



Evolved Call Center Agent Web-Client

User Guide

1 About this Document

This user guide provides step-by-step procedures and reference information for using the EvolveIP Hosted Thin Call Center Release 20.0 client application.

1.1 Audience

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

1.2 How This Guide is Organized

The following table identifies the sections to refer to for information about the functionality provided by Call Center.

Section	Overview
Error! Reference source not found.	This section provides an overview of Call Center and the functionality available to agents and supervisors.
Error! Reference source not found.	This section describes how to sign in and out of Call Center, perform the initial setup, change a password, and obtain help.
Error! Reference source not found.	This section provides an overview of the user interface.
Error! Reference source not found.	This section provides information on how to make and manage calls. This includes using your contacts to make calls or perform actions on existing calls.
Manage Calls	This section provides information on managing call logs.
Error! Reference source not found.	This section includes information on how to send e-mail messages to contacts.
Error! Reference source not found.	This section provides information on managing contact directories and searching for contacts.
Monitor IM&P Contacts and Chat with Contacts	This section provides information about monitoring the presence state of your IM&P contacts and chatting with them.
Error! Reference source not found.	This section describes how agents can monitor the phone state of selected supervisors.
Monitor Call Centers (Agent)	This section describes the Dashboard panel available to agents. The Dashboard panel allows agents to view key indicators about selected call centers they are staffing.
Error! Reference source not found.	This section describes how supervisors can use Call Center to manage agents under their supervision.

Section	Overview
Error! Reference source not found.	This section provides information on managing queued calls.
Error! Reference source not found.	This section describes the Dashboard that supervisors can use to monitor the state of selected call centers and agents.
Error! Reference source not found.	This section describes how to generate and schedule reports.
Error! Reference source not found.	This section describes the settings you can configure to set up and customize Call Center for improved usability.
Error! Reference source not found.	This appendix contains definitions of terms used in Call Center.
Error! Reference source not found.	This appendix describes a diagnostic tool available in some versions of Call Center used to troubleshoot performance problems with the help of support personnel.
Error! Reference source not found.	This appendix describes the keyboard shortcuts available in Call Center.

1.3 Additional Resources

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

- *EvolveIP Hosted Thin Call Center Agent/Supervisor Configuration and Administration Guide*
- *EvolveIP Call Center Solution Guide*
- *EvolveIP Call Center Reports Guide*
- *EvolveIP Getting Started Web Interface Administration Guide*
- *EvolveIP Application Server User Web Interface Administration Guide*

2 Introduction to Call Center: Supervisor

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

EvolveIP 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, EvolveIP 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 EvolveIP 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 *EvolveIP Hosted Thin Call Center Agent/Supervisor Configuration and Administration Guide* or ask your administrator.

This document describes the EvolveIP Hosted Thin Call Center client.

EvolveIP 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.

2.1 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.

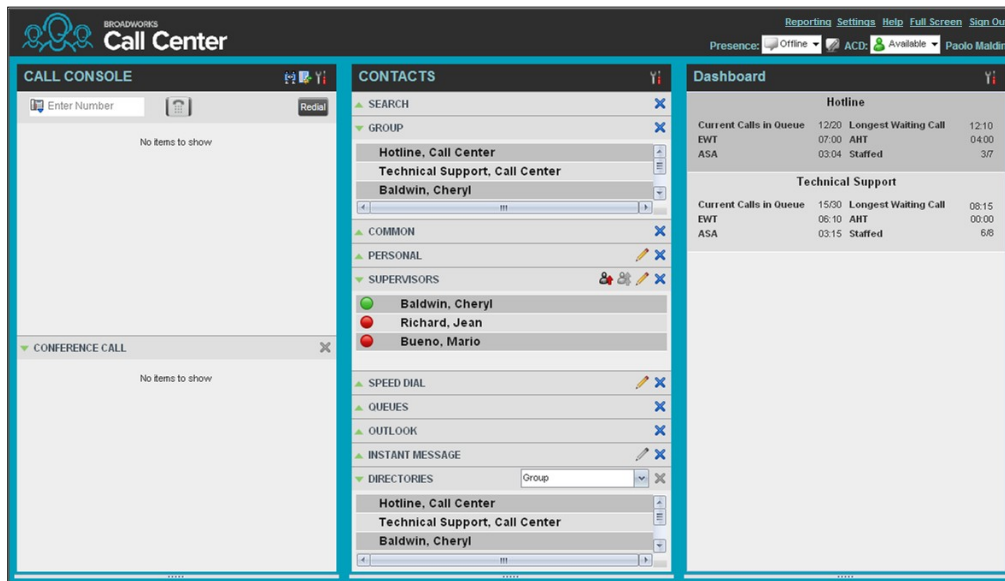


Figure 1 Call Center – Agent Main Interface

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.
- **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 **Error! Reference source not found. Error! Reference source not found.**

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

- **Error! Reference source not found.**
- **Error! Reference source not found.**
- [Manage Calls](#)
-
- **Error! Reference source not found.**
- **Error! Reference source not found.**
- [Monitor Call Centers \(Agent\)](#)
- **Error! Reference source not found.**
- **Error! Reference source not found.**

3 Getting Started

Call Center is hosted on EvolveIP 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.

NOTE 1: The minimum screen resolution required for the Call Center is 1024 x 768 pixels.

NOTE 2: Call Center does not support logging in as different users from the same machine at the same time.

NOTE 3: 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.

3.1 Launch Call Center from Web Portal

EvolveIP 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 Supervisor Client:

<https://callcenter.voip.evolveip.net/callcenter>

3.2 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.

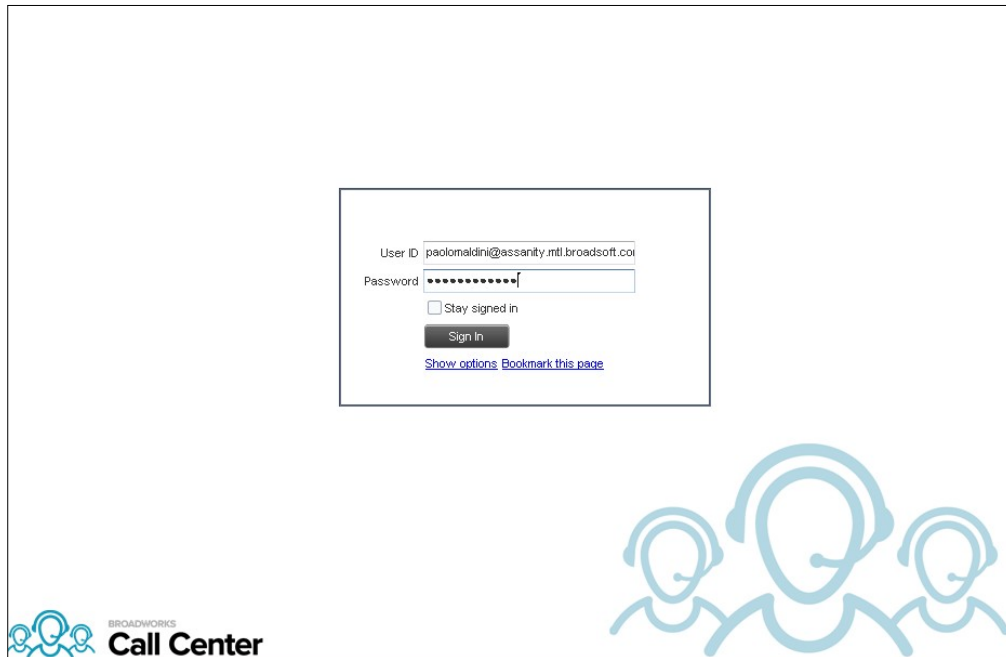


Figure 2 Call Center Sign-in Page

- 2) Enter your EvolveIP 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.

User ID: paolomaldini@assanity.mtl.broadsoft.com

Password: [masked]

Stay signed in

Sign In

[Hide options](#) [Bookmark this page](#)

Append Domain: [text box]

Hotel/Flexible Seating Host: Enter Host

Language: English (US) [dropdown]

Figure 3 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.

3.3 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 EvolveIP 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 EvolveIP 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.

NOTE 1: 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.

NOTE 2: 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 EvolveIP web portal. The host association time limit is usually configured by your administrator.

3.4 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."

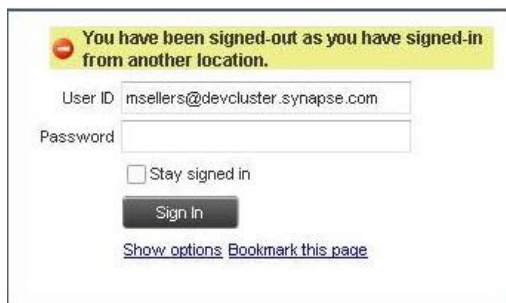


Figure 4 Sign-in Dialog Box with Error Message

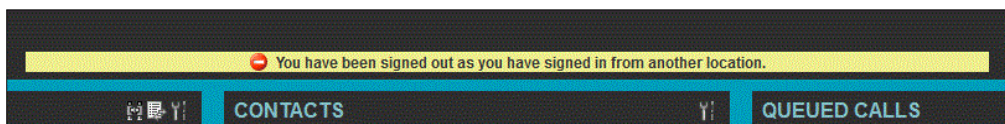


Figure 5 Main Interface (Top of Page) with Error Message

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

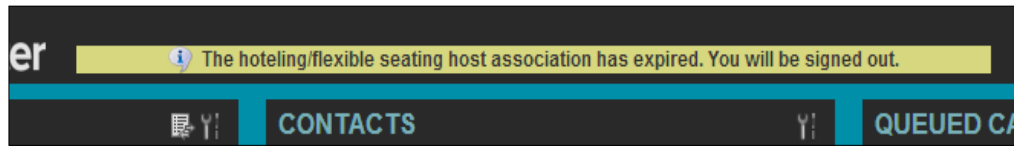


Figure 6 Main Interface (Top of Page) with Information Message

3.5 Get Help

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



Figure 7 Logo Pane with Help Link

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

3.6 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.

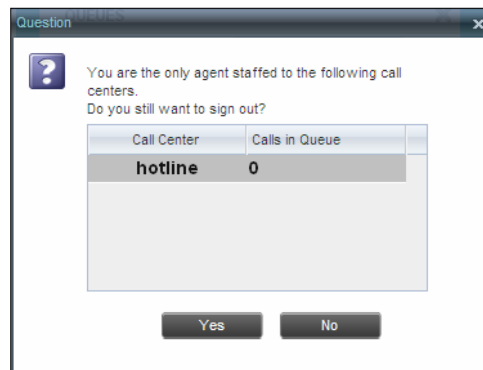


Figure 8 Dialog Box – Signing Out Last

- 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.

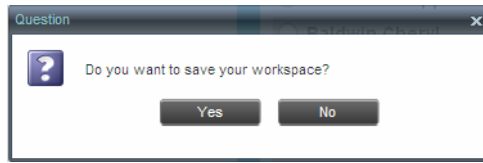


Figure 9 Dialog Box – Saving Workspace on Sign Out

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 [0 11.1.7 Workspace](#).

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

3.7 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 [0 11.2 Settings – Application](#).

- Configure the supervisors whose call status you want to monitor. For information, see section [8.1 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 **Error! Reference source not found. Error! Reference source not found.**

If you are a supervisor:

- Configure agents you want to monitor. For more information, see section **Error! Reference source not found. Error! Reference source not found.**
- Configure queues you want to monitor. For more information, see section **Error! Reference source not found. Error! Reference source not found.**

For more information about the settings you can configure in Call Center, see section **Error! Reference source not found. Error! Reference source not found.**

3.8 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**.

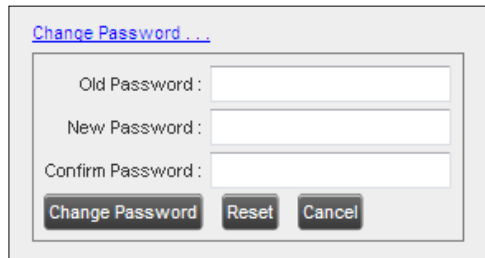


Figure 10 Changing Password

- 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 EvolveIP Single Sign-On feature. It must meet the password requirements set on EvolveIP.

3.9 Change Your ACD State

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.

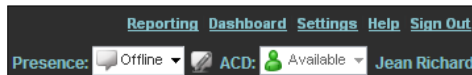


Figure 11 Logo Pane – ACD State Control

- 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.

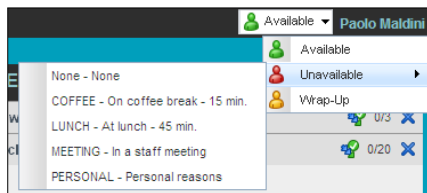




Figure 12 Logo Pane – Unavailable Codes

3.10 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 **Error! Reference source not found. Error! Reference source not found.**

4 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.

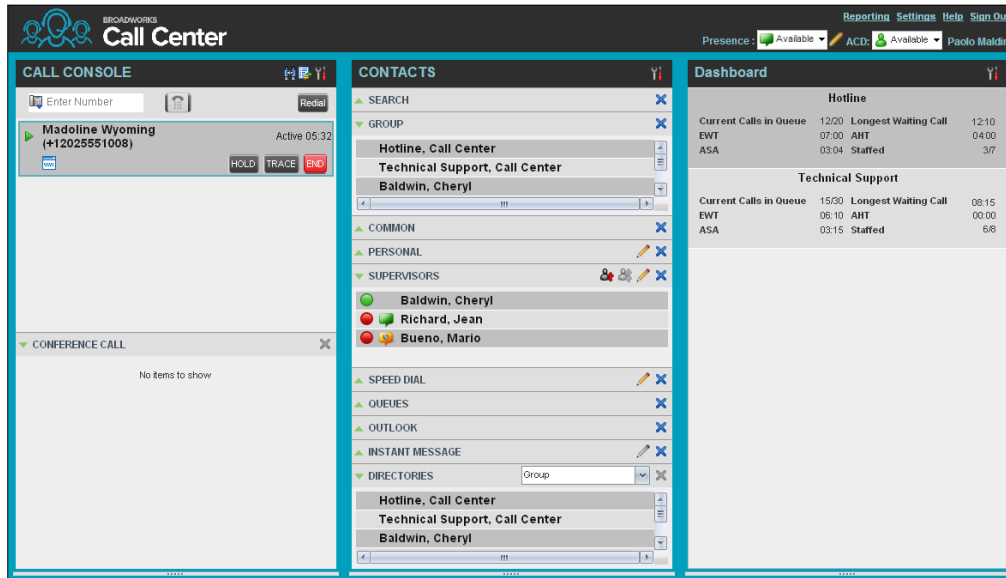


Figure 13 Call Center – Agent Main Interface

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 [0 11.1.7 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.

NOTE 1: To work in full screen mode, you can also click F11 when the main window is in focus.

NOTE 2: The Back, Forward, and Refresh operations of the web browser are not supported by Call Center, and if performed, the results are inconsistent.

NOTE 3: 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 [0 4.5 Controls](#). The action buttons are described in section [0 4.5.1 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 <i>Logo</i> pane displays global messages, information about the logged user, and links to other Call Center interface elements and functions.
Call Console	The <i>Call Console</i> is where you manage your current calls.
Contacts Pane	The <i>Contacts</i> 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 <i>Queued Calls</i> 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 <i>Chat</i> windows.
Call History Window	The <i>Call History</i> window, accessible from the <i>Call Console</i> 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 <i>Report</i> windows, accessible from the main page via the Reporting link, provide access to Enhanced Reporting, allowing you to generate, schedule, and view reports. Agents can only generate reports about themselves.
Dashboard (Supervisors)	The <i>Dashboard</i> , 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 <i>Dashboard</i> pane allows you to view the current state of the monitored call centers.
Settings Pages	The <i>Settings</i> 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:

- [4.1 Logo Pane](#)
- [4.2 Call Console](#)
- [4.3 Contacts Pane](#)
- [4.4 Call History](#)
- [4.5 Controls](#)

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

- *Queued Calls* pane – Section **Error! Reference source not found. Error! Reference source not found.**
- *Chat windows* – Section **Error! Reference source not found. Error! Reference source not found..**
- *Report windows* – Section **Error! Reference source not found. Error! Reference source not found.**
- *Dashboard pane* – Section [9 Monitor Call Centers \(Agent\)](#)
- *Dashboard* – Section **Error! Reference source not found. Error! Reference source not found.**
- *Settings pages* – Section **Error! Reference source not found. Error! Reference source not found.**

4.1 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.

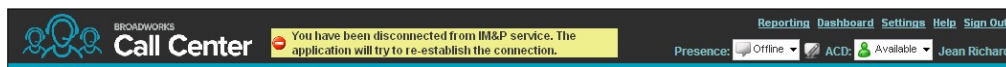


Figure 14 Call Center Logo Pane

4.1.1 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.

4.1.1 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.

4.1.2 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.

4.2 Call Console

You use the *Call Console* to view and manage your current calls. For information on managing your calls, see section **Error! Reference source not found. Error! Reference source not found.**

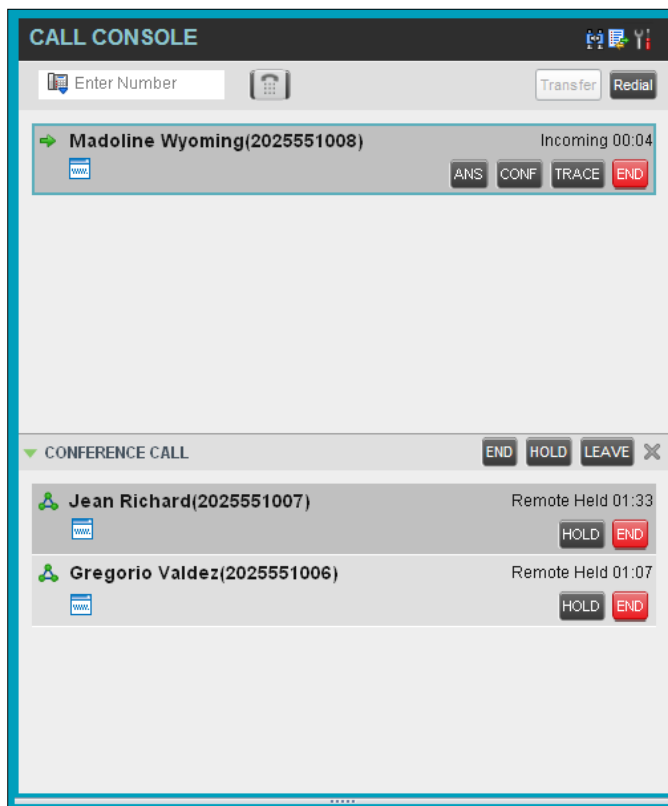


Figure 15 Call Console

The *Call Console* contains the following areas:

- [4.2.1 Header Bar](#)
- [4.2.2 Dialer](#)

- [4.2.3 Current Calls](#)
- [4.2.4 Conference Call](#)

4.2.1 Header Bar

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

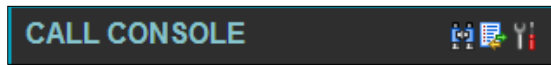







Figure 16 Call Console Header Bar

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.


4.2.2 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 17 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, which is where you enter the number to dial.
- Action buttons, which change depending on the context, and they allow you to perform operations on calls. For more information, see section [0 4.5.1 Call Action Buttons](#).

4.2.3 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.

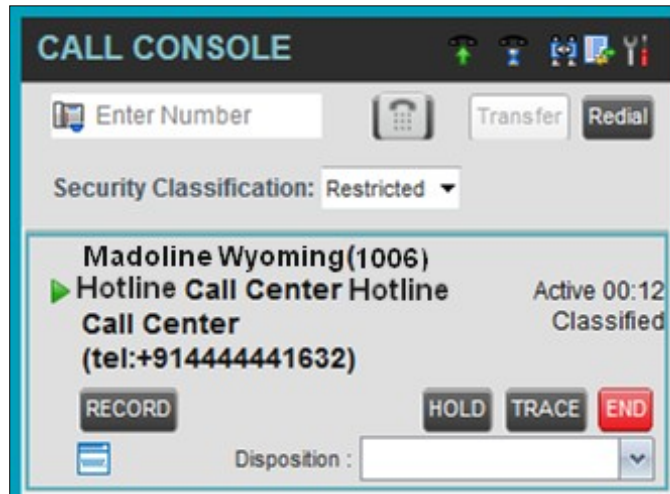


Figure 18 Call Console – Current Calls

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 [0 4.2.5 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 EvolveIP 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 [0 4.5.1 Call Action Buttons](#) and for the list of actions that can be taken in each call state, see section [0 4.2.5 Call States and Actions](#).

4.2.4 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 19 Call Console – Conference Call

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






-  End Conference button – This allows you to end the current conference.
-  Leave Conference button – This allows you to leave the conference.
-  Hold Conference button – This allows you to place the conference on hold.
-  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 [0 4.2.3 Current Calls](#).

For information on managing conferences, see section [5.13 Manage Conference Calls](#).

4.2.5 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

Call State	Display Name	Display Icon	Call Personality	Call Actions
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 Recalled		Terminator	Answer, Conference, End

4.3 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 **Error! Reference source not found. Error! Reference source not found.** For information about organizing and managing your contact directories, see section **Error! Reference source not found. Error! Reference source not found.**

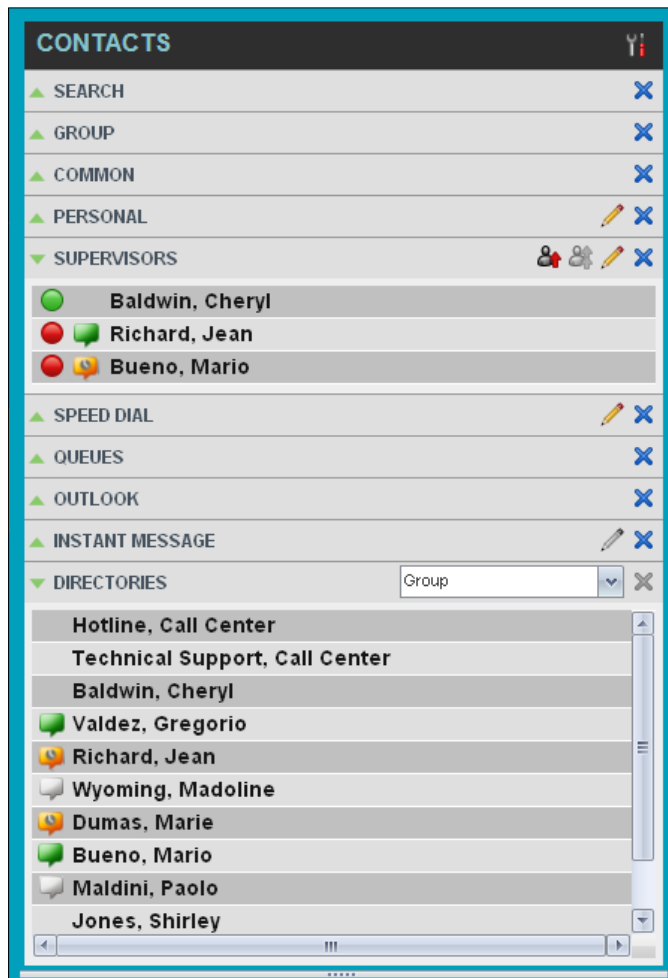


Figure 20 Contacts Pane

The *Contacts* pane contains the following panels:

- [4.3.1 Search Panel](#)
- [4.3.2 Enterprise/Group Panel](#)
- [4.3.3 Common Panel](#)
- **Error! Reference source not found.**
- [4.3.6 Speed Dial Panel](#)
- [4.3.7 Queues Panel](#)
- [4.3.8 Custom Directories Panels](#)
- [4.3.9 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 [0](#)

[7.1.1 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.

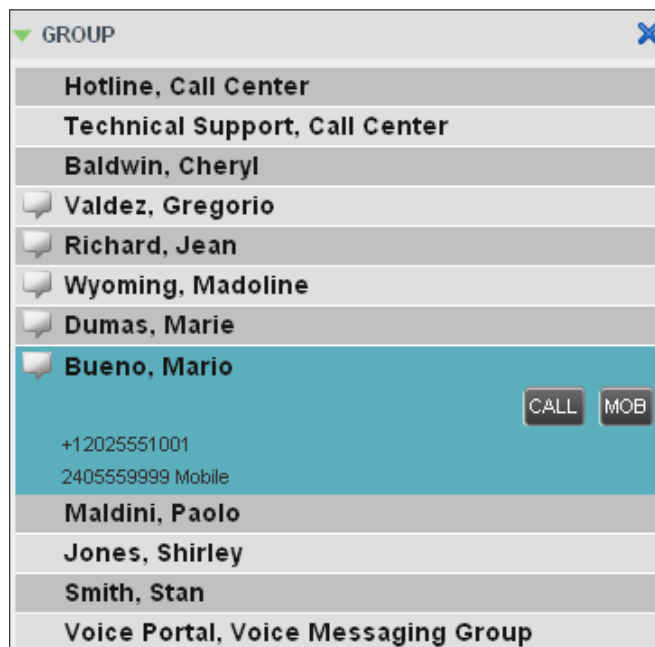


Figure 21 Group Panel – Contact in Focus with Action Buttons

For the list of Call Center action buttons, see section [0 4.5.1 Call Action Buttons.](#)

4.3.1 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 [0 7.3 Search for Contacts](#).

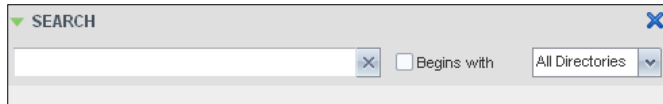


Figure 22 Contacts Pane – Search Panel

4.3.2 Enterprise/Group Panel

The *Enterprise/Group* panel contains the contacts in your EvolveIP 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.)

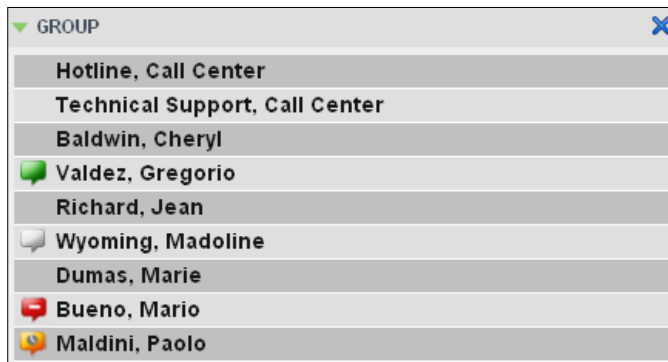


Figure 23 Contacts Pane – Group Panel

4.3.3 Common Panel

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

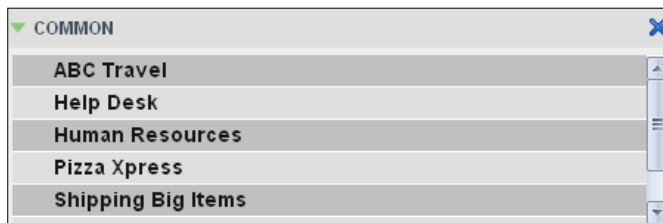


Figure 24 Contacts Pane – Common Panel

4.3.4 Personal Panel

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

For information about managing your personal contacts, see section [0 7.4 Manage Personal Contacts](#).

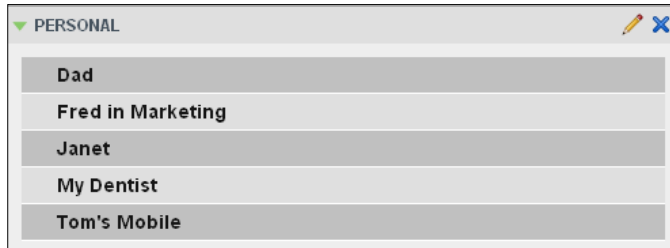


Figure 25 Contacts Pane – Personal Panel

4.3.5 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.

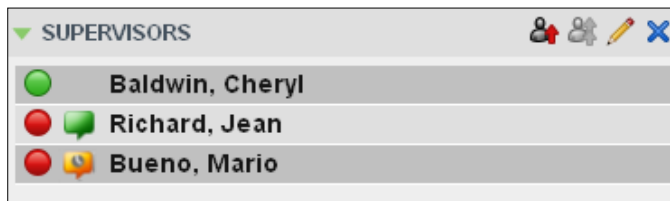


Figure 26 Contacts Pane – Supervisors Panel

Selected supervisors have their call status displayed. For more information, see section **Error! Reference source not found. Error! Reference source not found.**

4.3.6 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 [0 7.5 Manage Speed Dial Numbers](#).

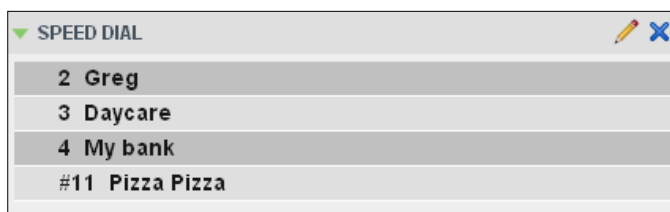


Figure 27 Contacts Pane – Speed Dial Panel

4.3.7 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.

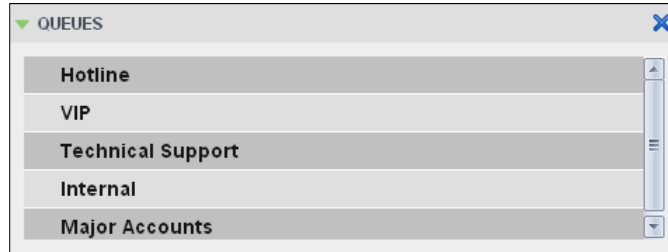


Figure 28 Contacts Pane – Queues Panel

4.3.8 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 EvolveIP group or enterprise directory.

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

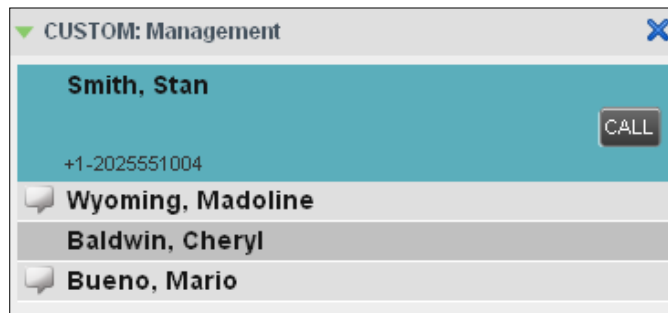


Figure 29 Contacts Pane – Custom Panel

4.3.9 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.

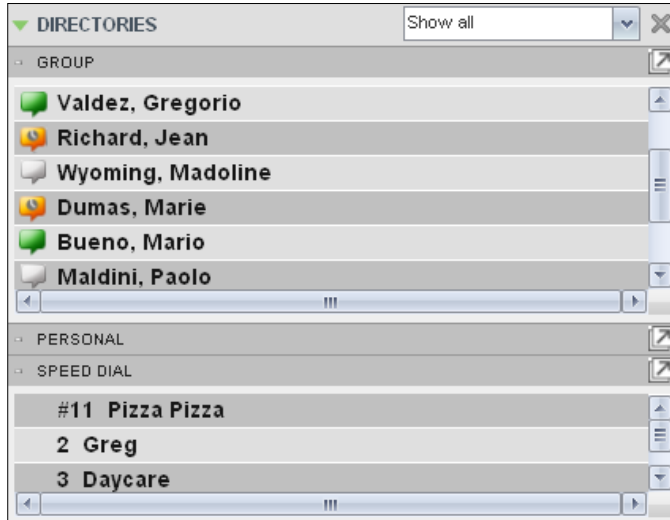


Figure 30 Contacts Pane – Directories Panel

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 **Error! Reference source not found. Error! Reference source not found.**

4.4 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 **Error! Reference source not found. Error! Reference source not found.**, and for information on managing your call logs, see section 5 [Manage Calls](#)

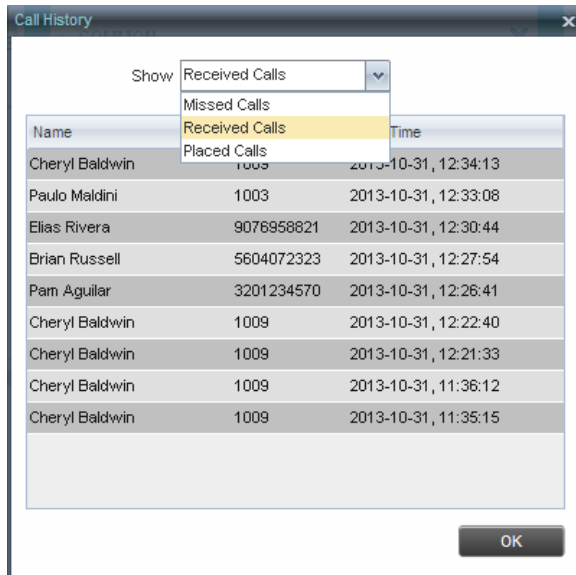


Figure 31 Call History Dialog Box

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

In addition, if you have Enhanced Call Logs service assigned, the following information is displayed, as applicable:

- Duration
- Outgoing DNIS
- Redirection Number
- Redirection Type

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.











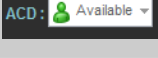
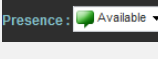

Figure 32 Call History Dialog Box – Call Log with Call Action Button














For the list of action buttons available in Call Center, see section [0 4.5.1 Call Action Buttons](#).

4.5 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 [0 4.5.1 Call Action Buttons](#).

Name	Description
Common Controls	
 Options	This is located in the upper-right corner of a pane or page. 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 <i>Wrap-Up</i> .
Disposition : <input type="text"/>	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 :  ACD State	This displays your current ACD state and allows you to change it.
Presence :  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.

Name	Description
 Auto Answer	This allows you to turn Auto Answering on or off.
 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 Conference	This ends a conference call.
 Leave Conference	This disconnects you from the conference while allowing other participants to continue the call.
 Hold Conference	This holds the conference call.
 Resume Conference	This resumes a held conference.
 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.
Queued Calls Pane – Call Center Queue Panel (Supervisors)	
 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.

4.5.1 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 33*. Note that other buttons may appear on the line for a contact, depending on the call state and the contact’s configuration.



Figure 33 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 <i>Dialer</i> .
 Call	This places a call to the selected contact or to a number from Call History.
 Redial	This redials the last dialed number.
 Mobile	This dials the contact’s mobile number.
 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	This transfers a call to an ad hoc number entered in the <i>Dialer</i> .
 Transfer	This transfers a call to a selected number or contact.
 Answer	This answers an incoming call, answers an unanswered call for a contact, or resumes a held call.
 Hold	This places a call on hold.
 End	This ends a call.
 Trace	This generates a call trace on a call.
 Conference	This establishes a conference call or adds a call to a conference.

Button	Description
 Record	Starts call recording or marks a call that is already being recorded to be kept.
 Pause	Pauses call recording.
 Resume	Resumes call recording.
 Stop	Ends call recording.
 Camp	This camps a call on a busy contact.
 Web Pop URL	This opens a page in your browser at the configured URL to provide additional information about the caller.
 Delete Call Log	This deletes a call log from Call History.
For Supervisors Only	
 Queue	This allows the supervisor to make an agent join or leave queues.
 Monitor Next Call	This allows the supervisor to silently monitor the next call for a selected agent or call center.
 Monitor	This allows the supervisor to silently monitor the current call for a selected agent with an active call.
 ACD State	This allows the supervisor to change a selected agent's ACD state.
 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.
 Answer	This answers an unanswered call for a monitored agent.
 Promote	This promotes a selected call to the next highest priority bucket within the queue.
 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 <i>Incoming</i> call rather than an <i>ACD</i> call in the reports.
 Reorder	This changes a call's position in the queue.

5 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.

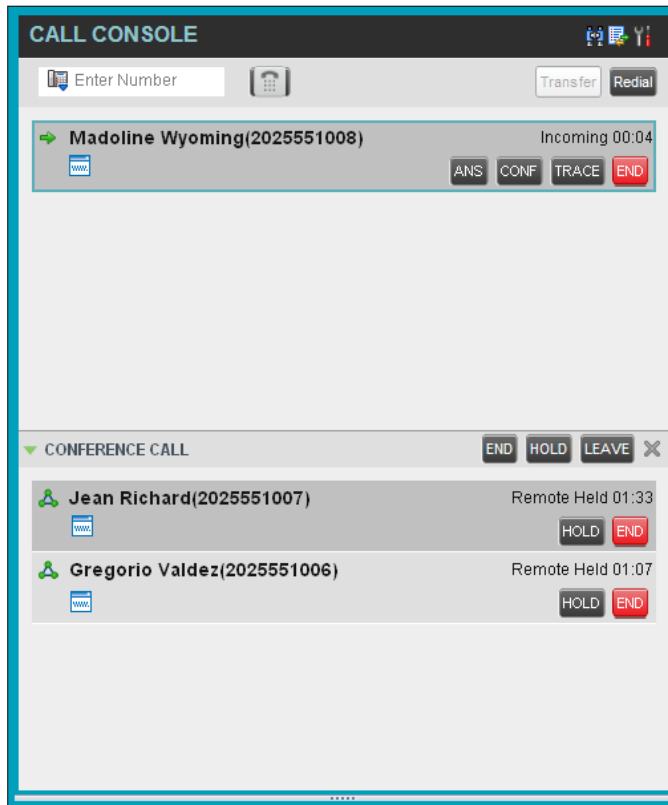


Figure 34 Call Console

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 [0 5.2 Drag and Drop Call onto Contact](#).

5.1 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 <i>Call Console</i> , 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 <i>Call Console</i> , click the Disposition Code button and select a code from the list. The code is applied to the last released call.

Function	Steps
Generate Call Trace for Selected Call	In the <i>Call Console</i> , click the Call Trace button for the target call.
Generate Call Trace for Last Released Call	In the <i>Call Console</i> , click the Call Trace button.
Answer Incoming Call	In the <i>Call Console</i> , click Answer for the target call.
Turn Auto Answer On	In the <i>Call Console</i> , click Auto Answer .
Open URL	In the <i>Call Notification</i> dialog box for an incoming call or on any call in the <i>Call Console</i> , click the Web Pop URL button.
Save a vCard	In the <i>Call Notification</i> dialog box for an incoming call, click the Add vCard button.
Place Call on Hold	In the <i>Call Console</i> , move the mouse over the call and click Hold .
Resume Held Call	In the <i>Call Console</i> , 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 <i>Dialer</i> and click Transfer on the <i>Dialer</i> .
Transfer with Consultation	While on the call, enter a number in the <i>Dialer</i> or select a contact in the <i>Contacts</i> pane and click Dial . When the new call is connected, consult with the party. When ready to transfer, select the original call. 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 <i>Queues</i> panel and click Transfer for that queue.
Start Three-Way Conference	In the <i>Call Console</i> , select a call. Move the mouse over a call that is not selected and click Conference .
Add Participant to Conference	In the <i>Call Console</i> , move the mouse over a call and click Conference .
Hold Conference	In the <i>Conference Call</i> panel, click Hold .
Resume Conference	In the <i>Conference Call</i> panel, click Resume .
Hold Conference Participant	In the <i>Conference Call</i> panel, select the call to put on hold and click Hold for that call.
Take Conference Participant Off Hold	In the <i>Conference Call</i> panel, select a held call and click Resume for that call.
Leave Conference	In the <i>Conference Call</i> panel, click Leave Conference .
End Participant	In the <i>Conference Call</i> panel, select the target call and click End .
End Conference	In the <i>Conference Call</i> panel, click End Conference .
Set Outbound CLID	In the <i>Dialer</i> , 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 <i>Dialer</i> , enter the number to call and click Dial .

Function	Steps
Re-dial Recent Number	In the <i>Dialer</i> , click Redial and select a number from the list.
Dial Recent Number	In the <i>Dialer</i> , start entering the number to dial. A list of numbers starting with the entered digits appears. Select a number from the list and click Dial .
Dial Contact	In the <i>Contacts</i> pane, click the contact and then click Call for that contact.
Dial from History	In the <i>Call Console</i> , click the Call History button. Select <i>Missed calls</i> , <i>Received calls</i> , or <i>Dialed calls</i> from the drop-down list. In the <i>Call History</i> dialog box, move the mouse over a call log and click Call .
Dial from Search	In the <i>Search</i> panel, select a contact and click Dial .

5.2 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.

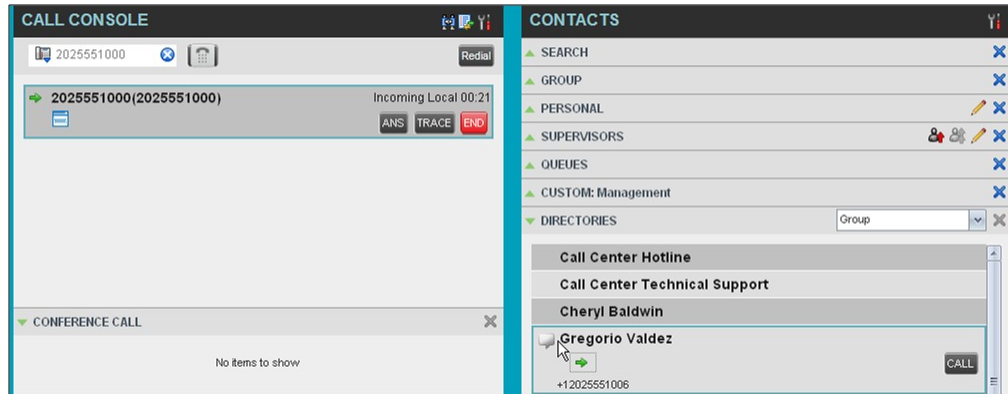


Figure 35 Dragging Call and Dropping on Contact

5.3 View Calls

You can view your current calls and your past calls (Call History). For information about Call History, see section [5 Manage Calls](#)

5.3.1 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*.

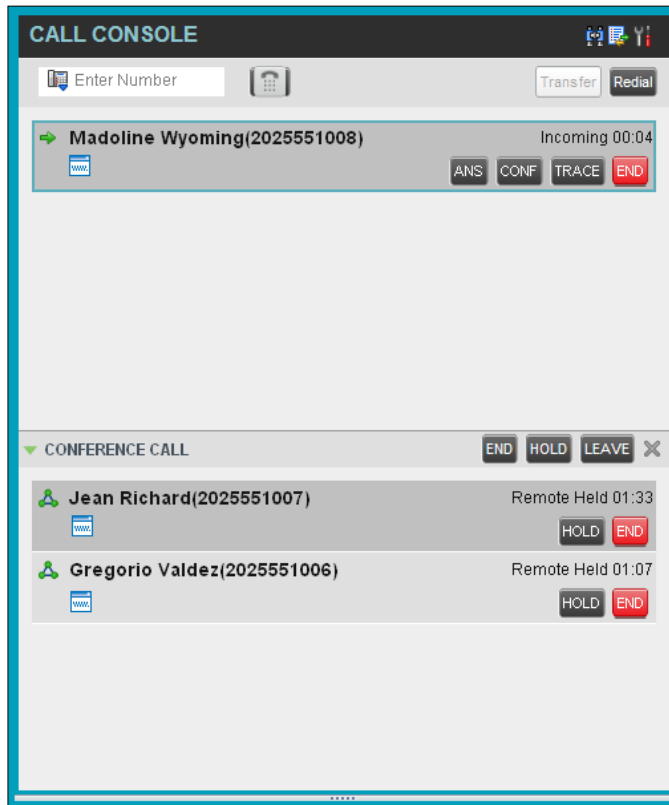


Figure 36 Call Console – View Current Calls

5.3.2 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.

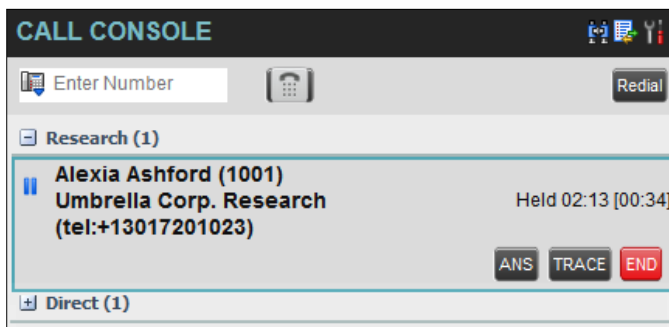



Figure 37 Call Console – Grouped Calls

To group or ungroup calls:

- 1) On the *Call Console* header bar, click **Options** .
- 2) Select *Group By* and then *Calls From*.

To ungroup, repeat the operation by selecting *None* instead of *Calls From*.

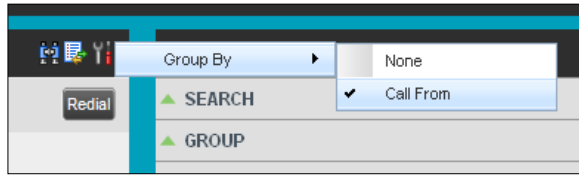




Figure 38 Grouping Calls in Call Console

To view or hide calls in a group:

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

5.3.3 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

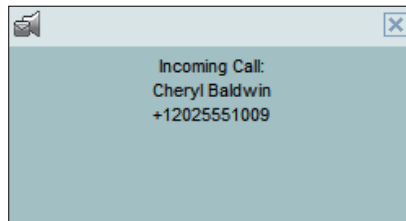


Figure 39 Call Notification Pop-up Window for Call That Is Not ACD Call

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 40 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.

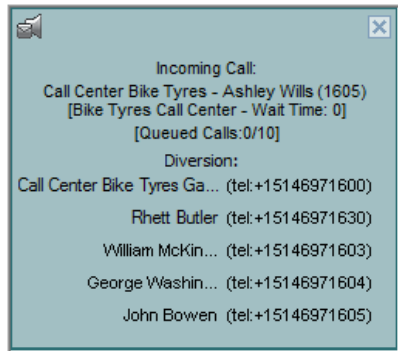


Figure 41 Call Notification Pop-up Window with Diversion Information

NOTE 1: You must have only one tab open in the browser running Call Center to receive call notifications.

NOTE 2: If calls come within eight seconds of each other, the *Call Notification* pop-up window only appears for the first call of that series.

5.4 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.

5.4.1 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.

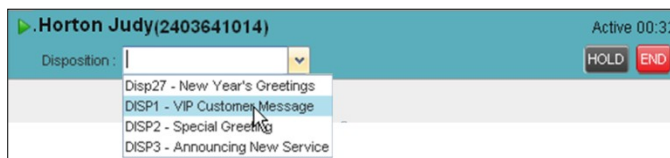


Figure 42 Call Console – Assigning Disposition Code to Active Call

- 2) From the list, select a code.

5.4.2 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.

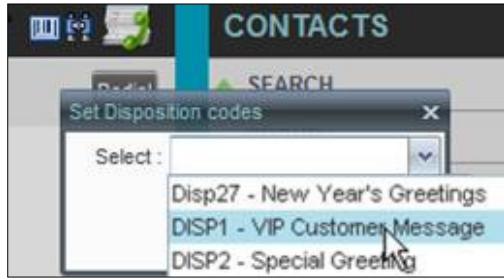


Figure 43 Call Console – Assigning Disposition

5.5 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.

5.1.1 Generate Call Trace for Selected Call


To generate a trace for a selected call:

Click **Trace**  for that call.

5.5.2 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** .

5.6 Record Calls

To record calls, you have to have the Call Recording service assigned and configured. You can record calls manually or have the system automatically record your calls. Depending on your Call Recording mode, Call Center may allow you to manually start, pause, resume, or stop recording a call.

For information on configuring your services, see the *EvolveIP Application Server User Web Interface Administration Guide*.



Figure 44 Call in Call Console with Record Button

When a call is being recorded, the recording state, (which can be either *Recording* or *Paused*) appears on the line for the call.

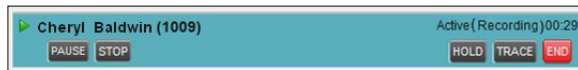


Figure 45 Call Being Recorded

5.6.1 Start Call Recording


To manually record calls, you have to have your Call Recording service mode set to *On Demand* or *On Demand with User Initiated Start*.

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


In the *On Demand* mode, the call is recorded from the beginning, and you have to request the recording before the end of the call to keep the recording. In the *On Demand with User Initiated Start* mode, the recording starts from the moment when you click the **Record** button.

5.6.2 Pause and Resume Call Recording

To pause and resume a recording, you have to have your Call Recording service mode set to *On Demand*, *On Demand with User Initiated Start*, or *Always with Pause/Resume*.

To pause a recording, select a call that is being recorded in the *Call Console* and click **Pause** .


The recording pauses until you resume it or the call ends.

To resume a paused recording, select a call whose recording has been paused in the *Call Console* and click **Resume** .

When you pause and resume a recording, only one call recording is generated for the call.

5.6.3 Stop Call Recording

You can only stop recording a call if your Call Recording service mode is set to *On Demand with User Initiated Start*.

To stop recording a call, select the call that is being recorded (or whose recording has been paused) in the *Call Console* and click **Stop** .

If you click **Start** after a call recording has been stopped, a separate recording is created.

5.7 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 46 Security Classification of Calls

5.7.1 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.

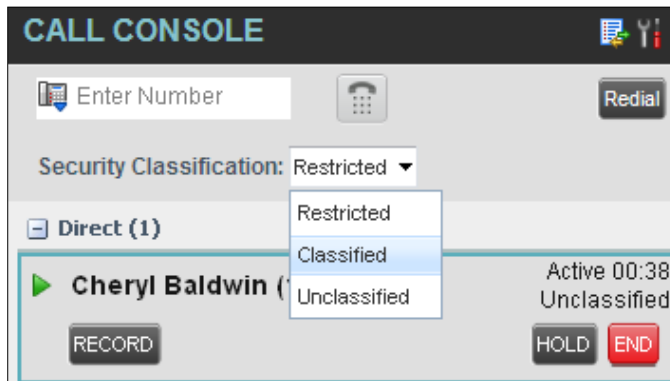


Figure 47 Security Classification Levels

To change your security classification:

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

5.8 Receive, Answer, and End Calls

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

5.8.1 Answer Call

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

To answer a ringing call:

Click **Answer**  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.

5.8.2 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 BroadSoft.


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

5.8.3 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 [0 11.1.4 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.

5.8.4 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.

5.8.5 End Call

To end a call:

Click **End**  for that call.

NOTE: If the call has not been answered yet, then the calling party continues to ring until there is no answer, until another applicable timer expires, or the user hangs up.

5.9 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.

5.9.1 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.

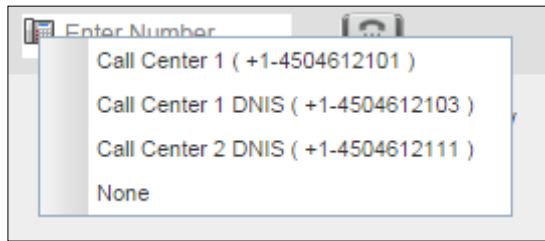


Figure 48 Dialer – Setting Outbound CLID

For information on permanently setting your outbound CLID, see section **Error! Reference source not found. Error! Reference source not found.**


5.9.2 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 49 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*.

5.9.3 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.

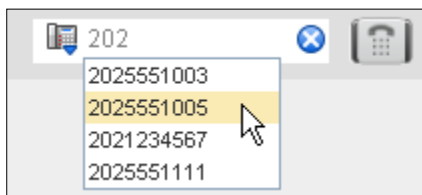




Figure 50 Dialer – Select Recently Dialed Number

- 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.

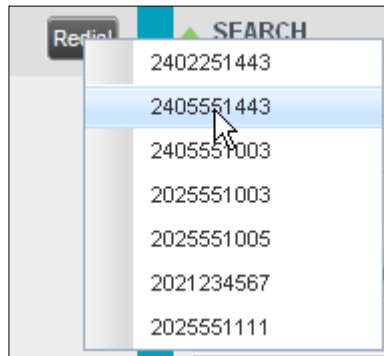



Figure 51 Dialer – Redialing Number

5.9.4 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**  for that contact.

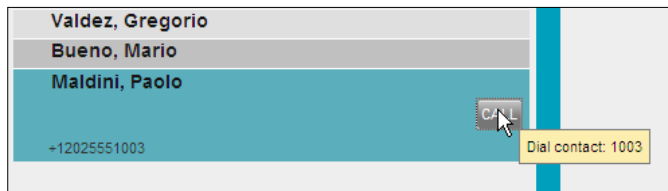



Figure 52 Group Panel – Expanded Contact with Action Buttons


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

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

5.9.5 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 [0 7.3 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** .

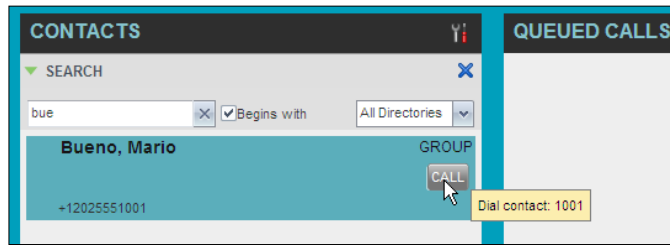


Figure 53 Dial From Search

5.9.6 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.

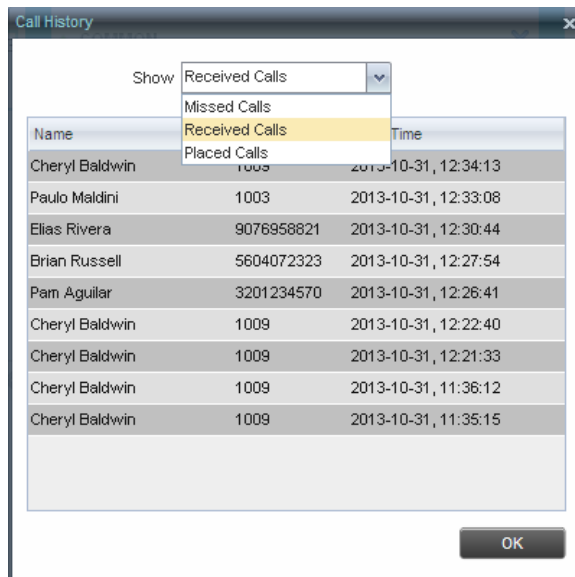



Figure 54 Call History Dialog Box

- 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**  button.

5.10 Place Calls on Hold, Resume, and Camp Calls

You can only put an active call on hold.

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

5.10.1 Place Call on Hold

To place a call on hold:

Click **Hold**  for the target call.

5.10.2 Resume Held Call

To resume a held call:

Click **Answer**  for the target call.


5.10.3 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 *Ringin*g.

If the camped call is not answered within the predefined time, then the call is recalled and it 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 **Error! Reference source not found. Error! Reference source not found.** For information on monitoring agents, see section **Error! Reference source not found. Error! Reference source not found.**

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 *Ringin*g.
- 3) Move the mouse over the contact and click **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*.


5.11 Transfer Calls

There are a number of ways that you can transfer a call. You can transfer using blind transfer, transfer with consultation, or transfer to a queue.

5.11.1 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:


- 3) From the *Call Console*, select the call to transfer.

- 4) In the *Contacts* pane, expand the directory from which you want to select a contact.
- 5) Click the destination contact and click **Transfer**  for that contact. The call is transferred and removed from the *Call Console*.

5.11.2 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*.

5.11.3 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**  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**  for that queue.

5.12 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.

5.12.1 Make Emergency Call

Use this method to escalate a call to a supervisor in an emergency. 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.

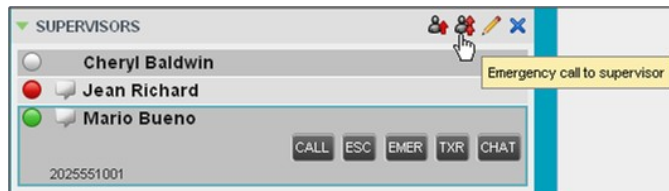


Figure 55 Supervisors Panel – Making Emergency Calls

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.


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




Figure 50 Conference Call Panel – Leave Conference

To make an emergency call to a specific supervisor:

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

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

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

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

5.12.2 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  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** .

5.12.3 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**  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** .


5.12.4 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**  for that supervisor.
- 2) When the supervisor accepts your call, speak to the supervisor about the issue.

In the *Call Console*, select the original call.



Move the mouse over the call to the supervisor and click **Conference** . A conference call is established and the calls appear in the *Conference Call* panel.

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

5.12.5 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**  for that supervisor.


When the supervisor accepts your call, speak to the supervisor about the issue.

In the *Call Console*, select the original call.

Move the mouse over the call to the supervisor and click **Conference** .

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

In the *Conference Call* panel, click **Hold Conference** . This puts both calls on hold but allows the customer and the supervisor to continue their conversation.

To drop a specific party from the conference, select their call from the *Conference Call* panel and click **End** .

To leave the call, click **Leave Conference**  in the *Conference Call* panel.

5.13 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 56 Call Console – Conference Call Panel

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

5.13.1 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 [5.9 Make Outbound Calls](#).

To start a conference:

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



Figure 57 Call Console – Starting Conference Call


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




Figure 58 Conference Call Panel – Conference Call

5.13.2 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** . The call is added to the conference.


5.13.3 Hold Conference

To put an active conference on hold:

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


5.13.4 Resume Conference

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

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


5.13.5 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** .


5.13.6 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** .

5.13.7 Leave Conference


To leave the conference:

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

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

5.13.8 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** .

5.13.9 End Conference

To end the conference:

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

6 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 **Error! Reference source not found. Error! Reference source not found.**


This section explains how to view and delete call logs.

6.1 View Call History

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

NOTE: The format in which date and time are displayed in the *Call History* dialog box depends on the date and time settings selected on the *Settings – General* configuration page. For details, see section [0 12.1.5 Date Format](#) and [0 11.1.6 Time Format](#).

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.

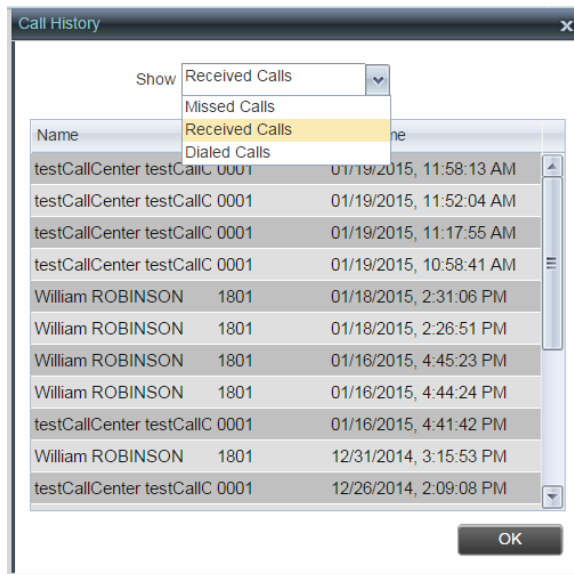


Figure 59 Call History Dialog Box

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

7 Manage Contacts

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

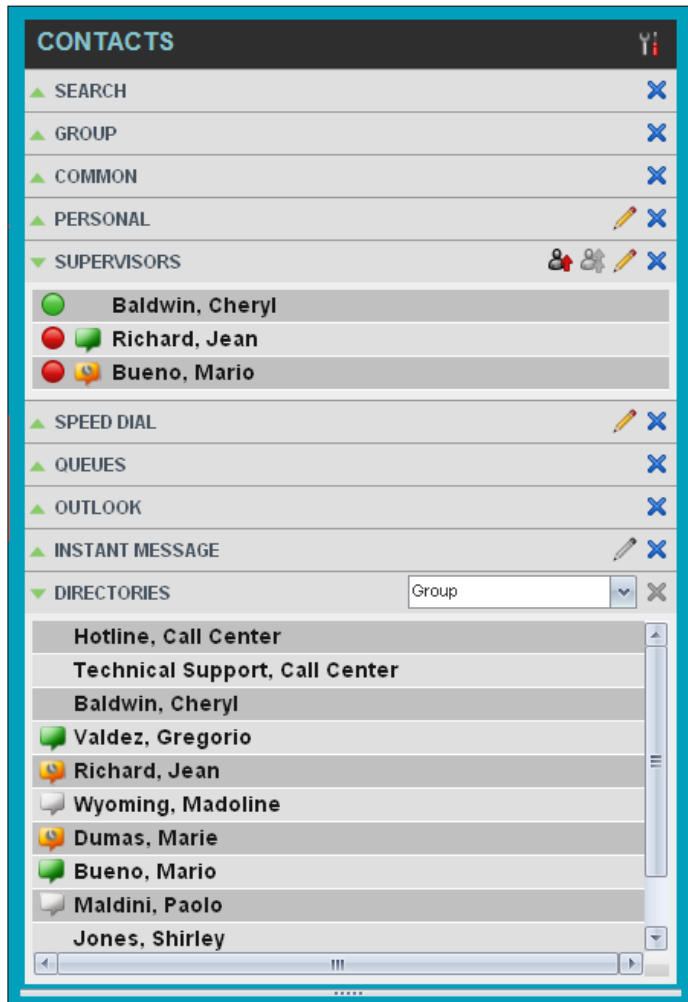


Figure 60 Contacts Pane

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

Interface Element	Description
Enterprise/Group	The <i>Enterprise/Group</i> directory contains the contacts in your EvolveIP group or enterprise directory.
Common	The <i>Common</i> directory contains the contacts in the common phone list configured by your administrator on EvolveIP.
Personal	The <i>Personal</i> directory contains all contacts in your Personal Phone List on EvolveIP.
Supervisors (Agents)	The <i>Supervisors</i> directory, available only to agents, contains the list of your supervisors and allows you to view their phone state.
Agents (Supervisors)	The <i>Agents</i> 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.

Interface Element	Description
Speed Dial	The <i>Speed Dial</i> 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 <i>Queues</i> 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 <i>Custom</i> directory contains selected contacts from your EvolveIP group or enterprise directory. You can have access to zero, one, or several custom directories. Custom directories are configured by your administrator.
Outlook	The <i>Outlook</i> directory contains your Outlook contacts.
Instant Message	The <i>Instant Message</i> directory lists IM&P contacts to which you are subscribed.
LDAP (Search Access Only)	Call Center provides search access to a configured <i>LDAP</i> directory. When you make a search on the <i>LDAP</i> directory and your search returns results, these results are displayed in the <i>Search</i> panel (in the <i>Contacts</i> pane). By default, no LDAP contacts are displayed in the <i>Contacts</i> 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:

- [7.1 View Contacts](#)
- [7.2 Organize Contacts](#)
- [7.3 Search for Contacts](#)
- [7.4 Manage Personal Contacts](#)
- [7.5 Manage Speed Dial Numbers](#)

7.1 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.

7.1.1 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.

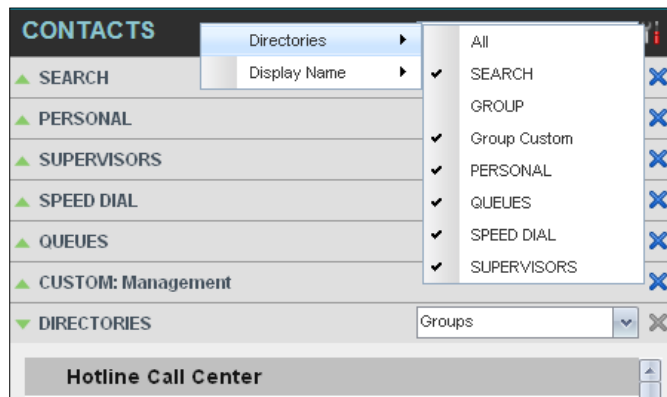


Figure 61 Contacts Pane – Show/Hide Contact Directories

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*.

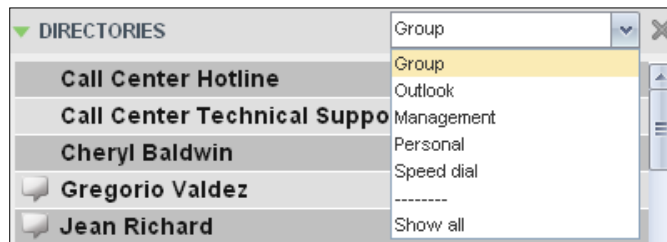


Figure 62 Directories Panel – Selecting Directory to Display

7.1.2 Display Directory Below Call Console

To display a directory below the Call Console:

- 3) In the *Directories* panel, select *Show all*.

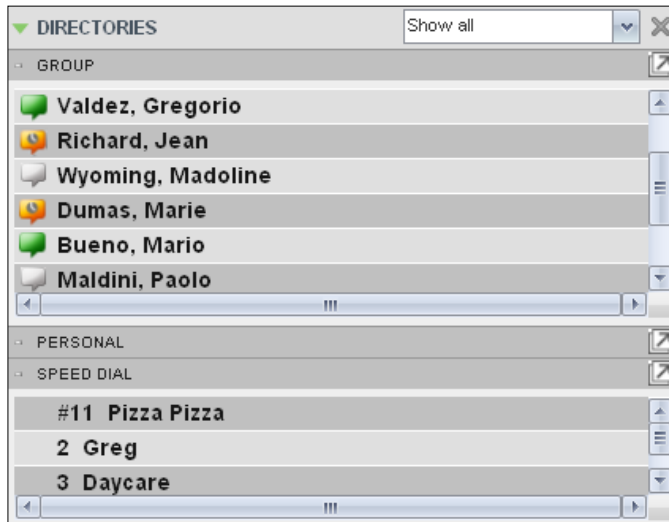



Figure 63 Directories Panel – Selecting Directory

- 4) Click the **Pullout Directory** button  for the directory to display.
- 5) The directory appears below the *Call Console*.

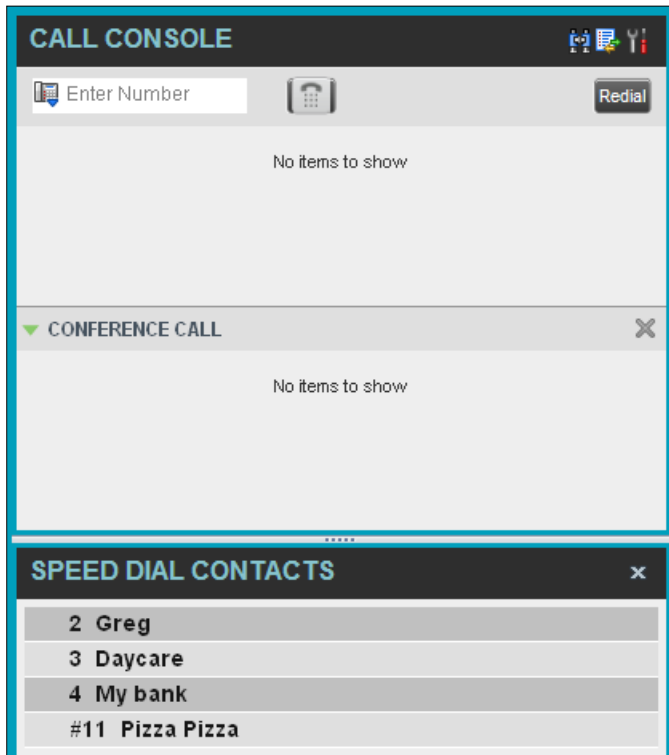



Figure 64 Custom Directory Displayed Below Call Console

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

7.1.3 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.

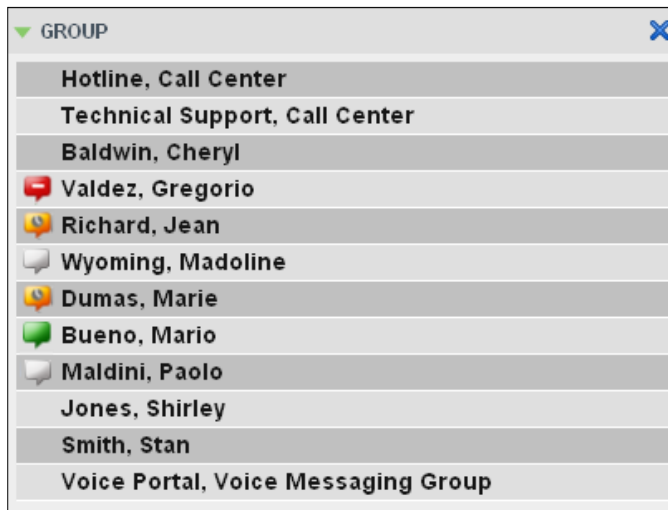


Figure 65 Group Panel Expanded

7.1.4 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.
- 3) 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 66 Group Panel – Contact Details

7.1.5 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*.

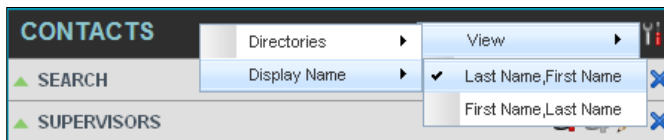


Figure 67 Contacts Pane – Displaying Contacts by First Name, Last Name

Figure 68 shows supervisors displayed by their last name followed by their first name.

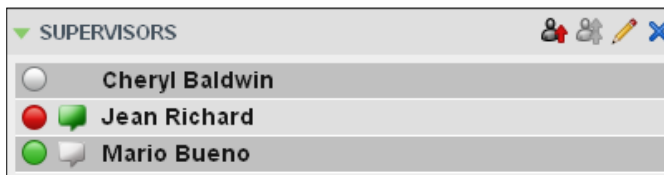



Figure 68 Supervisors Panel – Supervisors Listed by First Name, Last Name

7.2 Organize Contacts

7.2.1 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.

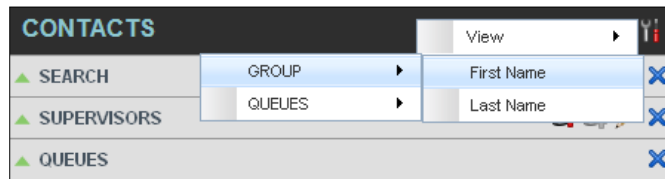


Figure 69 Contacts Pane – Sorting Contacts

Figure 70 shows a *Group* directory sorted by the contact’s first name.



Figure 70 Group Panel – Contacts Sorted by First Name

NOTE: When agents are ordered by ACD state and there is a change in the ACD state of an agent, the agents are not automatically re-ordered.

7.3 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.

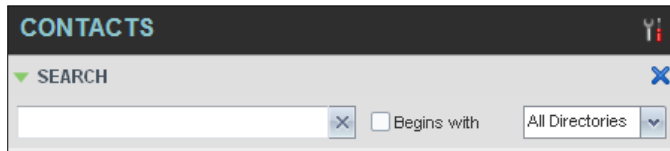


Figure 71 Contacts Pane – Search Panel

7.3.1 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.

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

Duplicate search results in other directories are displayed.




Figure 72 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”.

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.

7.4 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:

- [7.4.1 Add Personal Contact](#)
- [7.4.2 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.

7.4.1 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.

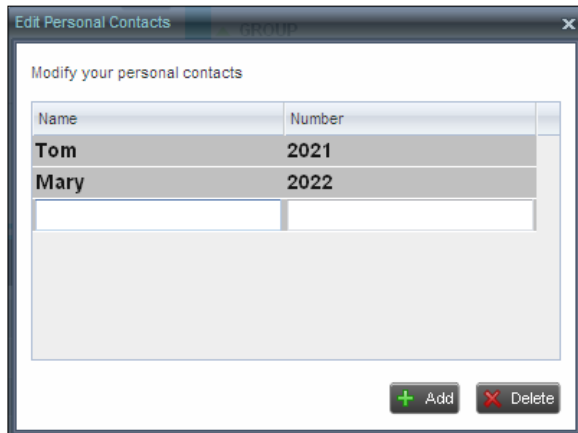



Figure 73 Edit Personal Contact Dialog Box – Adding Entry

- 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.

7.4.2 Delete Personal Contact

To delete a speed dial entry:

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

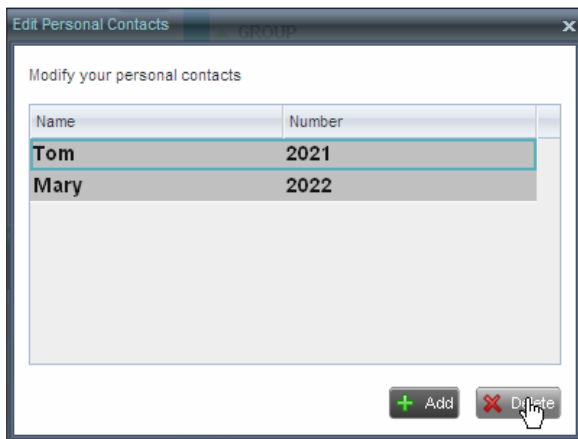


Figure 74 Edit Personal Contact Window – Deleting Entry

7.5 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:

- [7.5.1 Add Speed Dial Entry](#)
- [7.5.2 Modify Speed Dial Entry](#)
- [7.5.3 Delete Speed Dial Entry](#)

7.5.1 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.

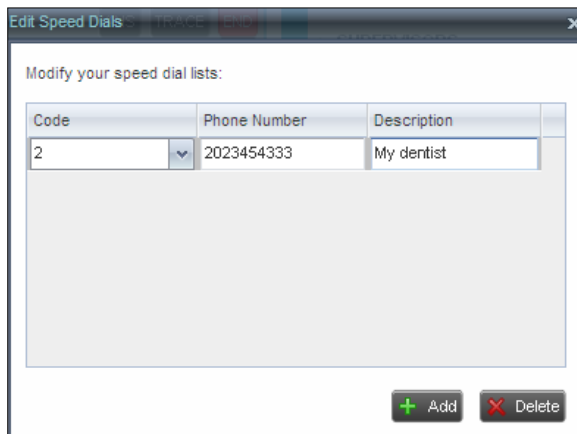



Figure 75 Edit Speed Dials Dialog Box – Adding Entry

- 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.

7.5.2 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.

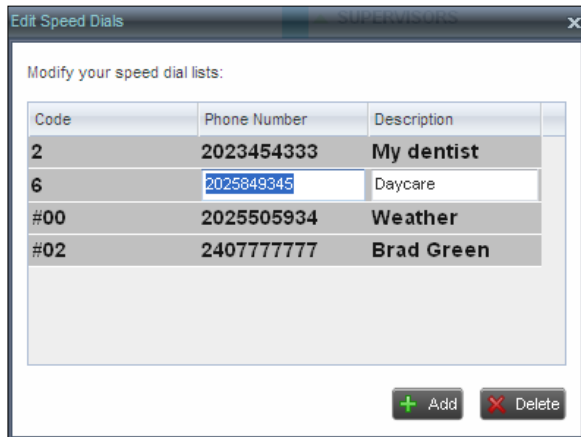



Figure 76 Edit Speed Dials Dialog Box – Modifying Entry

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

7.5.3 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**.

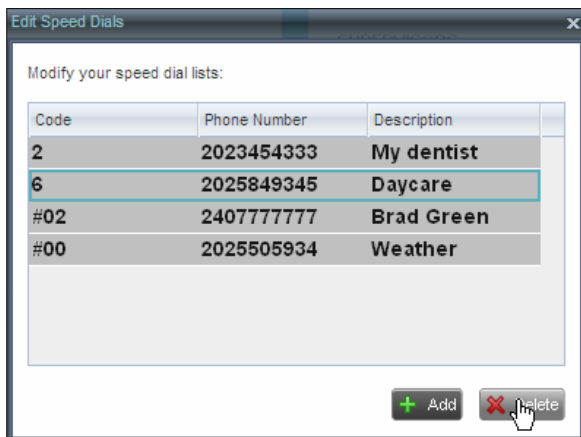


Figure 77 Edit Speed Dials Dialog Box – Deleting Entry

8 Manage Supervisors

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".

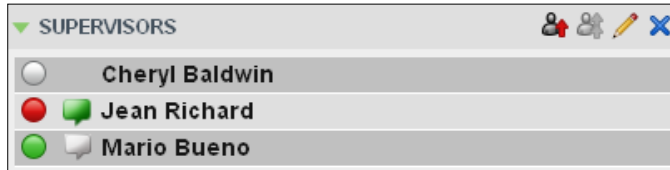


Figure 78 Supervisors Panel

NOTE: This capability is designed to monitor the supervisor's state related to normal calls. Conference calls are handled differently, and it may happen that the state of a supervisor who was in a conference call is temporarily not reflected properly. For example, if the supervisor is in a conference and then all other parties hang up, the supervisor's status shows as *Idle* even though their phone may still be off hook.

8.1 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.

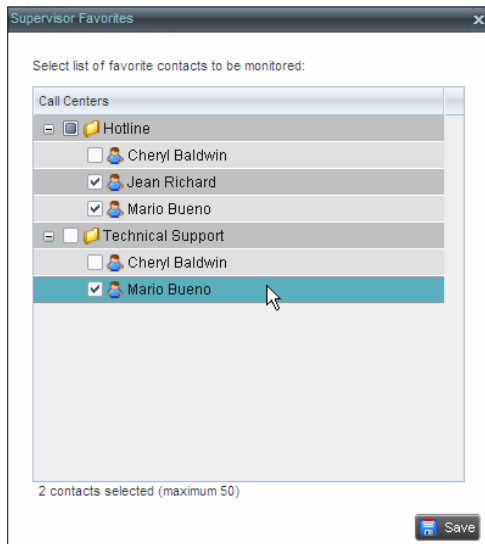


Figure 79 Supervisor Favorites Dialog Box

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

8.2 Supervisor Phone States

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

Phone State	Icon	Description
<i>Idle</i>	<input type="checkbox"/>	Supervisor’s phone is on-hook, which means the supervisor is not on a call.
<i>Busy</i>	<input type="checkbox"/>	Supervisor’s phone is off-hook, which means that the supervisor is on a call.
<i>Ringing</i>	<input type="checkbox"/>	Supervisor’s phone is in alerting state; a call is currently being delivered to the supervisor.
<i>Do Not Disturb</i>	<input type="checkbox"/>	Supervisor has enabled the Do Not Disturb service.
<i>Private</i>	<input type="checkbox"/>	Supervisor has enabled phone state privacy. 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.
<i>Call Forwarding Always</i>	<input type="checkbox"/>	Supervisor has enabled the Call Forwarding Always service.
<i>Unknown</i>	<input type="checkbox"/>	Supervisor is currently not monitored.

9 Monitor Call Centers (Agent)

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

9.1 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 [9.2 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 80 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 BroadWorks administrator to “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*.

9.2 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.

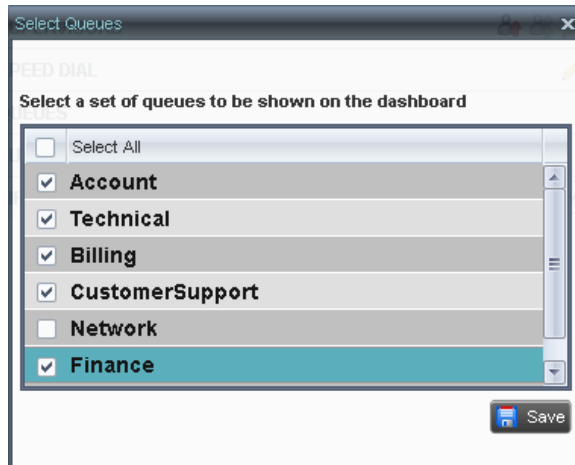



Figure 81 Select Queues Dialog Box

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

9.3 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.

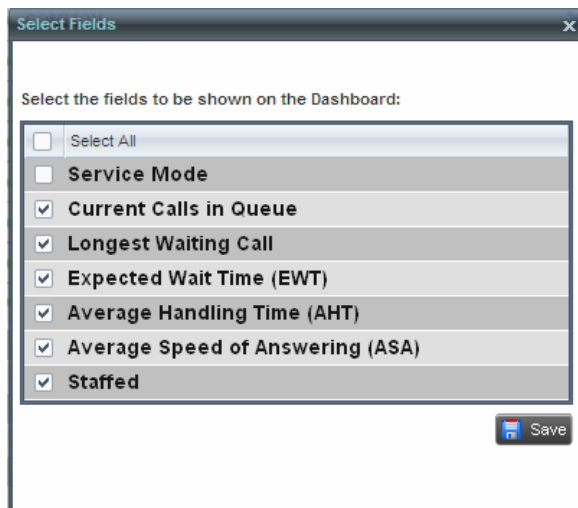



Figure 82 Select Fields Dialog Box

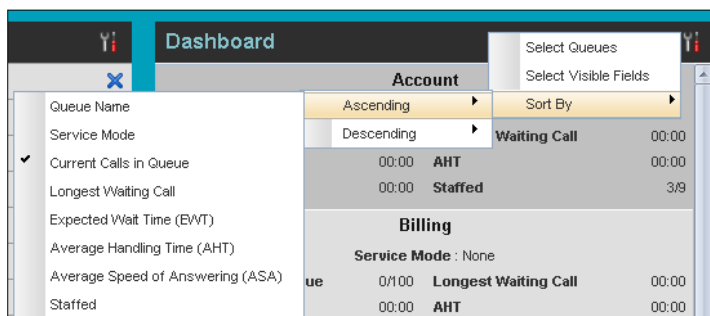
- 2) To display all performance indicators, check *Select All*. Alternatively, to show or hide some fields, check to uncheck the corresponding check boxes.
- 3) Click **Save**.

9.4 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.



10 Monitor IM&P Contacts and Chat with Contacts

When you have an IM&P service assigned on **Evolve IP**, 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 UC-One.

IM&P capabilities are available only when you are online. For information on setting you IM&P presence state below

10.1 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 you 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*.

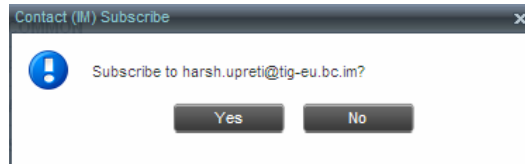
NOTE: The Instant Message panel does not include IM&P contacts in the *Unsubscribed* state.

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.


10.1.1 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.

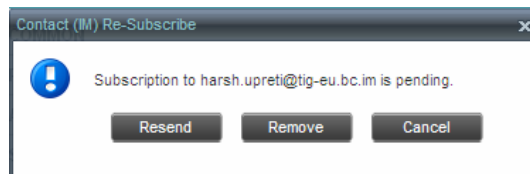


- 2) Click **Yes**.


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.

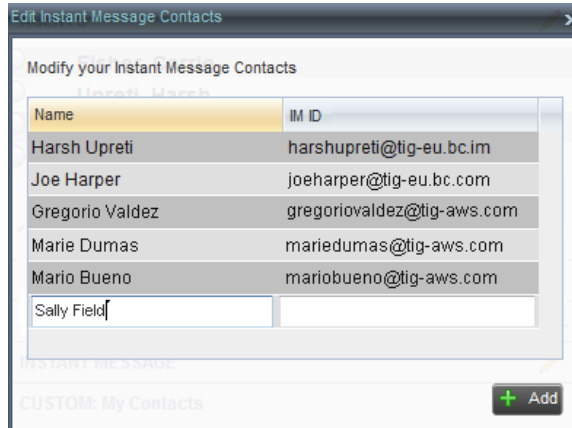
- 3) To resend a subscription request at any time, click the contact's presence icon again and click **Resend** in the dialog box that appears.



10.1.2 Add Contact to Message Directory

- 1) When you add a contact to the *Instant Message* directory, the system automatically sends a notification to 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.



- 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.

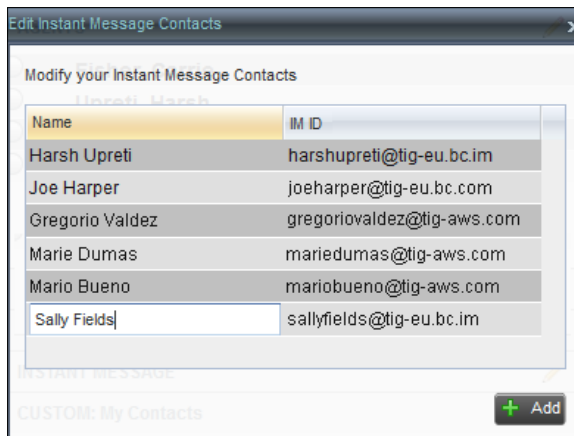
When the subscription is accepted, the contact’s presence state is updated to their actual presence state.

10.1.3 Modify Contact Name

You can modify the display name of an existing contact.

To modify the name of a contact:

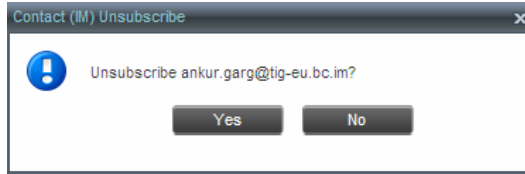
- 1) In the *Instant Message* panel, click **Edit** . The *Edit Instant Message Contacts* dialog box appears.
- 2) Double-click the contact and enter the new name in the *Name* text box.
- 3) To save your changes, click anywhere in the dialog box outside the entry.



10.1.4 Unsubscribe from a Contact

To stop monitoring a contact:

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



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

10.1.5 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.



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**.

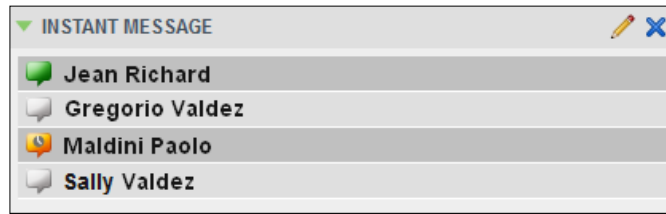
You can also close the dialog box and ignore the request. If you ignore the request, the dialog box will reappear the next time you go online.

10.1.6 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, UC-One Communicator Desktop, or UC-One Communicator Mobile.

The actual unified presence 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*.



The following table lists the possible unified presence states in Call Center.

IM&P State	Icon	Description
Subscribed States		
<i>Available</i>		The contact is online, available on one or more devices, and not busy on any device.
<i>Busy</i>		The contact is online, but currently busy on one or more devices. Do not disturb.
<i>Away</i>		The contact is connected but away from one or more devices and not busy on any device.
<i>Offline</i>		The contact is offline on all devices.
Unsubscribed States		
<i>Pending Subscription</i>		You sent a subscribe request to the contact, but it has not yet been accepted. Clicking the icon resends the request.
<i>Not subscribed</i>		The contact has the IM&P service but you are not subscribed to monitor their state. The contact does not appear in the <i>Instant Message</i> pane. Clicking this icon sends a subscription request to the contact.

10.2 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.

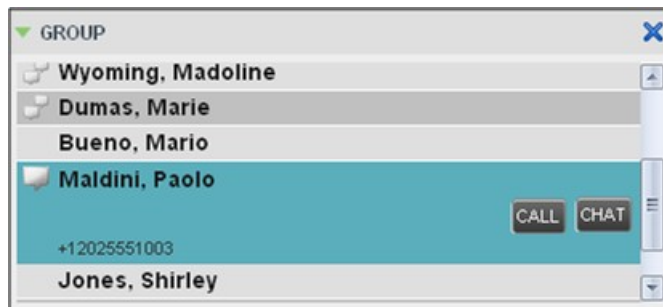
When your IM&P contact is in your group/enterprise, you can also phone them directly from the *Chat* window.


10.2.1 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.



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



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.

10.2.2 Place Call from a 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.

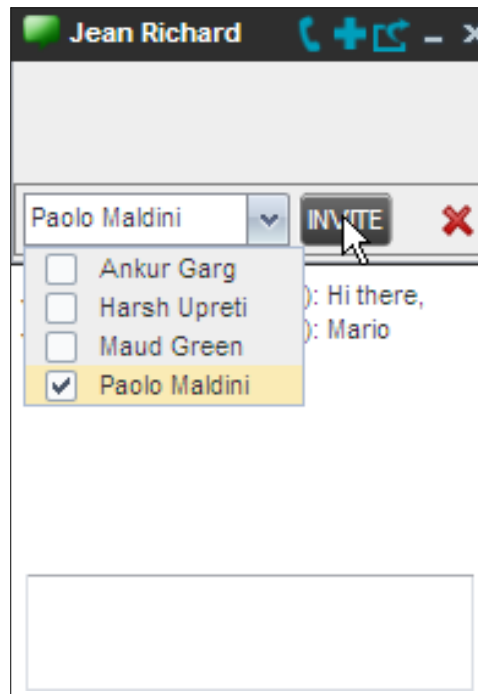
The Call Center client issues a Click-To-Dial attempt to the contact's phone number and the call appears in the *Call Console*.

10.2.3 Establish Multiuser Chat Session

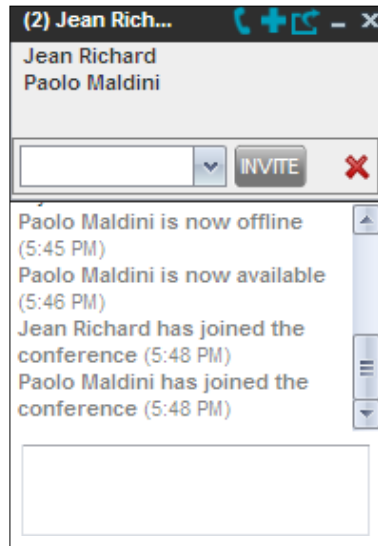
You can invite other contacts to your chat, thus converting your one-on-one chat to a multiuser chat. An incoming multiuser chat invitation opens a window for a new multiuser chat.

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.



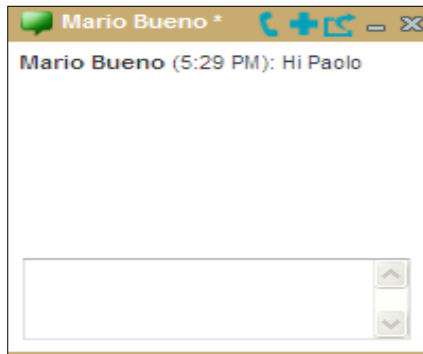
- 2) Select the check box next to each contact to invite and click the **Invite** button. When a contact joins the chat, a notification appears in the *Chat Logs* area of the *Chat* window. The participants (other than you) are also listed at the top of the window.



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

10.2.4 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



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:

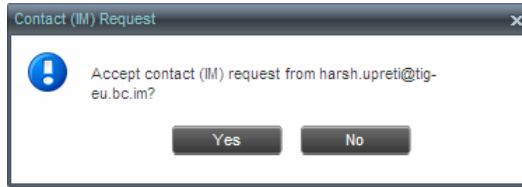
Click the **Pop-in** button  at the top-right of the window.

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.

10.2.5 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.



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.

11 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.

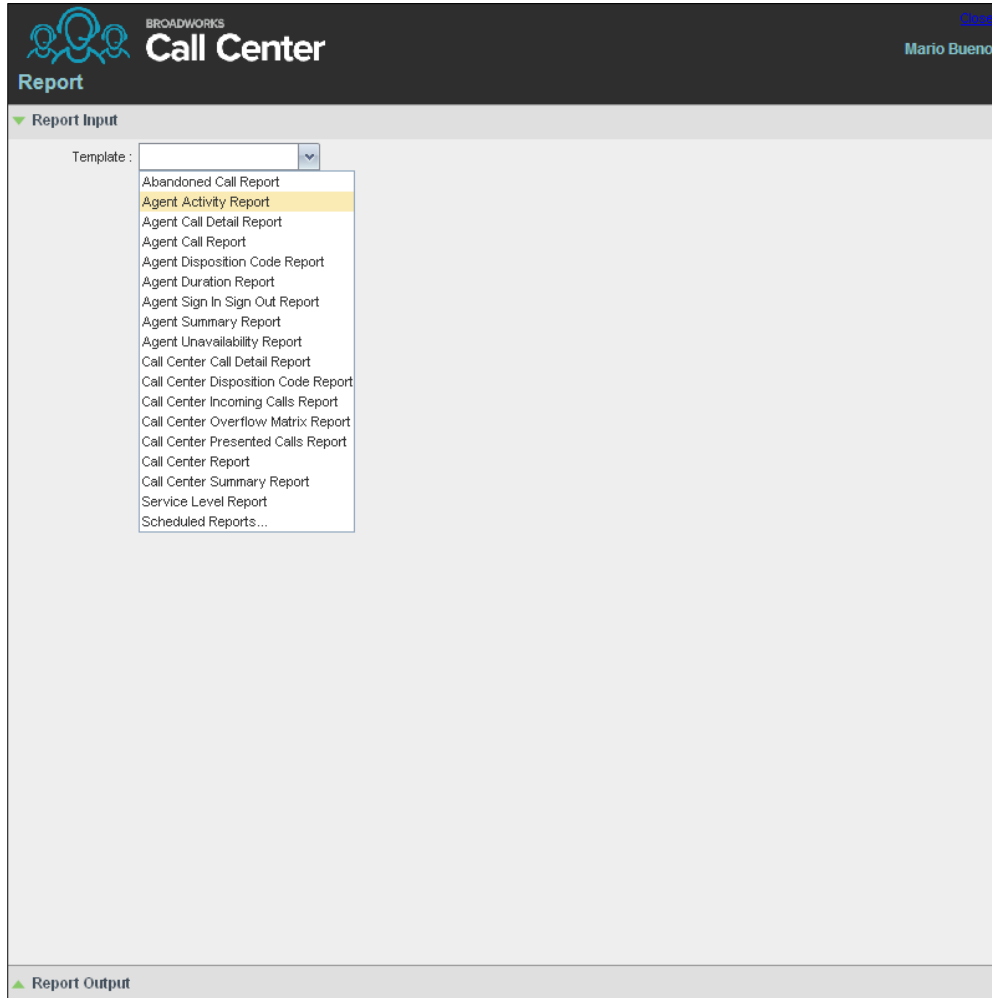


Figure 83 Main Interface (Top of Window)

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

11.1 To run a report:

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



- 2) Select a report template from the drop-down list. The page displays the input parameters for the 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
<i>Scope</i>	<p>For <i>Agent Reports</i>, it allows you to specify the agents to include in the report. You can check <i>All Agents</i> or <i>Agents</i>. If you check <i>Agents</i>, select agents from the drop-down list.</p> <p>NOTE: This parameter is disabled when an agent runs the report, since agents can only run reports about themselves.</p>	All Agents, Agents
	<p>For <i>Call Center Reports</i>, it specifies the call centers or DNIS numbers to include in the report. You can check <i>All Call Centers</i>, <i>Call Center</i>, or <i>DNIS</i>.</p> <p>If you check <i>Call Center</i>, select call centers from the drop-down list.</p> <p>If you select <i>DNIS</i>, select a call center and DNIS numbers from the drop-down lists. For <i>DNIS</i> you can also select <i>ALL DNIS</i>.</p>	All Call Centers, Call Center, DNIS
<i>Call Completion</i>	<p>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.</p>	1 through 72000

Input Field	Description	Allowed Value
<i>Short Duration</i>	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
<i>Service Level</i>	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
<i>Service Level Options</i>	<p>These settings are used to determine whether certain types of calls should be included in the service-level calculations:</p> <p>Check <i>Include overflow time transfers in service level</i> to include calls transferred due to time overflow.</p> <p>Check <i>Include other transfers in service level</i> to include calls transferred for other reasons.</p> <p>Select one of the following options for abandoned calls:</p> <ul style="list-style-type: none"> <i>Exclude Abandoned Calls</i> to exclude all abandoned calls <i>Include All Abandoned Calls</i> to include all abandoned calls <i>Include All Abandoned Calls Except Before Entrance Completes</i> to include calls abandoned after the entrance message has finished playing <i>Include Abandoned Calls Except in Defined Interval</i> to include calls abandoned after the time specified by the abandoned call interval parameter. 	These options can be checked or unchecked.
<i>Abandoned Call Interval</i>	If you selected the <i>Include Abandoned Calls Except in Defined Interval</i> option, enter the desired interval in this text box in seconds.	1 through 7200
<i>Service Level Percentage</i>	This setting allows you to specify the service-level objective (expressed as a percentage of calls).	
<i>Type</i>	<p>This can be checked as <i>Historical</i> or <i>Real time</i>.</p> <p>Historical reports show data from the assigned start date to the assigned end date.</p> <p>Real-time reports show data from the assigned start date to the present, with the current interval refreshed with real-time data.</p> <p>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.</p>	Historical or Real time
<i>Start Date</i>	<p>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:</p> <ul style="list-style-type: none"> 180 days of half-hour interval statistics 365 days of hourly interval statistics 730 days of daily interval statistics 	MMM DD, YYYY

Input Field	Description	Allowed Value
<i>Start Time</i>	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 <i>Hour Selection Type</i> . Time is applicable for hourly and minute intervals only.	1:00 am through 12:59 am, 1:00 pm through 12:59 pm, or 0:00 through 23:59
<i>End Date</i>	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
<i>End Time</i>	This is the time when you want the report to end. You can select the hour format (A.M., P.M., or Military time) from the <i>Hour Selection Type</i> . Time is applicable for hourly and minute intervals only. This is required when a Historical report is selected.	1:00 am through 12:59 am, 1:00 pm through 12:59 pm, or 0:00 through 23:59
<i>Sampling</i>	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
<i>Output Format</i>	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 is displayed in the <i>Report</i> window. If you select Excel File Format (XLS), a file is created that you can save on your computer.	PDF, XLS, HTML

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, (that 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*.

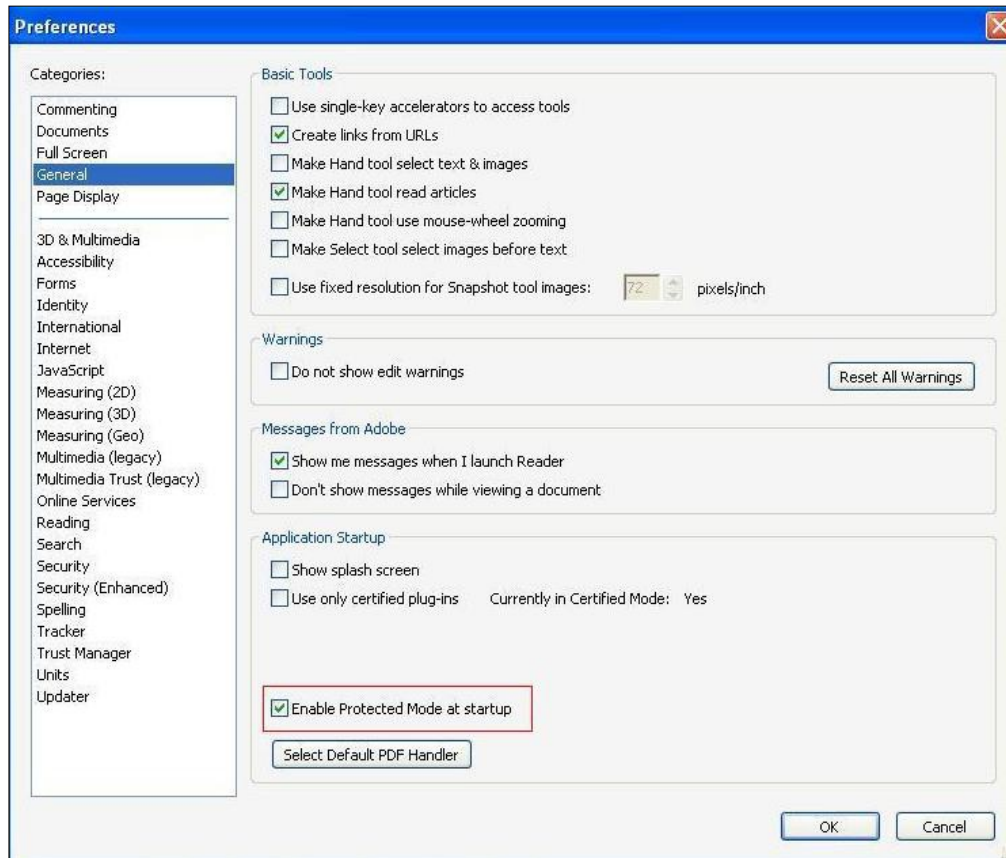


Figure 84 Preferences – General

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

11.2 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 *EvolveIP Call Center Reports Guide*.

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

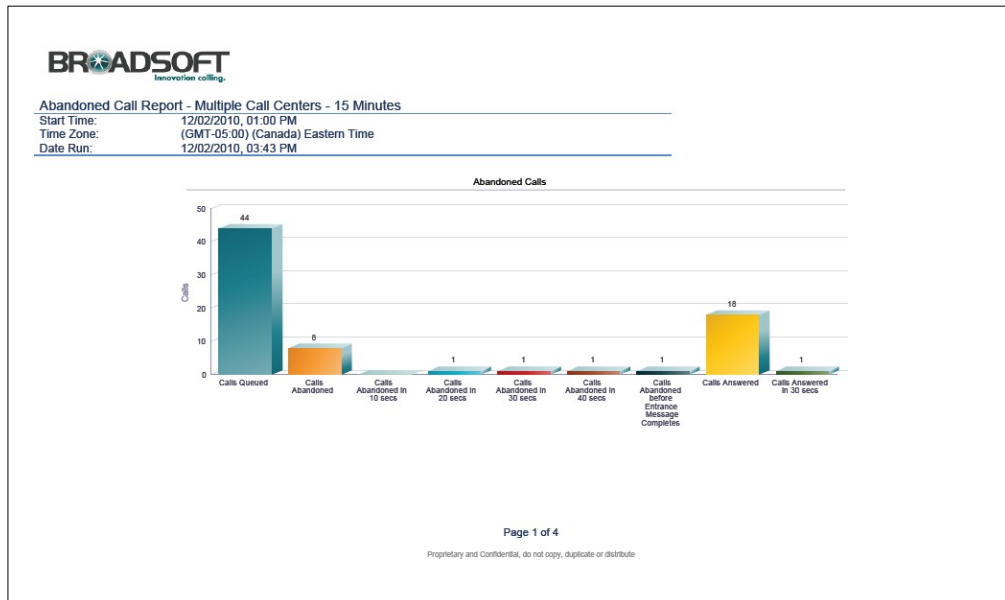


Figure 85 Abandoned Calls Report – Bar Chart

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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
	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
	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
	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
	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
	IS7039_CalCenterPremium	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
	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
	IS7043_CalCenterPremium	2	1	50.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	1	50.0%	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
	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

Page 2 of 4
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Figure 86 Abandoned Calls Report – Table (Fragment)

11.3 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.

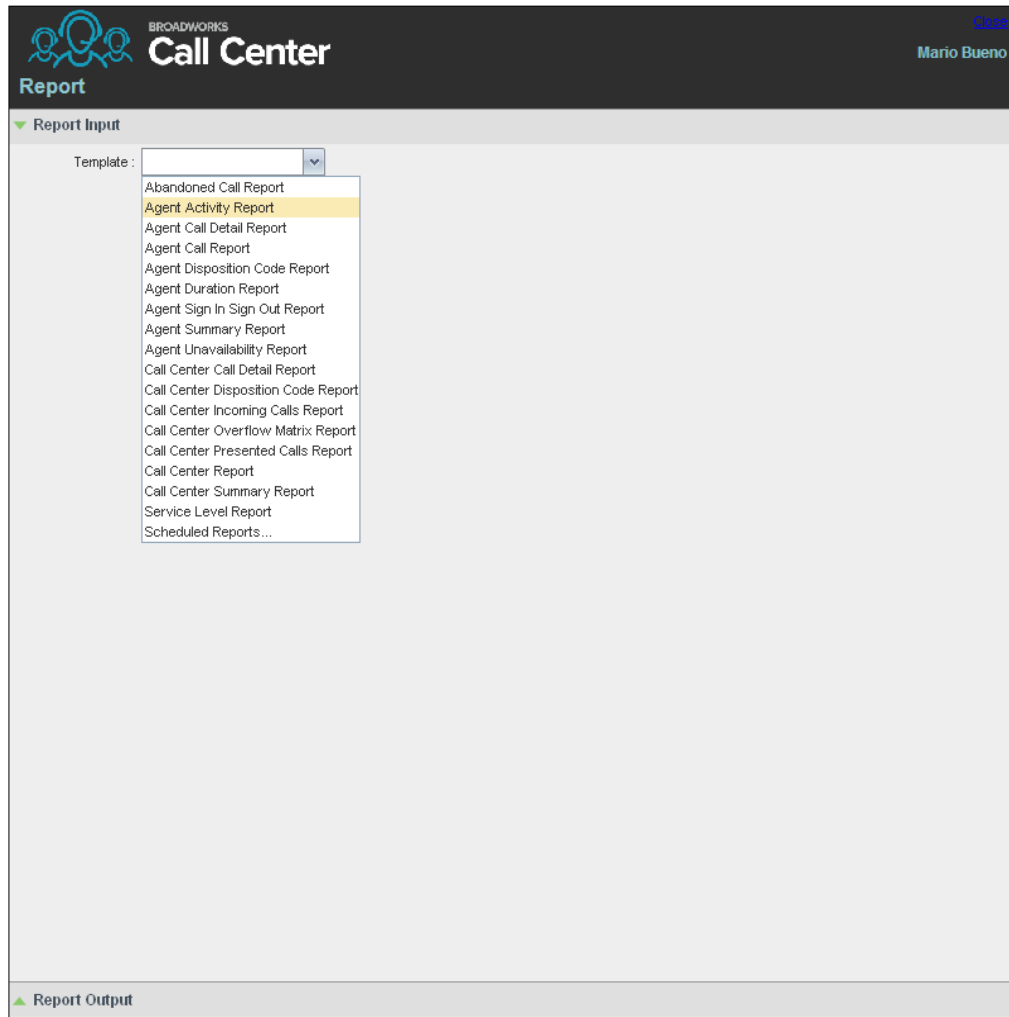


Figure 87 Report Window – Report List

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

Close
Report
Sheldon Cooper

Report Input

Template : Abandoned Call Report

Scope : All Call Centers Call Center DNIS

[Hide Performance Parameters...](#)

Service Level :

Abandoned Call Threshold :

Type : Historical Real time Scheduled

Name :

Description :

Report Time:

*Schedule Date : 07/30/2012 *Schedule Time : 12:00pm HH:MM [am/pm]

Recurrence Pattern:

Recurs : Never

Every : 1 day(s)

Timeframe: 07/30/2012 : 12:00pm HH:MM [am/pm] : 07/30/2012 : 12:00pm HH:MM [am/pm]

Sampling : Daily

Output Format : PDF

Recipients :

: :

: :

: :

: :

: :

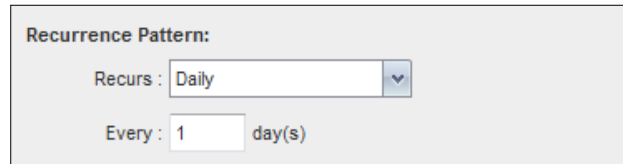
Report Output

Figure 88 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.

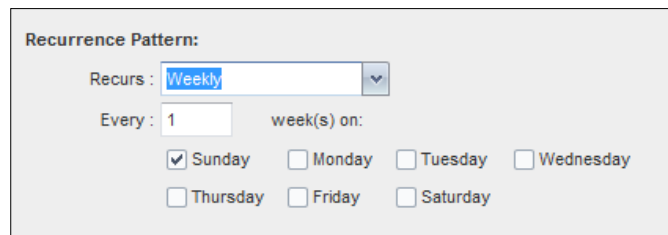
- If you selected *Daily*, enter the frequency of recurrence in days.



Recurrence Pattern:
 Recurs : Daily
 Every : 1 day(s)

Figure 89 Scheduled Report – Daily Recurrence Pattern

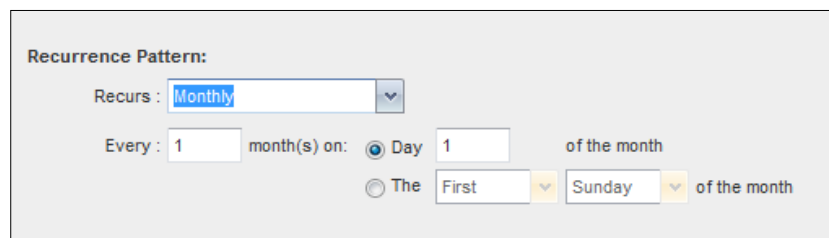
- If you selected *Weekly*, enter the frequency of occurrence in weeks and select the day of the week when you want the report to be generated.



Recurrence Pattern:
 Recurs : Weekly
 Every : 1 week(s) on:
 Sunday Monday Tuesday Wednesday
 Thursday Friday Saturday

Figure 90 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.



Recurrence Pattern:
 Recurs : Monthly
 Every : 1 month(s) on: Day 1 of the month
 The First Sunday of the month

Figure 91 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.

Recurrence Pattern:

Recurs : Yearly

Every : 1 year(s) on: Day 1 of January

The First Sunday of January

Figure 92 Scheduled Report – Yearly Recurrence Pattern

6) Specify when the report should run.

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

Report Time:

*Schedule Date : 07/30/2012

*Schedule Time : 12:00pm

Figure 93 Report Time for Nonrecurrent Report

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

Report Time:

*Start Date : 07/30/2012

*Run Time : 12:00pm

Figure 94 Report Time for 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 95 Scheduled Report – Recurrence Range

- 8) Specify the report time frame, that is, the period for which you are requesting the report.
 - For a nonrecurrent report, enter the actual dates and times.

Figure 96 Report Timeframe for Nonrecurrent 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 97 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 that 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.

Timeframe : Previous : 1 Day

Sampling : Daily

Output Format : PDF

Figure 98 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 **Error! Reference source not found. Error! Reference source not found..**
- 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.

11.4 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.

Name	Description	Template	Action
Abandoned Calls	Weekly report	Abandoned Call Rep...	
Call Center Daily	All Call Centers Daily ...	Call Center Report	

Figure 99 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.

12 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.

- [12.1 Settings – General](#)
- [11.2 Settings – Application](#)
- [11.3 Settings – Services](#)
- [11.4 Settings – Plug-ins](#)
- **Error! Reference source not found.**
- [11.5 Settings – Report](#)
- [11.6 Settings – About](#)

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

12.1 Settings – General

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

The screenshot shows the 'General' settings page in the Call Center web client. At the top, there is a navigation bar with links for 'Dashboard', 'Back To Application', 'Help', 'Full Screen', and 'Sign Out'. The user's name 'Mario Bueno' and status 'Available' are displayed. Below the navigation bar are tabs for 'General', 'Application', 'Services', 'Plug-ins', 'Messaging', and 'About'. The 'General' tab is active, showing the following settings:

- Account:** A link to 'Change Password'.
- Hoteling/Flexible Seating Host:** A text input field with the placeholder 'Enter Host'.
- Language:** A dropdown menu set to 'English (US)' and a checked checkbox for 'Synchronize language with service profile'.
- Screen Pop:** A text input field with the placeholder 'Enter URL' and an unchecked checkbox for 'Auto pop incoming calls'.
- Date Format:** Radio buttons for 'MM/DD/YYYY' (selected) and 'DD/MM/YYYY'.
- Time Format:** Radio buttons for 'AM/PM' (selected) and '24 Hour'.
- Workspace:** Three buttons: 'Save Workspace', 'Load Workspace', and 'Restore Workspace', along with an unchecked checkbox for 'Always save workspace on signout'.

Figure 100 Settings – General

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

12.1.1 Account

You use this area to change your EvolveIP password.

Call Center shares logon credentials with EvolveIP. 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 EvolveIP.

To change your password:

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

The screenshot shows a 'Change Password' dialog box with the following elements:

- Title: [Change Password ...](#)
- Input field: Old Password :
- Input field: New Password :
- Input field: Confirm Password :
- Buttons: Change Password, Reset, Cancel

- 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.

12.1.2 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 hot 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 that corresponds to the desk/device you are using, for example, "station_224@acme.com".

11.1.3 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 EvolveIP profile and ignores the language selection on this page.

11.1.4 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.

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

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

```
http://www.mysite.com/webapp.php?remoteNumber=_REMOTE_PHONE_&sp=_SERVICE_PROVIDE_
```

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 EvolveIP ID (Note that in this case the "user" is the EvolveIP 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 EvolveIP group to which the user belongs

__SERVICE_PROVIDER__: The name of the EvolveIP 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.

12.1.5 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 selected date format is also used to display the dates in the *Call History* dialog box. The possible options are:

- MM/DD/YYYY
- DD/MM/YYYY

11.1.6 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 and in the *Call History* dialog box. 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. It is always *DD:HH:MM:SS*.

11.1.7 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

NOTE 1: This functionality does not work in Internet Explorer, due to a technical limitation of Internet Explorer. Moreover, Firefox 7 and later does not provide a standard API to re-size a window without opening a new window. Therefore, saving workspace settings for the main application window size does not work in Firefox 7 and or later.

NOTE 2: The browser window running Call Center should be at least 1024 x 768 pixels in size.

NOTE 3: 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.

11.2 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.

The screenshot displays the 'Application' settings page. At the top, there is a navigation bar with tabs for 'General', 'Application', 'Services', 'Plug-ins', 'Messaging', 'Report', and 'About'. The 'Application' tab is currently selected. Below the navigation bar, the page is titled 'Application' and contains two main sections:

Queue Memberships

<input type="checkbox"/>	Queue	Number	Wrap-Up Policy	Skill Level
<input type="checkbox"/>	Banking	1000001045	1:00	6
<input type="checkbox"/>	Cards	1000001047	1:00	1
<input type="checkbox"/>	General	1000001048	1:00	9
<input type="checkbox"/>	HealthCare	1000001049	1:00	4
<input type="checkbox"/>	Marketing	1000001043	1:00	6
<input type="checkbox"/>	Mortgage	1000001044	1:00	N/A
<input type="checkbox"/>	Payroll	1000001042	1:00	1
<input type="checkbox"/>	Sales	1000001041	1:00	5
<input type="checkbox"/>	Trading	1000001046	1:00	5
<input type="checkbox"/>	Transport	1000001050	1:00	5

Agent Policies

Post Sign-In ACD State : Available ▼

Post Call ACD State : Wrap-Up ▼

Set Wrap-Up timer to 1 : 0 for queues without a policy

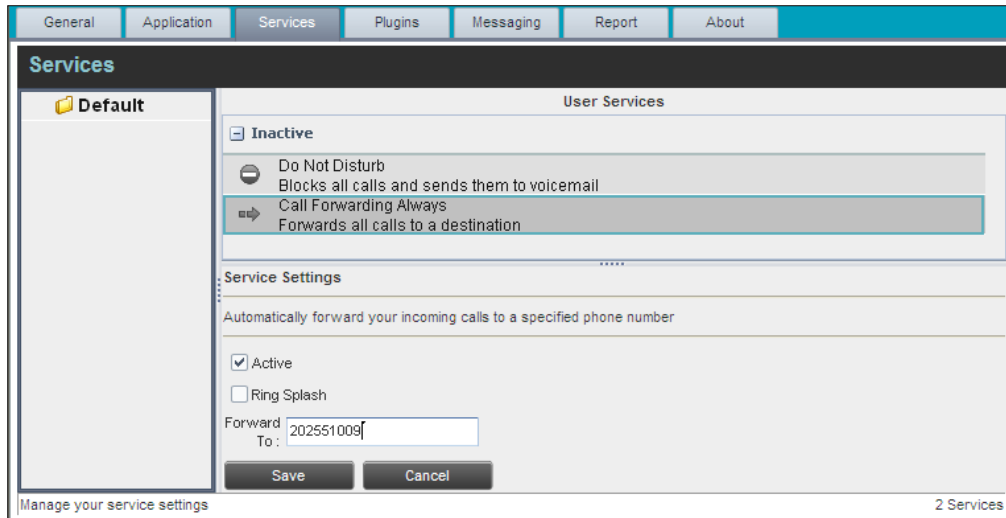
Outgoing calls as call center

Outbound Caller Id : ▼

11.3 Settings – Services

You use the Services tab to configure various services assigned to you by your administrator on EvolveIP, 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.



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**.

11.4 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 101 Settings – Plugins

11.4.1 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.

11.4.2 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*.

11.4.3 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.

11.4.4 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.

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

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

where:

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

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

Statistic	Description	Allowed Values	Example Value
EvolveIP User ID	EvolveIP user ID	String	jsmith@abc.net
Call Center ID	Call Center ID for inbound ACD calls only	String, null	ABCSales
Availability	Agent’s joined state	Joined, Not Joined, null	Joined
ACD State	Agent’s ACD state	Sign-On, Available, Unavailable, Wrap-Up, Sign-Out, null	Null
Call ID	ID of the call	String, null	192.168.1.5:1
Call State	State of the call	Idle, Incoming, Outgoing, Active, Held, Remote Held, Detached, Released, null	Incoming
Personality	The personality of the call. It indicates whether the user originated this call or whether the call was placed to the user.	Integer (0, 1, 2): 0 = EvolveIP Originator 1 = Originator 2 = Terminator	0

Statistic	Description	Allowed Values	Example Value
Remote Name	External caller name	String or null	Null
Remote Number	External caller number	String or null	5555551234
Last Redirected Name	Last redirected name	String or null	Jane Doe
Last Redirected Number	Last redirected number	String or null	Null
Time	Date stamp of record	Long Date/Time Format	2008-04-03 12:08:17.859

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

11.5 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.

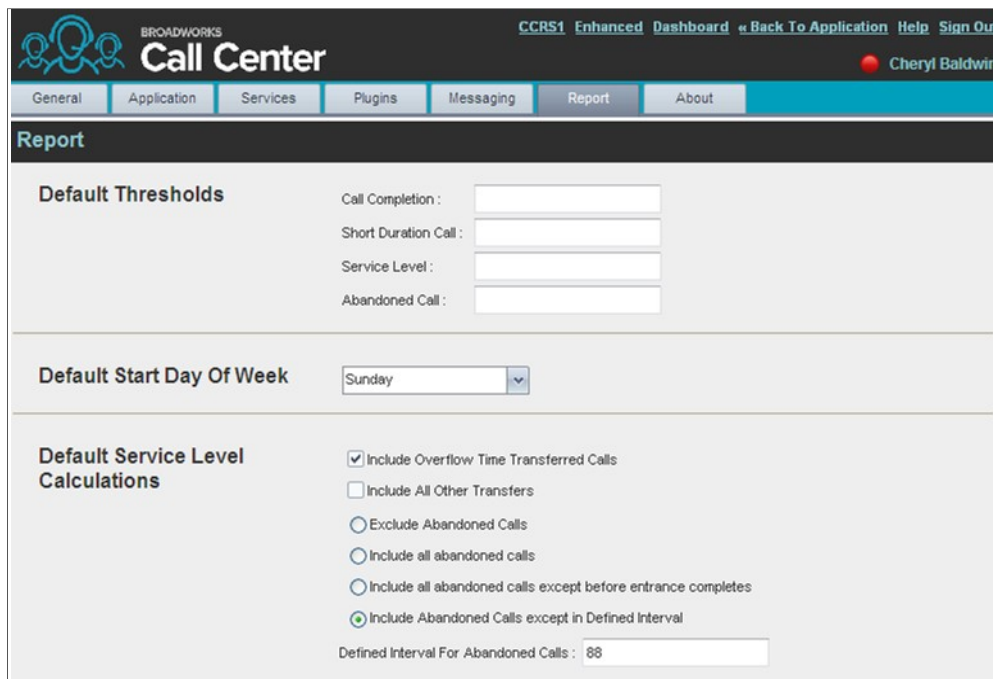


Figure 102 Settings – Report

11.5.1 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.

11.5.2 Default Start 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.

11.5.3 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.

11.6 Settings – About

You use the *About* tab to view the information about Call Center.

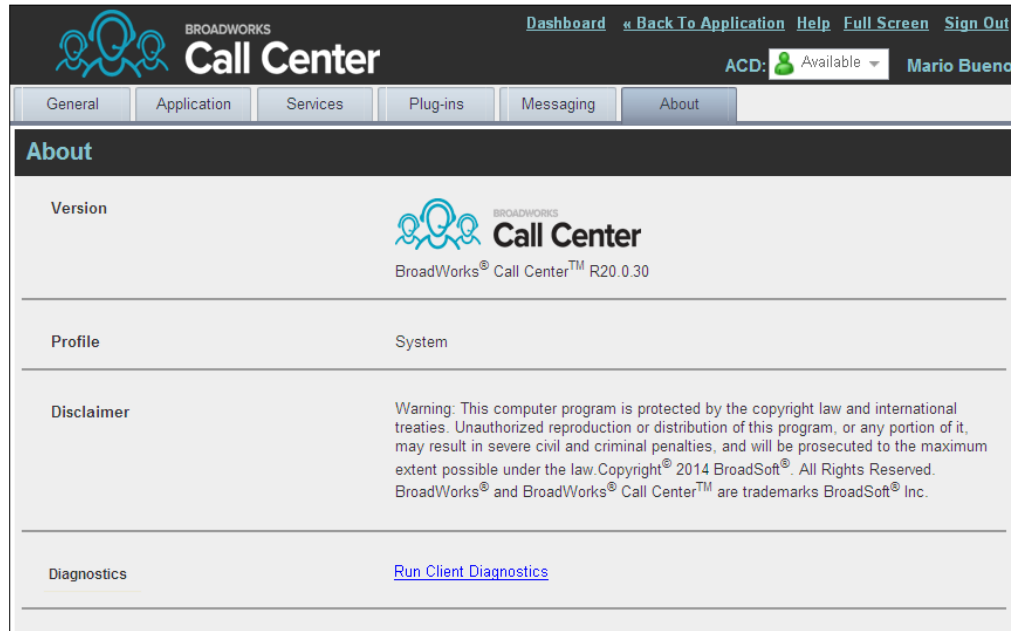


Figure 103 Settings – About

The following information is provided on this page:

- *Version* – This is the name and software version of EvolveIPs 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 **Error! Reference source not found.**

13 Configure Web Browser

13.1 Internet Explorer Settings for Full Screen Mode

For the supported versions of Internet Explorer, see the *EvolveIP 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.

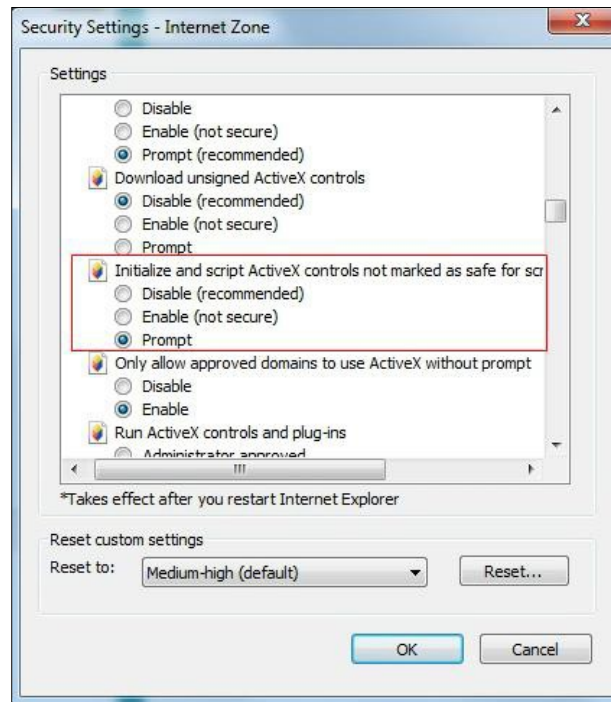


Figure 104 Security Settings – Internet Zone Dialog Box

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.

13.2 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 *Enable JavaScript* check box.

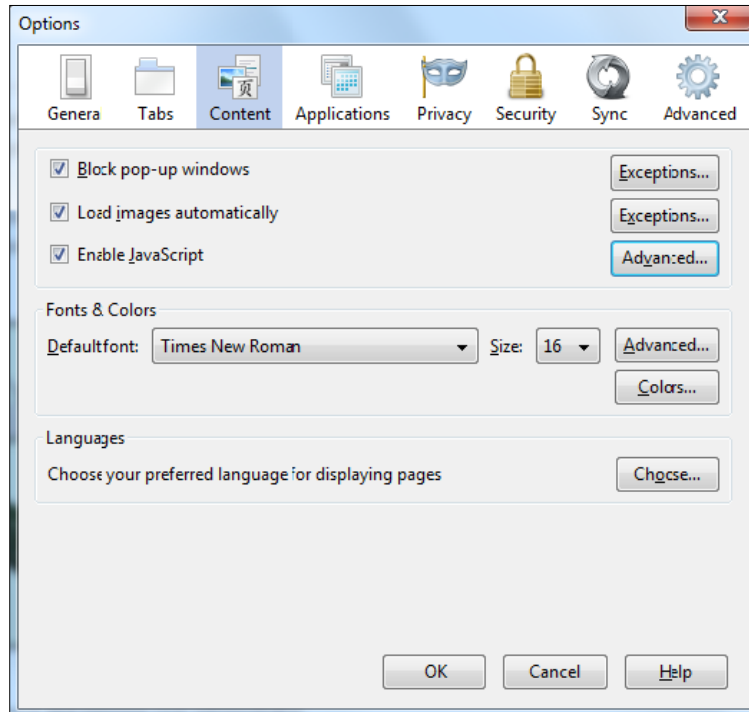


Figure 105 Firefox – Content Tab

- 4) In the *Advanced JavaScript Settings* dialog box, check the *Raise or lower windows* box.

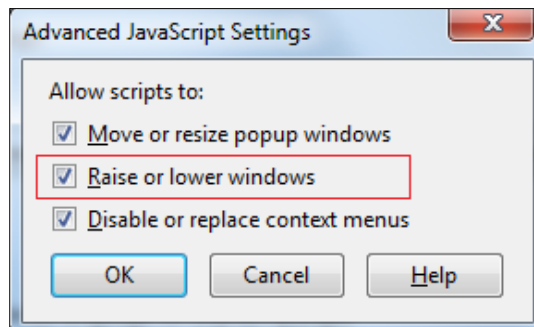





Figure 106 Firefox – Window Focus Settings

- 5) Restart Firefox.

14 Appendix A: Glossary and Definitions

14.1 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
<i>Available</i>		<p>Agent is available to receive ACD calls. (Agent can also receive direct calls.)</p> <p>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.</p> <p>ACD calls may be delivered to an agent who is in an <i>Available</i> state.</p> <p>EvolveIP uses both the ACD state and the phone state of the agent to determine whether to route a call to the agent.</p> <p>By default, agents receive calls when they are available and their phone is <i>Idle</i>. 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.</p>
<i>Unavailable</i>		<p>Agent is unavailable to receive ACD calls. (Agent can still receive direct calls.)</p> <p>The <i>Unavailable</i> state should be used when the agent is away from their workstation and not available to take calls.</p> <p>ACD calls are not delivered to agents in an <i>Unavailable</i> state.</p> <p>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.</p>
<i>Wrap-Up</i>		<p>Agent is performing post call work.</p> <p>This state is designed to allow the agent to complete paperwork or other post call procedures associated with the last call.</p> <p>Calls may be delivered to agents in <i>Wrap-Up</i> state depending on the call center configuration.</p> <p>By default, calls are not routed to agents in <i>Wrap-Up</i> state, except when the call center is configured to enable calls to agents in the <i>Wrap-Up</i> state.</p>
<i>Sign-In</i>		<p>The <i>Sign-In</i> 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.</p> <p><i>Sign-In</i> is a transitional state and agents do not remain in this state; rather they transition to their post sign-in state.</p> <p>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.</p>
<i>Sign-Out</i>		<p>The <i>Sign-Out</i> state is equivalent to a “clock out”, which means that the agent’s workday or shift is completed and they are leaving.</p> <p>Calls are not delivered to the agent in this state.</p> <p>It is recommended not to use this state when agents leave for lunch or breaks during the day. The <i>Unavailable</i> state should be used for that.</p>

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.

14.2 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.

14.3 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
<i>Idle</i>		Supervisor’s phone is on-hook, which means the supervisor is not on a call.
<i>Busy</i>		Supervisor’s phone is off-hook, which means that the supervisor is on a call.
<i>Ringing</i>		Supervisor’s phone is in <i>alerting</i> state; a call is currently being delivered to the supervisor.
<i>Do Not Disturb</i>		Supervisor has enabled the Do Not Disturb service.
<i>Private</i>		Supervisor has enabled phone status privacy. 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.
<i>Call Forwarding Always</i>		Supervisor has enabled the Call Forwarding Always service.
<i>Unknown</i>		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
<i>Idle</i>	<i>Available</i>	<input type="checkbox"/>	Agent's phone is on-hook and the agent is available to take ACD calls.
<i>Ringing</i>	<i>Available</i>	<input type="checkbox"/>	Agent's phone is ringing and the agent is available to take the call.
<i>Any</i>	<i>Unavailable, Sign-In, Sign-Out</i>	<input type="checkbox"/>	Agent is not available to take ACD calls.
<i>Idle, Ringing</i>	<i>Wrap-Up</i>	<input type="checkbox"/>	Agent is performing post call work. They may or may not be available to take calls.
<i>Busy</i>	<i>Available, Wrap-Up</i>	<input type="checkbox"/>	Agent's phone is off-hook, which means that the agent is on a call. Calls may be delivered to agents depending on their call waiting settings and the call center's call waiting and wrap-up settings.
<i>Do Not Disturb</i>	<i>Any</i>	<input type="checkbox"/>	Agent has enabled the Do Not Disturb service. ACD calls are not delivered to an agent in the <i>Do Not Disturb</i> call state. This state is not recommended for Call Center agents. Agents should use the <i>Unavailable ACD</i> state when they need to block new incoming calls temporarily.
<i>Call Forwarding Always</i>	<i>Any</i>	<input type="checkbox"/>	Agent has enabled the Call Forwarding Always service.
<i>Private</i>	<i>Any</i>	<input type="checkbox"/>	Agent has enabled phone status privacy. 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.
<i>Unknown</i>	<i>Any</i>	<input type="checkbox"/>	Agent is currently not monitored.

14.4 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
<i>Ringing In (Local)</i>	Incoming Local	<input type="checkbox"/>	Click To Dial	Answer, End
<i>Ringing In (Remote)</i>	Incoming	<input type="checkbox"/>	Terminator	Answer, Conference, End
<i>Ringing Out, Outgoing</i>	Outgoing	<input type="checkbox"/>	Originator	Conference, End

Call State	Display Name	Display Icon	Call Personality	Call Actions
Active	Active	<input type="checkbox"/>	Any	Transfer, Hold, End, Conference
On Hold	Held	<input type="checkbox"/>	Any	Transfer, Resume, End, Conference
On Hold (Remote)	Held	<input type="checkbox"/>	Any	Transfer, Hold, End, Conference
Active (In Conference)	Active	<input type="checkbox"/>	Conference	Transfer, Hold, End
On Hold (In Conference)	Held	<input type="checkbox"/>	Conference	Resume, Transfer, End
Ringling In (Recalled Call)	Call Recalled	<input type="checkbox"/>	Terminator	Answer, Conference, End

14.5 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. Other calls treated as inbound calls include: <ul style="list-style-type: none"> ▪ Calls that a supervisor retrieves from a queue ▪ Calls that an agent receives due to a transfer from another agent (Note that they may have originated as ACD calls.)
Outbound Call	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. 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. 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.

Name	Description
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.
Stranded Call	This is a call that is in a queue after all agents assigned to the queue have moved to the <i>Sign-Out</i> ACD state.

15 Appendix A: Glossary and Definitions

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.

15.1 Launching Diagnostic Tool

To start the Diagnostic Tool, go to the *Settings – About* page and click the **Run Client Diagnostics** link.

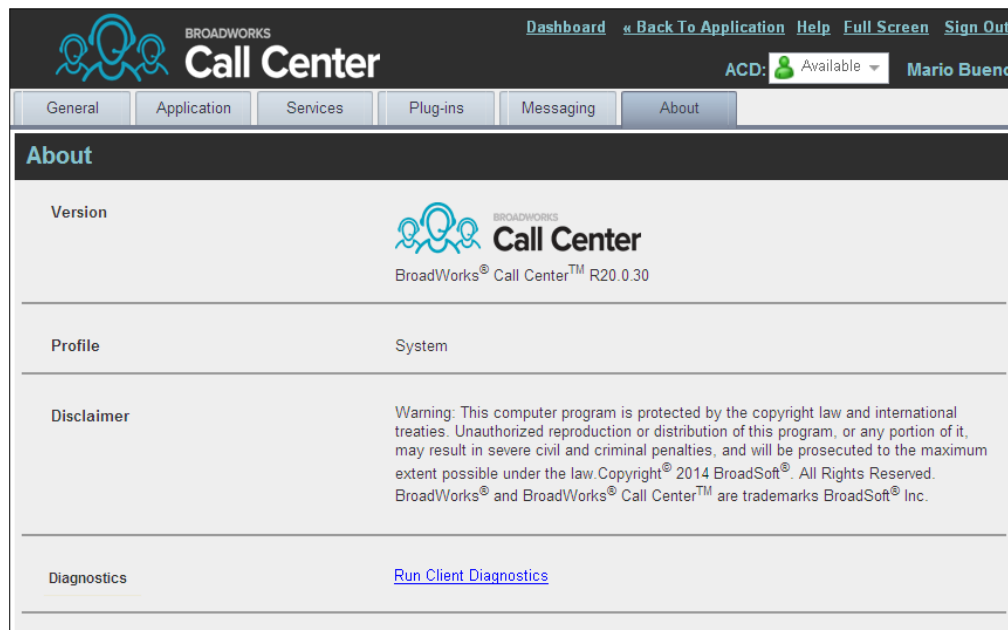


Figure 107 Settings – About (Launching Diagnostic Tool)

15.2 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.

15.2.1 Session Tab

The Session tab displays session information stored for the user on EvolveIP. 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.

Call Center Diagnostics
 Tony Romo

Session | Long Polling | Calls | Service | Monitoring | Support

User Name: Tony Romo Number: 2403641069
 User ID: tonyromo@cowboys.com Ext: 1069
 Licenses: Call Forwarding Always, Do Not Disturb, Outlook Integration, Remote Office, Voice Messaging User, Customer Originated Trace, Speed Dial, 100 External Calling Line ID Delivery, Internal Calling Line ID Delivery, Call Waiting, Basic Call Logs, Call Transfer, BroadWorks Agent, N-Way Call, BroadWorks Receptionist - Office, Call Center - Premium, Call Center Monitoring, Call Recording, Third-Party IMP, Client License 4

Session/Channel Set ID: d322a81d-5dbc-40c7-a6cd-4f06c08300cd
 Channel ID: e43b2d15-625a-4d26-b9bc-e0bad2c8743f
 XSP Address: 10.59.20.123

Subscriptions: 8

Subscription ID	Event Pkg	Target ID	Expires	Request Times	Response Times	Latency(ms)	Initial Event Time	Shared Subscrip
e345f4b9-591c-4765-a877-1241e0ab6aec	Call Forwarding /	salomar@umbrel 3600		15.33.10.024	15.33.10.664	640	15.33.10.663	
fc172cdc-412e-4436-a058-4edad5d86e90	Call Center Agen	ihunnigan@umbre 3600		15.33.09.974	15.33.10.322	348	15.33.10.303	
d8fba10f-e24d-47fd-9232-090d8e97b564	Voice Mail Mess:	ptalekar@umbrel 3600		15.33.03.890	15.33.05.646	1756	15.33.05.100	
0b26e3e3-a8cd-427f-b300-51903cdd9ba0	Do Not Disturb	adawong@umbre 3600		15.33.09.976	15.33.10.317	341	15.33.10.369	
f1fb95e2-376a-403b-8bc0-71f7c0f5c3ca	Call Forwarding /	billycoen@umbre 3600		15.33.09.967	15.33.10.224	257	15.33.10.285	
7380ddda-1248-4992-a9c5-a350c235b731	Basic Call	agraham@umbre 3600		15.33.09.975	15.33.10.320	345	15.33.10.299	
ff0986a-abe9-473b-ab26-af55b613ae35	Call Center Agen	jmuller@umbreliz 3600		15.33.09.983	15.33.10.387	404	15.33.10.383	
6fd8af7a-cce2-47b4-8df3-812fc88c9ff7	Call Center Agen	adawong@umbre 3600		15.33.09.954	15.33.10.140	186	15.33.10.215	

Figure 108 Diagnostic Tool – Session Tab

15.2.2 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.

Poll	Request Timestamp	Response Timestamp	Status	Poll Time (msec)	Data
74	15:37:04:290	15:37:04:364	200	74	
75	15:37:05:877	15:37:05:953	200	76	
76	15:37:07:184	15:37:07:246	200	62	
77	15:37:08:500	15:37:08:576	200	76	
78	15:37:09:933	15:37:10:085	200	152	
79	15:37:11:774	15:37:11:886	200	112	
80	15:37:13:288	15:37:13:460	200	172	
81	15:37:15:205	15:37:15:495	200	290	
82	15:37:17:492	15:37:17:763	200	271	
83	15:37:19:487	15:37:19:552	200	65	

Poll	Feature Data	Event	Event ID
No items to show.			

Figure 109 Diagnostic Tool – Long Polling Tab

15.2.3 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.

When you place a call from the Dialer, the statistics for the call are displayed in this tab.

Outbound Call Client Time Details					
Destination	Call ID	Dial Time	Client Alerting - Incoming	Client Answer	Client Alerting - Outgoing
1007	callhalf-32545.0	15:37:57:993			

Figure 110 Diagnostic Tool – Calls Tab

15.2.4 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.

The screenshot shows the 'Service' tab in the Diagnostic Tool. A message box states: "When you enable or disable the 'Do Not Disturb' service from the client, the stastics are displayed in this tab." Below this is a table titled "Service Action Client Time Details".

Command	Request Time	Response Time	Latency (ms)
DND On	15:37:11:689	15:37:13:237	1548

Figure 111 Diagnostic Tool – Service Tab

15.2.5 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.

The screenshot shows the 'Monitoring' tab in the Diagnostic Tool. A message box states: "When you monitor users from the main application, the statistics about monitored contacts are displayed in this tab." Below this is a table with the following data:

Target	Monitor Requested	Monitor Started	Latency (msec)
aashford@umbrellacorporation.com	15:40:56:332	15:41:00:167	3835

Figure 112 Diagnostic Tool – Monitoring Tab

15.2.6 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.

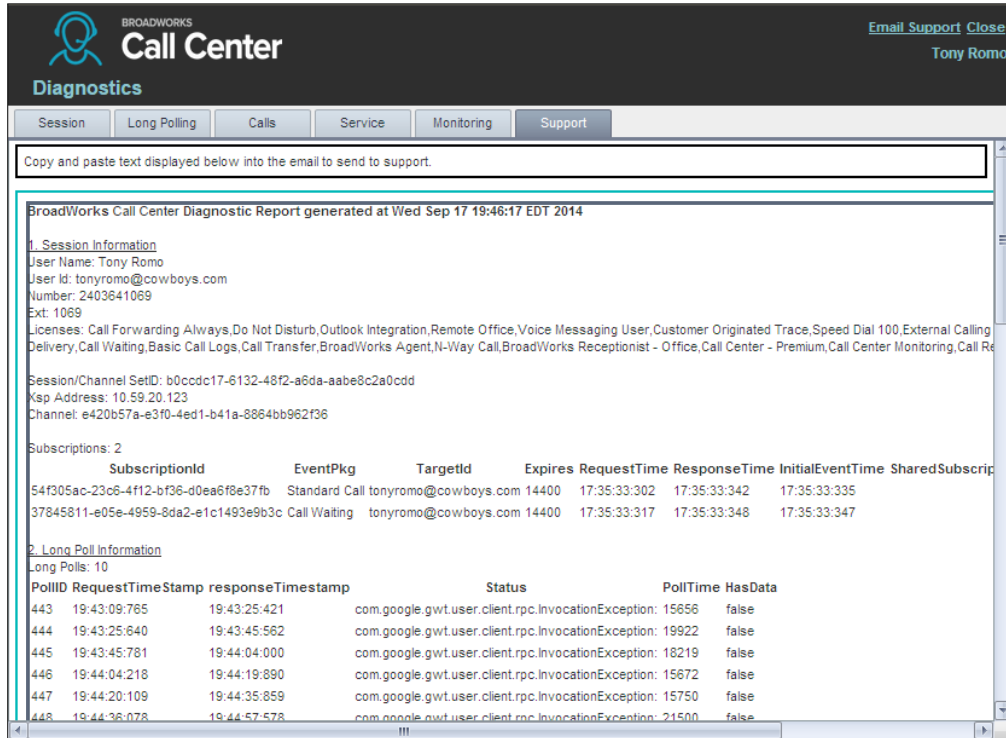


Figure 113 Diagnostic Tool – Support Tab

15.3 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.

16 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 <i>Dialer</i> text box.	This places the cursor in the <i>Dialer</i> text box; it retains the currently selected item (if applicable). NOTE: In Internet Explorer 8, the “/” shortcut key does not always work. Pressing the key clears the default <i>Enter Number</i> text, but does not place the cursor in the input box.
?	Click the <i>Search</i> text box.	This places the cursor in the <i>Search</i> 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 <i>Call Console</i> or the <i>Queued Calls</i> pane.
ARROW UP	Click the scroll bar or the previous item in a list.	This selects the previous item in the <i>Call Console</i> or the <i>Queued Calls</i> pane.
PAGE DOWN	Scroll down one page.	This goes to the next page in the <i>Call Console</i> or the <i>Queued Calls</i> pane.
PAGE UP	Scroll up one page.	This goes to the previous page in the <i>Call Console</i> or the <i>Queued Calls</i> pane.
1...9	Select a call in the <i>Call Console</i> .	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 <i>Call Console</i> .	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 <i>Call Console</i> .	This ends the selected call.
ENTER	Click Dial .	If the cursor is placed in the <i>Enter Number</i> text box in the <i>Dialer</i> , the entered digits are dialed.
ENTER	Click Search .	If the cursor is placed in the <i>Search</i> text box, a search is performed.
+	Click Transfer in the <i>Dialer</i> .	This transfers the selected call to the ad hoc number entered in the <i>Dialer</i> .
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.

Key	Equivalent Mouse Action	Description
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 <i>Settings</i> page.
B or b	Click the Back to Application link.	This goes back from the <i>Settings</i> page to the main page.
R or r	Click the Call History button.	This opens the <i>Call History</i> 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 <i>Dashboard</i> or brings the <i>Dashboard</i> 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 <i>Available</i> (Agent).	This sets the agent's ACD state to "Available".
SHIFT+U	Select <i>Unavailable</i> (Agent).	This sets the agent's ACD state to "Unavailable".
SHIFT+W	Select <i>Wrap-Up</i> (Agent).	This sets the agent's ACD state to "Wrap-Up".

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