie”, but not “Marianne” or “Mary Ann”.

**5.** To clear the search results, click **Reset** .

**Note:** Contact entries displayed in search results follow the same rules as if that entry was accessed in its own directory. This allows you to perform any operations directly from the search results.

# MANAGE PERSONAL CONTACTS

You can add or remove personal contacts via the web portal or in Call Center, and the updates appear in both places. However, the updates that you make via the web portal appear only in Call Center at the next sign-in.

To update personal contacts using the client, perform the following operations:

- Add Personal Contact
- Delete Personal Contact

You cannot modify a personal contact entry in Call Center. To modify information for a personal contact, delete the entry and add it again.

## ADD PERSONAL CONTACT

To add a personal contact:

**1.** In the *Personal* panel, click **Edit** . The *Edit Personal Contact* dialog box appears.

**2.** Click **Add**. A new line is added below the existing entries, allowing you to define a new entry.

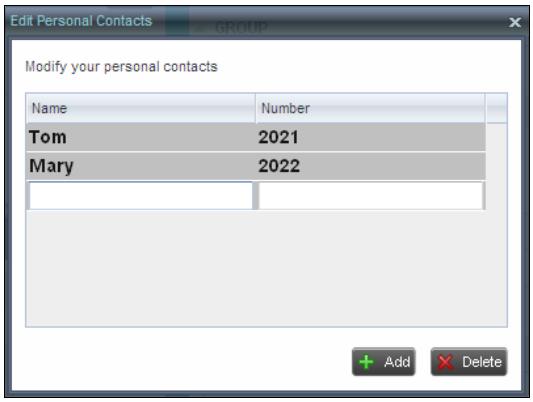



**Figure 79 Edit Personal Contact Dialog Box – Adding Entry**

3. In the Name text box, enter the contact's name or description, as you want it to appear on the contact's list.
4. In the Number text box, enter the phone number of the contact.
5. To save the entry, click anywhere in the dialog box outside the entry.

## DELETE PERSONAL CONTACT

To delete a speed dial entry:

1. In the *Personal* panel, click **Edit** . The *Edit Personal Contact* dialog box appears.
2. Select the entry to delete and click **Delete**.

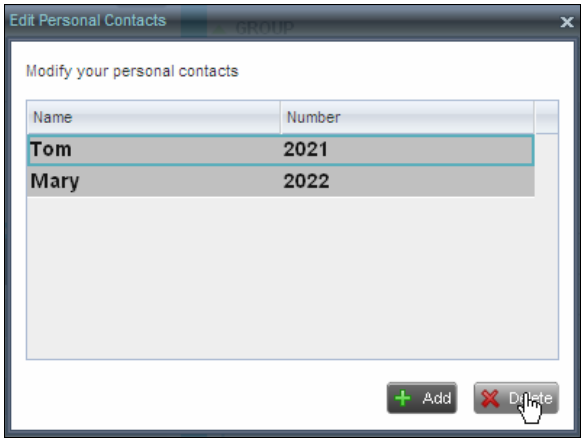



**Figure 80 Edit Personal Contact Window – Deleting Entry**

# MANAGE SPEED DIAL NUMBERS

You can add or remove speed dial numbers via the web portal or in Call Center, and the updates appear in both places. However, the updates that you make via the web portal appear only in Call Center at the next sign-in.

To update speed dial entries using the client, perform the following operations:

- Add Speed Dial Entry
- Modify Speed Dial Entry
- Delete Speed Dial Entry

## ADD SPEED DIAL ENTRY

To add a speed dial entry:

1. In the *Speed Dial* panel, click **Edit** . The *Edit Speed Dials* dialog box appears.
2. Click **Add**. A new line is added below the existing entries, allowing you to define a new entry.

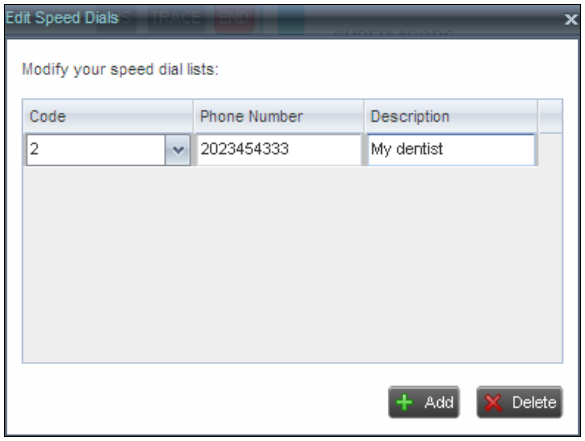



**Figure 81 Edit Speed Dials Dialog Box – Adding Entry**

3. From the *Code* drop-down list, select a speed dial code.
4. In the *Phone Number* text box, enter the phone number to assign to the code.
5. In the *Description* text box, enter a description that allows you to identify the entry.
6. To save the changes, click anywhere in the dialog box outside the entry.

## MODIFY SPEED DIAL ENTRY

To modify a speed dial entry:

1. In the *Speed Dial* panel, click **Edit** . The *Edit Speed Dials* dialog box appears.
2. Double-click the entry to modify. The entry becomes modifiable.

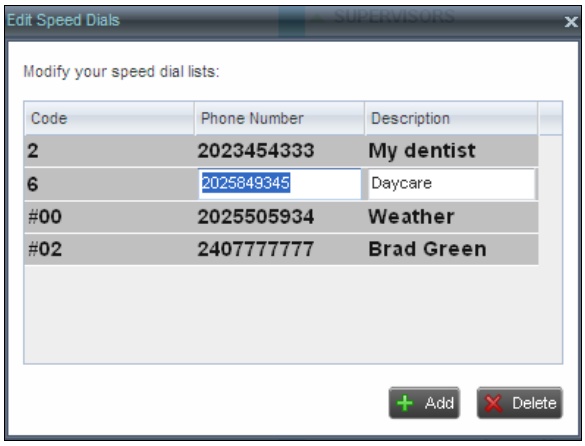



**Figure 82 Edit Speed Dials Dialog Box – Modifying Entry**

3. Modify information as required.
4. To save the changes, click anywhere in the dialog box outside the entry.

## DELETE SPEED DIAL ENTRY

To delete a speed dial entry:

1. In the *Speed Dial* panel, click **Edit** . The *Edit Speed Dials* dialog box appears.
2. Select the entry to delete and click **Delete**.

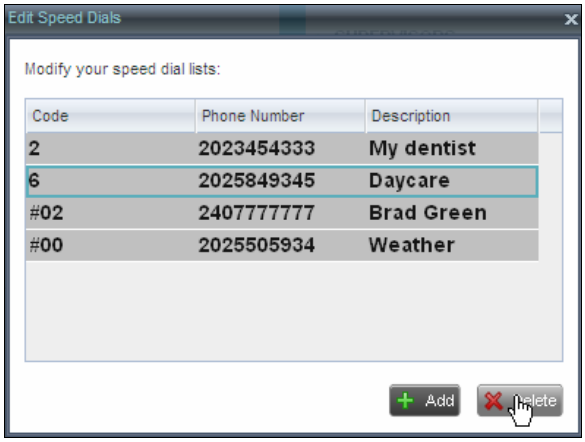



**Figure 83 Edit Speed Dials Dialog Box – Deleting Entry**

# MONITOR IM&P CONTACTS AND CHAT WITH CONTACTS

When you have an IM&P service assigned on Clearspan, you can chat with other IM&P users and see the unified presence state of selected IM&P users directly from Call Center. The unified presence of a contact is their presence state when they are logged in through multiple devices or applications, such as IM&P or Clearspan Communicator.

IM&P capabilities are available only when you are online. For information on setting you IM&P presence state, see section *Change Your Instant Messaging and Presence State*.

## MONITOR IM&P CONTACTS

To view the presence state of an IM&P contact, you have to first subscribe to the contact. Otherwise, Call Center displays the contact's state as *Unsubscribed*. When you send a subscription request to a contact and are waiting for their reply, Call Center displays the contact's state as *Pending Subscription*.

The following directories display the IM&P state of contacts: Instant Message, Agent, Supervisor, Enterprise/Group, Custom, Search, and Directories.

**Note:** The Instant Message panel does not include IM&P contacts in the *Unsubscribed* state.

You can subscribe to a contact either by sending a subscription request to the contact or by adding the contact to the *Instant Message* directory.

For information about the operations related to subscribing to contacts and viewing their presence state, see the following sections:

- Subscribe to Contact
- Add Contact to Instant Message Directory
- Modify Contact Name
- Unsubscribe from Contact
- Accept or Reject Subscription Request
- View Unified Presence State of Contacts

### SUBSCRIBE TO CONTACT

To send a subscription request to a contact:

1. Click the IM&P presence icon of an unsubscribed contact in any directory where the presence state of contacts is displayed. The *Contact (IM) Subscribe* dialog box appears.

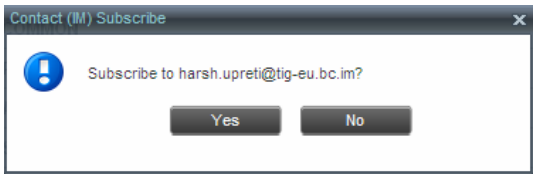



**Figure 84 Contact (IM) Subscribe Dialog Box**

2. Click **Yes**.

   A subscription request is sent to the contact, and the contact is added to the *Instant Message* directory. The contact's state is set to "Pending Subscription" .

   When the subscription is accepted, the contact's presence state is updated to their actual presence state.

3. To resend a subscription request at any time, click the contact's presence icon again and click **Resend** in the dialog box that appears.

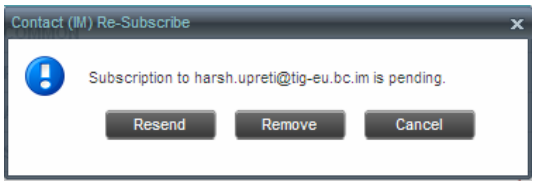



**Figure 85 Contact (IM) Re-Subscribe Dialog Box**

## ADD CONTACT TO INSTANT MESSAGE DIRECTORY

When you add a contact to the *Instant Message* directory, the system automatically sends a subscription request to the contact.

To add a contact to the Instant Message directory:

1. In the *Instant Message* panel, click **Edit** . The *Edit Instant Message Contacts* dialog box appears.
2. Click **Add**. A new line is added below the existing entries, allowing you to define a new entry.

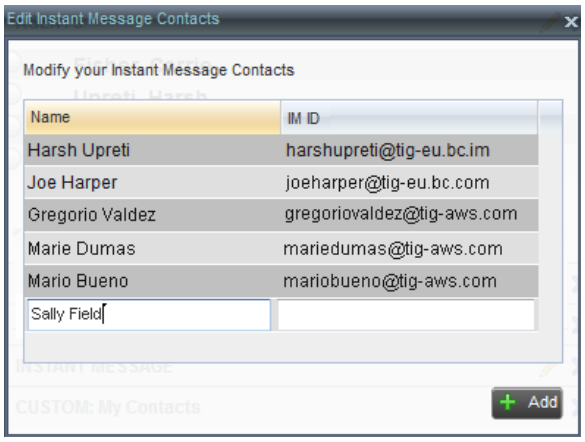



**Figure 86 Edit Instant Message Contacts Dialog Box – Add Contact**

3. In the *Name* text box, enter the display name of the contact to add.
4. In the IM ID text box, enter a valid IM&P ID of the contact.
5. To save the changes, click anywhere in the dialog box outside the entry.

A subscription request is sent to the contact, the contact's presence state is set to "Pending Subscription", and the contact is added to the *Instant Message* panel.

When the subscription is accepted, the contact's presence state is updated to their actual presence state.

## MODIFY CONTACT NAME

You can modify the display name of an existing contact.

To modify the name of a contact:

1. In the *Instant* Message panel, click **Edit** . The *Edit Instant Message Contacts* dialog box appears.
2. Double-click the contact and enter the new name in the *Name* text box.
3. To save your changes, click anywhere in the dialog box outside the entry.

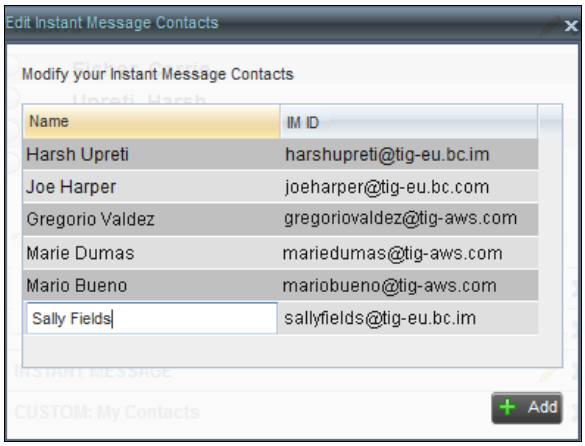



**Figure 87 Edit Instant Message Contacts Dialog Box – Modify Contact**

## UNSUBSCRIBE FROM CONTACT

To stop monitoring a contact:

1. Click the presence icon of the contact. The Contact (IM) Unsubscribe dialog box appears.

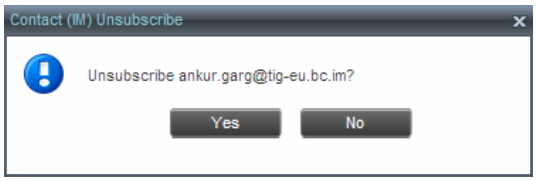



**Figure 88 Contact (IM) Unsubscribe Dialog Box**

2. Click **Yes**. The contact is removed from the *Instant Message* directory and its presence status changes to *Unsubscribed* in other directories.

## ACCEPT OR REJECT SUBSCRIPTION REQUEST

When you receive a request from another user, a dialog box appears allowing you to accept or deny the request.

**Figure 89 Contact (IM) Request Dialog Box**

To accept the request, click **Yes**. If the contact is not yet in your *Instant Message* directory, a request is sent automatically to add the user to the directory.

To reject the request, click **No**.

You can also close the dialog box and ignore the request. If you ignore the request, the dialog box will reappear the next time you go online.

## VIEW UNIFIED PRESENCE STATE OF CONTACTS

You can view the unified presence state of IM&P contacts in the *Instant Message, Agent*, *Supervisor*, *Enterprise/Group*, *Custom, Directories,* and *Search* panels. The presence icon is displayed to the left of the contact's name.

Unified instant messaging presence states indicate your contacts' availability to communicate using client applications such as Hosted Thin Call Center, Hosted Thin Receptionist, Clearspan Communicator Desktop, or Clearspan Communicator Mobile.

The actual IM&P state of a contact is displayed only if you are subscribed to the contact. Otherwise the contact's state is displayed as *Unsubscribed* or *Pending Subscription*.

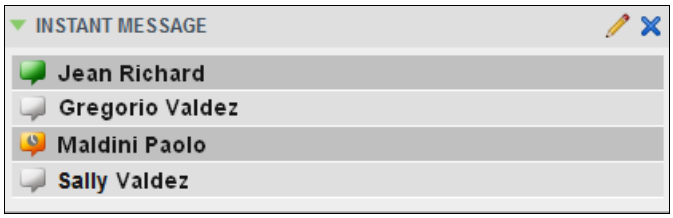



**Figure 90 Instant Message Directory – Unified IM&P Presence State of Contacts**

The following table lists the possible unified IM&P presence states in Call Center:

| IM&P STATE | ICON | DESCRIPTION |
|---|---|---|
| **Subscribed states** | | |
| *Available* | | The contact is online, available on one or more devices, and not busy on any device. |
| *Busy* | | The contact is online, but currently busy on one or more devices. Do not disturb. |
| *Away* | | The contact is connected but away from one or more devices and not busy on any device. |
| *Offline* | | The contact is offline on all devices. |
| **Unsubscribed states** | | |
| *Pending Subscription* | | You sent a subscribe request to the contact, but it has not yet been accepted. Clicking the icon |

| IM&P STATE | ICON | DESCRIPTION |
|---|---|---|
| | | resends the request. |
| *Not subscribed* | | The contact has the IM&P service but you are not subscribed to monitor their state. The contact does not appear in the *Instant Message* pane. Clicking this icon sends a subscription request to the contact. |

## CHAT WITH IM&P CONTACTS

You can have several concurrent one-on-one or multiuser instant messaging sessions open.

You can chat with more than one contact at the same time, either in one-on-one sessions or by participating in multiuser chats. Each session requires a separate window.

*Chat* windows appear at the bottom-right hand side of the Call Center main interface. Subsequent windows open to the left of the latest opened *Chat* window.

*Chat* windows can be taken out of the main interface and placed elsewhere on the screen.

The number of concurrently open *Chat* windows depends on the browser window size and screen resolution. The oldest *Chat* window is closed when there is no more room for a new *Chat* window to open. This only applies to *Chat* windows that are placed within the main interface.

You can start a chat session with a contact or accept a session request from another user. A one-on-one session can be converted into a multiuser chat by inviting more participants. You can also receive an invitation to a multiuser chat from another user.

When your IM&P contact is in your group/enterprise, you can also phone them directly from the *Chat* window.

The tasks related to instant messaging are described in the following sections:

- Start Instant Messaging Session
- Place Call from Chat Window
- Establish Multiuser Chat Session
- Manage Instant Messaging Sessions

## START INSTANT MESSAGING SESSION

You can start an instant messaging session with an IM&P contact from any of the following panels: *Instant Message, Agent*, *Supervisor*, *Enterprise/Group*, *Custom, Search,* and *Directories*.

To start an instant messaging session with a contact:

1. In the *Contacts* pane, click the target contact. The entry expands displaying available action buttons.

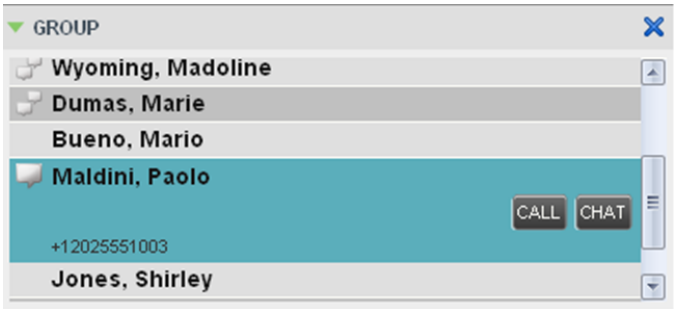



**Figure 91 IM&P Contact with Chat button**

2. Click **Chat** CHAT on the line for the contact. A *Chat* window appears, displaying your contact's information on the title bar.

**Figure 92 Chat Window**

**Note:** A *Chat* window also appears when another IM&P user initiates a chat session with you.

3. Type your message in the text box at the bottom of the window and click ENTER. Your message is sent to your contact.

The messages you send and receive appear in the *Chat Logs* area at the top of the window, below the title bar. Up to 50 messages per contact are kept in the log for the duration of your IM&P session, even if you close the *Chat* window and later start exchanging messages again with the same contact. The messages are cleared when you go offline.

## PLACE CALL FROM CHAT WINDOW

If the user with whom you are chatting is also a contact in your *Group/Enterprise* directory, you can call them directly from the *Chat* window.

To place a call from the *Chat* window:

Click the **Call** button at the top-right of the *Chat* window.

The Call Center client issues a Click-To-Dial attempt to the contact's phone number and the call appears in the *Call Console*.

## ESTABLISH MULTIUSER CHAT SESSION

You can invite other contacts to your chat, thus converting your one-on-one chat to a multiuser chat. An incoming multiuser chat invitation opens a window for a new multiuser chat.

To add users to a chat session:

1. Click the **Add User to Chat** button in the *Chat* window. A drop-down list of available contacts appears.

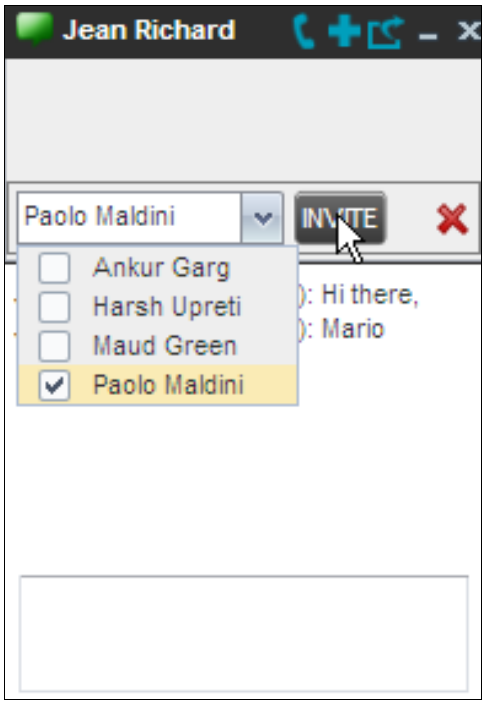



**Figure 93 Add Participants to a Chat**

**2.** Select the check box next to each contact to invite and click the **Invite** button. When a contact joins the chat, a notification appears in the *Chat Logs* area of the *Chat* window. The participants (other than you) are also listed at the top of the window.

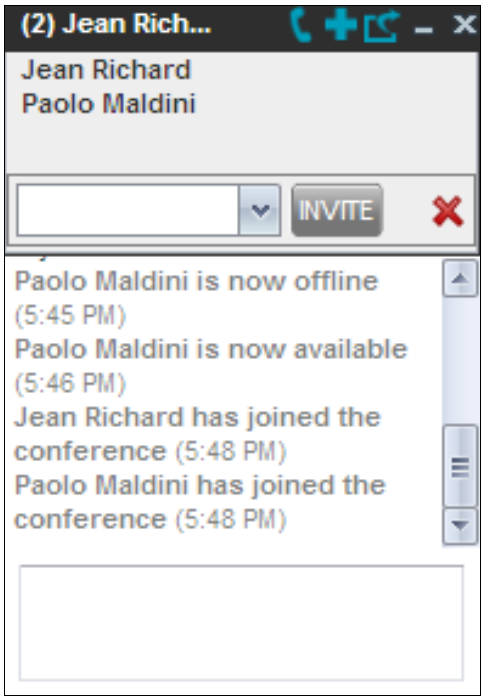



**Figure 94 Multiuser Chat**

**3.** To leave the multiuser chat, close the *Chat* window.

## MANAGE INSTANT MESSAGING SESSIONS

If a *Chat* window is not in focus and an incoming message is available for you to read, the color of the window is light brown as shown in the following figure. This changes to black as soon as the window is in focus.

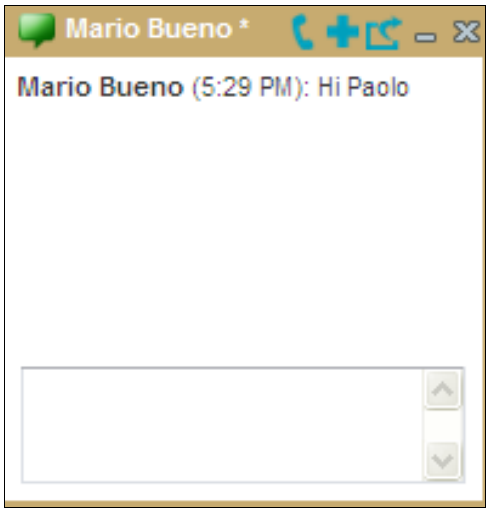



**Figure 95 Managing Chat Sessions**

You can also close, minimize, or pop out a *Chat* window, that is, take the *Chat* window out of the Call Center main interface and place it elsewhere on the desktop.

To pop out a *Chat* window:

Click the **Pop-out** button at the top-right of the window.

The window is placed on the desktop outside of Call Center and the Pop-out button becomes the Pop-in button.

To place the window back within the Call Center main interface:

Click the **Pop-in** button at the top-right of the window.

To minimize or close a *Chat* window:

Click the **Minimize** or **Close** button at the top-right of the window. When a window is closed, the windows to the left (if present) shift to the right. This applies only to *Chat* windows that are placed within the Call Center main interface.

# MONITOR SUPERVISORS (AGENT)

Call Center allows you to monitor the phone state of selected supervisors (up to 50). This is useful when you are escalating a call and want to find a supervisor who is available to take a call quickly.

You use the *Supervisors* panel to view the phone state of selected supervisors and to select supervisors to monitor. Supervisors who are not monitored have their state set to "Unknown".

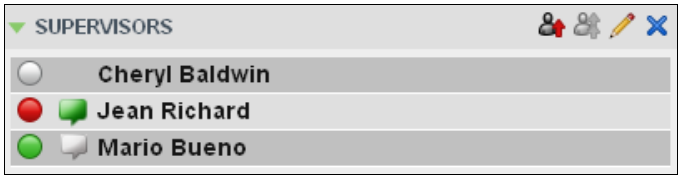



**Figure 96 Supervisors Panel**

## SELECT SUPERVISORS TO MONITOR

The list of selected supervisors is saved when signing out as part of your workspace and is restored on subsequent logins.

To select the supervisors to monitor:

1. In the *Supervisors* panel, click **Edit** . The *Supervisor Favorites* dialog box appears.

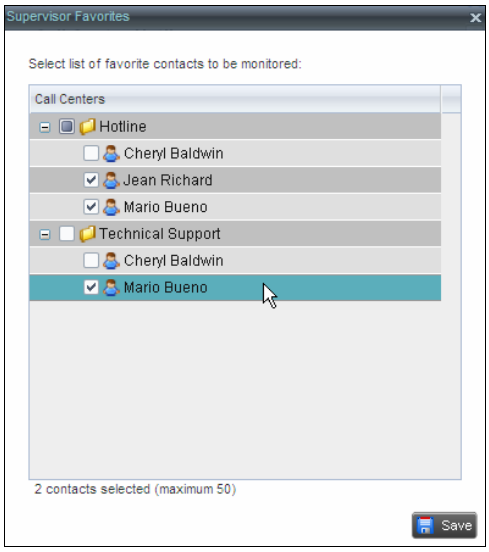



**Figure 97 Supervisor Favorites Dialog Box**

2. Check the box next to each supervisor to monitor and click **Save**.

## SUPERVISOR PHONE STATES

The following table lists the possible states for a supervisor's phone line:

| PHONE STATE | ICON | DESCRIPTION |
|---|---|---|
| *Idle* | | Supervisor's phone is on-hook, which means the supervisor is not on a call. |
| *Busy* | | Supervisor's phone is off-hook, which means that the supervisor is on a call. |
| *Ringing* | | Supervisor's phone is in alerting state; a call is currently being delivered to the supervisor. |
| *Do Not Disturb* | | Supervisor has enabled the Do Not Disturb service. |
| *Private* | | Supervisor has enabled phone state privacy.<br>**NOTE:** This terminates monitoring of the supervisor's phone state for the current login session. To be able to monitor their phone state again, you must sign out and then sign in after the supervisor has disabled their phone state privacy. |
| *Call Forwarding Always* | | Supervisor has enabled the Call Forwarding Always service. |
| *Unknown* | | Supervisor is currently not monitored. |

# MONITOR CALL CENTERS (AGENT)

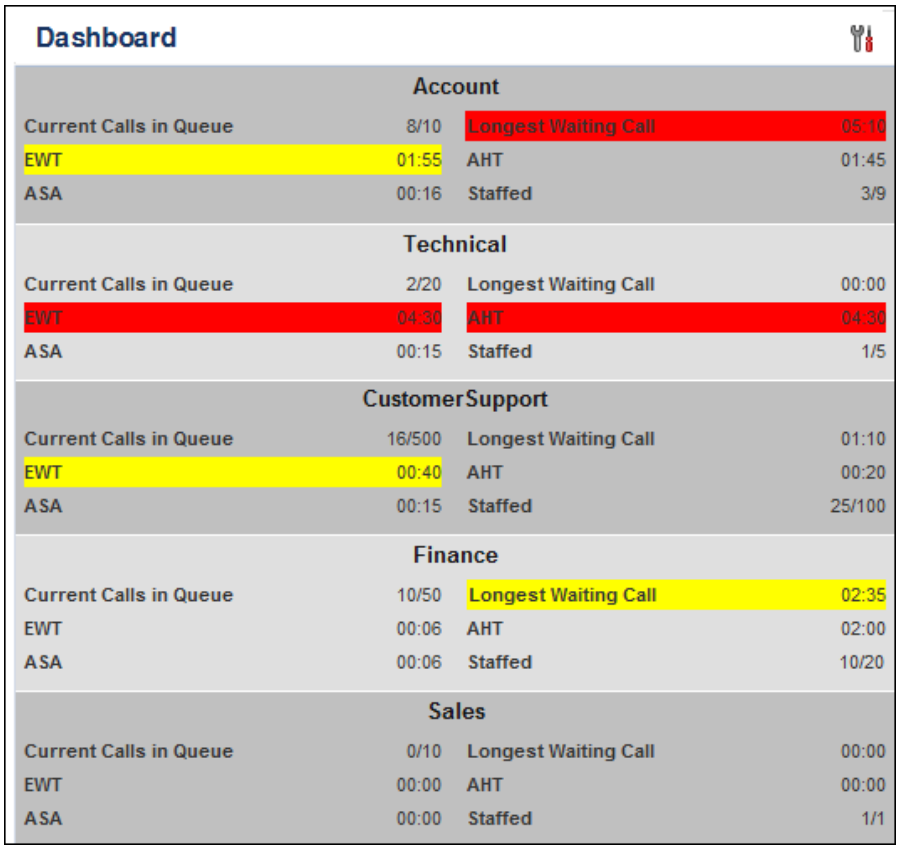
Call Center provides you with real-time information about monitored queues. This information is displayed in the *Dashboard* pane.

## DASHBOARD PANE

The *Dashboard* pane lists the monitored call centers and provides key indicators for each. For information about selecting call centers to monitor, see section *Select Call Centers to Monitor*.

Some fields are color-coded to provide visual indicators of threshold severity. Threshold values are configured by your administrator. The visual Indicators of threshold severity are as follows:

| SEVERITY | COLOR |
|---|---|
| 0 (no threshold crossed) | No color |
| 1 (yellow threshold crossed) | Yellow |
| 2 (red threshold crossed) | Red |



Dashboard

| Account | | | |
|---|---|---|---|
| Current Calls in Queue | 8/10 | Longest Waiting Call | 05:10 |
| EWT | 01:55 | AHT | 01:45 |
| ASA | 00:16 | Staffed | 3/9 |

| Technical | | | |
|---|---|---|---|
| Current Calls in Queue | 2/20 | Longest Waiting Call | 00:00 |
| EWT | 04:30 | AHT | 04:30 |
| ASA | 00:15 | Staffed | 1/5 |

| CustomerSupport | | | |
|---|---|---|---|
| Current Calls in Queue | 16/500 | Longest Waiting Call | 01:10 |
| EWT | 00:40 | AHT | 00:20 |
| ASA | 00:15 | Staffed | 25/100 |

| Finance | | | |
|---|---|---|---|
| Current Calls in Queue | 10/50 | Longest Waiting Call | 02:35 |
| EWT | 00:06 | AHT | 02:00 |
| ASA | 00:06 | Staffed | 10/20 |

| Sales | | | |
|---|---|---|---|
| Current Calls in Queue | 0/10 | Longest Waiting Call | 00:00 |
| EWT | 00:00 | AHT | 00:00 |
| ASA | 00:00 | Staffed | 1/1 |

**Figure 98 Dashboard Pane (Agents)**

The following information is provided for each monitored call center:

- *Call center name* – The name of the call center.
- *Service Mode* (Premium call centers) – The mode in which the call center currently operates. This field can have one of the following values:
  - 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 either to “Perform busy treatment” or “Transfer to phone number/SIP-URI”. Setting the action to “None” acts as if the Night Service policy was not triggered and the *Night Service/Night Service Override* status is not displayed in Call Center.

  - 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 Clearspan administrator to either “Perform busy treatment” or “Transfer to phone number/SIP-URI”. Setting the action to “None” acts as if the *Holiday Service* policy was not triggered and the *Holiday Service* status is not displayed in Call Center.

- Forced Forwarding – All calls to this call center are forwarded to a specified destination.
- None – Call center is in normal mode of operation; none of the above modes are enabled.

**Note:** When the call center is in Normal service mode, the *Service Mode* field displays “None”.

- *Current Calls in Queue* – This is the number of queued calls expressed 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.
- *Longest Waiting Call* – This is the waiting time of the call that has been in the queue the longest.
- *EWT (Expected Waiting Time)* – This is the estimated time a caller has to wait in this queue before their call is answered.
- *AHT (Average Handle Time)* – This is the average time it takes to process a call in this queue.
- *ASA (Average Speed of Answer)* – This is the average time a caller spends in the queue before the call is offered to an agent.
- *Staffed* – This is the number of agents that are in *Sign-In*, *Available*, *Unavailable*, or *Wrap-Up* ACD state, as a ratio of all agents assigned to this call center.

The fields that provide visual indicators are *Current Calls in Queue*, *Longest Waiting Call*, *EWT*, *AHT*, and *ASA*.

## SELECT CALL CENTERS TO MONITOR

You can select up to 50 call centers to monitor in the *Dashboard* pane. You can only monitor call centers to which you have been assigned.

To select call centers to monitor:

1. In the *Dashboard* pane, click **Options** and select the *Select Queues* option. The *Select Queues* dialog box appears.

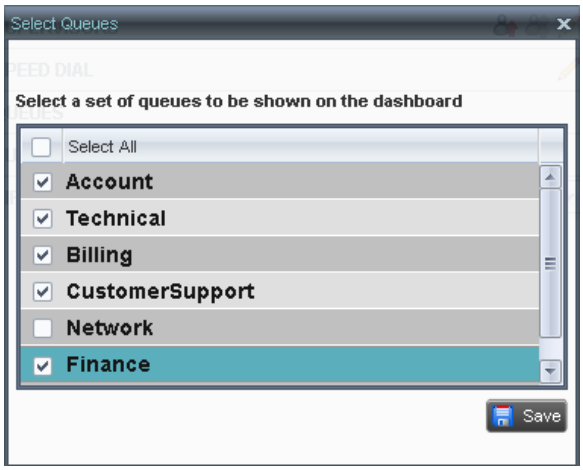



**Figure 99 Select Queues Dialog Box**

2. Check the call centers you want to monitor and click **Save**.

## SELECT INFORMATION TO DISPLAY

You can select which performance indicators you want to display in the *Dashboard* pane.

To select information to display:

1. In the *Dashboard* pane, click **Options** and select the *Select Visible Fields* option. The *Select Fields* dialog box appears.

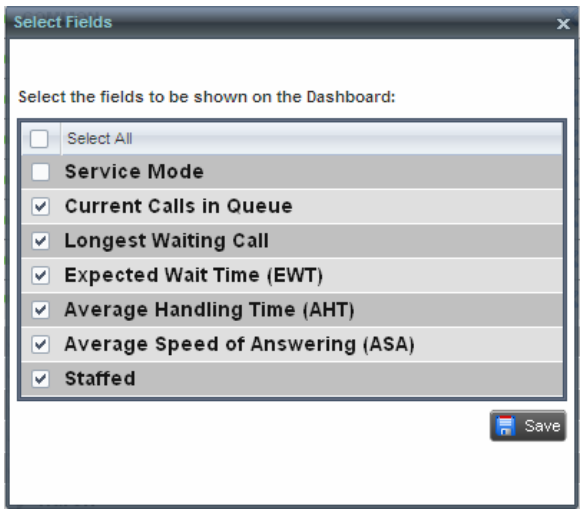



**Figure 100 Select Fields Dialog Box**

2. To display all performance indicators, check *Select All*. Or to show or hide some fields, check to uncheck the corresponding check boxes.

3. Click **Save**.

## ORDER CALL CENTERS

By default, call centers displayed in the *Dashboard* pane are ordered by name. You can change the order in which call centers are displayed.

To change the order of call centers:

1. In the *Dashboard* pane, click **Options**
2. Select *Sort By* and then select the ordering options you want.

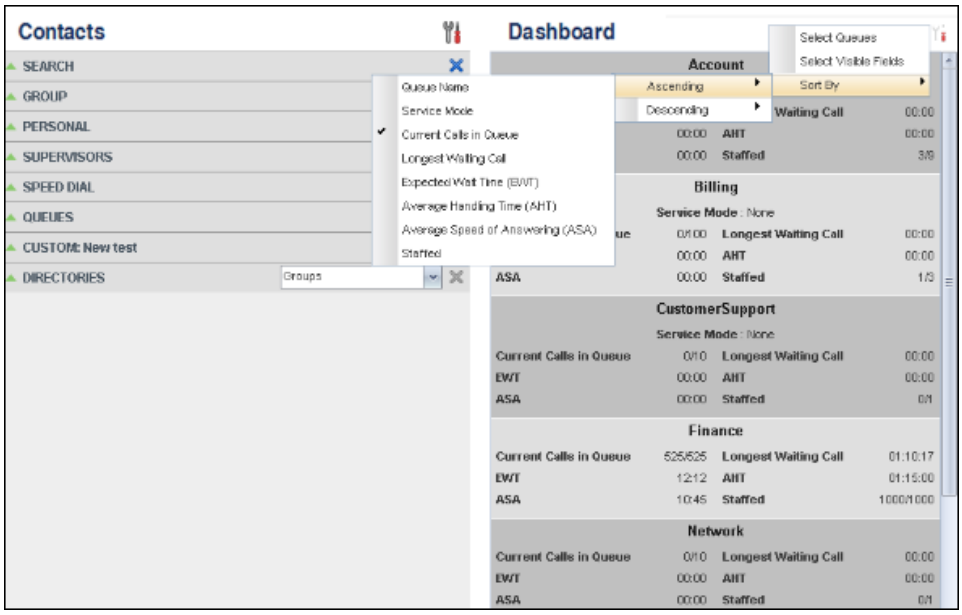



**Figure 101 Dashboard – Options – Sort By**

# MANAGE AGENTS (SUPERVISOR)

You use the *Agents* panel to view the agents who you are supervising and to perform actions on them. You can also monitor the call and the ACD state of selected agents and make agents join or leave queues. For information on selecting agents to monitor, see section *Select Agents to Monitor*.

**Figure 102 Agents Panel**

## SELECT AGENTS TO MONITOR

Call Center allows you to monitor the call and the ACD state of selected agents, but agents are not automatically monitored. To monitor the state of an agent, you must select the agent.

To select agents to monitor:

1. In the Agents panel, click **Edit** . The *Edit Monitored Agents* dialog box appears.

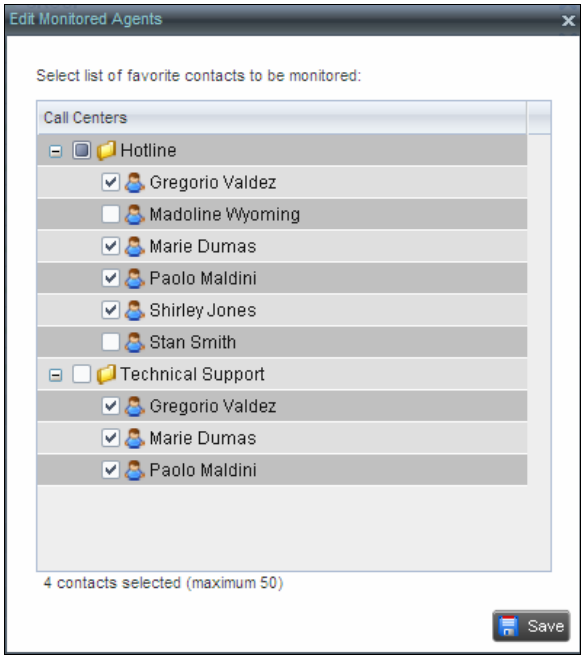



**Figure 103 Edit Monitored Agents Dialog Box**

2. Select the check box next to each agent to monitor. If an agent is staffing multiple call centers, by selecting that agent for monitoring in one call center, you are also selecting them for monitoring under all call centers that they are staffing.
3. Click **Save**.

The selected agents have their call and ACD state displayed. The state of agents who are not monitored appears as unknown (dimmed).

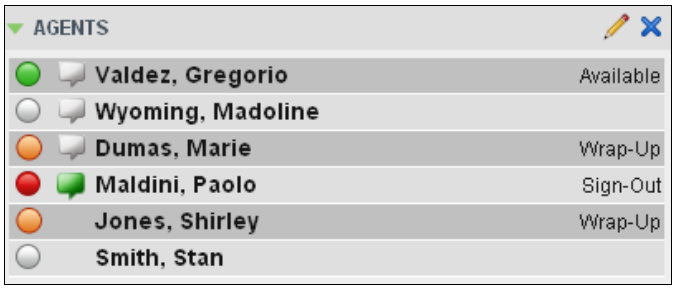



**Figure 104 Agents Panel – Monitored Agents**

The list is saved and is available during subsequent sessions.

## MAKE AGENTS JOIN QUEUES

Call Center allows you to force an agent's join status in queues, effectively making the agent join or leave queues.

**Figure 105 Agents Panel – Contact with Queue Button**

To make an agent join or leave one or more queues:

1. In the *Agents* panel, click the target agent. The entry expands displaying available action buttons.
2. Click the Queue button. The *Agent Queue Membership* dialog box appears listing the call centers to which the agent is assigned.

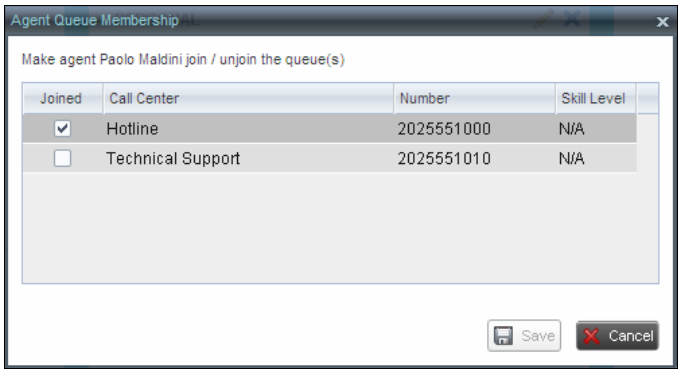



**Figure 106 Agent Queue Membership Dialog Box**

3. To make the agent join a queue, check the Joined box in the row of the queue you want the agent to join.
4. To make the agent leave a queue, uncheck the Joined box in the row of the queue you want the agent to leave.
5. Click **Save**.

## AGENT PHONE AND ACD STATES

Monitored agents have their phone and ACD state displayed. A single icon, to the left of the agent's name, represents the agent's combined phone and ACD state, which indicates the agent's ability to take calls. In addition, the agent's ACD state is also displayed in text following their name. If the agent's ACD state is set to "Unavailable", the unavailable code is also displayed (if applicable).

Other agents have their state set to “Unknown”.

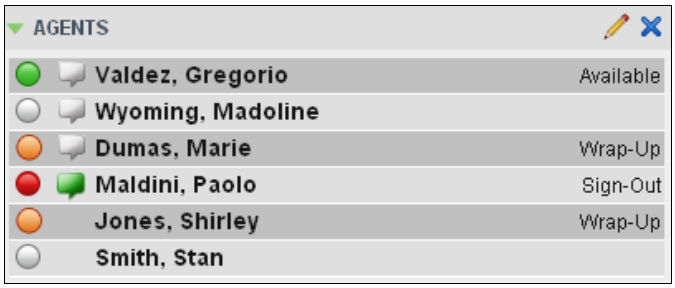



**Figure 107 Agents Panel – Agents with Phone and ACD State Displayed**

The possible agent’s phone and ACD states are as follows:

| PHONE STATE | ACD STATE | ICON | DESCRIPTION |
|---|---|---|---|
| *Idle* | *Available* | | Agent’s phone is on-hook and the agent is available to take ACD calls. |
| *Ringing* | *Available* | | Agent’s phone is ringing and the agent is available to take the call. |
| *Any* | *Unavailable, Sign-In, Sign-Out* | | Agent is not available to take ACD calls. |
| *Idle, Ringing* | *Wrap-Up* | | Agent is performing post call work. They may or may not be available to take calls. |
| *Busy* | *Available, Wrap-Up* | | Agent’s phone is off-hook, which means that the agent is on a call.<br>Calls **may** be delivered to agents depending on their call waiting settings and the call center’s call waiting and wrap-up settings. |
| *Do Not Disturb* | Any | | Agent has enabled the Do Not Disturb service.<br>ACD calls are **not** delivered to agent in the Do Not Disturb call state.<br>This state is **not recommended** for Call Center agents. Agents should use the Unavailable ACD state when they need to block new incoming calls temporarily. |
| *Call Forwarding Always* | Any | | Agent has enabled the Call Forwarding Always service. |
| *Private* | Any | | Agent has enabled phone state privacy.<br>**NOTE**: This terminates monitoring of the agent’s phone state for the current login session. To be able to monitor their phone state again, you must sign out and then sign in after the agent has disabled their phone state privacy. |

| PHONE STATE | ACD STATE | ICON | DESCRIPTION |
|---|---|---|---|
| *Unknown* | Any | | Agent is currently not monitored. |

# VIEW AGENT'S DETAILS

Clicking an agent expands the entry to show all queues the agent is assigned to and all the agent's current calls, in order of arrival.

For each call, the following information is displayed:

- Call number
- Calling name (if available) and calling number (and for direct calls, extension), for example, "Joe Smith +12403645125"
- Call length in the following format: "MM:SS" (or "HH:MM:SS" if the call lasts longer than an hour), for example, "10:22"

For each queue, the following information is displayed:

- Call Center ID
- Whether the agent has joined the queue
- The agent's skill level in that queue, if applicable

**Figure 108 Agents Panel Entry Expanded**

# CHANGE AGENT ACD STATE

You can force an ACD state change for an agent. This action can only be performed on monitored agents.

To change and agent's ACD state:

1. In the *Agents* panel, click the agent and then click the **ACD State** button ACD.

**Figure 109 Agents Panel – Agent ACD States**

2. From the drop-down list, select the new state.
3. If you selected Unavailable, you may have to select the reason for their unavailability.

## SILENTLY MONITOR AGENT'S CALL

Call Center allows you to listen to monitored agents' calls without being heard. You can listen in on agents who you selected for phone and ACD state monitoring.

**Note:** This function is available if you have the Directed Call Pickup with Barge-in and Call Center Monitoring services assigned.

You can silently monitor one agent at a time, and the agent you monitor must have the Call Center – Premium service assigned.

You can choose to monitor the agent's current call or next incoming call. To monitor the current call, the agent must have exactly one active call.

To listen in on an agent's current call silently:

1. In the Contacts pane, expand the Agents panel and click the agent to monitor. The agent must have exactly one active call.
2. Click **Monitor** SM for that agent.

   A new call is created in the *Conference Call* panel. You are conferenced in to the call and muted (Silent Monitoring).

To listen in on an agent's next call silently:

1. In the *Contacts* pane, expand the *Agents* panel.

2. Click the target agent and click Monitor **Next Call** SMN for that agent. A monitoring call is established for the selected agent.

   When the next call is received and answered by the agent, you are conferenced in to the call and your call is muted. Both calls appear in the *Conference Call* panel.

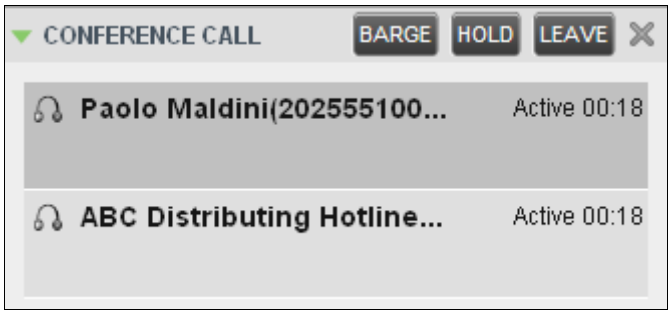



**Figure 110 Silently Monitored Call**

To barge in on a call you are silently monitoring:

In the *Conference Call* panel, click **Barge In** BARGE. You are conferenced in to the call.

For information on operations that can be performed on conference calls, see section *Manage Conference Calls*.

## BARGE IN ON AGENT'S CALL

Supervisor Barge-In allows you to barge in on an agent's call. This is useful when you want to enter an already established call between two other people. You can only barge in on agents who you selected for phone and ACD state monitoring.

**Note:** This functionality is only available if you have been assigned the Directed Call Pickup with Barge-in service.

To barge in on an agent's call:

1. In the *Contacts* pane, expand the Agents panel and select an agent. The agent must have exactly one active call.

2. Click the agent to expand the entry and click **Barge In** BARGE. A Three-Way Conference is established.

For information on operations that can be performed on conference calls, see section *Manage Conference Calls*.

# PICK UP AGENT'S RINGING CALL

Call Pickup allows you to pick up an unanswered call on behalf of an agent. This is useful when the agent is away or busy.

**Notes:** This functionality is only available if your group has been assigned the Call Pickup service.

A call that is retrieved using Call Pickup is treated in the Call Center reports as a direct inbound call to the retrieving party and not as an ACD call, because it was not answered by the agent selected using the ACD process.

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 pick up an unanswered call for an agent:

1. In the Agents panel, select an agent whose phone is ringing.
2. Move the mouse over the agent and click **Answer** ANS.

   You are now answering the call, and the call appears in the *Call Console*.

# MANAGE QUEUED CALLS (SUPERVISOR)

Call Center allows you to manage queued calls in the selected call centers (up to five) and to monitor calls in real time. You use the *Queued Calls* pane to manage queued calls under your supervision.

Section *Queued Calls Pane* describes the *Queued Calls* pane. The rest of this section describes the operations you perform to manage queued calls:

- Select Call Centers to Monitor
- Show or Hide Call Center Panels
- View Queued Calls
- Group Queued Calls
- Order Queued Calls
- Monitor Next Call
- Enable Night Service Override or Forced Forwarding (Premium Call Center)
- Retrieve Call from Queue
- Promote Call in Queue (Premium Call Center)
- Transfer Call to Another Queue
- Transfer Call to Top of Queue (Premium Call Center)
- Transfer Call from Queue to Agent
- Transfer Call to Ad Hoc Number
- Change Position of Call in Queue

## QUEUED CALLS PANE

You use the *Queued Calls* pane to manage queued calls.

The *Queued Calls* pane displays the monitored call centers and lists the calls queued in each call center.

You can monitor up to five call center queues at a time, plus one special queue, called the Quick Link Queue, which does not count toward the maximum of the five-queue limit. The monitoring of a Quick Link Queue is triggered from the *Dashboard*.

For information about selecting call centers to monitor, see section *Select Call Centers to Monitor*.

Each call center is displayed in a separate panel. The panel's header provides the following information and controls:

- Call center name – The name of the call center.
- Call center number – The primary phone number of the call center.

**Figure 111 Queued Calls Pane**

- Service Mode button – This identifies the service mode of the supervised call center. Clicking the button launches the *Edit Queued Calls Favorites* dialog box and allows you to activate Night Service Override or Forced Forwarding. The call center can be in one if the following service modes:
  - 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* mode appears only if the Night Service policy is triggered. It is triggered either by the *Night Service* schedule or by a manual override, and if the action to apply to incoming calls is set by a Clearspan administrator to either *Perform busy treatment* or *Transfer to phone number/SIP-URI*. Setting the action to "None" acts as if the Night Service policy was not triggered, and as a result, the *Night Service/Night Service Override* mode is not displayed.

  - Holiday Service – The call center is processing calls according to the Holiday Service schedule and policy.

**Note:** The *Holiday Service* mode appears only if the Holiday Service policy is triggered and if the action to apply to incoming calls is set by a Clearspan administrator to either *Perform busy treatment* or *Transfer to phone number/SIP-URI*. Setting the action to "None" acts as if the Holiday Service policy was not triggered, and as a result, the *Holiday Service* mode is not displayed.

  - Forced Forwarding – All calls to this call center are forwarded to a specified destination.
  - Normal – Call center is in normal mode of operation; none of the above modes is enabled.

When you expand the panel for a call center, the list of calls queued in that call center appears.

- Message Waiting icon – This icon is displayed if there is one or more outstanding voice messages left in the call center's voice mailbox. This icon performs the role of a message waiting indicator for the call center.
- Ratio of visible calls to display limit – This is the number of calls in the queue that are currently displayed against the maximum number of calls that can be displayed for a queue.
- Ratio of queued calls to queue length – This is the number of calls in queue against the queue length that is displayed.

By default, calls are listed according to their position in the queue, with the oldest call first. They can be grouped by the priority bucket. For more information, see section *Group Queued Calls*.

The following information is provided for each call:

- Call Status icon – A graphic representation of the state of the queued call:
  - Waiting – The call is queued, waiting to be answered.
  - Announcement – An entrance announcement or music is being played to the caller.
  - Reordered – The position of the call in the queue has been changed.
  - Bounced – The call has been bounced.
- Caller's identity – The name (if available) and the phone number of the calling party.
- Call time –The total call time, including the time in the current queue (in parentheses).

Clicking a call expands the call to show additional data:

- Priority (Premium call center) – The priority bucket of the call.
- Position – The position of the call in the queue.
- Destination – The name (if available) and the phone number of the call center (or DNIS, when applicable) that was called.

When the call is expanded, the action buttons for actions that can be performed on the call appear. For the list of action buttons available in Call Center, see section *Call Action Buttons*.

## SELECT CALL CENTERS TO MONITOR

You can select up to five call centers to monitor. You view the monitored call centers in the *Queued Calls* pane.

To select call centers to monitor:

1. In the *Queued Calls* pane, click **Options** and select the *Edit Queue Favorite* Dialog option.

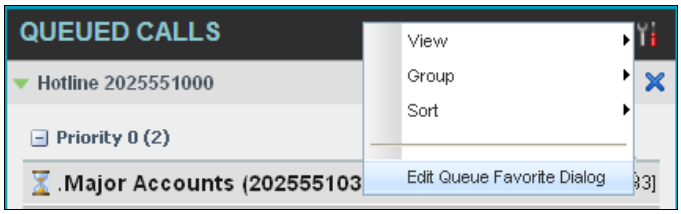



**Figure 112 Queued Calls – Options – Edit Queue Favorite Dialogue**

The *Edit Queue Favorites* dialog box appears.

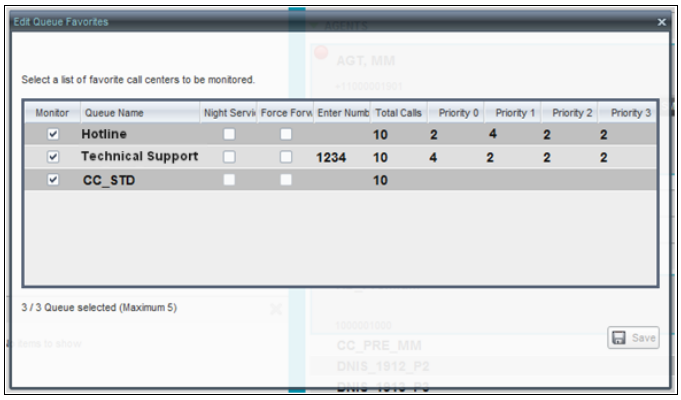



**Figure 113 Edit Queue Favorites Dialog Box**

2. Select the *Monitor* check boxes in the rows of the call centers to monitor. Note that the Quick Link Queue can only be selected for monitoring from the *Dashboard*.

   If you select a queue that you are currently monitoring as the Quick Link Queue, the queue stops being monitored as the Quick Link Queue when you save your changes and it is monitored as a regular queue.

3. Click **Save**.

**Note:** Clicking the Close button in a call center panel in the *Queued Calls* pane, closes the panel but does not stop monitoring the call center.

To stop monitoring a call center, deselect the *Monitor* check box for the call center in the *Edit Queue Favorites* dialog box.

For information about showing or hiding a call center in the *Queued Calls* pane, see section *Show or Hide Call Center Panels*.

## MODIFY NUMBER OF CALLS TO DISPLAY

For each Standard call center that you are monitoring, you can modify the maximum number of calls to be displayed and for each Premium call center you can modify the maximum number of calls that can be displayed in each priority bucket. The total number of calls to display for a call center cannot exceed 50.

1. In the Queued Calls pane, click **Options** and select the *Edit Queue Favorite Dialog* option. The Edit Queue Favorites dialog box appears.
2. For each Standard call center you are monitoring, set the total number of calls to display.
3. For each Premium call center you are monitoring, set the number of calls to display in each priority bucket. The total number of call in all priority buckets cannot exceed 50.

## SHOW OR HIDE CALL CENTER PANELS

You can show or hide call center panels for monitored queues. This is not the same as selecting queues to be monitored. For more information, see section *Select Call Centers to Monitor*.

To show/hide call center panels:

1. In the Queued Calls pane, click **Options**.
2. Select *View* and then select or unselect the names of the call centers. To show or hide all call centers, select or deselect *All*.

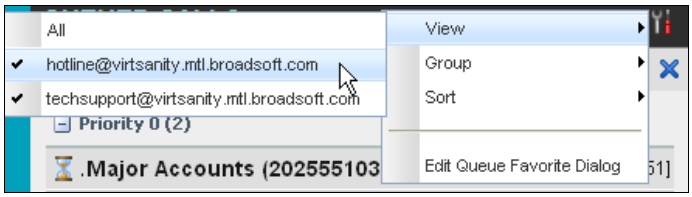



**Figure 114 Queued Calls – Options – View**

Alternatively to hide a call center, click the **Close** button . The call center is removed from the display but continues to be monitored.

**Note:** This does not apply to the Quick Link Queue. When you click the Close button for the Quick Link Queue, the queue is no longer monitored.

# VIEW QUEUED CALLS

You can selectively expand or collapse call center panels to show or hide calls in the monitored call centers.

To view queued calls for a call center:

Click the *Expand* button for that call center.

To view call details of a selected call:

Click that call.

# GROUP QUEUED CALLS

You can group queued calls by their priority bucket.

To group or ungroup queued calls:

1. In the *Queued Calls* pane, click **Options**.
2. From the drop-down list, select *Group,* and then select or deselect *Group by Priority*. This action applies to all monitored call centers.

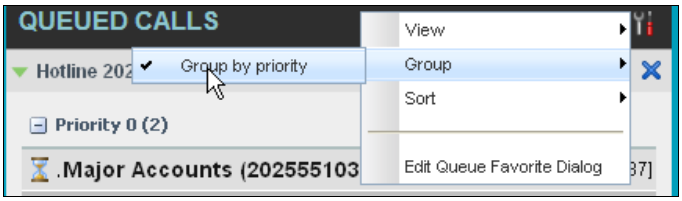



**Figure 115 Queued Calls – Options – Group**

3. To ungroup calls, unselect the *Group by Priority* option.

# ORDER QUEUED CALLS

Queued calls can be ordered according to their total waiting time or their waiting time in the current priority bucket.

To order queued calls:

1. In the *Queued Calls* pane, click **Options**.
2. Select *Sort* and then the ordering option you want. This operation applies to all monitored call centers.

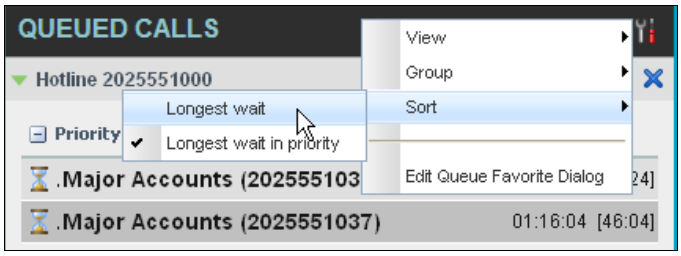



**Figure 116 Queued Calls – Options – Sort**

**Note:** The ordering does not work when calls are grouped. If required, first ungroup the calls.

## MONITOR NEXT CALL

You can silently monitor the next call that is received by a call center.

**Note:** To use this feature, you must have the Call Center Monitoring service assigned.

To monitor the call center's next call:

1. In the *Contacts* pane, expand the *Queues* panel and click the target call center to expand it.
2. Click the Monitor **Next Call** button SMN for that call center. A monitoring call is established for the selected call center.

When the next call is received and answered by an agent, you are conferenced in to the call and your call is muted. Both calls appear in the *Conference Call* panel.

To barge in on a call you are silently monitoring:

In the *Conference Call* panel, click **Barge In** BARGE. You are conferenced in to the call.

For information on operations that can be performed on conference calls, see section *Manage Conference Calls*.

## ENABLE NIGHT SERVICE OVERRIDE OR FORCED FORWARDING (PREMIUM CALL CENTER)

Call Center allows you to manually override the current mode of operation and enable the Night Service and/or Forced Forwarding of calls for selected call centers.

To enable Night Service Override and/or Forced Forwarding:

1. In the *Queued Calls* pane, click the **Service Mode** button in the panel for one of the call centers. The *Edit Queue Favorites* dialog box appears.

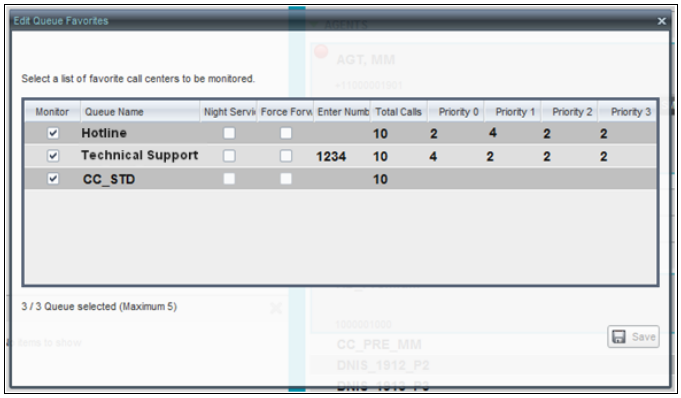



**Figure 117 Edit Queue Favorites Dialog Box**

2. For each call center for which you want to override the time schedule and manually initiate Night Service (including the Quick Link Queue if present), check the *Night Service Override* check box.

3. For each call center for which you want to divert calls to a specified destination temporarily (including the Quick Link Queue if present), check the *Force Forwarding* box and enter the phone number to which to forward the calls in the *Enter Number* box.

**Note:** Night Service Override has precedence over Forced Forwarding.

## RETRIEVE CALL FROM QUEUE

You can retrieve queued calls from the queue to your phone device.

To retrieve a call from a queue:

Click the call in the *Queued Calls* pane and click **Retrieve** RETRIEVE for that call.

Once you retrieve a call, the call appears in the *Call Console* and you treat it as any other call. For example, you can transfer it to an ad hoc number or to another queue. For more information, see section *Manage Calls*.

## PROMOTE CALL IN QUEUE (PREMIUM CALL CENTER)

A priority is attached to an incoming call based on the DNIS number on which it is received. Calls are distributed to the agents staffing the queue based on this priority, with calls of the higher priority being exhausted before calls in the next priority are distributed.

You can manually promote calls from a lower priority bucket to a higher priority bucket. A manually promoted call ends up as the last call in the higher priority bucket with a wait time of zero seconds.

To promote a call, that is to change its priority:

1. In the *Queued Calls* pane, expand a *Call Center* panel.
2. Click the call you want to promote and click **Promote** PROMOTE for that call.
   The queued call is promoted to the end of the next highest priority bucket.

## TRANSFER CALL TO ANOTHER QUEUE

To transfer a queued call to another queue:

1. In the *Queued Calls* pane, select the call to transfer.
2. In the *Contacts* pane, expand the *Queues* panel.
3. Click the target queue and click **Transfer** TXR for that queue.

   The call is transferred and removed from the queue.

## TRANSFER CALL FROM QUEUE TO AGENT

To transfer a call from a queue to an agent:

1. In the *Queued Calls* pane, select the call to transfer.
2. In the *Contacts* pane, expand the *Agents* panel.
3. Click the target agent and click **Transfer** TXR for that agent.

   The call is transferred and removed from the queue.

## TRANSFER CALL TO AD HOC NUMBER

To transfer a call to an ad hoc number:

1. In the *Queued Calls* pane, select the queued call.
2. In the *Dialer*, enter the destination number and click **Transfer** TXR.

**Figure 118 Ad Hoc Queue Transfer**

The call is transferred and removed from the queue.

## CHANGE POSITION OF CALL IN QUEUE

You can reorder a queued call in a Standard call center or in the “0” priority bucket in a Premium call center.

To change a call’s position in a queue:

1. In the *Queued Calls* pane, click the target call to expand it.

**Figure 119 Reordering Queued Call**

2. Click **Reorder** REORDER and select the new position in the queue from the list that appears.

   The call is placed in the new position.

**Notes:** You cannot place a call ahead of a bounced call.

The list can contain a maximum of 24 reorder positions, which you can choose from to reorder a call in queue, in addition to *Send to Back* and *Sent to Front* options.

## TRANSFER CALL TO TOP OF QUEUE (PREMIUM CALL CENTER)

If your administrator has configured the call center with the Transfer to Top feature, follow this procedure to transfer the call to the top of the queue.

You can only transfer a call to the top of the highest priority bucket (bucket with priority “0”).

There need to be at least two calls in the target queue.

1. In the *Queued Calls* pane, click the target call to expand it.

2. Click **Reorder** REORDER and select *Send to Front* from the list that appears.

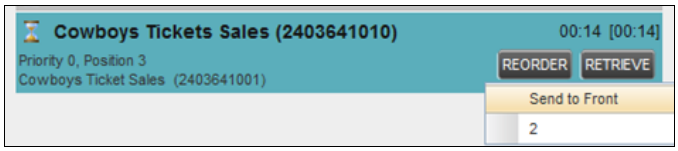



**Figure 120 Transferring Call to Top of Queue**

# VIEW REAL-TIME STATISTICS (SUPERVISOR)

Call Center provides you with real-time information about supervised agents and queues. This information is displayed in the Dashboard. You can also navigate to a selected agent or a queue directly from the Dashboard.

## DISPLAY DASHBOARD

To access the Dashboard:

Click the **Dashboard** link at the top right-hand side of the main interface window. The *Dashboard* is launched in a separate window and can be open at the same time as other Call Center windows.

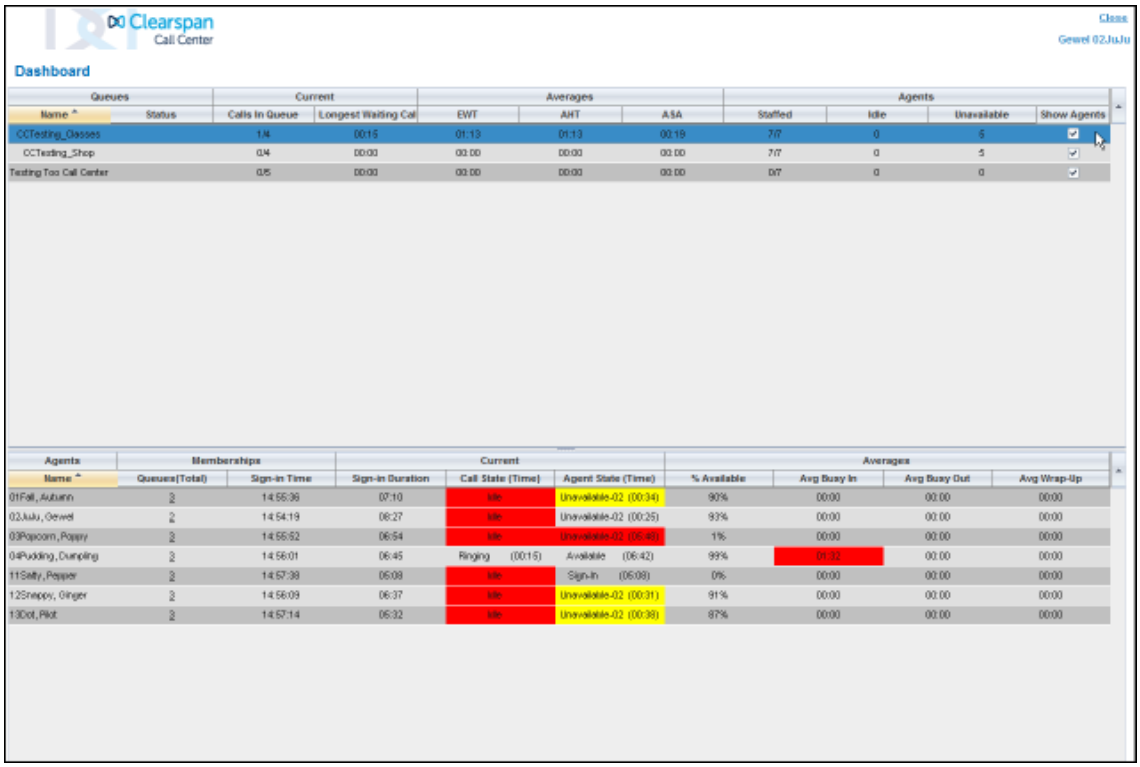



**Figure 121 Dashboard**

The *Dashboard* is divided into two parts with queue information in the top half and agent information in the bottom half. The information is updated at a configurable refresh rate. The default is 5 seconds.

By default, information about agents is hidden.

To view agents staffing a call center:

Check the *Show Agents* check box in the row for that call center.

Some fields are color-coded to provide visual indicators of threshold severity. Threshold values are configured by your administrator.

| SEVERITY | COLOR |
|---|---|
| 0 (no threshold crossed) | No color |
| 1 (yellow threshold crossed) | Yellow |
| 2 (red threshold crossed) | Red |

# QUEUE INFORMATION

The *Dashboard* displays each call center queue on a separate line and provides the following information about each queue:

- *Name* – This is the name of the call center.
- *Status (Premium call centers)* – This identifies the service mode in which the call center currently operates, 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 either to “Perform busy treatment” or “Transfer to phone number/SIP-URI”. Setting the action to “None” acts as if the Night Service policy was not triggered and the *Night Service/Night Service Override* status is not displayed in Call Center.

  - 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 Clearspan administrator to either “Perform busy treatment” or “Transfer to phone number/SIP-URI”. Setting the action to “None” acts as if the *Holiday Service* policy was not triggered and the *Holiday Service* status is not displayed in Call Center.

  - Forced Forwarding – All calls to this call center are forwarded to a specified destination.
  - Normal – Call center is in normal mode of operation; none of the above modes is enabled.

**Note:** When the call center is in Normal service mode, the *Status* field is empty.

- *Calls in Queue* –This is the number of queued calls expressed 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.
- *Long Waiting Call* –This is the waiting time of the call that has been in the queue the longest.
- EWT (Expected Waiting Time) –This is the expected waiting time of calls in the queue.
- *AHT (Average Handle Time)* –This is the average handling time for calls in the queue.
- *ASA (Average Speed of Answer)* –This is the average amount of time a caller spends in the queue before the call is offered to an agent.
- *Staffed (Agents)* –This is the number of agents managed by you that are in *Sign-In*, *Available*, *Unavailable*, or *Wrap-Up* ACD state, as a ratio of all agents managed by you for this call center.
- *Idle (Agents)* –This is the number of agents who are in the *Available* ACD state but presently not on a call.
- *Unavailable* –This is the number of agents who are signed in to the call center but not available to take calls.
- *Show Agents* –When this check box is selected, the agents who are joined in the call center are displayed in the *Agents* area of the *Dashboard*.

The fields that provide visual indicators are *Calls in Queue*, *Longest Waiting Time*, *EWT*, *AHT*, and *ASA*.

## AGENT INFORMATION

The *Dashboard* displays information about the agents for the selected queues.

To display agent information:

1. To select the queues for which you want to view agents’ information, check the *Show Agents* box on the lines for the queues in the *Queues* area of the *Dashboard*.
2. To hide signed-out agents, check the *Hide Signed Out Agents* box at the top-right corner of the *Dashboard*.

**Figure 122 Dashboard – Hide Signed Out Agents Box**

The following information is provided for each displayed agent:

- *Status* – This is the agent's combined phone and ACD state. For more information, see section Agent Phone and ACD States.

  Note that the Status column is only sorted by the ACD state and it ignores the phone state.

- *Name* –This is the agent's name.
- *Queues (total)* – This is the total number of queues to which the agent is assigned. This number is a link, which when clicked, opens a dialog box that lists the agent's queues.
- *Sign-In Time* – This is the agent's most recent sign-in time.
- *Sign-In Duration* –This is the amount of time that the agent has been signed in.
- *Call State (Time)* –This is the call state and time on the current call. The call state can be Idle, Ringing, or On a call. If an agent is in multiple calls, the call time reflects the time of the longest running call. When a call is released, then the call time reflects the time on the remaining calls.
- *Agent State (Time)* –This is the agent ACD state and time. If an agent is unavailable, the unavailable code is shown.
- *% Available* –This is the time that the agent was available to take calls shown as a percentage of the duration of the current sign-in.
- *Avg Busy In* –This is the average time spent by the agent on an incoming ACD call.
- *Avg Busy Out* –This is the average time spent by the agent on an outgoing ACD call.
- *Avg Wrap-Up* –This is the average time spent by the agent in a post call wrap-up.

Fields that provide visual indicators are Call State (Time), On Call, Idle, Agent State (Time), Unavailable, Avg Busy In, Avg Busy Out, and Avg Wrap-Up.

The *Dashboard* is designed to be used together with the *Queued Calls* pane and the *Agents* panel in the *Contacts* pane. The *Dashboard* provides you with a real-time view of agents and queues, while the *Agents* panel and *Queued Calls* pane allow you to take actions on monitored agents and ACD calls. For more information about the actions you can take to manage agents and queued calls, see sections *Manage Agents (Supervisor)* and *Manage Queued Calls (Supervisor)*.

## SELECT INFORMATION TO DISPLAY

By default, Call Center displays information about call centers and agents as described in sections *Queue Information* and *Agent Information*. You may however modify what information you want to appear in the *Dashboard*.

To select information to display:

1. Right-click the first row in the queued calls or agents table.
2. From the menu that appears, select *Columns*.
3. From the list of available columns, uncheck the columns you want to hide and check the columns you want visible.

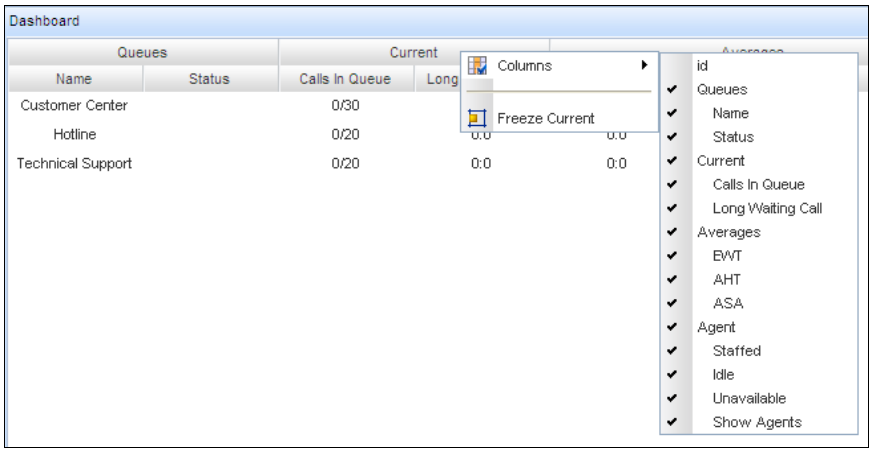



**Figure 123 Dashboard – Select Columns to Display**

4. When you are done, click anywhere in the *Dashboard* outside the menu.

## NAVIGATE TO AGENT IN AGENT DIRECTORY OR QUEUE IN QUEUED CALLS PANE

Call Center allows you to navigate to a call center queue in the *Queued Calls* pane or to an agent in the *Agents* directory directly from the *Dashboard*.

If the selected queue is currently not monitored, the application starts monitoring the queue as a special queue, called Quick Link Queue, which does not count toward the maximum of five queues that can be monitored. You can perform normal call operations on calls in the Quick Link Queue.

- When you close the Quick Link Queue, Call Center stops monitoring the queue and the queue is removed from the *Queue* pane.
- When you click a non-monitored queue while there is already a queue monitored as Quick Link Queue, the new queue replaces the old queue as the Quick Link Queue and Call Center stops monitoring the old queue.

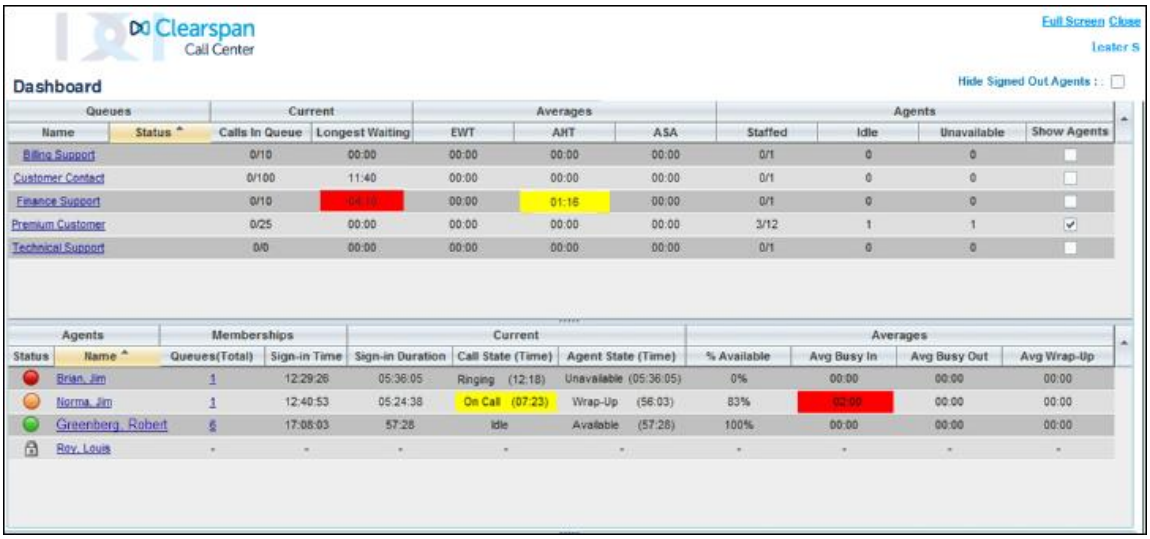



**Figure 124 Dashboard – Navigate to Queue or Agent**

1. To navigate from the *Dashboard* to a call center queue in the *Queued Calls* pane, click the name of the queue. The main window is brought to the foreground and the selected queue is displayed with an expanded listing of calls in the queue. All other queues are collapsed.

**Figure 125 Queued Calls Pane – Quick Link Queue**

2. To navigate from the *Dashboard* to an agent in the *Agents* directory, make sure that the *Show Agents* check box (on the row for the queue the agent is staffing), is checked and then click the agent's name. The main window is brought to the foreground and the selected agent is displayed expanded in the *Agents* panel.

# GENERATE REPORTS

Call Center provides reporting functions to agents and supervisors. Agents can only generate reports about their own activity whereas supervisors have access to reports on activity and performance of agents and call centers under their supervision.

The Reporting feature allows you to run reports and schedule reports to run in the future using predefined templates. Reports can be of type *Agent* or *Call Center*.

The report templates available to you depend on how your administrator has configured your system.

You use the Reporting link at the top of the main interface to access pages used to generate and schedule reports.

**Figure 126 Main Interface (Top of Window)**

This section provides an example of a report. For the list of canned report templates available on Clearspan for report generation, see the *Clearspan Call Center Reports Guide*.

## RUN REPORT

To run a report:

1. Click the Reporting link at the top right-hand side of the main window. A *Report* window appears.

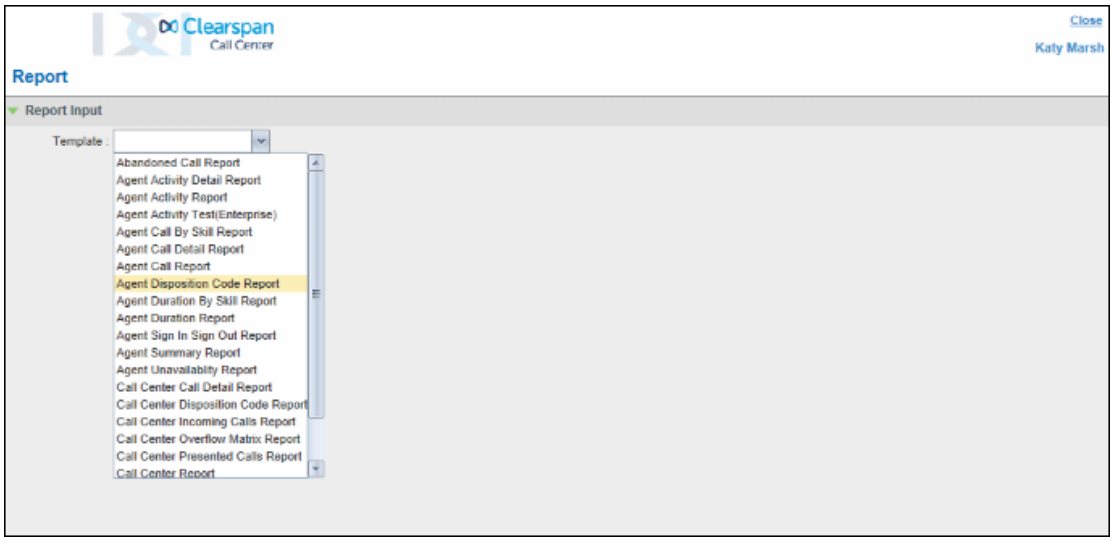



**Figure 127 Report Window**

2. Select a report template from the drop-down list. The page displays the input parameters for the report.

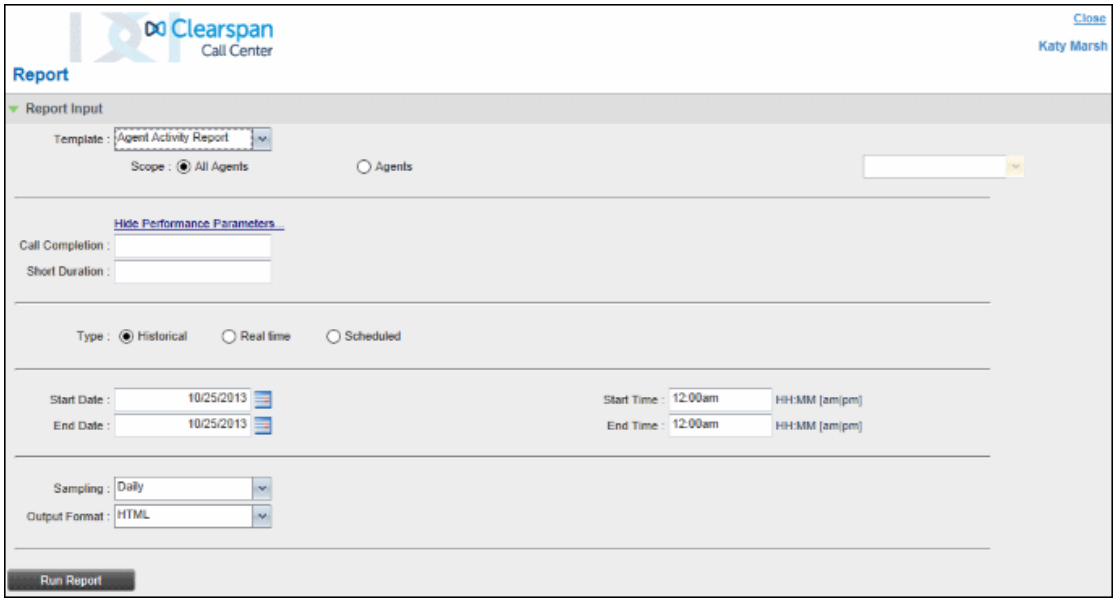



**Figure 128 Abandoned Call Report – Running Report**

3. Fill in the required information. The input that you need to provide depends on the template you select and the report type. The following table explains the input parameters for all reports.

| INPUT FIELD | DESCRIPTION | ALLOWED VALUE |
|---|---|---|
| *Scope* | For Agent Reports, it allows you to specify the agents to include in the report. You can check All Agents or Agents. If you check Agents, select agents from the drop-down list.<br><br>**NOTE**: This parameter is disabled when an agent runs the report, since agents can only run reports about themselves. | All Agents, Agents |
| | For Call Center Reports, it specifies the call centers or DNIS numbers to include in the report. You can check All Call Centers, Call Center, or DNIS.<br><br>• If you check Call Center, select call centers from the drop-down list.<br><br>• If you select DNIS, select a call center and DNIS numbers from the drop-down lists. For DNIS you can also select ALL DNIS. | All Call Centers, Call Center, DNIS |
| *Call Completion* | This setting is used to count the number of ACD calls an agent has completed within a service level during the specified interval. The Call Completion service level can be set to “1” through “7200” seconds. | 1 through 72000 |
| *Short Duration* | This setting is used to count the number of ACD short duration calls completed by an agent during an interval. You can set the maximum length of a short duration call to “1” through “7200” seconds. | 1 through 7200 |
| *Service Level* | This setting allows you to provide up to five service levels, used to perform service-level calculations for each call center or DNIS. Each service level can be set to “1” through “7200” seconds. | 1 through 7200 |
| *Service Level Options* | These settings are used to determine whether certain types of calls should be included in the service-level calculations:<br><br>• Check Include overflow time transfers in service level to include calls transferred due to time overflow.<br><br>• Check Include other transfers in service level to include calls transferred for other reasons.<br><br>• Select one of the following options for abandoned calls:<br><br>  ○ Exclude Abandoned Calls to exclude all abandoned calls<br><br>  ○ Include All Abandoned Calls to include all abandoned calls<br><br>  ○ Include All Abandoned Calls Except Before Entrance Completes to include calls abandoned after the entrance message has finished playing<br><br>  ○ Include Abandoned Calls Except in Defined | These options can be checked or unchecked. |

| INPUT FIELD | DESCRIPTION | ALLOWED VALUE |
|---|---|---|
| | Interval to include calls abandoned after the time specified by the abandoned call interval parameter. | |
| *Abandoned Call Interval* | If you selected the Include Abandoned Calls Except in Defined Interval option, enter the desired interval in this text box in seconds. | 1 through 7200 |
| *Service Level Percentage* | This setting allows you to specify the service-level objective (expressed as a percentage of calls). | |
| *Type* | This can be checked as Historical or Real time.<br>• Historical reports show data from the assigned start date to the assigned end date.<br>• Real-time reports show data from the assigned start date to the present, with the current interval refreshed with real-time data.<br>Real-time reports for individual agents contain data for each time interval, 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. | Historical or Real time |
| *Start Date* | This is the date when you want the report to start. 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:<br>• 180 days of half-hour interval statistics<br>• 365 days of hourly interval statistics<br>• 730 days of daily interval statistics | MMM DD, YYYY |
| *Start Time* | This is the time when you want the report to start. 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. | 1:00am through 12:59am, 1:00pm through 12:59pm, or 0:00 through 23:59 |
| *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 the Calendar icon. This is required when a Historical report is selected. | MMM DD, YYYY |
| *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 required when a Historical report is selected. | 1:00am through 12:59am, 1:00pm through 12:59pm, or 0:00 through 23:59 |
| *Sampling* | This sampling period is only applicable to interval-based report templates and determines how the report information is presented. For example, an hourly report displays information for each hour of the report time frame. | 15 minutes, 30 minutes, Hourly, Daily, Weekly, Monthly |
| *Output Format* | This allows you to specify in what format you would like the report output to be generated. If you select Hypertext Markup Language (HTML) or PDF, the report | PDF, XLS, HTML |

| INPUT FIELD | DESCRIPTION | ALLOWED VALUE |
|---|---|---|
| | in displayed in the Report window. If you select Excel File Format (XLS), a file is created that you can save on your computer. | |

4. Click Run Report.

   The results of the report are displayed in the *Report Output* area of the window. See the following section for an example of a report.

**Note:** Adobe Reader 10.01 has a setting *Enable Protected Mode at startup,* which is enabled by default. If you select the PDF report format and are using Adobe Reader 10.01 (or later, which has this setting), you need to disable the setting; otherwise, report results are not displayed.

To disable the protected mode in Adobe Reader, perform the following steps.

1. Close all opened Internet Explorer and Adobe Reader instances.
2. Open Adobe Reader.
3. From the menu bar, select *Edit* and then *Preferences*. The *Preferences* dialog box appears.
4. From the *Categories* menu on the left, select *General*.

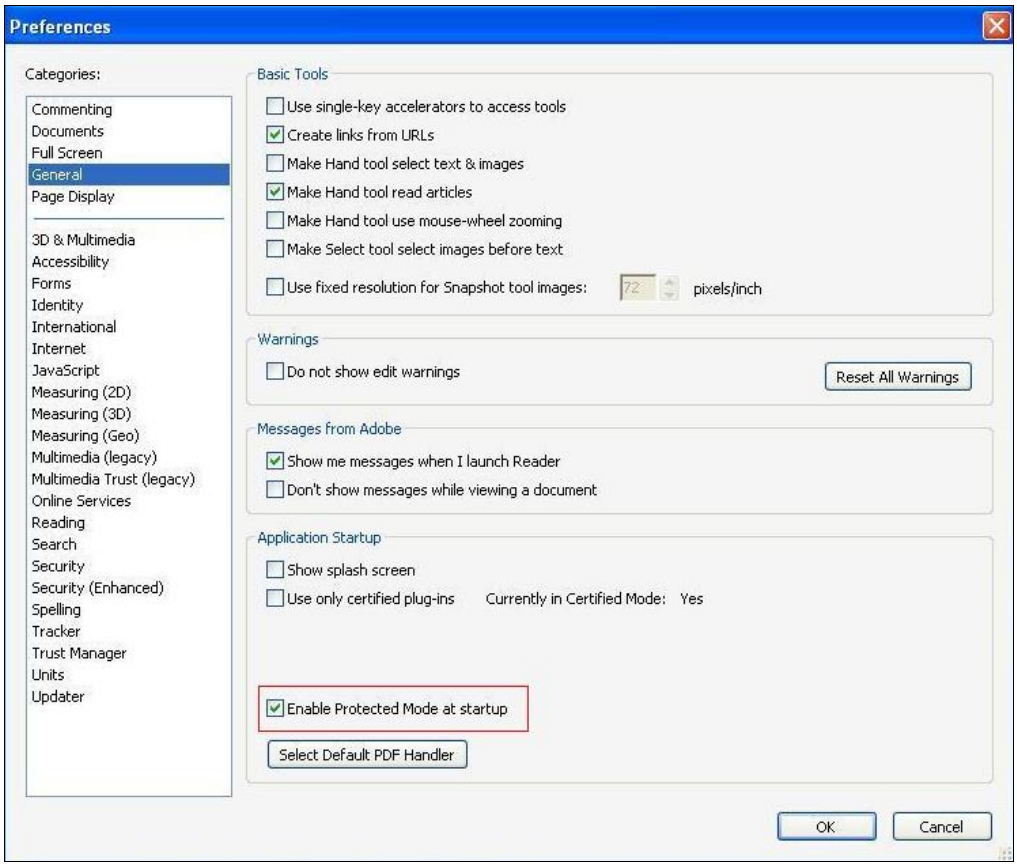



**Figure 129 Preferences – General**

5. Uncheck *Enable Protected Mode at startup*.
6. Click **OK**.
7. Close Adobe Reader.

## *Report Results (Example)*

Depending on the report type, the report results can contain the following elements: A pie chart, a bar chart, a table, a high-water marks table, and a line chart.

If you select HTML or PDF report format when requesting a report, the report is displayed in the *Report* window. If you select XLS, a file is created that you can save on your computer.

This section provides an example of a report: Abandoned Calls Report. For more information on the reports available in Call Center, see the *Clearspan Call Center Reports Guide*.

The results of the Abandoned Calls Report are presented in a bar chart and table.

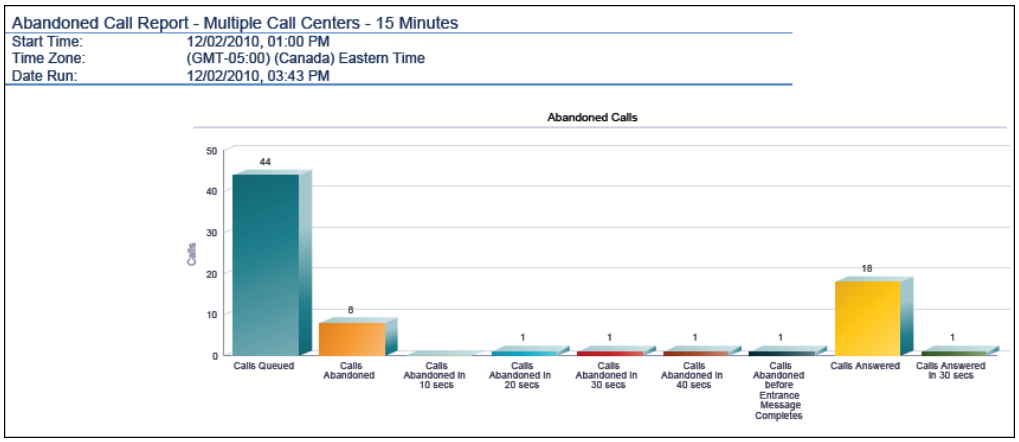
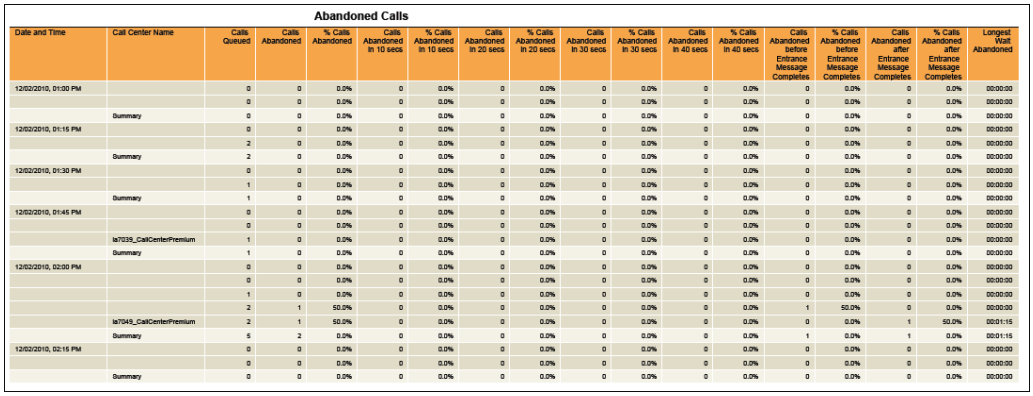



**Figure 130 Abandoned Calls Report – Bar Chart**



Abandoned Calls

| Date and Time | Call Center Name | Calls Queued | Calls Abandoned | % Calls Abandoned | Calls Abandoned in 10 secs | % Calls Abandoned in 10 secs | Calls Abandoned in 20 secs | % Calls Abandoned in 20 secs | Calls Abandoned in 30 secs | % Calls Abandoned in 30 secs | Calls Abandoned in 40 secs | % Calls Abandoned in 40 secs | Calls Abandoned before Entrance Message Completes | % Calls Abandoned before Entrance Message Completes | Calls Abandoned after Entrance Message Completes | % Calls Abandoned after Entrance Message Completes | Longest Wait Abandoned |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 12/02/2010, 01:00 PM | | 0 | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 00:00:00 |
| | | 0 | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 00:00:00 |
| | Summary | 0 | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 00:00:00 |
| 12/02/2010, 01:15 PM | | 0 | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 00:00:00 |
| | | 2 | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 00:00:00 |
| | Summary | 2 | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 00:00:00 |
| 12/02/2010, 01:30 PM | | 0 | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 00:00:00 |
| | | 1 | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 00:00:00 |
| | Summary | 1 | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 00:00:00 |
| 12/02/2010, 01:45 PM | | 0 | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 00:00:00 |
| | | 0 | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 00:00:00 |
| | la7039_CallCenterPremium | 1 | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 00:00:00 |
| | Summary | 1 | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 00:00:00 |
| 12/02/2010, 02:00 PM | | 0 | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 00:00:00 |
| | | 0 | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 00:00:00 |
| | | 1 | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 00:00:00 |
| | | 2 | 1 | 50.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 1 | 50.0% | 0 | 0.0% | 00:00:00 |
| | la7049_CallCenterPremium | 2 | 1 | 50.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 1 | 50.0% | 00:01:15 |
| | Summary | 5 | 2 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 1 | 0.0% | 1 | 0.0% | 00:01:15 |
| 12/02/2010, 02:15 PM | | 0 | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 00:00:00 |
| | | 0 | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 00:00:00 |
| | Summary | 0 | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 0 | 0.0% | 00:00:00 |

**Figure 131 Abandoned Calls Report – Table (Fragment)**

## SCHEDULE REPORT

To schedule reports, your company (group or enterprise) must have Enhanced Reporting enabled. For more information, see your administrator.

To schedule a report:

1. Click the **Reporting** link at the top right-hand side of the main window. A *Report* window appears.

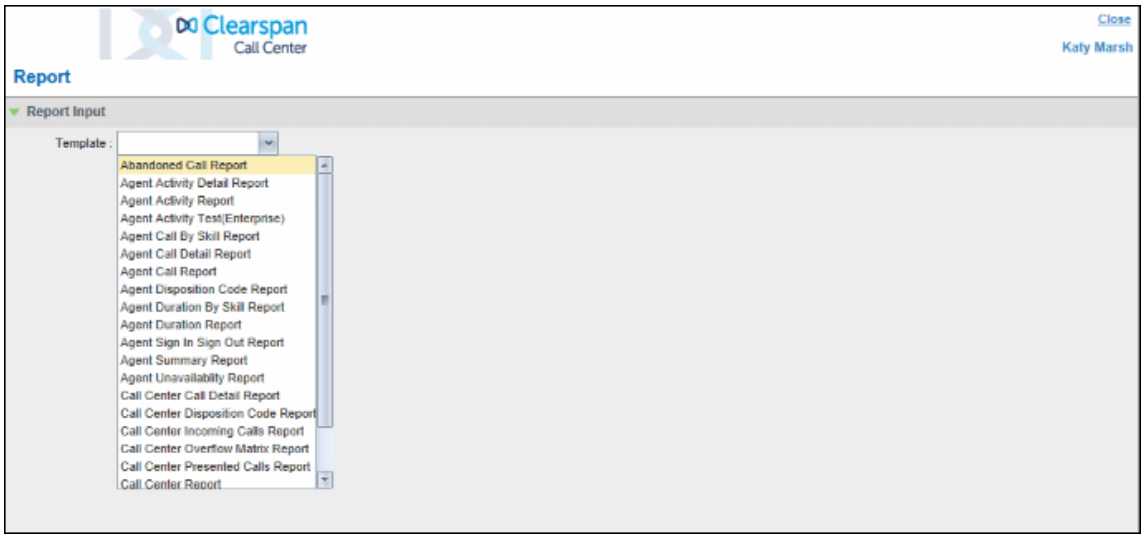



**Figure 132 Report Window – Report List**

2. Select a report template from the drop-down list. The page displays the input parameters for the report.

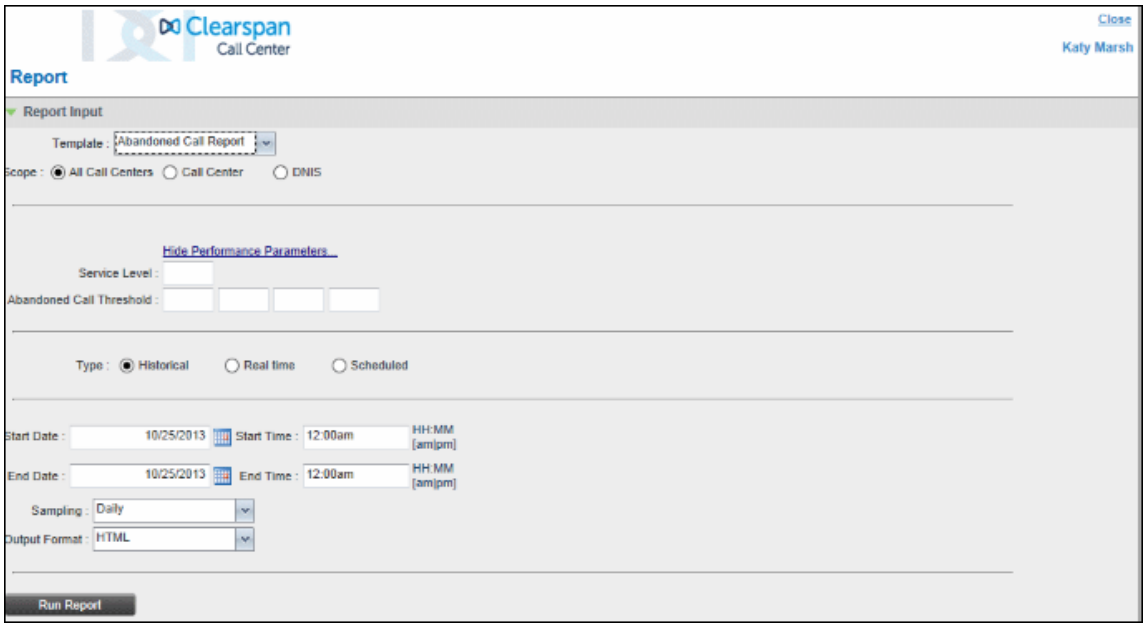



**Figure 133 Scheduling Report (Abandoned Call Report)**

3. For *Type*, select *Scheduled*.

4. Provide the name and the description of the report.

5. Specify the recurrence pattern of the report. From the *Recurs* drop-down list, select one of the following options: *Never, Daily, Weekly, Monthly*, or *Yearly*. Never signifies that this is a one-time report.

- If you selected Daily, enter the frequency of recurrence in days.

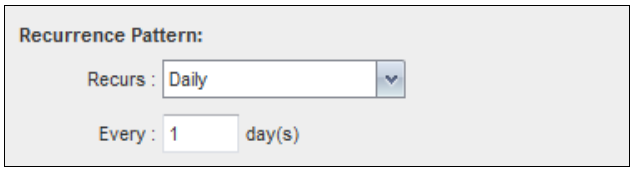



**Figure 134 Scheduled Report – Daily Recurrence Pattern**

- If you selected Weekly, enter the frequency of occurrence in weeks and select the day of the week when you want the report to be generated.

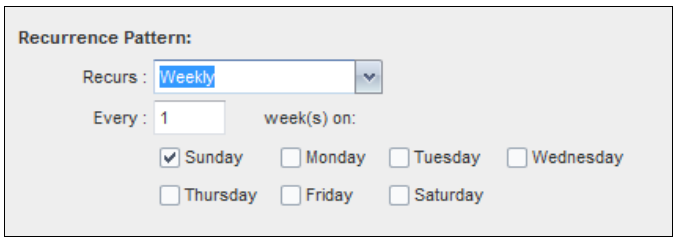



**Figure 135 Scheduled Report – Weekly Recurrence Pattern**

- If you selected Monthly, enter the frequency of occurrence in months and specify the day when you want the report to be generated. Select one of the following options:
  - To schedule the report on a specific day of the month, for example, the twenty-seventh, check Day <X> of the month and enter the day.
  - To schedule the report on a specific day of the week within the month, for example the second Monday of the month, check The <X> <Day of week> of the month and select X and Day of week from the drop-down lists.

**Figure 136 Scheduled Report – Monthly Recurrence Pattern**

  - If you selected *Yearly*, specify the frequency of occurrence in years, for example every two years, and specify the day for the recurrence of the report. Select one of the following options:
    - To schedule the report on a specific day of the year, check Day <X> of <Month> and select the day and the month.
    - To schedule the report on a specific day of the week and month, for example, the first Sunday of January, check The <X> <Day of week> of <Month> and select X, Day of week, and Month from the drop-down lists.

**Figure 137 Scheduled Report – Yearly Recurrence Pattern**

**6.** Specify when the report should run.

- For a non-recurrent report, specify the actual date and time to generate the report.

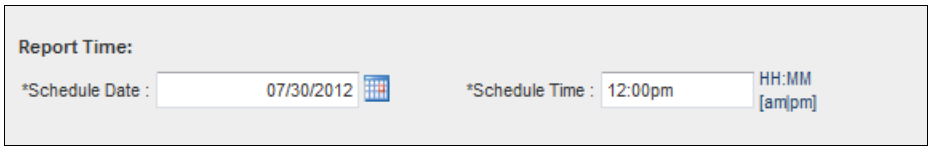



**Figure 138 Report Time for a Non-recurrent Report**

- For a recurrent report, specify when the report should be generated for the first time.

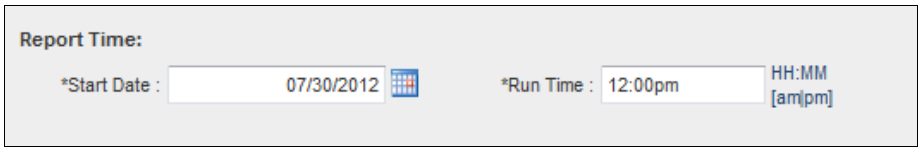



**Figure 139 Report Time for a Recurrent Report**

**Note:** The start date and run time (and for weekly reports the day of the week) determine when the report is generated for the first time. The subsequent times are determined by the recurrence pattern and range.

**7.** For a recurrent report, specify when the reporting should end. For *Recurrence Range*, select from the following options:

- Never
- After <X> occurrences, and enter the number of occurrences
- Date, and select a date from the calendar

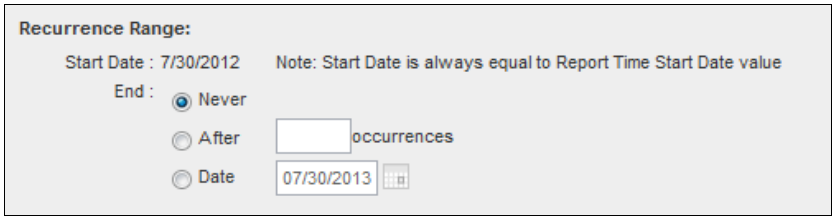



**Figure 140 Scheduled Report – Recurrence Range**

**8.** Specify the report time frame, that is, the period for which you are requesting the report.

- For a non-recurrent report, enter the actual dates and times.

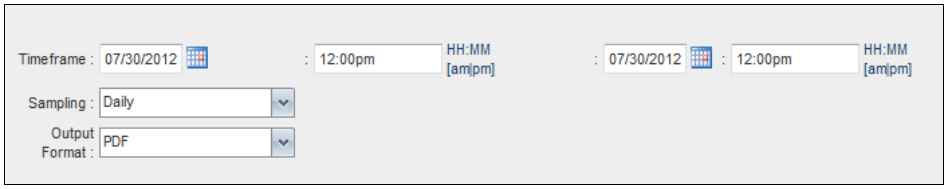



**Figure 141 Report Timeframe for a Non-recurrent report**

- For a recurrent report, select the time frame relative to the report generation time, for example, the previous month, previous five days, and so on.

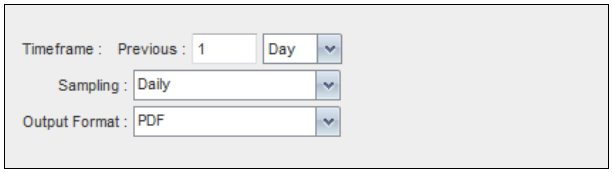



**Figure 142 Report Timeframe for Recurrent Report**

**Note:** A report time frame always has a beginning date and time and an end date and time. For a recurring report the relative time frame is converted to the actual dates and times at the moment when the report is run.

The actual time frame always starts at the top of the hour, day, week, month, or year and is based on the selected time zone and day of the week. For example, if a report is scheduled to run every day at 5:45 P.M. for the previous two hours, then the actual time frame of the report is from 3:00 P.M. to 5:00 P.M. of the day when the report is run.

**9.** Specify the sampling frequency. From the *Sampling* drop-down list, select a frequency.

**10.** Specify the output format of the report. From the *Output Format* drop-down list, select a format, for example, PDF.

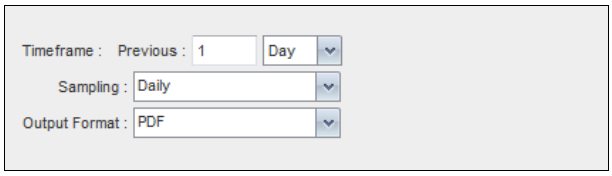



**Figure 143 Report Sampling and Output Format**

**11.** Enter the e-mail addresses of the recipients of the report.

**12.** Enter the remaining parameters, as required. For the description of the remaining parameters, see section Run Report.

**13.** Click **Schedule Report**.

The report is scheduled. It is run at the specified times and sent to the recipients configured in the report schedule.

## MANAGE SCHEDULED REPORTS

You can list, modify, and delete scheduled reports.

To manage scheduled reports:

**1.** Click the Reporting link at the top right-hand side of the main window. A Report window appears.

**2.** From the drop-down list, select *Scheduled Reports*. A *Scheduled Reports* dialog box appears, listing the reports that you have scheduled.

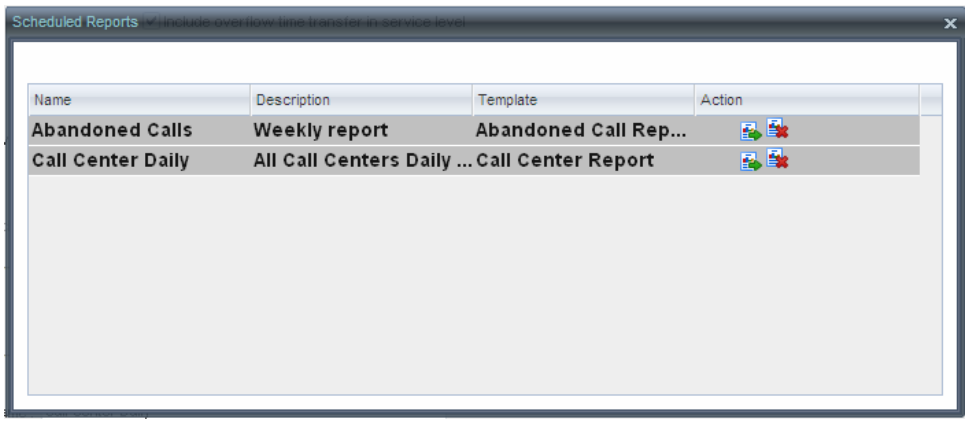



**Figure 144 Scheduled Reports Dialog Box**

**3.** To edit a report, click the **Load** button in the row for the report, and modify the report as required.

**4.** To delete a report, click the **Delete** button in the row for the report.

# CONFIGURE CALL CENTER

You use the *Settings* page, accessed via the Settings link at the top right-hand side of the main page to configure various aspects of the Call Center application.

To return to the main interface, click the **Back To Application** link.

**Note:** Do **not** use the internet browser's Back button to return to the main interface.

This section provides information about the options that you can use to configure Call Center.

- Settings – General
- Settings – Application
- Settings – Services
- Settings – Plug-ins
- Settings – Messaging
- Settings – Report
- Settings – About

**Note:** Depending on your system configuration, some settings may not be available.

## SETTINGS – GENERAL

You use the General tab to configure miscellaneous settings that improve the usability of Call Center.

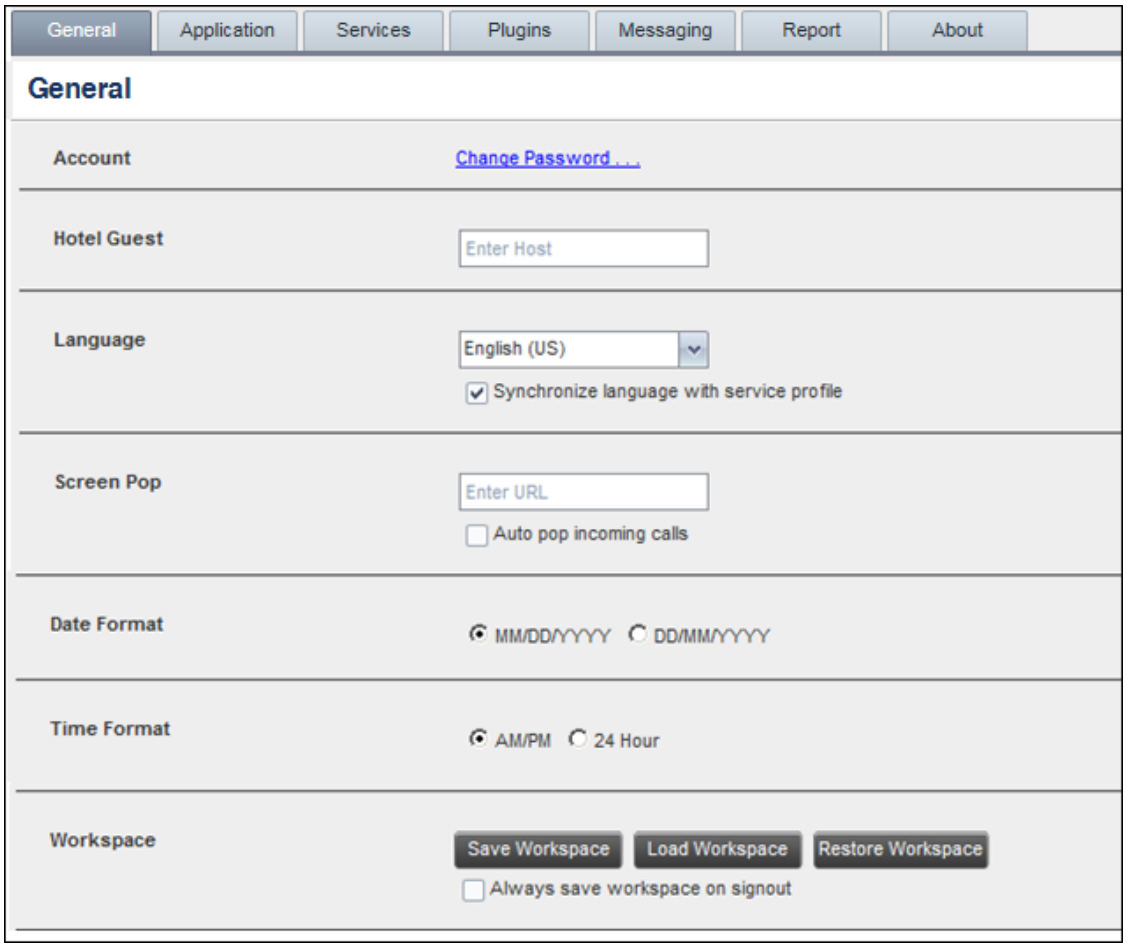



**Figure 145 Settings – General**

The following subsections describe the settings that can be configured on this page.

## ACCOUNT

You use this area to change your Clearspan password.

Call Center shares logon credentials with Clearspan. So when you change your password in Call Center, remember to use this new password when accessing your web portal.

**Note:** The password you enter must meet the password requirements set on Clearspan.

To change your password:

1. Click the **Change Password** link. The section expands, allowing you to change your password.

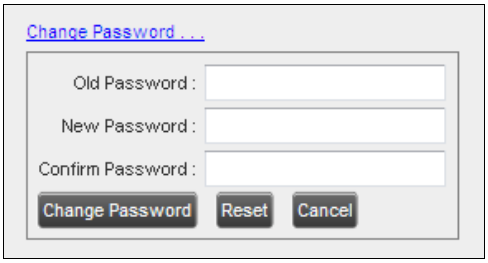



**Figure 146 Account – Change Password**

2. Enter your current and new password and click **Change Password**.

   Note that the *Reset* button does not reset your password. It only clears the input boxes.

## HOTEL/FLEXIBLE SEATING HOST

This setting allows you to configure the Hoteling Host or Flexible Seating Host, which is required when you use Call Center from a Hoteling desk/device. This way you do not need to enter this information every time you sign in to Call Center if you use the same Hoteling or Flexible Seating device.

In the text box, enter the user name of the Hoteling Host or Flexible Seating Host who corresponds to the desk/device you are using, for example, “station_224@acme.com”.

## LANGUAGE

The language settings allow you select the language of the Call Center user interface.

- The drop-down list lists the languages available in your edition of Call Center. To change the language, select a new language from the list.
- *Synchronize language to my profile* – This box, when checked, synchronizes the Call Center language with your Clearspan profile and ignores the language selection on this page.

## SCREEN POP

You use the screen pop settings to configure the URL that may be launched on incoming calls.

- *Enter URL* – This text box allows you to enter the URL address of the web page that Call Center opens using the default browser when you click the **Web Pop URL** button in the *Call Notification* pop-up window.

- *Auto pop for incoming calls* – When this option is checked, Call Center launches the Web Pop URL without your having to click the Web Pop URL button in the *Call Notification* pop-up window for each incoming call.

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=__S
ERVICE_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 Clearspan ID (Note that in this case the "user" is the Clearspan 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 Clearspan group to which the user belongs
- __SERVICE_PROVIDER__: The name of the Clearspan service provider to which the user belongs
- __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", "Outgoing", or "Alerting"
- __DNIS_NAME__: The name of the DNIS on which the call was received
- __DNIS_PHONE__: The phone number of the DNIS on which the call was received
- __REDIRECTED_NAME_1__ , __REDIRECTED_NAME_2__, and so on: The name of a party to whom the call was redirected prior to being delivered to you, from the most recent to the least recent
- __REDIRECTED_PHONE_1__, __REDIRECTED_PHONE_1__, and so on: The phone number of a party to whom the call was redirected prior to being delivered to you, from the most recent to the least recent
- __REDIRECTED_USERID_1__, __REDIRECTED_USERID_1__, and so on: The user ID of a party to whom the call was redirected prior to being delivered to you, from the most recent to the least recent

**Note:** The maximum number of redirections that can be displayed on a *Web Pop URL* page is configured by your administrator.

## DATE FORMAT

This setting allows you to select the format for displaying dates in reports. The format is used for all dates that are included in generated reports. The possible options are:

- MM/DD/YYYY
- DD/MM/YYYY

## TIME FORMAT

This setting allows you to select the format for displaying time in reports. It is used for all times that are included in generated reports. The selected time format is also used to display the time in the chat logs. The possible options are:

- AM/PM
- 24 hours

Note that this setting does not impact the format in which event duration is reported in generated reports, which is always *DD:HH:MM:SS*.

## WORKSPACE

Call Center allows you to customize elements of your workspace, such as the size and placement of windows on the desktop. The system remembers the setup between sessions.

The following elements can be customized:

- The size and position of the web browser window in which the main interface is displayed
- The size of the panes (Call Console, Contacts, and Queued Calls)
- The size and position of the Dashboard window
- The size and position of any Report window

**Notes:** This functionality does not work in Internet Explorer, due to a technical limitation of Internet Explorer.

When a window is vertically resized, the panes do not always resize to fill the window. To resize a window, drag the window from the bottom right-hand corner or collapse and then expand the panes after resizing to adjust them to the window.

- *Save Workspace* – This button, when clicked, saves the current workspace.
- *Load Workspace* – This button, when clicked, arranges your workspace according to the last saved configuration.
- *Restore To Default* – This button, when clicked, restores the workspace to the system default configuration.
- *Always save workspace on signout* – When you sign out from the client, Call Center asks you whether you want to save your current workspace. To save your workspace automatically when signing out, without being asked, check the *Always save workspace on signout* box.

To customize your workspace:

1. Arrange the windows the way you like.
2. Click the **Save Workspace** button to save the current configuration. To restore the system default, click **Restore To Default**.
3. At any time to return to the last saved configuration, click the **Load Workspace** button.

## SETTINGS – APPLICATION

You use the Application tab to configure your application settings. The settings are different for agents and supervisors. They are described in the following subsections.

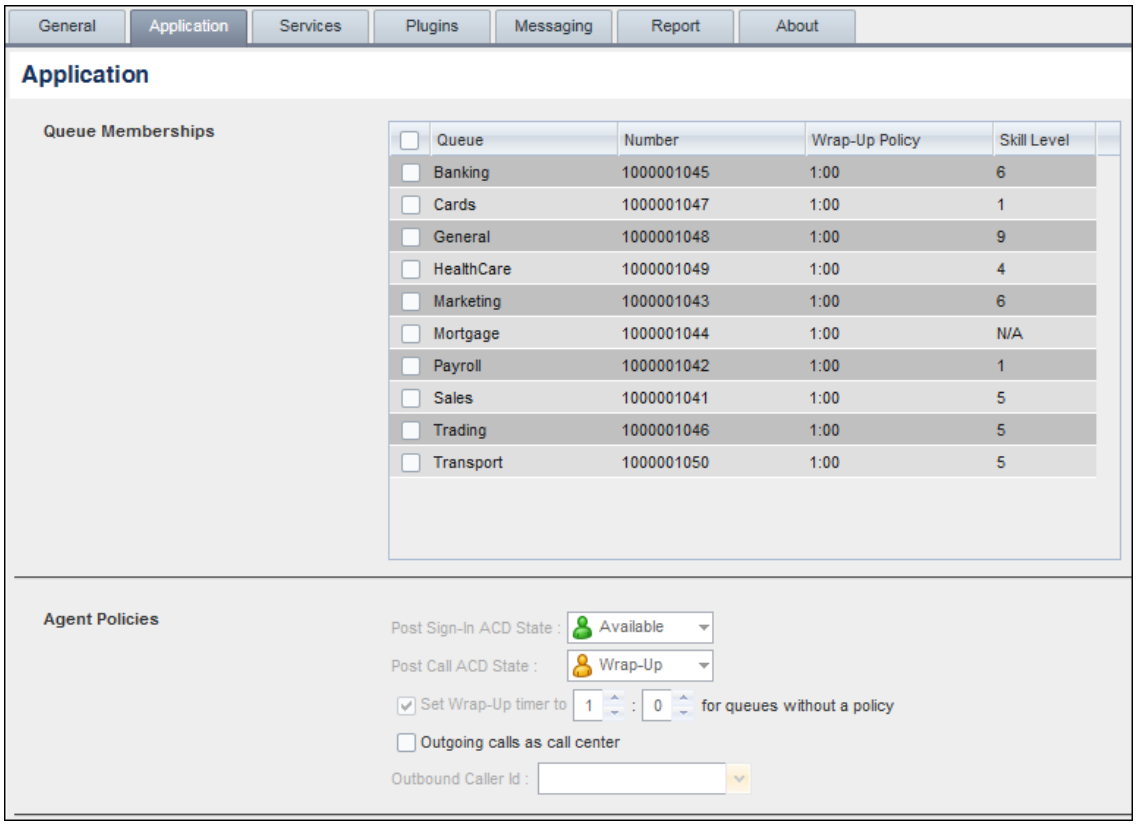



**Figure 147 Settings – Application (Agent)**

## QUEUE MEMBERSHIPS (AGENT)

These settings allow you to select the call center queues you wish to join. The table also displays your skill level in each queue (for more information, see section *Agent Skill Levels (Premium Call Centers)*.

1. To join a call center queue, select the check box on the line for the call center.
2. To join all queues, select the check box in the header.

**Note:** If you are not allowed to join/leave a queue, the line for the queue is dimmed and you can only view your join status in the queue. To change your join status in a queue, if you are not allowed to do it yourself, contact your administrator.

## AGENT POLICIES (AGENT)

You use agent policies settings to specify your post sign-in ACD state, post call ACD state, wrap-up timer, and outbound CLID:

- *Post Sign-In ACD State* – To configure your post sign-in ACD state, select a state from the *Sign-In State* drop-down list. Your ACD state is automatically set to the selected state when you sign in to Call Center.

If you selected *Unavailable* and unavailable codes are enabled for your organization, select an unavailable code from the drop-down menu.

- *Post Call ACD State* – To configure your post call ACD state, that is your ACD state upon completion of a call, select a state from the *Post Call State* list.

  If you selected *Unavailable* and unavailable codes are enabled for your organization, select an unavailable code from the drop-down menu.

  In most cases, when you select *Wrap-Up*, you must also configure your wrap-up timer.

- *Set Wrap-Up Timer to* – To set your post call wrap-up timer, check the *Set Wrap-Up Timer to <mm:ss> for queues without a policy* box and enter the time in minutes and seconds. Your ACD state automatically changes from *Wrap-Up* to *Available* after the specified period of time.

**Note:** Your post call wrap-up timer setting may be overridden if your administrator sets the timer to a smaller value on Clearspan.

- *Outgoing calls as call center* – Check this box to display a call center CLID instead of your phone number when you make a call.
- *Outbound Caller ID* – If you checked *Make outgoing calls as call center*, select the number to use from the drop-down menu.

## BARGE-IN & MONITOR (SUPERVISOR)

The following options only apply if you have the Directed Call Pickup with Barge-in and/or Call Center Monitoring services assigned. If the Call Center Monitoring service is not assigned, then the *Monitor* option is not visible.

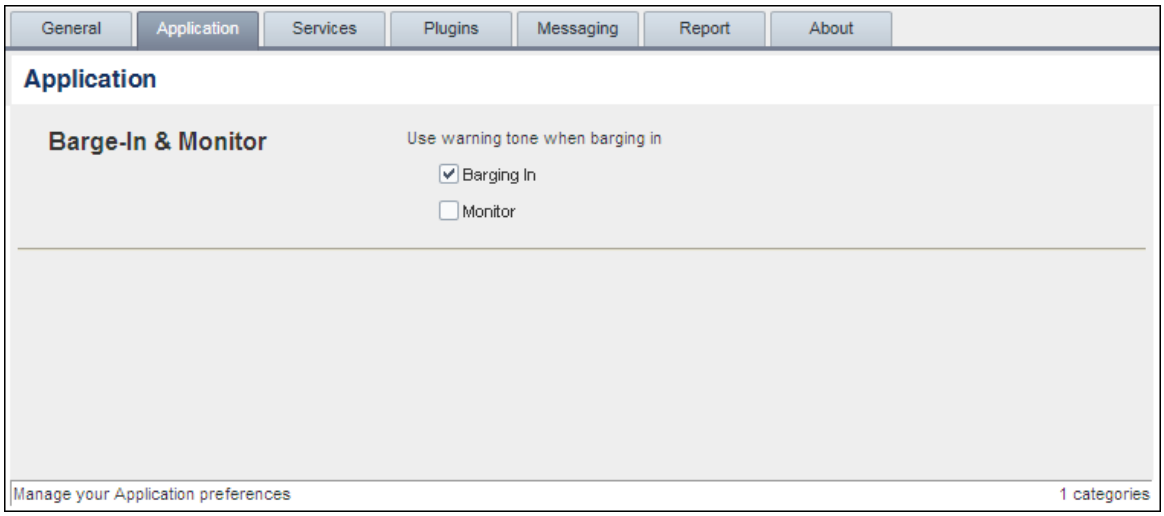



**Figure 148 Settings – Application (Supervisor)**

Use warning tone when:

- *Barging In* – When this option is set, the agent hears a warning tone when you barge in on their call.
- *Monitoring* – When this option is checked, the agent hears a warning tone when you start silently monitoring their call.

## SETTINGS – SERVICES

You use the Services tab to configure various services assigned to you by your administrator on Clearspan, which are integrated with Call Center. These settings are only available if you have been assigned such services. For more information, see your administrator.

The services are grouped into two categories: Active and Inactive.

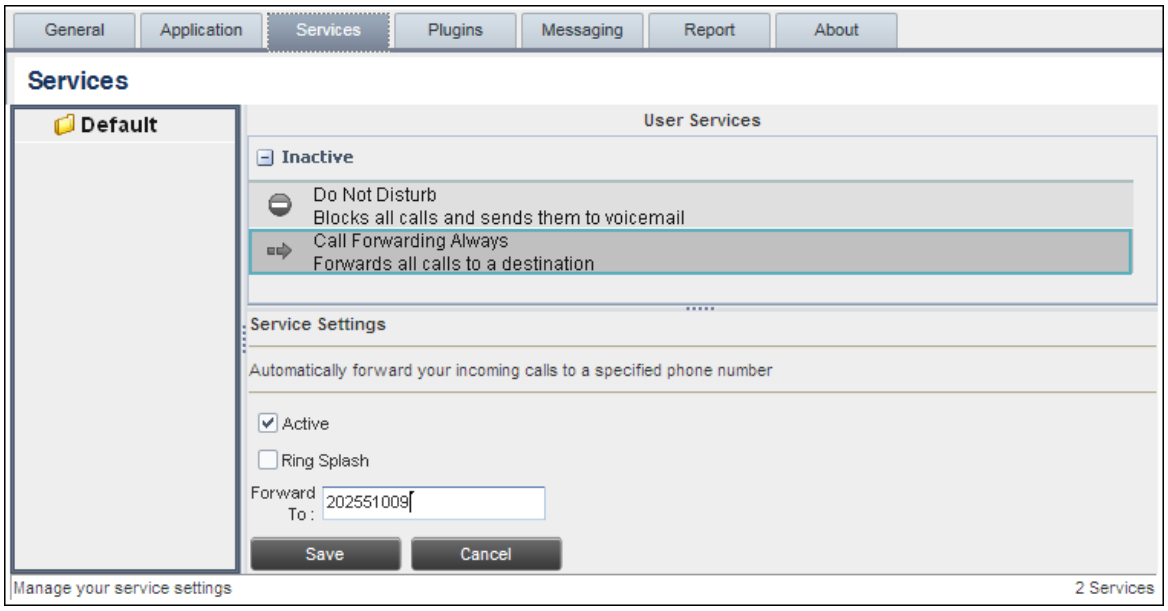



**Figure 149 Settings – Services**

The services that you can configure (if you have been assigned the services) are:

- *Do Not Disturb* – When you activate this service, you are not available to take calls, and all your calls are automatically sent to your voice mail.
- *Call Forwarding Always* – When you activate this service, you must provide the phone number to forward your calls to. When the service is active, all your calls are forwarded to the specified number.

To activate a service:

1. Select the service and check the *Is Active* box. The service is moved from the *Inactive* to *Active* category.
2. If you enabled the Call Forwarding Always service, in the *Forward To* box that appears, enter the number to forward your calls to.
3. To generate a ring splash for incoming calls, check the *RingSplash* option.
4. To save your changes, click **Save**.

## SETTINGS – PLUG-INS

You use the Plugins tab to configure the plug-in software used by Call Center to provide functionality such call notification, program shortcuts, and call log.

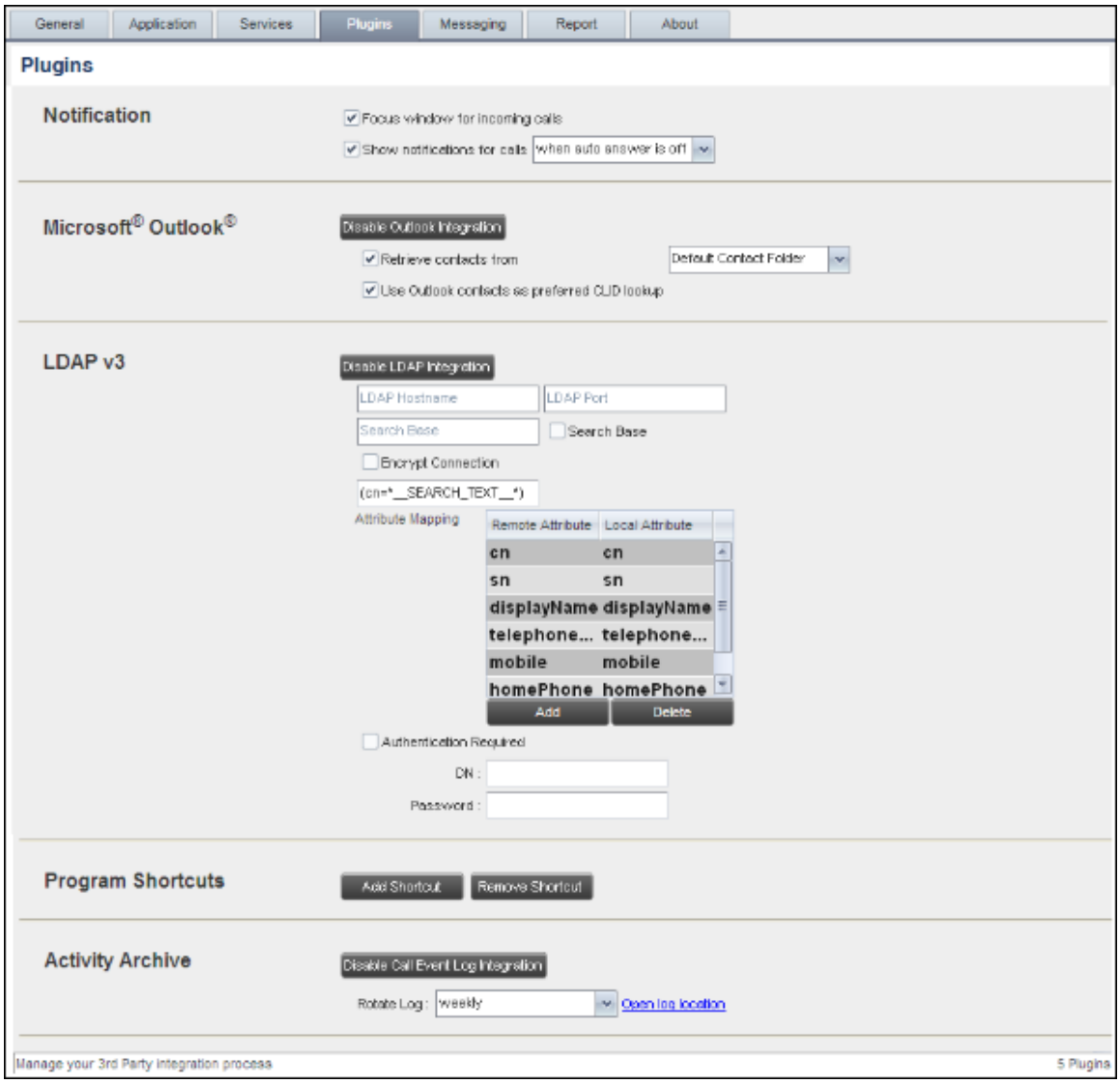



**Figure 150 Settings – Plugins**

## NOTIFICATION

These options control when and how call notifications are displayed. The options you can set are as follows:

- *Focus window for incoming calls* – When this option is checked and the browser window that is running Call Center is minimized, Call Center automatically restores the window on incoming calls.

  This does not work in Firefox. In Internet Explorer, you must have only one tab open in the web browser running Call Center.

- *Show notification for calls* – When this option is checked, Call Center displays the *Call Notification* pop-up window on top of other applications' windows when you receive a call. When you check this box, you need to select an option from the drop-down list to specify the condition under which notifications are displayed.

  This does not work if other tabs are open in the same web browser window as Call Center. In addition, if calls come within eight seconds of each other, the *Call Notification* pop-up window appears only for the first call of that series.

## MICROSOFT OUTLOOK

The Microsoft Outlook options control Outlook integration with Call Center. They are only visible if Outlook integration is enabled in Call Center.

The options you can set are as follows:

- *Enable/Disable Outlook Integration* – This determines whether Call Center integrates with Outlook to provide you with access to your Outlook contacts. If Outlook integration is disabled, the corresponding desktop plug-in software components are not downloaded from Clearspan.
- *Retrieve contacts from* – This option allows you to specify where to look for your Outlook contacts.
- *Use Outlook contacts as preferred CLID lookup* – When this option is checked, Call Center uses Outlook to try to identify a caller, when the caller ID is unknown.

**Note:** The Outlook Integration feature provides the following functionality: CLID lookup, saving vCards, and accessing and searching Outlook contacts. When using Microsoft Outlook 2010 or 2013 (32- or 64-bit edition), Outlook must be running before Call Center is launched for these functions to work.

## LDAP V3

LDAP settings allow you integrate an LDAP directory with Call Center. These options are only visible if LDAP integration is enabled in Call Center. If you do not know the appropriate settings, contact your system administrator.

Make sure you have correctly imported a valid certificate in the Java Keystore (JKS) with the keytool.

To import a certificate:

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/Disable LDAP Integration* – This determines whether Call Center provides LDAP directory lookup services. Clicking the **Enable LDAP Integration** button enables the controls for LDAP settings.
- *LDAP Hostname* – This is the network address of the LDAP server.
- *LDAP Port* – This is the port number for the LDAP server. This is compulsory and can be obtained from your system administrator.
- Search Base:
  - The text box determines the location in the LDAP server tree that Call Center looks in when executing a search.
  - The check box, when checked, searches all sub-trees within the search base until the specifications are found.
- *Encrypt Connection* – This option determines whether Call Center uses encryption when connecting to the LDAP server. Note that if encryption is enabled, you may have to use of a different port.
- *("cn=_ _Search_ _Text")* – This option 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.

- *Attribute Mapping* – This table controls the way that Call Center maps attributes returned from the directory server to columns displayed on the list of search results.

  In each row of the table, enter an LDAP attribute in the *Remote Attribute* column. In the *Local Attribute* column, enter a corresponding local attribute. Typical Remote Attribute values are “cn”, “sn”, “telephoneNumber”, “mobile”, “homePhone”, and “mail”.

- *Authentication Required* – When this box is checked, Call Center must provide a user name and password to the directory server to conduct searches.
- *DN* – This is the user name Call Center uses when connecting to the LDAP server when *Authentication Required* is checked.
- *Password* – This is the password that corresponds to the authentication *DN*.

### PROGRAM SHORTCUTS

You use the program shortcuts settings to create call center shortcuts on your desktop for convenient access to Call Center.

The program shortcuts plug-in allows for the creation of desktop shortcuts on a Windows platform, which when clicked, launches the applications in your default web browser.

- *Add Shortcut* – This button, when clicked, creates a call center shortcut on your desktop.
- *Remove Shortcut* – This button, when clicked, removes the previously created Call Center shortcut. If you did not create a shortcut using the Add Shortcut button, the Remove Shortcut button has no effect.

### CALL EVENT LOG

This plug-in software provides the ability to store call event statistics content locally on your computer.

- *Enable/Disable Call Event Log Integration* – This double-action button allows you to enable or disable call log archives on your computer.
- *Rotate Log* – This parameter allows you to specify the frequency with which the call log is rotated. You select the frequency from the drop-down list.
- *Open Log Location* – Click this link to go to the place on your computer where the log is stored.

## SETTINGS – MESSAGING

The Messaging tab allows you to configure various messaging options for Call Center. Currently, e-mail messaging and instant messaging are supported.

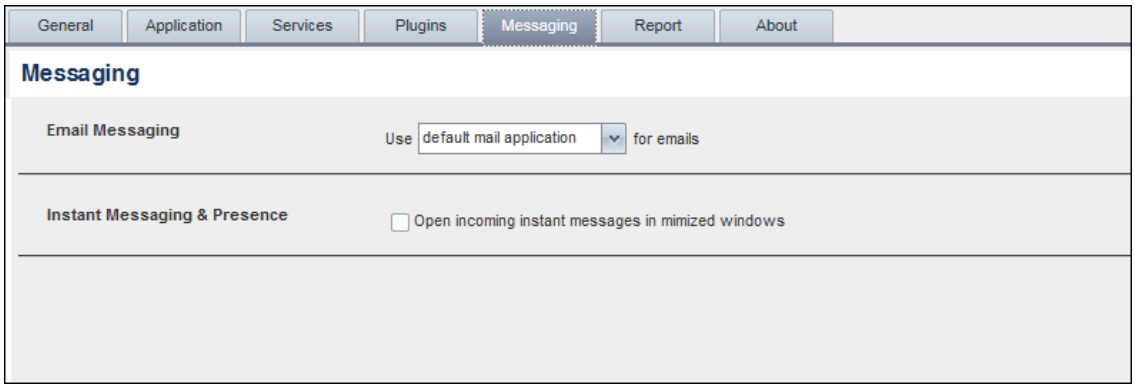



**Figure 151 Settings – Messaging**

## E-MAIL MESSAGING

These options allow you to specify the mail client you use for sending e-mail messages.

From the drop-down list, select the mail client to use for e-mails.

If you selected the custom Simple Mail Transfer Protocol (SMTP) option, you also need to configure the following options:

- *Display Name* – This is the name that is displayed in the *From* field.
- *Reply-to Address* – This is the address where reply messages can be sent.
- *Default Subject* – This is the subject that appears when you generate an e-mail message in Call Center.
- *SMTP Host* – This is the IP address of the SMTP host.
- *SMTP Port* – This is the port of the SMTP host.
- *Outgoing SMTP Server requires Authentication* – When this option is set, authentication is required to send e-mails.
- *Username* – This is the name you must enter to authenticate yourself.
- *Password* – This is the password part of your authentication credentials.
- *Mail Type* – This is the type of mail to use.
- *Mail Template* – This is the mail template to use.

## INSTANT MESSAGING AND PRESENCE

Check this option if you want the *Chat* windows that appear when you receive an instant message to appear in minimized format.

# SETTINGS – REPORT

You use the Report tab to configure values to be used as default input parameters for generating reports. If you do not provide any values, system defaults are used. You can change these values as required when generating reports.

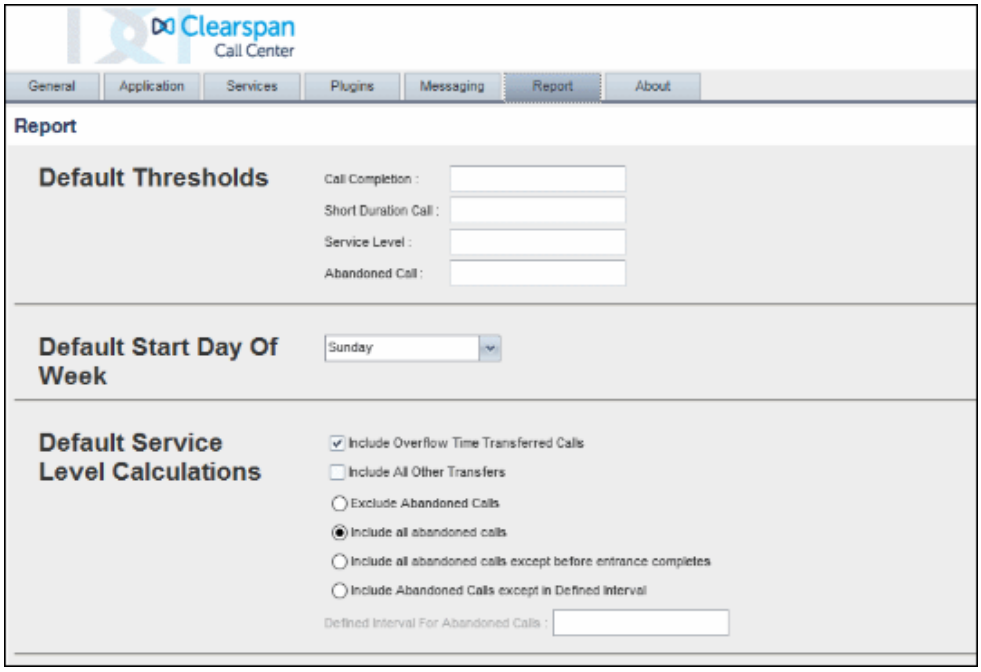



**Figure 152 Settings – Report**

## DEFAULT THRESHOLDS

These settings allow you to configure the thresholds that are used by default when you generate reports that require you to provide thresholds. This is useful, if you often use the same threshold values. You can always change a default value, when required.

- *Call Completion* – This setting is used to count the number of ACD calls an agent has completed within a service level during the specified interval. The Call Completion service level can be set to “1” through “7200” seconds.
- *Short Duration Call* – This setting is used to count the number of ACD short duration calls completed by an agent during an interval. You can set the maximum length of a short duration call to “1” through “7200” seconds.

## DEFAULT START DAY OF THE WEEK

The following setting allows you to configure the day of the week to start reports.

- *Default Start Day of Week* – This setting applies to interval-based reports, when the selected sampling period is “Weekly”. It can be set to any day of the week.

### DEFAULT SERVICE-LEVEL CALCULATIONS

The following settings allow you to configure default settings used to make service-level calculations.

- *Include Overflow Time Transferred Calls* – Check this box to include calls transferred due to time overflow in service-level calculations.
- *Include All Other Transfers* – Check this box to include calls transferred for other reasons that overflow in service-level calculations.
- *Exclude Abandoned Calls* – Check this box to exclude all abandoned calls from service-level calculations.
- *Include all abandoned calls* – Check this box to include all abandoned calls in service-level calculations.
- *Include all abandoned calls except before entrance completes* – Check this box to include calls abandoned after the entrance message has finished playing in service-level calculations.
- *Include Abandoned Calls except in Defined Interval* – Check this box to include calls abandoned after the time specified by the interval for abandoned calls parameter in service-level calculations.
- *Defined Interval for Abandoned Calls* – If you checked *Include Abandoned Calls except in Defined Interval,* enter the desired interval in this text box in seconds. The *Defined Interval for Abandoned Calls* can be set to “1” through “7200” seconds.

## SETTINGS – ABOUT

You use the About tab to view the information about Call Center.

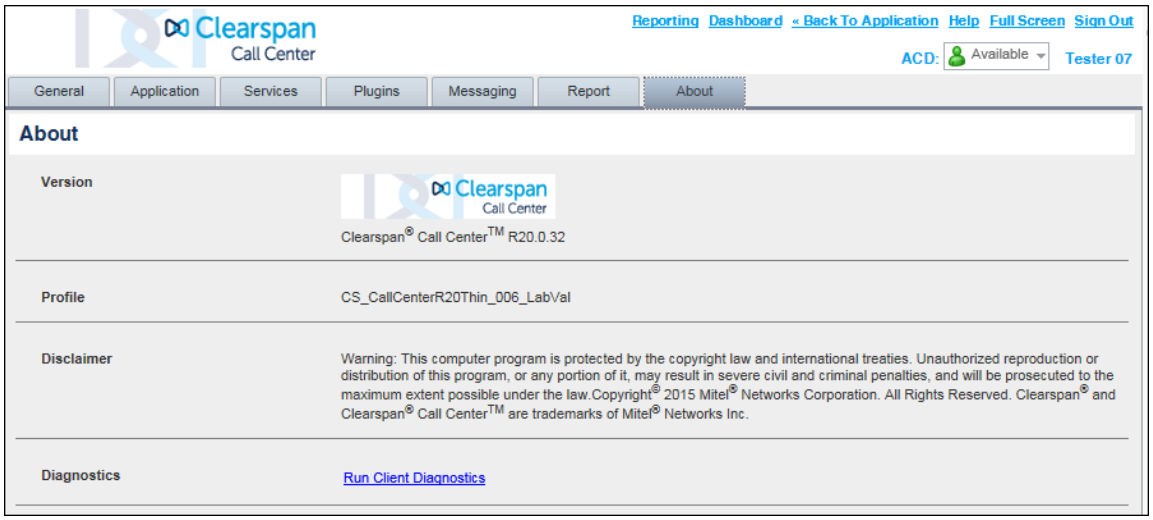



**Figure 153 Settings – About**

The following information is provided on this page:

- *Version* – This is the name and software version of Clearspan Call Center client.
- *Profile* – This is the Call Center client profile used.
- *Disclaimer* – This is the Call Center copyright information.
- *Diagnostics* – This allows you to access the Diagnostic Tool, available in some versions of Call Center. If the tool is not available, this information does not appear. For more information about the tool, see *Appendix B: Diagnostic Tool*.

# CONFIGURE WEB BROWSER

## INTERNET EXPLORER SETTINGS FOR FULL SCREEN MODE

For the supported versions of Internet Explorer, see the Clearspan Hosted Thin Call Center Agent/Supervisor Configuration and Administration Guide.

Internet Explorer needs to be configured as follows to enable the Full Screen link in Call Center. Otherwise, the link has no effect; Call Center is not displayed in full-screen mode when the Full Screen link is clicked and no error message is displayed to the user.

1. On the Internet Explorer *Menu* bar, select the *Tools* menu and then click **Internet Options**.
2. In the *Internet Options* dialog box, click the **Security** tab and then click the **Custom level...** button.

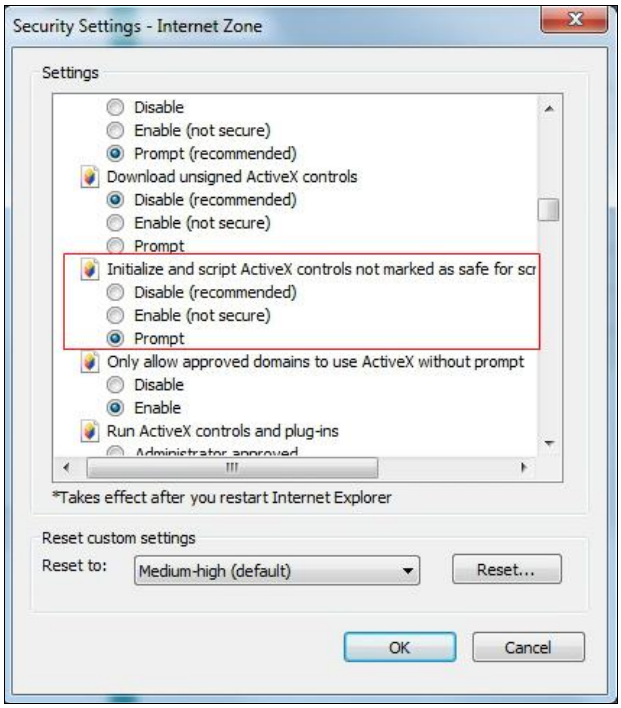



**Figure 154 Security Settings – Internet Zone Dialog Box**

3. In the *Security Settings – Internet Zone* dialog box, scroll down to *Initialize and script ActiveX controls not marked as safe for scripting* setting in the *ActiveX controls and plug-ins section*.
4. Select *Enable* or *Prompt*.
5. Restart Internet Explorer.

# FIREFOX SETTINGS QUICK LINK NAVIGATION

The following settings are required in Firefox for quick link navigation to work. If these settings are not configured, Call Center does not change focus from the Dashboard to the main application window when the user clicks on a quick link.

1. On the Firefox *Menu* bar, select the *Tools* menu, and then click **Options**.
2. In the *Options* dialog box, click the **Content** tab.
3. Click the **Advanced** button, to the right of the to *Enable JavaScript* check box.

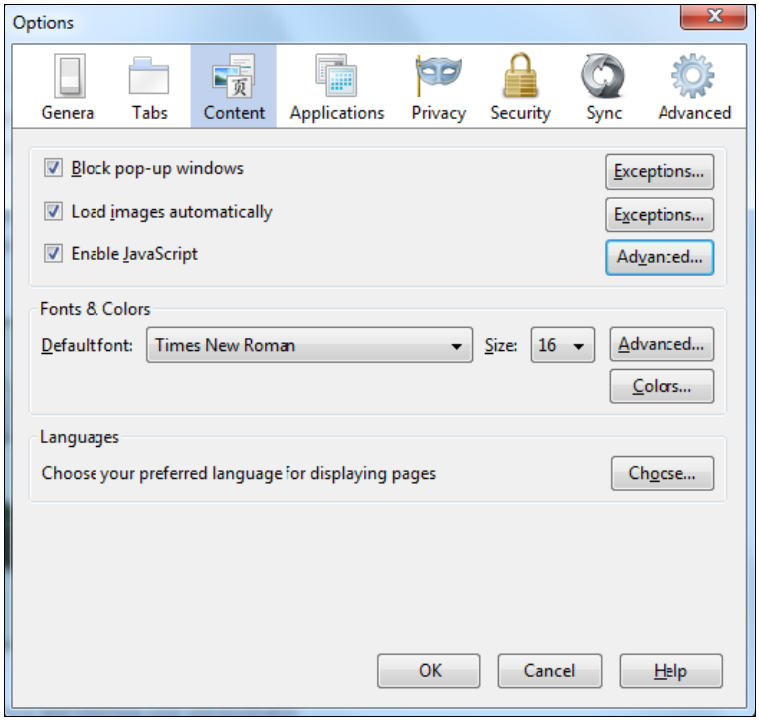



**Figure 155 Firefox – Content Tab**

4. In the *Advanced JavaScript Settings* dialog box, check the *Raise or lower windows* box.

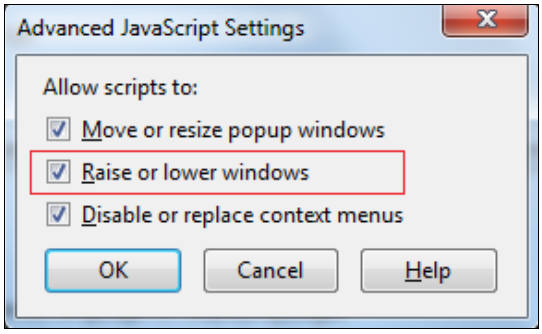



**Figure 156 Firefox – Window Focus Settings**

**5.** Restart Firefox.

# APPENDIX A: GLOSSARY AND DEFINITIONS

## ACD STATES

ACD states specify the agent's availability to take calls. The possible call states are those listed in the following table.

An agent can be in one of the ACD states.

| ACD STATE | ICON | DESCRIPTION |
|---|---|---|
| *Available* | | Agent is available to receive ACD calls.<br>(Agent can also receive direct calls.)<br>This is the primary ACD state of an agent during the workday. It indicates that the agent is at their workstation and either ready to take a call or on an active call.<br>ACD calls **may** be delivered to an agent who is in an *Available* state.<br>Clearspan uses both the ACD state **and** the phone state of the agent to determine whether to route a call to the agent.<br>By default, agents receive calls when they are available **and** their phone is *Idle*. However, this behavior can be overridden if Call Waiting on agents is enabled for the call center, which allows for new calls when the agent is available **and** on an active call. |
| *Unavailable* | | Agent is unavailable to receive ACD calls.<br>(Agent can still receive direct calls.)<br>The *Unavailable* state should be used when the agent is away from their workstation and not available to take calls.<br>ACD calls are not delivered to agents in an *Unavailable* state.<br>This state should be used when the agent is at lunch, on a break, in a meeting, or engaged in some other activity while they are at work, but unavailable to take calls. |
| *Wrap-Up* | | Agent is performing post call work.<br>This state is designed to allow the agent to complete paperwork or other post call procedures associated with the last call.<br>Calls **may** be delivered to agents in *Wrap-Up* state depending on the call center configuration.<br>By default, calls are not routed to agents in *Wrap-Up* state, except when the call center is configured to |

| ACD STATE | ICON | DESCRIPTION |
|---|---|---|
| | | enable calls to agents in the *Wrap-Up* state. |
| *Sign-In* | | The *Sign-In* state is equivalent to a “clock in”, which means that the agent is at their work location but not yet ready to accept incoming calls. Calls are not delivered to the agent in this state.<br>*Sign-In* is a transitional state and agents do not remain in this state; rather they transition to their post sign-in state.<br>It is recommended that agents only be in this 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”, which means that the agent’s workday or shift is completed and they are leaving.<br>Calls are not delivered to the agent in this state.<br>It is recommended not to use this state when agents leave for lunch or breaks during the day. The *Unavailable* state should be used for that. |

In Call Center, an agent can only set their ACD state to “Available”, “Unavailable”, or “Wrap-Up”. A supervisor can set the ACD state of an agent to “Available”, Unavailable”, Wrap-Up”, or Sign-Out”.

The *Sign-In* state can only be assigned to an agent through the web portal.

## AGENT SKILL LEVELS (PREMIUM CALL CENTERS)

Agent skill levels are used to rate the ability of an agent to handle calls in call centers with skill-based routing.

- An agent skill level is an integer between 1 and 20, where 1 indicates the highest skill level.
- A skill level is assigned to an agent for each call center with skill-based routing to which the agent is assigned.
- A skill level is shown as “N/A” for Standard call centers and for call centers with priority-based routing.

# PHONE STATES

Phone states show the state of the monitored agent's telephone line or the supervisor's telephone line.

For supervisors, the phone states are displayed as follows:

| PHONE STATE | ICON | DESCRIPTION |
|---|---|---|
| *Idle* | | Supervisor's phone is on-hook, which means the supervisor is not on a call. |
| *Busy* | | Supervisor's phone is off-hook, which means that the supervisor is on a call. |
| *Ringing* | | Supervisor's phone is in alerting state; a call is currently being delivered to the supervisor. |
| *Do Not Disturb* | | Supervisor has enabled the Do Not Disturb service. |
| *Private* | | Supervisor has enabled phone status privacy.<br>**NOTE**: This terminates monitoring of the supervisor's phone state for the current login session. To be able to monitor their phone state again, you must sign out and then sign in after the supervisor has disabled their phone state privacy. |
| *Call Forwarding Always* | | Supervisor has enabled the Call Forwarding Always service. |
| *Unknown* | | Supervisor is currently not monitored. |

For agents, the phone states are combined with their ACD states and are displayed as follows:

| PHONE STATE | ACD STATE | ICON | DESCRIPTION |
|---|---|---|---|
| *Idle* | *Available* | | Agent's phone is on-hook and the agent is available to take ACD calls. |
| *Ringing* | *Available* | | Agent's phone is ringing and the agent is available to take the call. |
| *Any* | *Unavailable, Sign-In, Sign-Out* | | Agent is not available to take ACD calls. |
| *Idle, Ringing* | *Wrap-Up* | | Agent is performing post call work. They may or may not be available to take calls. |
| *Busy* | *Available, Wrap-Up* | | Agent's phone is off-hook, which means that the agent is on a call.<br>Calls **may** be delivered to agents depending on their call waiting settings and the call center's call waiting and wrap-up settings. |

| PHONE STATE | ACD STATE | ICON | DESCRIPTION |
|---|---|---|---|
| *Do Not Disturb* | Any | | Agent has enabled the Do Not Disturb service.<br>ACD calls are not delivered to an agent in the Do Not Disturb call state.<br>This state is **not recommended** for Call Center agents. Agents should use the Unavailable ACD state when they need to block new incoming calls temporarily. |
| *Call Forwarding Always* | Any | | Agent has enabled the Call Forwarding Always service. |
| *Private* | Any | | Agent has enabled phone status privacy.<br>**NOTE**: This terminates monitoring of the agent's phone state for the current login session. To be able to monitor their phone state again, you must sign out and then sign in after the agent has disabled their phone state privacy. |
| *Unknown* | Any | | Agent is currently not monitored. |

## UNIFIED INSTANT MESSAGING PRESENCE STATES

Unified instant messaging presence states indicate you or your contacts' availability to communicate using client applications such as Hosted Thin Call Center, Hosted Thin Receptionist, Clearspan Communicator Desktop, or Clearspan Communicator Mobile. The possible states are as follows:

| IM&P STATE | ICON | DESCRIPTION |
|---|---|---|
| **Subscribed states** | | |
| *Available* | | The contact is online, available on one or more devices, and not busy on any device. |
| *Busy* | | The contact is online, but currently busy on one or more devices. Do not disturb. |
| *Away* | | The contact is connected but away from one or more devices and not busy on any device. |
| *Offline* | | The contact if offline on all devices. If you are offline, you do not receive any presence updates or instant messages. Also, your Instant Message pane is empty and the presence state of your contacts in other *Contact* panels is set to "Offline". |
| **Unsubscribed states** | | |
| *Pending Subscription* | | You sent a subscribe request to the contact, but it has not yet been accepted. Clicking the icon resends the request. |
| *Not subscribed* | | The contact has IM&P but you are not subscribed to monitor their state. The contact is not listed in the *Instant Message* directory. Clicking this icon sends a subscription request to the contact. |

# CALL STATES

Call states are the states that your current calls can be in. They are as follows:

| CALL STATE | DISPLAY NAME | DISPLAY ICON | CALL PERSONALITY | CALL ACTIONS |
|---|---|---|---|---|
| *Ringing In (Local)* | Incoming Local | | Click To Dial | Answer, End |
| *Ringing In (Remote)* | Incoming | | Terminator | Answer, Conference, End |
| *Ringing Out, Outgoing* | Outgoing | | Originator | Conference, End |
| *Active* | Active | | Any | Transfer, Hold, End, Conference |
| *On Hold* | Held | | Any | Transfer, Resume, End, Conference |
| *On Hold (Remote)* | Held | | Any | Transfer, Hold, End, Conference |
| *Active (In Conference)* | Active | | Conference | Transfer, Hold, End |
| *On Hold (In Conference)* | Held | | Conference | Resume, Transfer, End |
| *Ringing In (Recalled Call)* | Call Recalled | | Terminator | Answer, Conference, End |

# CALL TYPES

This section defines different types of calls measured in call center statistics.

| NAME | DESCRIPTION |
|---|---|
| ACD Call | This is a call delivered to a call center pilot number that is directed to an agent via the ACD function. |
| Inbound Call | This is a direct call to an agent.<br>Other calls treated as inbound calls include:<br>• Calls that a supervisor retrieves from a queue<br>• Calls that an agent receives due to a transfer from another agent (Note that they may have originated as ACD calls.) |
| Outbound Call | This is an outbound call made by an agent. |
| Held Call | This is an ACD call that was placed on hold by an agent. Each time an agent places a call on hold, it is counted as a held call. |
| Transferred Call | This is an ACD call that was transferred to another number.<br>Transfers can be the result of manual transfers by agents, transfers to voice mail because the calls were timed out, and transfers by supervisors to alternate queues. |

| NAME | DESCRIPTION |
|---|---|
| | **Note**: A timed-out call is a call that is transferred due to exceeding the maximum wait time in a queue. |
| Answered Call | This is an ACD call that was answered by an agent. |
| Abandoned Call | This is an ACD call that entered the queue, but the caller hung up before the call was answered or transferred. |
| Received Call | This is an ACD call that was received and either answered or abandoned. Overflowed calls are not included. |
| Overflowed Call | This is an ACD call that was received, but immediately transferred to another destination due to the queue's exceeding the configured maximum queue size or the configured maximum wait time. |
| Queued Call | This is an ACD call that is not immediately diverted using the Night Service, Holiday Service, Forced Forwarding, or Overflow, and goes to a queue to be distributed to an agent or to wait for an available agent. |
| Bounced Call | This is a call that has been transferred back to queue because it was not answered by an agent in the specified time.<br><br>**Note**: As of Clearspan release 20, Bounced Call is now supported in Basic Call Center as well as Premium Call Center. |
| Stranded Call | This is a call that is in a queue after all agents assigned to the queue have moved to the *Sign-Out* ACD state. |

# APPENDIX B: DIAGNOSTIC TOOL

The Diagnostic Tool provides client-side performance measurements for the Call Center client to help troubleshoot client application performance problems. It should only be used when performance problems occur and with the assistance of a support person.

**Note:** The Diagnostic Tool is available in Release 20.0.30 or later, and only if enabled by the service provider.

## LAUNCHING DIAGNOSTIC TOOL

To start the Diagnostic Tool, go to the *Settings – About* page and click the **Run Client Diagnostics** link.

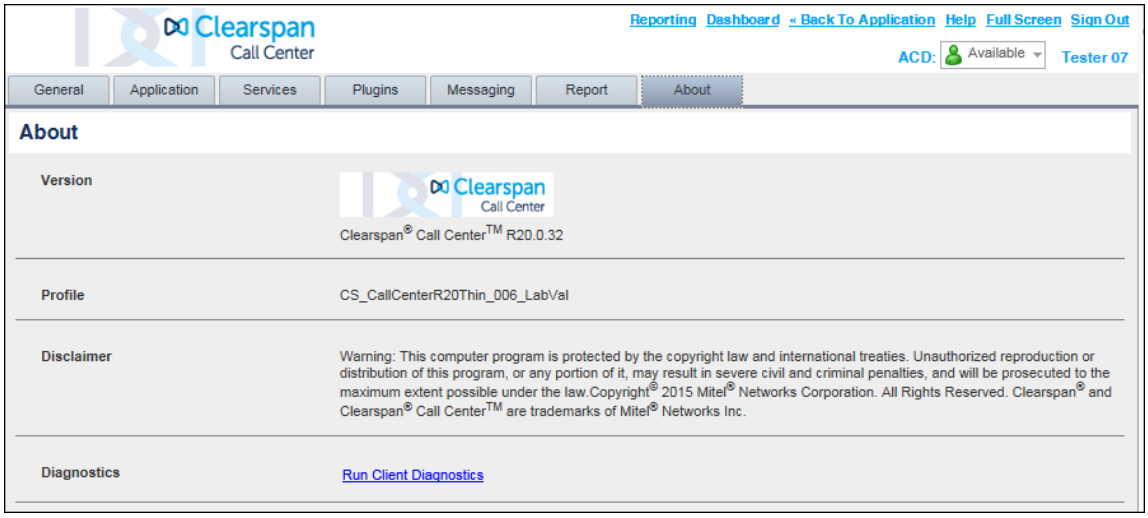



**Figure 157 Settings – About (Launching Diagnostic Tool)**

## DIAGNOSTIC TOOL GUI

The Diagnostic Tool runs in a separate browser window. Its user interface consists of six tabs: Session, Long Polling, Calls, Service, Monitoring, and Support. Each tab is described in a separate subsection.

## SESSION TAB

The Session tab displays session information stored for the user on Clearspan. It provides information about the logged user, connection, and subscriptions.

The user information includes your name, user ID, phone number, extension, and the list of services assigned to you.

The connection information includes the session ID for the current session, the channel ID for the OCI-C channel, and the address of the Xtended Services Platform the client is running on.

The subscription table shows all active subscriptions for the logged-in user and is updated in real-time.

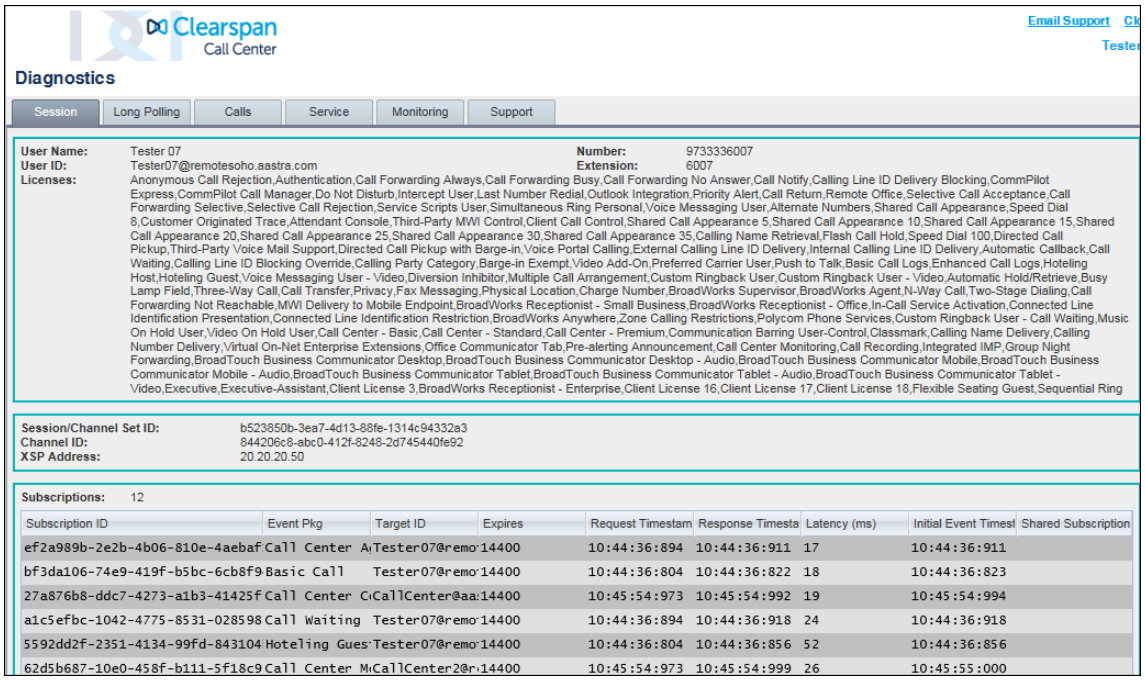



**Figure 158 Diagnostic Tool – Session Tab**

## LONG POLLING TAB

The Long Polling tab shows, in real-time, statistics on long polls performed by the client. The Polls table lists long polls and includes the request timestamp, response timestamp, status, and poll time of each long poll.

By default, the number of long polls retained in the Polls table is “10”.

To change the number of displayed long polls, click the drop-down arrow in the *Polls* combo box, and select a new number from the drop-down list.

The *Data* column of the Polls table indicates whether the long poll contains data or not. If the icon in the *Data* column is a green icon, then the corresponding long poll contains data. Clicking on the row for the long poll displays detailed data in the Poll Details table at the bottom of the page.

The Poll Details table displays the feature data that is contained in the update as well as the event type and event ID that triggered the data update.

To clear the tab and start fresh captures of the long polls, click the **Clear** button.

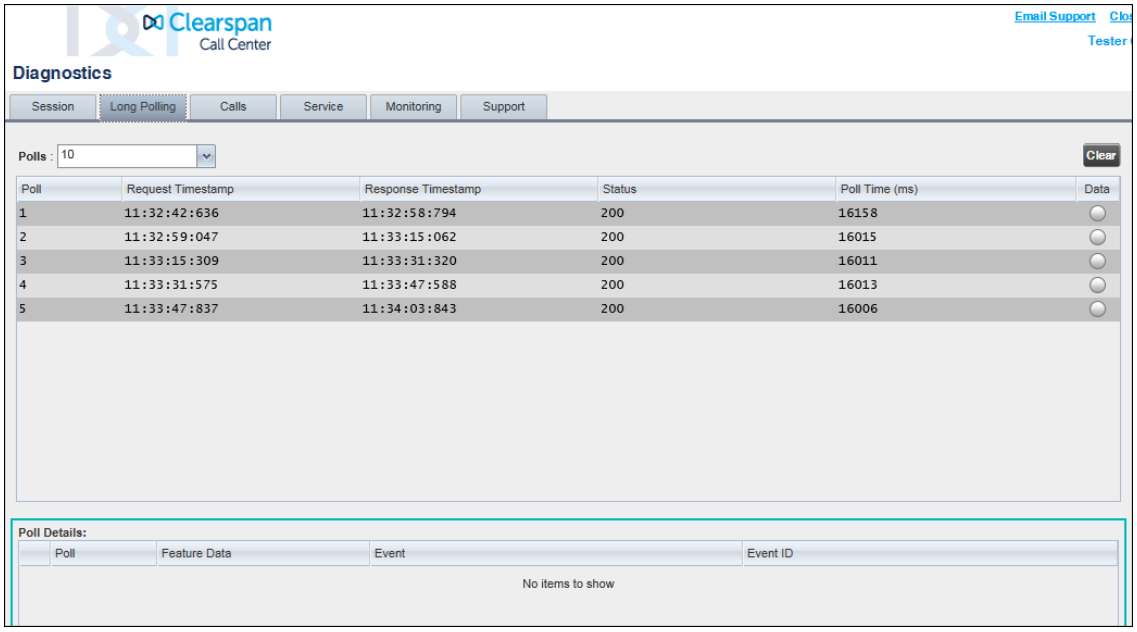



**Figure 159 Diagnostic Tool – Long Polling Tab**

## CALLS TAB

The Calls tab shows call statistics for calls placed through the dialer. For each call, the following information is displayed: the called destination, the call ID of the outbound call, the time the number was dialed, the time the client received the incoming alerting call update, the client answer time (if the call was answered from the client), and the time the client received the outgoing call update.

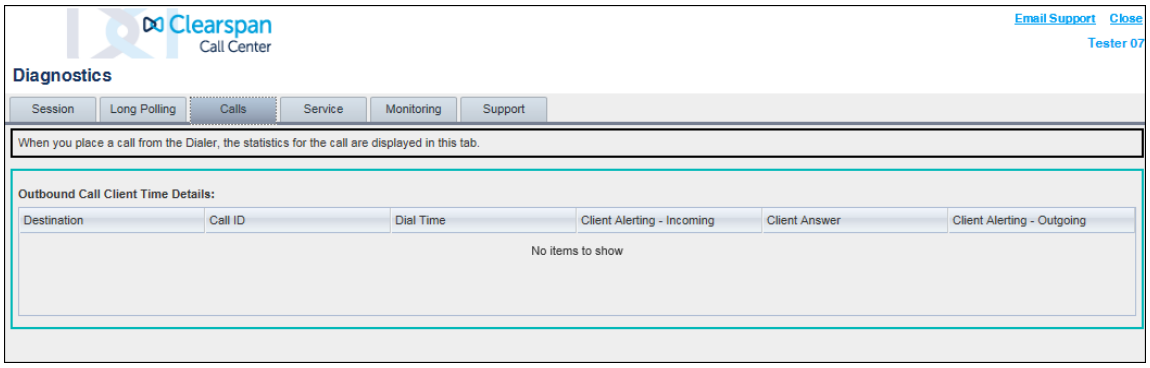



**Figure 160 Diagnostic Tool – Calls Tab**

## SERVICE TAB

The Service tab measures the time for enabling/disabling the DND service from the client. It is only shown if you have the DND service assigned.

For each service action, the tool displays the command that was invoked (DND On or DND Off), the time the command was invoked from the client, the time the command response was received by the client, and the time difference in milliseconds between the request time and the response time.

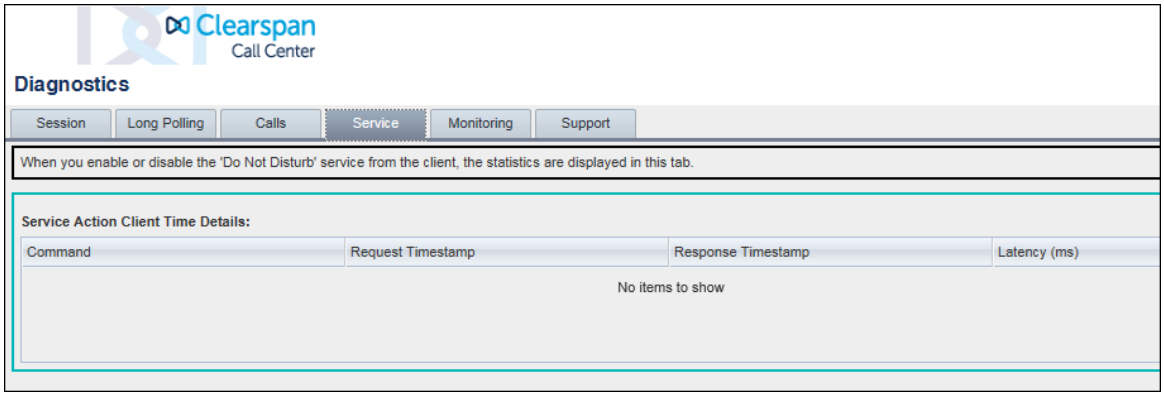



**Figure 161 Diagnostic Tool – Service Tab**

## MONITORING TAB

The Monitoring tab displays statistics on monitored agents (if you are a supervisor) or supervisors (if you are an agent). The *Target* column displays the user ID of the agents or supervisors being monitored.

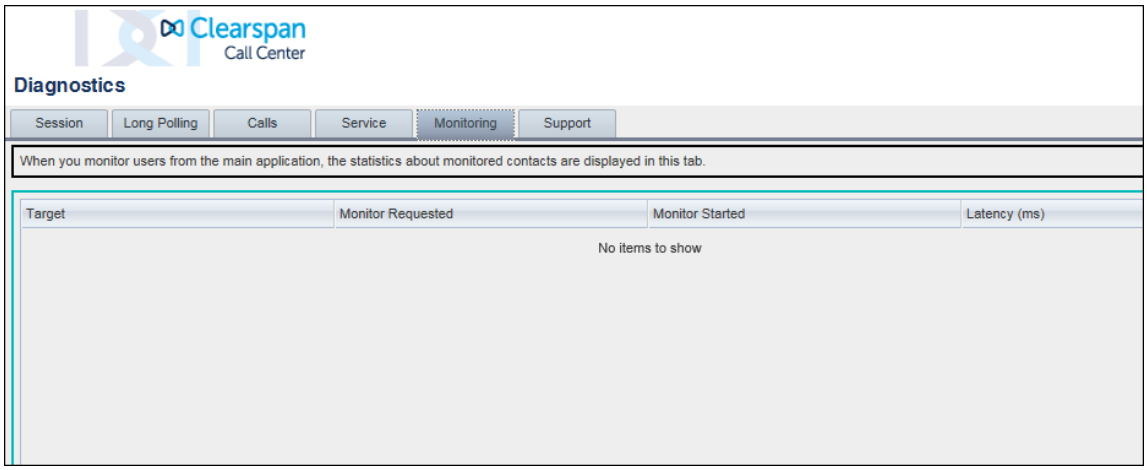



**Figure 162 Diagnostic Tool – Monitoring Tab**

## SUPPORT TAB

The Support tab is a textual representation of all data contained in the other tabs. The text in this tab should be copied and pasted into the body of the e-mail that you send to the technical support of your service provider.

The Email Support link in the upper right-hand corner of the Diagnostic Tool can be used to open the default e-mail client on your machine. If the “To” address is not preconfigured by the service provider, the support person should provide it to you.

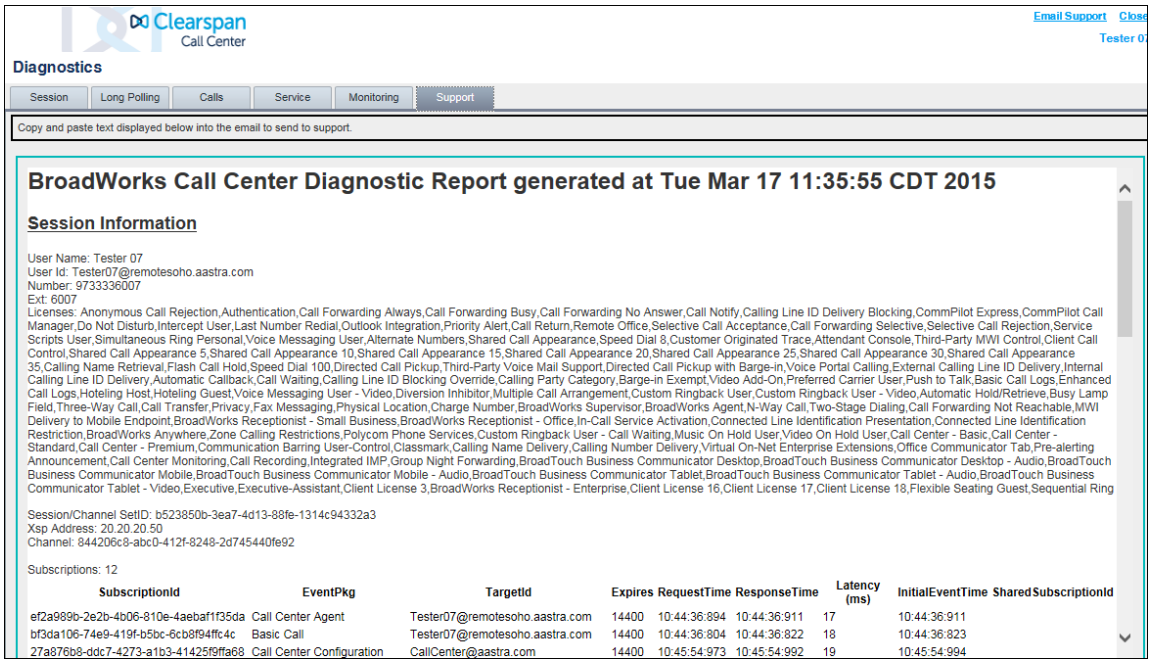



**Figure 163 Diagnostic Tool – Support Tab**

# KNOWN ISSUES

If you are using the Chrome browser to run Call Center, and you click the Diagnostic Tool *Email Support* link, an untitled tab opens in the Call Center window, in addition to the new message window of your default e-mail application. The issue can occur if the Chrome browser attempts to process the request with a different mail protocol than the one defined on your computer.

# APPENDIX C: KEYBOARD SHORTCUTS

When using keyboard shortcuts, make sure that the main interface window is in focus.

| KEY | EQUIVALENT MOUSE ACTION | DESCRIPTION |
|---|---|---|
| ESC | Click the **Close** button in a dialog box. | This closes the open dialog box. |
| ESC | Cancel the changes. | This exits the currently selected editable item, such as a text box. |
| / | Click the *Dialer* text box. | This places the cursor in the *Dialer* text box; it retains the currently selected item (if applicable).<br>**NOTE**: In Internet Explorer 8, the "/" shortcut key does not always work. Pressing the key clears the default *Enter Number* text, but does not place the cursor in the input box. |
| ? | Click the *Search* text box. | This places the cursor in the *Search* text box; it retains the currently selected item (if applicable). |
| ARROW DOWN | Click the scroll bar or the next item on a list. | This selects the next item in the *Call Console* or the *Queued Calls* pane. |
| ARROW UP | Click the scroll bar or the previous item in a list. | This selects the previous item in the *Call Console* or the *Queued Calls* pane. |
| PAGE DOWN | Scroll down one page. | This goes to the next page in the *Call Console* or the *Queued Calls* pane. |
| PAGE UP | Scroll up one page. | This goes to the previous page in the *Call Console* or the *Queued Calls* pane. |
| 1….9 | Select a call in the *Call Console*. | Pressing **1** selects the first call, pressing **2** selects the second call, and so on. |
| SPACEBAR | Click **Answer** on the selected incoming call in the *Call Console*. | This answers the selected incoming call or if no call is selected, the incoming call that has been waiting the longest. Pressing the SPACEBAR again answers the next longest waiting incoming call, which puts the previously answered call on hold. |
| <PERIOD> | Click **End** on the selected call in the *Call Console*. | This ends the selected call. |
| ENTER | Click **Dial**. | If the cursor is placed in the *Enter Number* text box in the *Dialer*, the entered digits are dialed. |
| ENTER | Click **Search**. | If the cursor is placed in the *Search* text box, a search is performed. |

| KEY | EQUIVALENT MOUSE ACTION | DESCRIPTION |
|---|---|---|
| + | Click **Transfer** in the *Dialer*. | This transfers the selected call to the ad hoc number entered in the *Dialer*. |
| SHIFT+1..9 | Select a ringing call and click **Answer**. | Pressing **SHIFT+1** selects and answers the first ringing call, pressing **SHIFT+2** selects and answers the second ringing call, and so on. |
| SHIFT+1..9 | Select an active call and click **Hold**. | Pressing **SHIFT+1** selects and places on hold the first active call, pressing **SHIFT+2** selects and answers the second active call, and so on. |
| SHIFT+1..9 | Select a held call and click **Retrieve**. | Pressing **SHIFT+1** selects and retrieves the first held call, pressing **SHIFT+2** selects and retrieves the second held call, and so on. |
| S or s | Click the **Settings** link. | This goes from the main page to the *Settings* page. |
| B or b | Click the **Back to Application** link. | This goes back from the *Settings* page to the main page. |
| R or r | Click the **Call History** button. | This opens the *Call History* dialog box. |
| H or h | Click the **Help** link. | This opens this guide in a PDF format. |
| D or d | Click the **Dashboard** link (Supervisor) | This opens the *Dashboard* or brings the *Dashboard* to the front if it is already open. |
| SHIFT+L or SHIFT+l | Click the **Sign Out** link. | This signs the user out of the application. |
| SHIFT+A | Select *Available* (Agent). | This sets the agent's ACD state to "Available". |
| SHIFT+U | Select *Unavailable* (Agent). | This sets the agent's ACD state to "Unavailable". |
| SHIFT+W | Select *Wrap-Up* (Agent). | This sets the agent's ACD state to "Wrap-Up". |

# Index


### A

About Call Center .....154
Accept IM&P subscription request.....86
ACD states.....103, 159
  Changing by agent.....15
  Changing for agent .....105
Actions on calls.....26
Ad hoc number, dialing.....52
Adding
  Conference participant.....64
  Instant Message directory entry .....84
  Personal contact .....79
  Speed dial number.....81
  Users to chat.....90
Additional resources .....2
Agents
  ACD states.....159
  Barging in on.....107
  Changing ACD state by .....15
  Changing ACD state for.....105
  Changing IM&P presence state by .....15
  Managing .....101
  Panel.....30
  Phone and ACD states .....103
  Picking up calls .....108
  Real-time statistics about.....122
  Selecting call centers to monitor.....98
  Selecting to monitor .....101
  Silently monitoring .....106
  Viewing details.....105
Answering call.....50
Application policies, configuring .....144
Application settings, configuring .....143, 146
Assigning disposition codes .....46
  Current call .....47
  Wrap-Up.....47
Auto Answering calls ..... 50

### B

Barge-in and monitoring settings, configuring..... 145
Barging in on agent..... 107
Blind escalating call ..... 60
Blind transferring calls ..... 58
Busy Camp On..... 57

### C

Call Center
  Client, agent..... 3
  Client, supervisor ..... 5
  Configuring..... 138
  Getting started ..... 8
  Launching from web portal..... 8
  Overview ..... 3
  Panels, viewing ..... 113
  Selecting for monitoring by agent ..... 98
  Selecting for monitoring by supervisor 111
  Setting up ..... 13
  Signing in, hot desk..... 11
  Signing in, web browser..... 9
Call Centers
  Monitoring by agent ..... 96
  Order in agent's Dashboard..... 100
Call Console..... 21
  Call states and actions..... 26
  Conference Call panel ..... 24
  Current calls..... 23
  Dialer..... 23
  Header bar ..... 22
Call Displaying directories below Call Console ..... 72
Call History..... 33
  Deleting..... 66
  Dialing from..... 55

Managing .....66
Viewing .....66
Call Pickup.....108
Calls
Action buttons .....37
Answering .....50
Assigning disposition codes .....46
Auto Answering.....50
Blind escalating.....60
Blind transferring.....58
Camping .....57
Dialing
Ad hoc number .....52
Contact .....54
History .....55
Search .....55
Dragging and dropping .....43
Emergency.....59
Ending.....52
Escalating .....59
Conference and handover.....61
Consultation.....61
Mid-conference hold.....62
Event log, configuring .....151
Generating trace .....47
Last released call .....48
Selected call .....48
Making outbound .....52
Managing .....40
Managing conference .....62
Modify number to display.....113
Open URL.....51
Operations quick reference .....40
Placing on hold .....57
Recording .....48
Redialing number.....54
Resuming held.....57
Saving vCard .....51
Security Classification.....49
Silently monitoring
Agent .....106
In queue.....115
States.....163
States and actions ..... 26
Transferring..... 58
Transferring to queue..... 59
Transferring to top of queue..... 118
Transferring with consultation..... 58
Types ..... 163
Viewing..... 43
Camping calls ..... 57
Changing
ACD state..... 15
IM&P presence state..... 15
Password ..... 14, 139
Changing Security Classification ..... 49
Chatting
Managing sessions ..... 92
Starting multiuser session..... 90
Starting one-on-one session..... 89
Classification, security level of calls..... 49
Common panel..... 29
Conference
Adding participant ..... 64
Ending..... 65
Ending participant ..... 65
Escalating call ..... 61
Holding..... 64
Holding participant ..... 64
Leaving..... 65
Managing ..... 62
Resuming..... 64
Resuming participant ..... 65
Starting..... 63
Three-Way ..... 63
Conference Call, panel ..... 24
Configuring
Application policies ..... 144
Application settings..... 143, 146
Barge-in and monitoring settings..... 145
Call Center client..... 138
Call event log ..... 151
Call notification settings ..... 149
E-mail messaging ..... 152

Firefox ..... 157
General settings ..... 138
General settings, account ..... 139
Hotel Guest ..... 140
IM&P messaging ..... 152
Internet Explorer ..... 156
Language ..... 140
LDAP settings ..... 150
Messaging ..... 151
Outlook integration ..... 149
Plug-ins ..... 147
Program shortcuts ..... 151
Queues membership ..... 144
Report settings ..... 153
Screen Pop ..... 140
Web browser ..... 156
Workspace settings ..... 142

Consultation
Escalating calls ..... 61
Transferring calls ..... 58

Contacts
Dialing ..... 54
Displaying directories below Call Console ..... 72
E-mailing ..... 68
IM&P, accept subscription request ..... 86
IM&P, chatting with ..... 88
IM&P, subscribe to ..... 83
IM&P, unsubscribe from ..... 86
IM&P, viewing presence state ..... 87
Managing ..... 69
Organizing ..... 76
Searching ..... 77
Selecting display order ..... 75
Showing or hiding contact details ..... 74
Showing or hiding directories ..... 71
Showing or hiding directory content ..... 73
Sorting ..... 76
Viewing ..... 70

Contacts pane ..... 26
Agents panel ..... 30
Common panel ..... 29
Custom directory panel ..... 31
Directories panel ..... 33
Enterprise/Group panel ..... 29
Instant Message panel ..... 32
Outlook panel ..... 32
Personal panel ..... 29
Queues panel ..... 31
Search panel ..... 28
Speed Dial panel ..... 31
Supervisors panel ..... 30

Controls
Action buttons ..... 37
Call Center ..... 34

Current calls ..... 23
Viewing ..... 43

Custom directory panel ..... 31

Customer Originated Trace ..... 47

## *D*

Dashboard
Agent ..... 96
Supervisor ..... 120

Default service-level calculations, report settings ..... 154

Definitions ..... 159
ACD states ..... 159
Agent phone and ACD states ..... 103
Call states ..... 163
Call types ..... 163
IM&P states ..... 162
Phone states ..... 161

Deleting
Call History ..... 66
Personal contact ..... 80
Speed dial number ..... 82

Dialer ..... 23

Dialing
Ad hoc number ..... 52

Contact....54
From chat window....90
History....55
Search....55
Directories
Displaying below Call Console ....72
Directories panel....33
Directory
Agents....30
Custom....31
Enterprise/Group ....29
Instant Message ....32
Outlook....32
Personal....29, 79
Queues ....31
Search....28
Searching....77
Sort ....76
Speed Dial ....31, 80
Supervisors....30
Viewing ....70
Disabling, services....17
Disposition codes, assigning to calls....46
Dragging and dropping calls....43


## E


Editing, Instant Message directory ....85
E-mail
Configuring options for....152
E-mailing contacts ....68
Emergency call ....59
Enabling
Forced Forwarding....115
Night Service Override....115
Services ....17
Ending
Call....52
Conference ....65
Conference participant....65
Enterprise panel....29
Escalating call....59
Blind .... 60
Conference .... 61
Consultation .... 61
Emergency .... 59
Handover.... 61
Mid-conference hold .... 62
Exploring workspace.... 18


## F


Forced Forwarding, enabling .... 115


## G


General settings, configuring .... 138
Generating
Call trace .... 47
Reports.... 126
Enhanced.... 126
Global Message Area .... 20
Glossary.... 159
Group panel .... 29
Grouping, queued calls .... 114


## H


Handover, escalating call.... 61
Header bar .... 22
Help, getting.... 12
Holding
Call .... 57
Conference .... 64
Conference participant.... 64
Hot desk sign in .... 11
Hotel Guest settings, configuring.... 140


## I


IM&P
Accepting subscription requests .... 86
Configuring options for.... 152
Contacts, chatting with.... 88
Subscribing to contact.... 83
Unsubscribing from contact .... 86
Viewing presence state of contacts .... 87
IM&P presence
Changing by agent.... 15

IM&P states .....162
Incoming call, viewing details .....45
Instant Message directory
Adding entries .....84
Editing entries .....85
Instant Messaging and Presence
Configuring options for.....152
Interface
Dashboard pane for agent .....96
Supervisor's Dashboard .....120

***K***

Keyboard shortcuts.....170, 171

***L***

Language, configuring .....140
Launching Call Center from web portal .....8
LDAP, configuring.....150
Leaving conference .....65
Logged user information.....20
Logo pane.....20
Global Message Area .....20
Links.....20
Logged user information.....20

***M***

Making outbound calls.....52
Managing
Agents.....101
Call History .....66
Calls .....40
Chat sessions .....92
Conference calls .....62
Contacts.....69
Personal contacts .....79
Queued calls.....109
Queued calls, promoting.....116
Queued calls, retrieving .....116
Reordering, calls in queue .....118
Speed dial numbers.....80
Transferring calls between queues.....117
Transferring calls from queue to agent 117
Transferring calls to ad hoc number ... 117
Messaging, configuring ..... 151
Modifying number of calls to display..... 113
Modifying speed dial number..... 81
Modifying, Instant Message directory ..... 85
Monitoring
Call centers by agent ..... 96
Contact's IM&P presence ..... 83
Phone state
Agents..... 103
Supervisors..... 94
Silently
Agent's call ..... 106
Next queued call..... 115
Multiuser chat, starting..... 90

***N***

Night Service Override, enabling ..... 115
Notification, configuring ..... 149

***O***

Ordering
Call centers in agent's Dashboard..... 100
Queued calls ..... 114
Organizing, contacts ..... 76
Outgoing CLID, setting ..... 52
Outlook integration, configuring ..... 149
Outlook panel..... 32

***P***

Pane
Call Console..... 21
Contacts ..... 26
Queued Calls ..... 109
Panel
Agents ..... 30
Conference Call ..... 24
Custom directory..... 31
Directories ..... 33
Enterprise/Group..... 29
Instant Message..... 32

Outlook....32
Personal....29
Queues....31
Search....28
Speed Dial....31
Supervisors....30

Participant
Adding to conference....64
Ending in conference....65
Holding in conference....64
Resuming in conference....65

Password, changing....14, 139

Personal contacts
Adding....79
Deleting....80
Managing....79

Personal panel....29

Phone states....95, 103, 161
Monitoring for supervisors....94

Picking up agent's call....108

Plug-ins settings, configuring....147

Pop-up notification....45

Presence state of IM&P contacts....87

Presence states....162

Program shortcuts, configuring....151

Promoting calls in queue....116

Pulling out directories....72

## Q

Queue
Membership, configuring....144
Position call in, reorder....118
Promoting calls....116
Real-time statistics about....121
Retrieving calls from....116
Transferring call....59
Transferring calls between....117
Transferring calls to ad hoc number....117
Transferring calls to agent....117
Transferring calls to top....118

Queued calls
Grouping....114
Managing....109
Monitoring....115
Ordering....114
Viewing details....114

Queued Calls, pane....109

Queues panel....31

Quick reference, call operations....40

## R

Real-time statistics....120

Recording Calls....48

Redialing number....54

Reordering, calls in queue....118

Report settings
Configuring....153
Date and time....153
Default service-level calculations....154
Default thresholds....153

Reports
Generating....126
Managing scheduled....137
Running enhanced....126
Scheduling enhanced....132

Resuming
Conference....64
Conference participant....65
Held call....57

## S

Scheduling Enhanced Report....132

Screen Pop, configuring....140

Search panel....28

Search, dialing from....55

Searching for contacts....77

Selecting
Agents to monitor....101
Call centers to monitor by agent....98
Call Centers to monitor by supervisor. 111
Supervisors to monitor....94

Services, enabling or disabling....17

Setting, outgoing CLID .....52
Settings
About.....154
Application .....143, 146
Queue membership.....144
Application policies .....144
Barge-in and monitoring .....145
General .....138
Hotel Guest.....140
Language.....140
Screen Pop.....140
Workspace.....142
Messaging .....151
E-mail messaging.....152
IM&P.....152
Plug-ins.....147
Call event log.....151
LDAP .....150
Notification.....149
Outlook .....149
Program shortcuts.....151
Report .....153
Shortcuts, keyboard.....170, 171
Sign in
Hot desk.....11
Web browser.....9
Sign out.....12
Sign-in
Restrictions .....11
Silent Monitoring.....106
Sorting, contacts.....76
Speed dial numbers
Adding.....81
Deleting.....82
Managing .....80
Modifying .....81
Speed Dial panel .....31
Starting
Chat session .....89
Multiuser chat .....90
Starting Three-Way Conference.....63
States
ACD .....159
Calls ..... 163
User’s phone line ..... 161
User's presence states ..... 162
Statistics
Agent information..... 122
Agents and queues, real-time..... 120
Dashboard ..... 120
Navigating to agent..... 124
Queue information ..... 121
Selecting information to display..... 123
Subscribe to IM&P contact ..... 83
Subscription request, accept from IM&P contacts..... 86
Supervisors
Changing agent’s ACD state..... 105
Monitoring phone state ..... 94
Panel ..... 30
Phone states ..... 95
Selecting call centers to monitor..... 111
Selecting to monitor ..... 94
Viewing agent statistics..... 122
Viewing queue statistics..... 121

## *T*

Trace, generating for calls ..... 47
Transferring calls ..... 58
Blind ..... 58
Consultation ..... 58
Queue ..... 59
Supervisor
Queue to ad hoc number..... 117
Queue to agent..... 117
Queues, between ..... 117
Top of queue..... 118

## *U*

Unsubscribe from IM&P contact ..... 86
URL, opening for a call ..... 51
User interface
Action buttons ..... 37
Agents panel ..... 30

Call Console .....21
Call History .....33
Common panel .....29
Conference Call panel .....24
Contacts pane.....26
Controls.....34
Custom directory panel.....31
Dialer.....23
Directories panel.....33
Enterprise/Group panel.....29
Header bar.....22
Instant Message panel.....32
Logged user state .....20
Outlook panel.....32
Personal panel.....29
Queued Calls pane .....109
Queues panel .....31
Search panel.....28
Speed Dial panel .....31
Supervisors panel .....30

## V

vCard, saving.....51
Viewing
Agent details .....105
Call Center panels ..... 113
Call History..... 66
Calls ..... 43
Contacts ..... 70
Current calls ..... 43
Directory..... 70
Incoming call details..... 45
Queued calls details..... 114
Show or hide ..... 113
Viewing IM&P presence state..... 87

## W

Web Browser
Configuring..... 156
Configuring Firefox..... 157
Configuring Internet Explorer ..... 156
Web browser sign in ..... 9
Workspace
Call Console..... 21
Call History..... 33
Configuring settings ..... 142
Contacts pane ..... 26
Controls..... 34
Exploring ..... 18
Logo pane ..... 20

Powering connections

mitel.com

© 2015, Mitel Networks Corporation. All Rights Reserved.
The Mitel word and logo are trademarks of Mitel Networks Corporation.
Any reference to third party trademarks are for reference only and Mitel makes no representation of the ownership of these marks.