



# **XO Hosted PBX Call Center Client/Supervisor**

## **User Guide**

Document Version 1.0

## **XO<sup>®</sup> Guide**

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## 1 Summary of Changes

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

### 1.1 Changes for Release

This is the initial release of Call Center for XO Hosted PBX.



## 2 About This Document

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This user guide provides step-by-step procedures and reference information for using XO Hosted PBX Call Center client application.

### 2.1 Audience

This document is intended for Call Center Supervisors who use the XO Hosted PBX Call Center client.

### 2.2 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
<a href="#">Introduction to Call Center</a>	This section provides an overview of Call Center and the functionality available to agents and supervisors.
<a href="#">Getting Started</a>	This section describes how to sign in and out of Call Center, perform the initial setup, change a password, and obtain help.
<a href="#">Explore Workspace</a>	This section provides an overview of the user interface.
<a href="#">Manage Calls</a>	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.
<a href="#">Manage Contacts</a>	This section provides information on managing contact directories and searching for contacts.
<a href="#">Manage Agents</a>	This section describes how supervisors can use Call Center to manage agents under their supervision.
<a href="#">Manage Queued Calls</a>	This section provides information on managing queued calls.
<a href="#">View Real-Time Statistics</a>	This section describes the Dashboard that supervisors can use to monitor the state of selected call centers and agents.
<a href="#">Generate Reports</a>	This section describes how to generate and schedule reports.
<a href="#">Configure Call Center</a>	This section describes the settings you can configure to set up and customize Receptionist for improved usability.
<a href="#">Appendix A: Glossary and Definitions</a>	This appendix contains definitions of terms used in Call Center.
<a href="#">Appendix B: Keyboard Shortcuts</a>	This appendix describes the keyboard shortcuts available in Call Center.

### 2.3 Additional Resources

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

- *XO Hosted PBX Call Center Quick Reference Guide*
- *XO Hosted PBX Call Center Reports Guide*

### 3 Introduction to Call Center

XO Hosted PBX Call Center is a carrier-class communications management product fully integrated which provides an advanced Automatic Call Distribution capability.

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

#### 3.1 Call Center – Supervisor

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

Figure 1 shows the main interface of the Call Center – Supervisor.

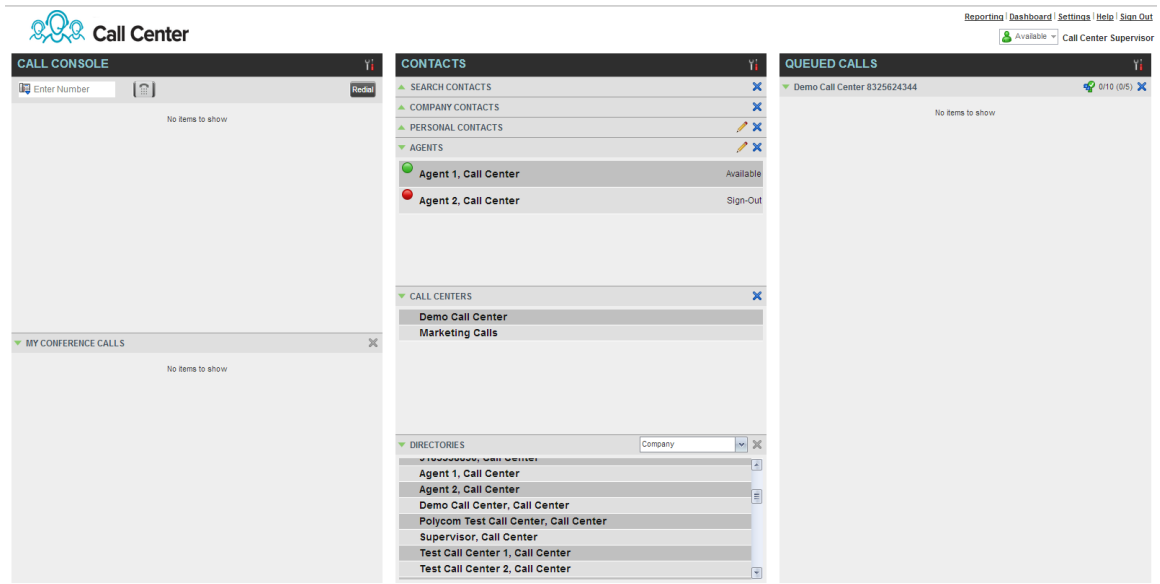


Figure 1 Call Center – Supervisor Main Interface

The Call Center interface contains the following work areas:

- **Logo pane** – The *Logo* pane displays information about you and contains links to other pages and functions.
- **Call Console** – You use the *Call Console* to view and manage your current calls.
- **Contacts pane** – The *Contacts* pane contains your contact directories and provides you with real-time call and ACD state of the agents you are monitoring.
- **Queued Calls pane** – You use the *Queued Calls* pane to manage queued calls.
- **Dashboard window** – The *Dashboard* provides real-time summary information for up to 50 queues and allows you to monitor key performance indicators for monitored call centers and supervised agents.

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

For more information, see section [5 Explore Workspace](#).

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

- [Manage Agents](#)
- [Manage Queued Calls](#)
- [View Real-Time Statistics](#)
- [Generate Reports](#)

In addition, for information about general Call Center functions available to you, see the following sections:

- [Getting Started](#)
- [Manage Calls](#)
- [Manage Contacts](#)
- [Configure Call Center](#)

## 4 Getting Started

Call Center is hosted on then XO Hosted PBX network and you access it over the internet either from your My Phone dashboard or directly from a web browser. The sign-in procedure is the same for agents and supervisors.

**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.

### 4.1 Launch Call Center

#### 4.1.1 From My Phone Dashboard

- 1) Log in to your XO Hosted PBX My Phone web portal.
- 2) From the My Features tab, push the Call Center button. In the Call Center Information screen, hit the Activate Supervisor button.



Figure 2 XO Hosted PBX Web Portal Logo Pane – Launching Call Center as Supervisor

- 3) Enter your XO Hosted PBX user ID in *user@domain* format and enter your password.



Figure 3 Call Center Sign-in Page

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.

- 4) 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.

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



Figure 4 Call Center Sign-in Page – Advanced Options

- 6) 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.
- 7) The Hotel Host option is not available at this time, but is reserved for future functionality.
- 8) English (US) is the only supported language at this time. Another language may be selected, but only English (US) will be shown.
- 9) To add a bookmark to this page in your browser, click **Bookmark this page** and follow the instructions of your browser.
- 10) Click **Sign In**.

Call Center starts and you are signed in.

#### 4.1.2 To Sign in from Web Browser

- 1) In your web browser, enter the Uniform Resource Locator (URL) of the Call Center client. The *Call Center Sign-in* page appears.
- 2) Follow from Step 3 above.

## 4.2 Get Help

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

Figure 5 Main Interface (Top of Page) – Help Link

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

### 4.3 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.

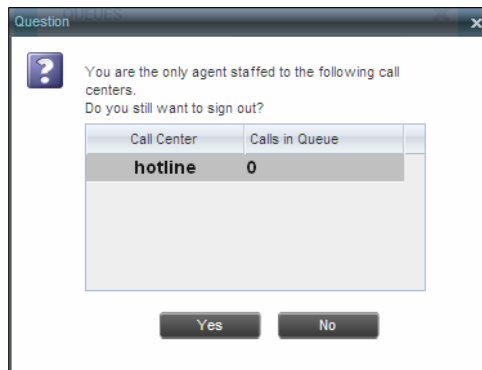


Figure 6 Dialog Box – Signing Out Last

- 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.

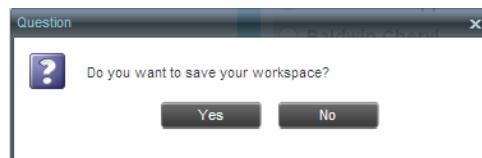


Figure 7 Dialog Box – Saving Workspace on Sign Out

- To save your current workspace, click **Yes**. This allows you to retain the same interface setup at your next session.

### 4.4 Set Up Call Center

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

- Configure agents you want to monitor. For more information, see section [8.1 Select Agents to Monitor](#).
- Configure queues you want to monitor. For more information, see section [9.2 Select Call Centers to Monitor](#).

For more information about the settings you can configure in Call Center, see section [12 Configure Call Center](#).

## 4.5 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 8 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:** It must meet the password requirements set on XO Hosted PBX.

## 4.6 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 *Active* box.

- 4) If you checked the *Active* box for the Call Forwarding Always service, in the *Forward To* text box, enter the phone number to forward your call to. Also, Check the *Ring Splash* box if you would like to be notified by short ring to let you know a call came in and was forwarded.
- 5) Click **Save**.

For more information, see section [12 Configure Call Center](#).



## 5 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 change other Call Center settings.

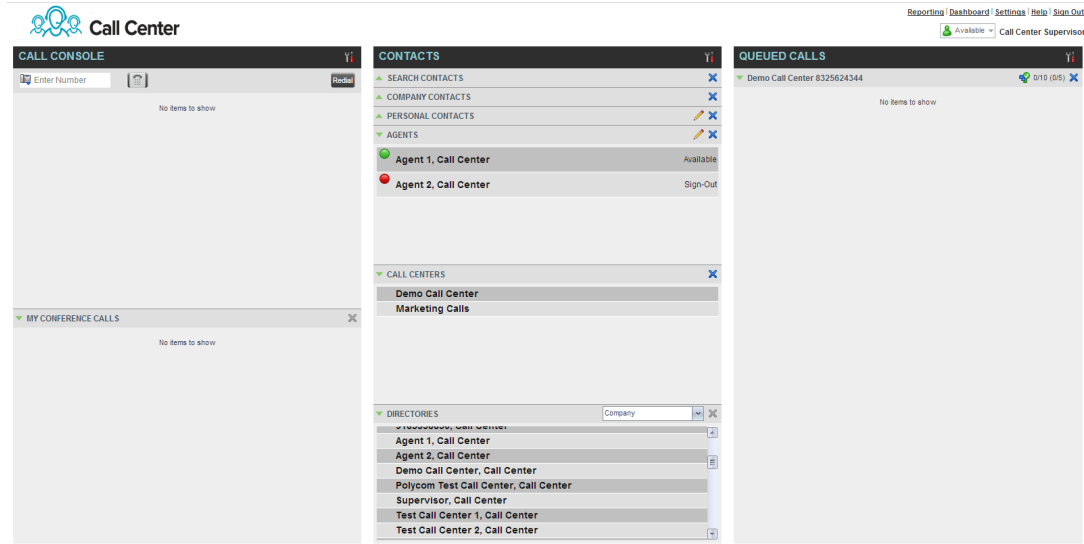


Figure 9 Call Center – Supervisor Main Interface

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.

**NOTE 1:** To work in full screen mode, make sure that the main window is in focus and then click **F11**.

**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 [5.4 Controls](#). The action buttons are described in section [5.4.1 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.

Interface Element	Description
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	The <i>Queued Calls</i> pane, available only to supervisors, allows you to manage queued calls for selected call centers that you supervise.
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.
Dashboard	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).
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:

- [Logo Pane](#)
- [Call Console](#)
- [Contacts Pane](#)
- [Queued Calls Pane](#)
- [Controls](#)

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

- *Queued Calls* pane – Section [9.1 Queued Calls Pane](#)
- *Report* windows – Section [11 Generate Reports](#)
- *Dashboard* – Section [10 View Real-Time Statistics](#)
- *Settings* pages – Section [12 Configure Call Center](#)

## 5.1 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.

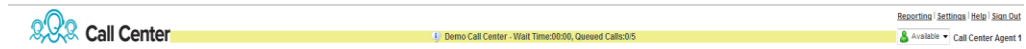


Figure 10 Call Center Logo Pane

### 5.1.1 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.

### 5.1.2 Links to Other Interface Elements and Functions

The *Logo* pane displays links to the *Settings* pages, the *Dashboard*, and the Help and Sign Out links.





### 5.1.3 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 is displayed to the right of your name. As Supervisor, if you are always Available unless configured by the Site Administrator to also function as an agent. If so, you can change your ACD state by selecting a new state from the drop-down list.

- ACD 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.

## 5.2 Call Console

You use the *Call Console* to view and manage your current calls. For information on managing your calls, see section 6 [Manage Calls](#).

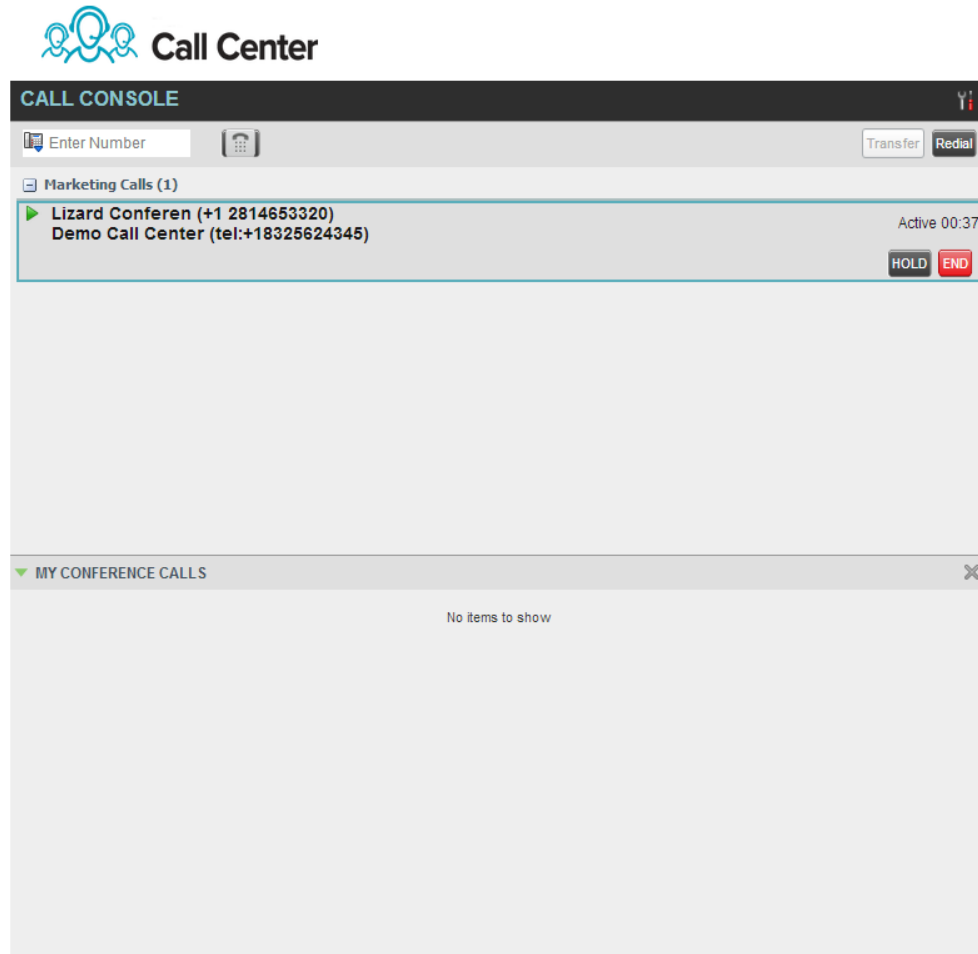


Figure 11 Call Console

The *Call Console* contains the following areas:

- [Header Bar](#)
- [Dialer](#)
- [Current Calls](#)
- [Conference Call](#)


### 5.2.1 Header Bar

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



Figure 12 Call Console Header Bar

The header bar can contain the following controls:

- Call Waiting button  – This allows you to enable or disable the Call Waiting service.
- Options button- Enables grouping of calls


### 5.2.2 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 13 Dialer

It contains the following elements:

- The Outbound CLID button , which allows you to configure the number you want to use for outgoing calls.
- The *Enter Number* text box, in which you enter the number to dial.
- Action buttons, which change depending on the context and allow you to perform operations on calls. For more information, see section [5.4.1 Call Action Buttons](#).

### 5.2.3 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 if you are also staffing it 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.

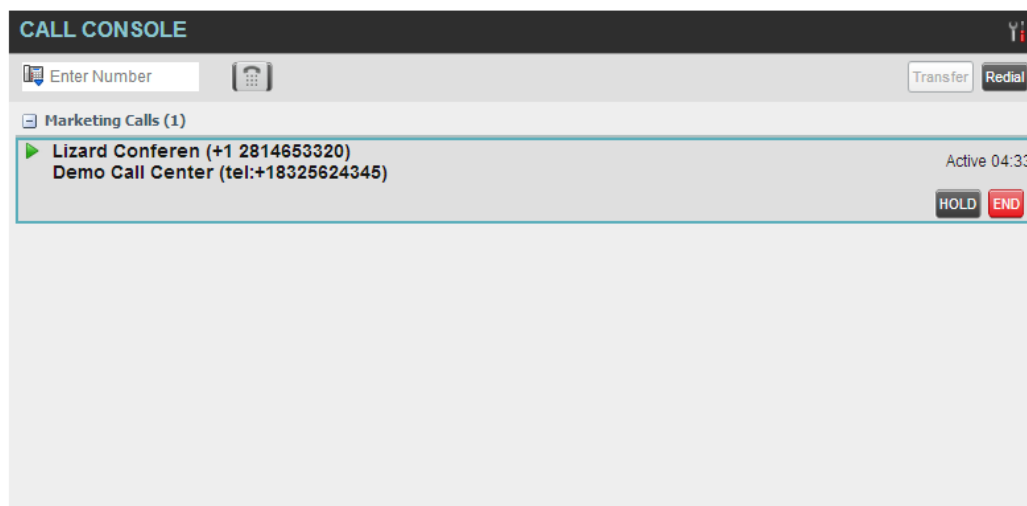


Figure 14 Call Console – Current Calls

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 [5.2.5 Call States and Actions](#).
- Remote CLID – This is the name of the remote party (if available) and the phone number in parenthesis.
- 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 XO Hosted PBX 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.

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 [5.4.1 Call Action Buttons](#) and for the list of actions that can be taken in each call state, see section [5.2.5 Call States and Actions](#).

### 5.2.4 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 15 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 [5.2.3 Current Calls](#).

For information on managing conferences, see section [6.7 Manage Conference Calls](#).

### 5.2.5 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)	Call Recalled		Terminator	Answer, Conference, End

### 5.3 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 6 [Manage Calls](#). For information about organizing and managing your contact directories, see section 7 [Manage Contacts](#).



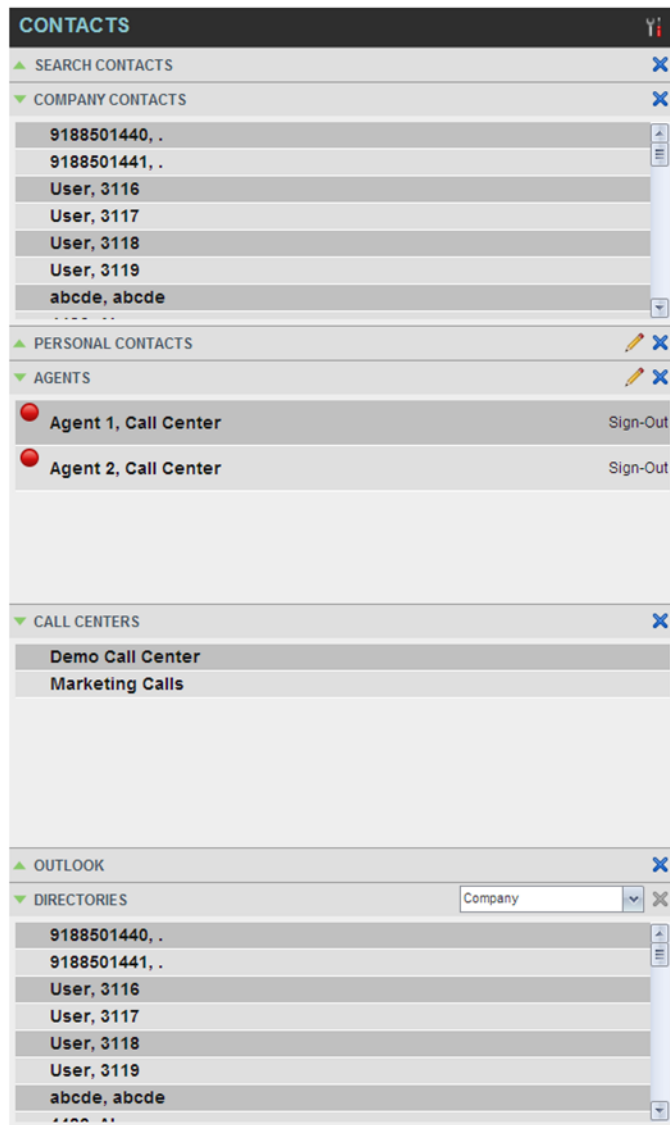


Figure 16 Contacts Pane

The *Contacts* pane contains the following panels:

- [Search Panel](#)
- [Company Panel](#)
- [Personal Contacts](#)
- [Agents Panel](#)
- [Call Centers Panel](#)
- [Outlook Panel](#)
- [Directories Panel](#)

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

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

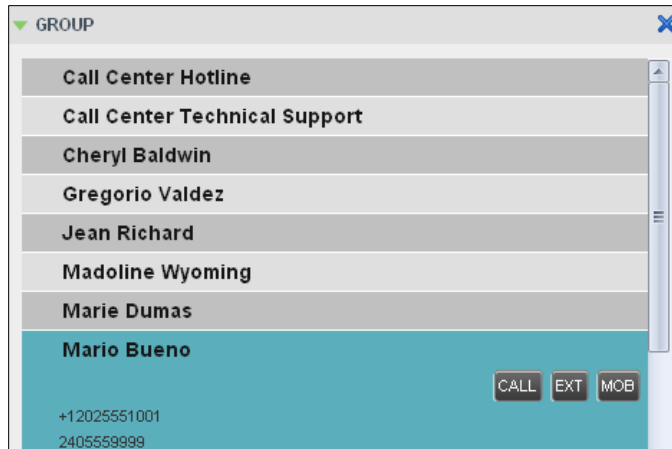


Figure 17 Group Panel – Contact in Focus with Action Buttons

For the list of Call Center action buttons, see section [5.4.1 Call Action Buttons](#).

### 5.3.1 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 [7.3 Search for Contacts](#).

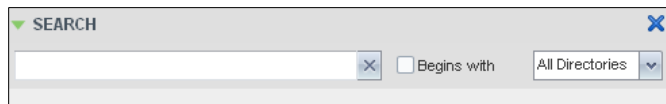


Figure 18 Contacts Pane – Search Panel

### 5.3.2 Company Panel

The *Company Contact* panel contains the contacts in your XO Hosted PBX enterprise directory.

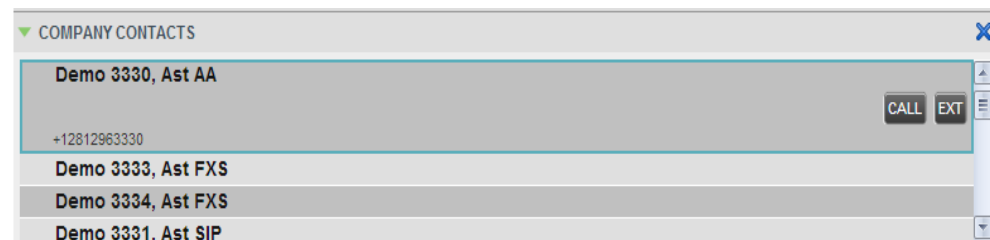


Figure 19 Contacts Pane – Company Contacts Panel

### 5.3.3 Personal Contacts Panel

The *Personal* panel contains the contacts from your XO Hosted PBX Personal Phone List which have been entered in the client. It displays the name/description and phone number of each contact.

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

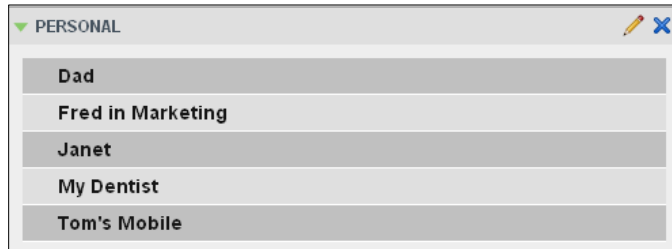


Figure 20 Contacts Pane – Personal Panel

### 5.3.4 Agents Panel

The *Agents* panel is used by supervisors to monitor and manage agents under their supervision. For more information, see section [8 Manage Agents](#).

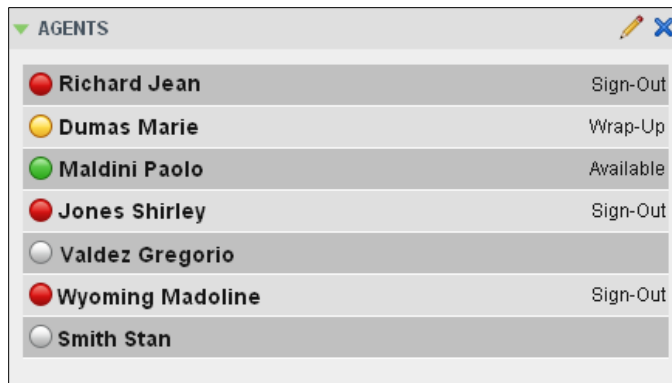


Figure 21 Contacts Pane – Agents Panel

### 5.3.5 Call Centers Panel

The *Call Centers* 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.

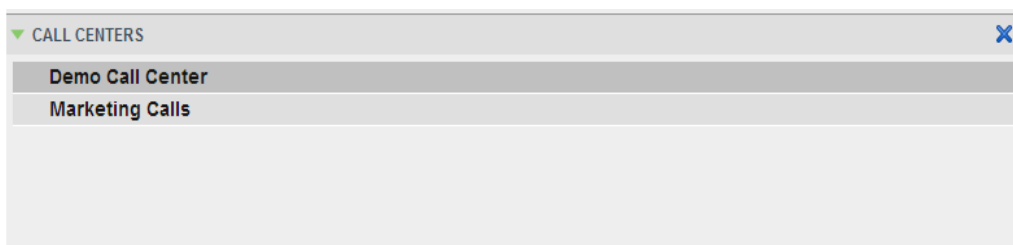


Figure 22 Contacts Pane – Call Centers Panel

### 5.3.6 Outlook Panel

The *Outlook* panel contains your Outlook contacts. This panel is available to you if you have the Outlook Integration service assigned.

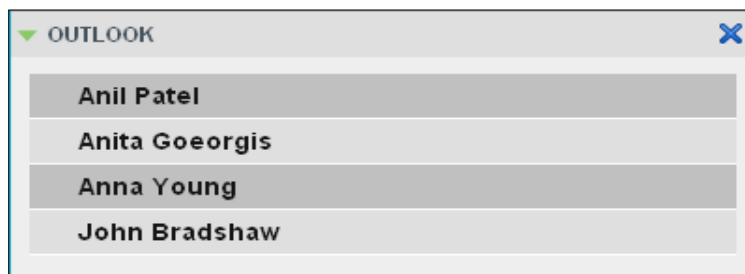


Figure 23 Contacts Pane – Outlook Panel

### 5.3.7 Directories Panel

The *Directories* panel consolidates the contacts from the *Enterprise* and *Personal* directories. 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.

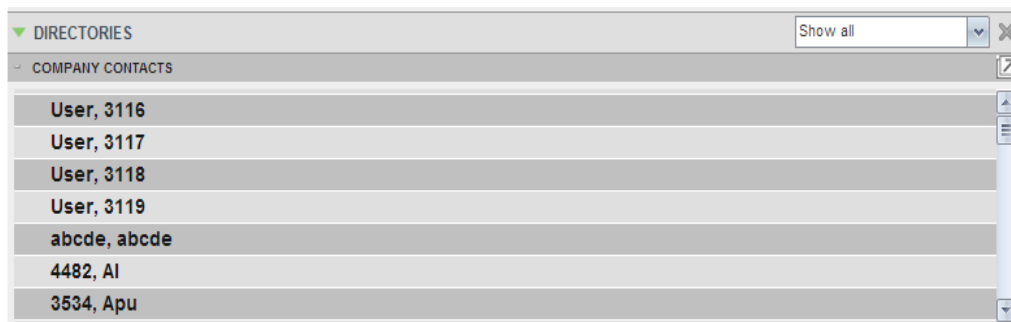


Figure 24 Contacts Pane – Directories Panel

















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 7 [Manage Contacts](#).

## 5.4 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.

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 [5.4.1 Call Action Buttons](#).

Name	Description
Common Controls	

Name	Description
 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.
<b>Dialer, Call Console, Directories Panel, and Search Panel Controls</b>	
 Outbound CLID	This allows you to select the phone number to use as your Calling Line ID for the next outgoing call.
 ACD States	This displays your current ACD state and allows you to change it.
 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.
<b>Dialog Box – Notification Window</b>	
 vCard	This saves the caller’s phone number and personal information as a vCard in Microsoft Outlook. It appears only when Outlook is running.
<b>Queued Calls Pane – Call Center Queue Panel</b>	
 Service Mode	This identifies and allows you to change the service mode of a supervised call center.
<b>Scheduled Reports Window</b>	
 Load Report	This loads a scheduled report, allowing you to view and modify it.
 Delete Report	This deletes a scheduled report.

### 5.4.1 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 and Extension buttons appear on the line for that contact, allowing you to call the contact. This is illustrated in *Figure 25*. Note that other buttons may appear on the line for a contact, depending on the call state and the contact's configuration.

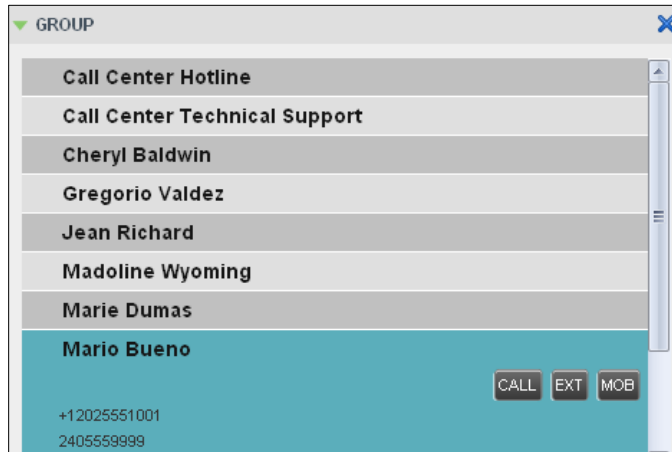
























Figure 25 Group Panel – Contact in Focus

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.
 EXT Extension	This dials the contact's extension.
 MOB Mobile	This dials the contact's mobile number.
 EMAIL E-mail	This brings up a new e-mail message window with the contact's e-mail address, allowing you to send a message to the contact.
 Transfer Transfer	This transfers a call to an ad hoc number entered in the <i>Dialer</i> .
 TXR Transfer	This transfers a call to a selected number or contact.
 ANS Answer	This answers an incoming call, answers an unanswered call for a contact, or resumes a held call.

Button	Description
 Hold	This places a call on hold.
 End	This ends a call.
 Conference	This establishes a conference call or adds a call to a conference.
 Escalate Call	This escalates a call to a selected supervisor.
 Emergency Call	This places an emergency call to a selected supervisor.
<b>For Supervisors Only</b>	
 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.

## 6 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.

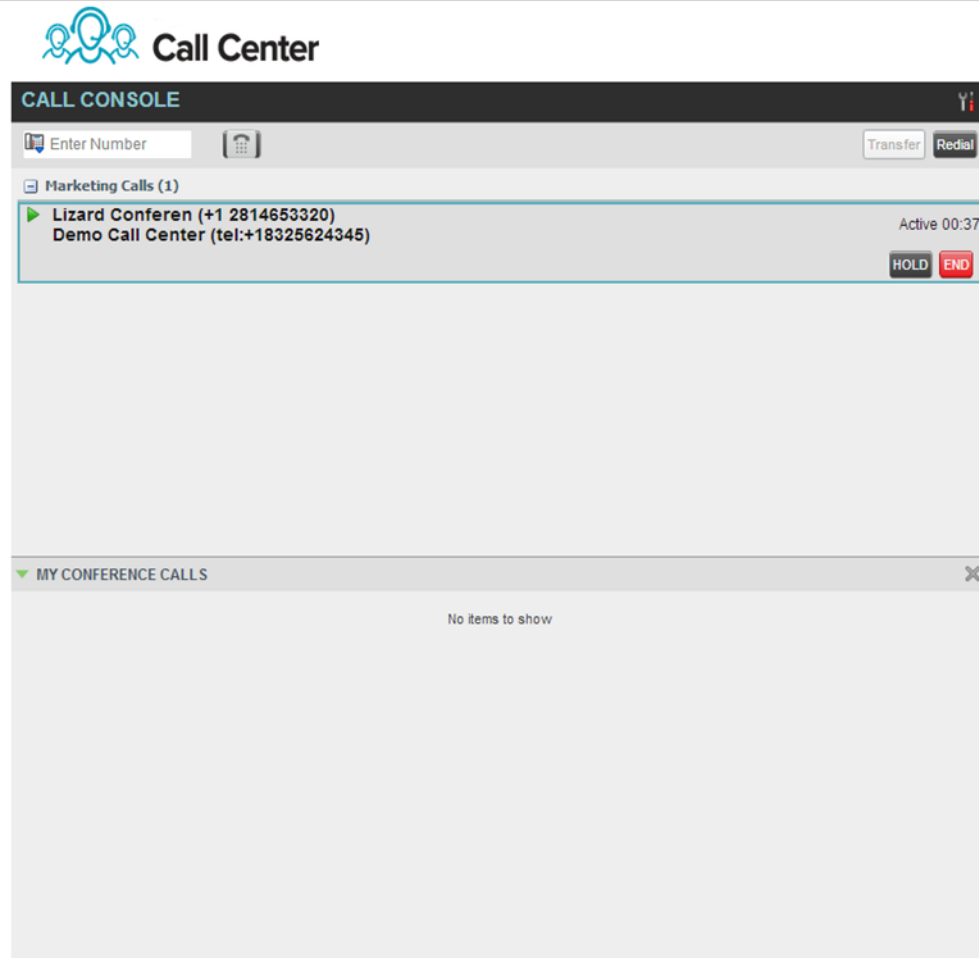


Figure 26 Call Console

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



## 6.1 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
Answer Incoming Call	In the <i>Call Console</i> , click <b>Answer</b> for the target call.
Open URL	In the <i>Call Notification</i> dialog box for an incoming call, click the <b>Web Pop URL</b> button.
Save a vCard	In the <i>Call Notification</i> dialog box for an incoming call, click the <b>Add vCard</b> button.
Place Call on Hold	In the <i>Call Console</i> , move the mouse over the call and click <b>Hold</b> .
Resume Held Call	In the <i>Call Console</i> , move the mouse over the call and click <b>Retrieve</b> .
Blind Transfer Call	Drag the call onto the target contact and click <b>Transfer</b> for that contact. Alternatively, enter the target number in the <i>Dialer</i> and click <b>Transfer</b> 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 <b>Dial</b> . 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 <b>Transfer</b> .
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 <b>Conference</b> .
Add Participant to Conference	In the <i>Call Console</i> , move the mouse over a call and click <b>Conference</b> .
Hold Conference	In the <i>Conference Call</i> panel, click <b>Hold</b> .
Resume Conference	In the <i>Conference Call</i> panel, click <b>Resume</b> .
Hold Conference Participant	In the <i>Conference Call</i> panel, select the call to put on hold and click <b>Hold</b> for that call.
Take Conference Participant Off Hold	In the <i>Conference Call</i> panel, select a held call and click <b>Resume</b> for that call.
Leave Conference	In the <i>Conference Call</i> panel, click <b>Leave Conference</b> .
End Participant	In the <i>Conference Call</i> panel, select the target call and click <b>End</b> .
End Conference	In the <i>Conference Call</i> panel, click <b>End Conference</b> .
Set Outbound CLID	In the <i>Dialer</i> , click the <b>Outbound CLID</b> 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 <b>Dial</b> .
Re-dial Recent Number	In the <i>Dialer</i> , click <b>Redial</b> 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 <b>Dial</b> .
Dial Contact	In the <i>Contacts</i> pane, click the contact and then click <b>Call</b> for that contact.
Dial from Search	In the <i>Search</i> panel, select a contact and click <b>Dial</b> .

## 6.2 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.

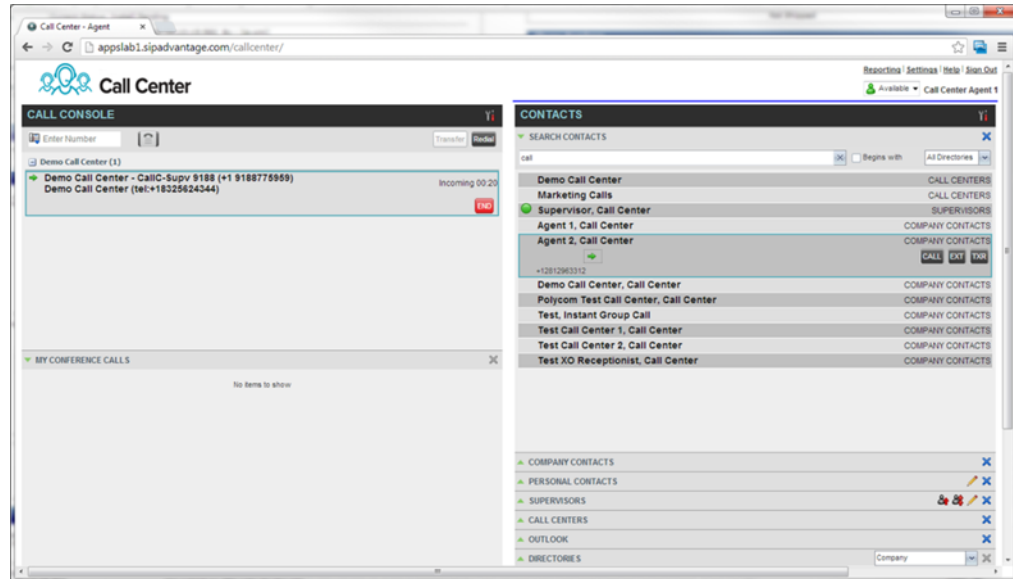


Figure 27 Dragging Call and Dropping on Contact

### 6.2.1 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*.

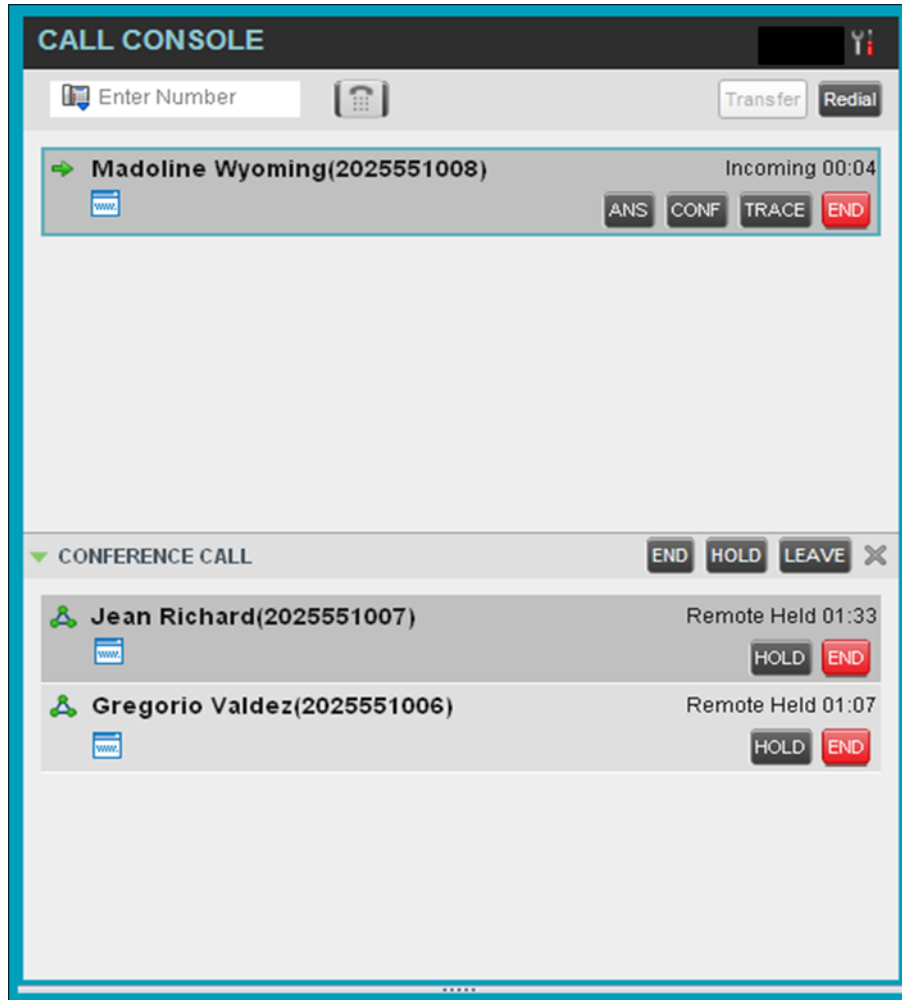


Figure 28 Call Console – View Current Calls

### 6.2.2 View Incoming Call Details

If logged into the Call Center as an Agent and 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

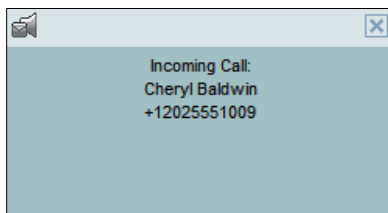


Figure 29 Call Notification Pop-up Window for Call that is Not ACD Call

- 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) if
  - Number of calls in queue (queued calls)

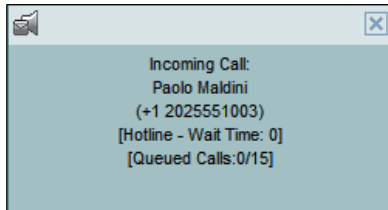


Figure 30 Call Notification Pop-up Window for ACD Call

**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.

## 6.3 Receive, Answer, and End Calls

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

### 6.3.1 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.

### 6.3.2 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.

### 6.3.3 End Call

**To end a call:**

Click **End**  for that call.

## 6.4 Make Outbound Calls

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

### 6.4.1 Set Your Outgoing Calling Line Identity

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.

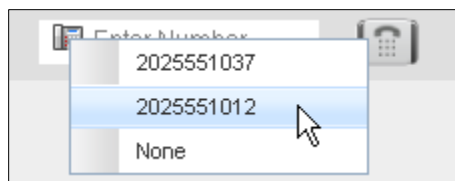


Figure 31 Dialer – Setting Outbound CLID

For information on permanently setting your outbound CLID, see section [12.2.2 Agent Policies](#).


### 6.4.2 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 32 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*.

### 6.4.3 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.

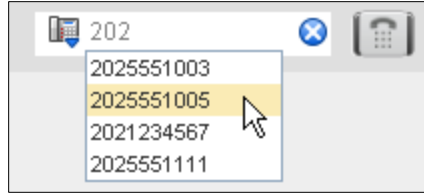




Figure 33 Dialer – Select Recently Dialed Number

- 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.

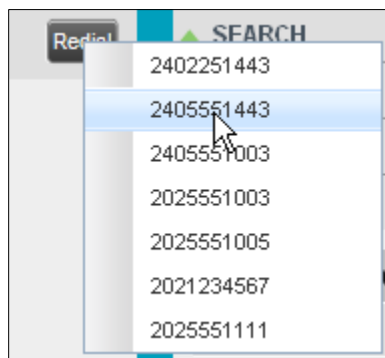



Figure 34 Dialer – Redialing Number

#### 6.4.4 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.

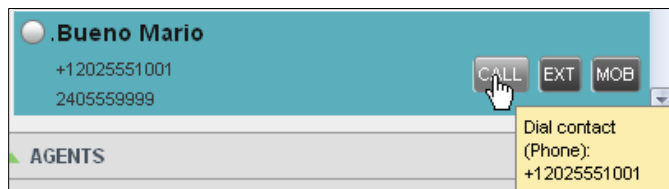


Figure 35 Group Panel – Expanded Contact with Action Buttons

Alternatively, to dial the contact's extension, click **Extension**  or 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*.

### 6.4.5 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 [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** .

## 6.5 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.

### 6.5.1 Place Call on Hold

#### To place a call on hold:

Click **Hold**  for the target call.

### 6.5.2 Resume Held Call

#### To resume a held call:

Click **Answer**  for the target call.


## 6.6 Transfer Calls

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


### 6.6.1 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:

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

### 6.6.2 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*.

### 6.7 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.

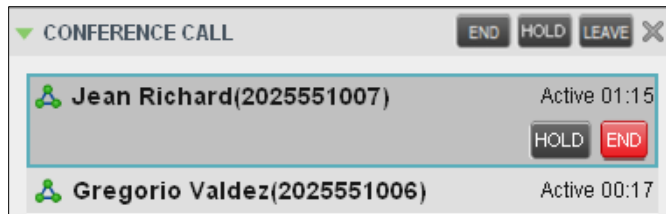


Figure 36 Call Console – Conference Call Panel

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



### 6.7.1 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 [6.4 Make Outbound Calls](#).

**To start a conference:**

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

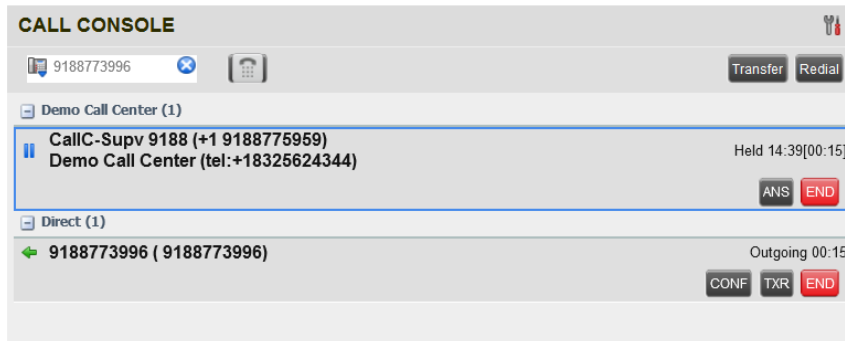


Figure 37 Call Console – Starting Conference Call


- 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 38 Conference Call Panel – Conference Call

### 6.7.2 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.


### 6.7.3 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.


### 6.7.4 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.


### 6.7.5 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** .

### 6.7.6 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** .

### 6.7.7 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.

### 6.7.8 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** .

### 6.7.9 End Conference

**To end the conference:**

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

## 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.

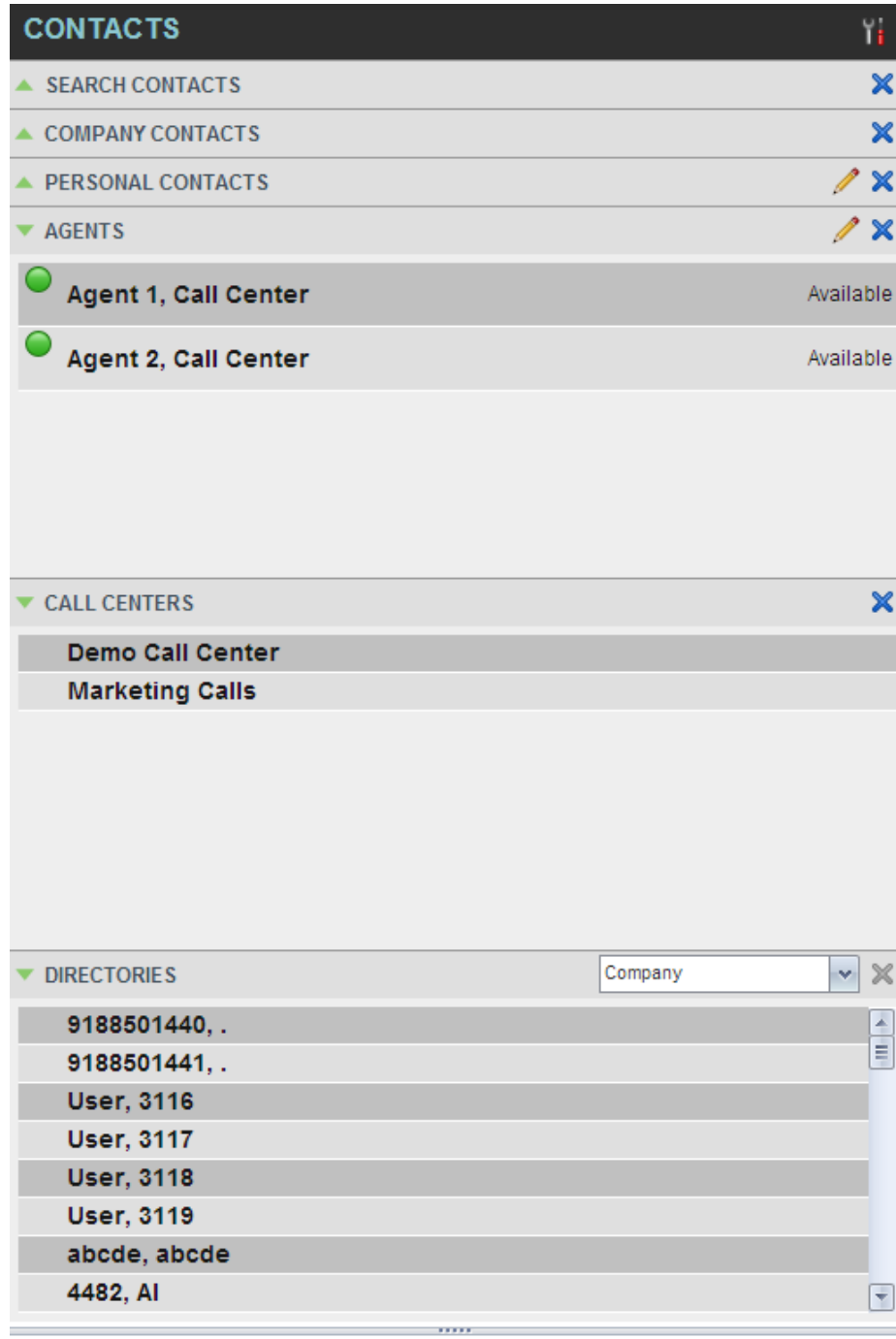


Figure 39 Contacts Pane

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

Interface Element	Description
-------------------	-------------

Interface Element	Description
Company Contact	The <i>Company Contacts</i> directory contains the contacts in your XO Hosted PBX.
Personal Contacts	The <i>Personal</i> directory contains all contacts in your Personal Phone List on XO Hosted PBX
Agents	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.
Call Centers	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.
Outlook	The <i>Outlook</i> directory contains your Outlook contacts.
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: *Company*, *Personal*, *Outlook*, and *Speed Dial*. The *Contacts* pane is always visible. You can choose which directories to display in the *Directories* panel and you can collapse the panel, but you cannot close it.

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

- [View Contacts](#)
- [Organize Contacts](#)
- [Search for Contacts](#)

## 7.1 View Contacts

Call Center allows you to select directories to display in the *Contacts* pane, 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 display 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.

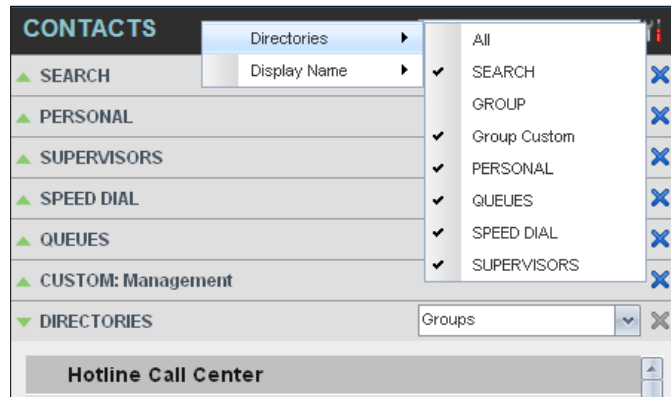


Figure 40 Contacts Pane – Show/Hide Contact Directories

**To display 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*.

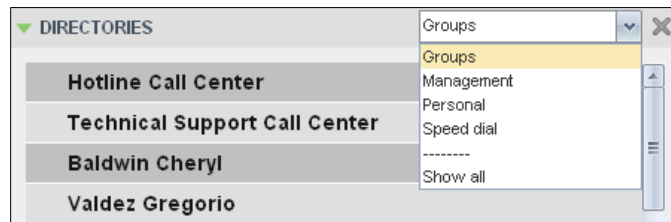


Figure 41 Directories Panel – Selecting Directory to Display

**To display a directory below the Call Console:**

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

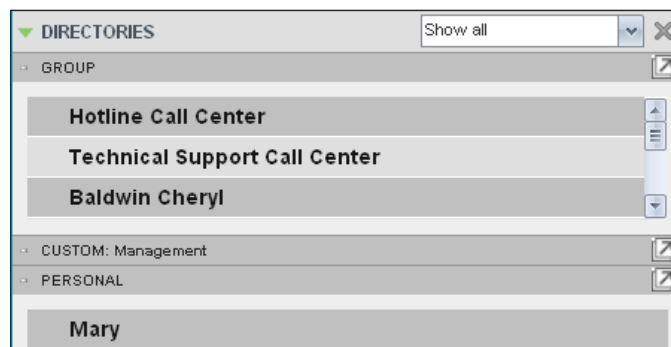


Figure 42 Directories Panel – Selecting Directory

### 7.1.2 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 43 Group Panel Expanded

### 7.1.3 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 and action buttons.

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

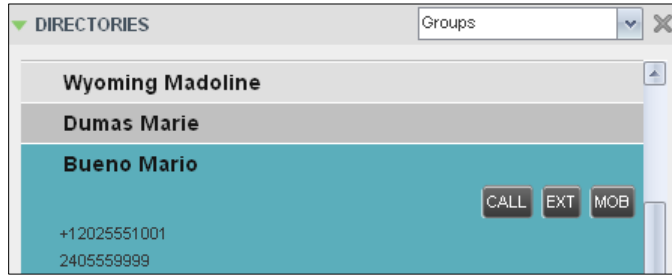



Figure 44 Group Panel – Contact Details

### 7.1.4 Select Display Order

Contacts in the *Company Contacts*, *Personal Contact*, *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*.

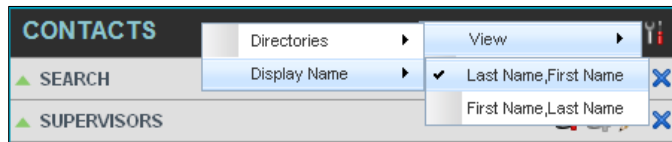


Figure 45 Contacts Pane – Displaying Contacts by First Name, Last Name

Figure 46 shows supervisors displayed by their last name followed by their first name.

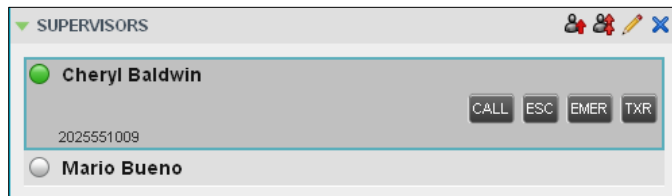


Figure 46 Supervisors Panel – Supervisors Listed by First Name, Last Name

## 7.2 Organize Contacts

### 7.2.1 Sort Contacts

You can sort contacts in the following directories: *Company Contacts*, 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.

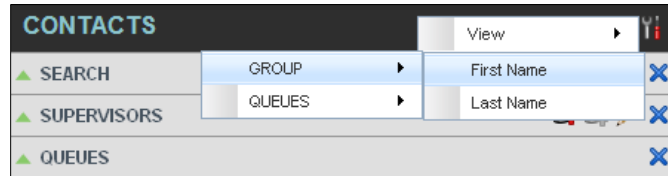


Figure 47 Contacts Pane – Sorting Contacts

Figure 48 shows a *Group* directory sorted by the contact's first name.



Figure 48 Group Panel – Contacts Sorted by First Name

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

## 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.

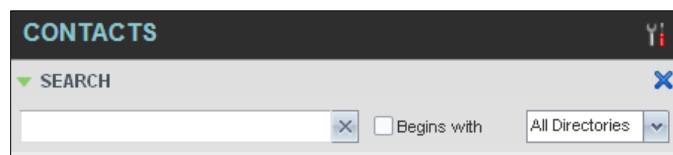


Figure 49 Contacts Pane – Search Panel



### 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.

XO Hosted PBX directories are searched in the following order: Supervisors, Agents, Company Contacts. Duplicate search results in XO Hosted PBX directories are not displayed; the first match for a given contact is displayed.

Duplicate search results in other directories are displayed.

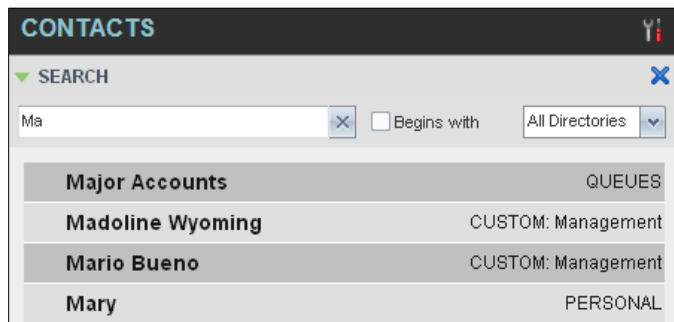


Figure 50 Contacts Pane – Search Results

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

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

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

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

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

## 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:

- [Add Personal Contact](#)
- [Delete Personal Contact](#)

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

### 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.

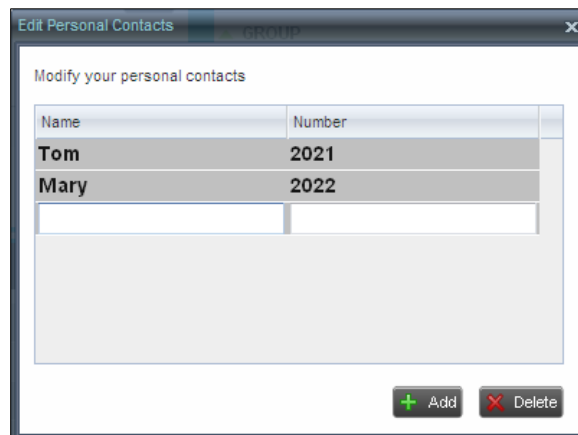



Figure 51 Edit Personal Contact Dialog Box – Adding Entry

- 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.
- 2) Select the entry to delete and click **Delete**.

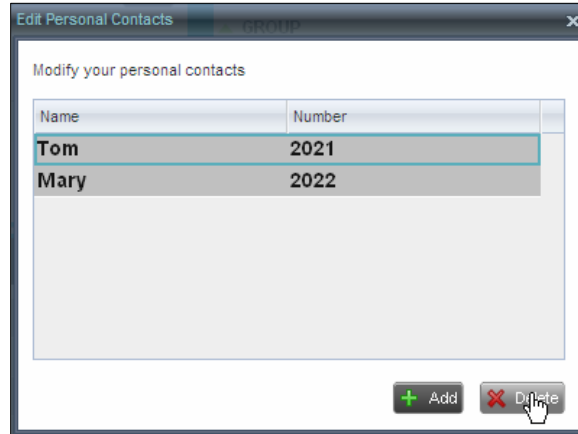


Figure 52 Edit Personal Contact Window – Deleting Entry

## 8 Manage Agents

You use the *Agents* panel to view the agents who you are supervising and to perform actions on them. You can also monitor the call and the ACD state of selected agents

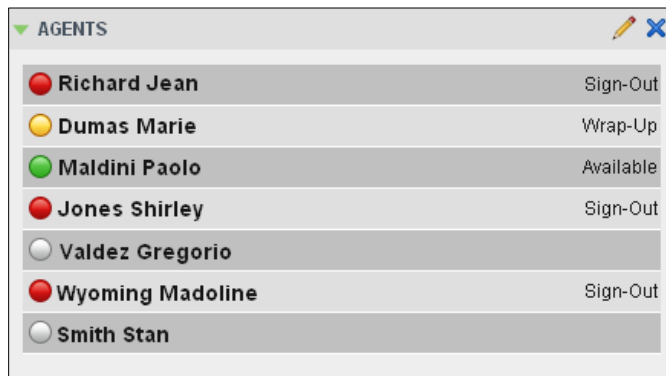


Figure 53 Agents Panel

### 8.1 Select Agents to Monitor

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

**To select agents to monitor:**

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

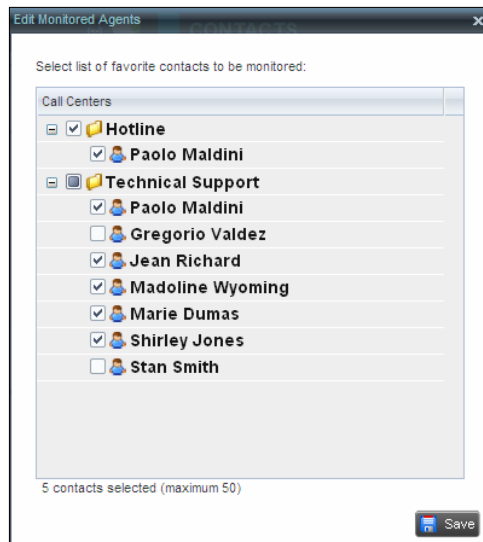


Figure 54 Edit Monitored Agents Dialog Box

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

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

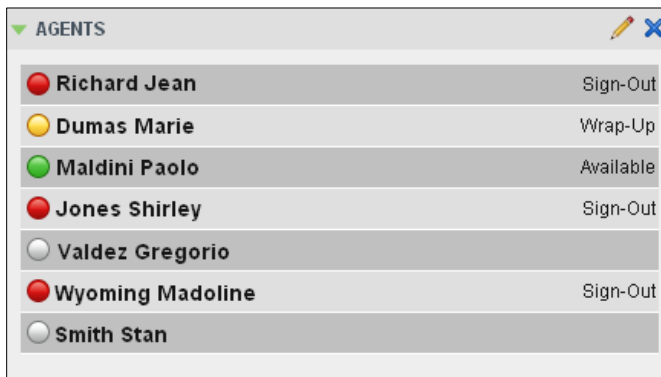


Figure 55 Agents Panel – Monitored Agents

The list is saved and is available during subsequent sessions.

## 8.2 Agent Phone and ACD States

Monitored agents have their phone and ACD state displayed. A single icon, to the left of the agent's name, represents the agent's combined phone and ACD state, which indicates the agent's ability to take calls. In addition, the agent's ACD state is also displayed in text following their name.

Other agents have their state set to "Unknown".

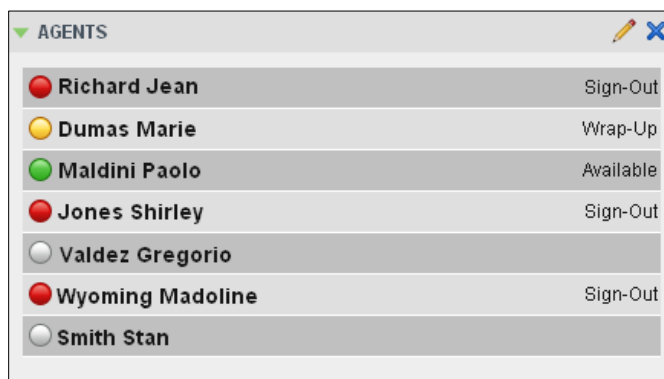









Figure 56 Agents Panel – Agents with Phone and ACD State Displayed

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

Phone State	ACD State	Icon	Description
<i>Idle</i>	<i>Available</i>		Agent's phone is on-hook and the agent is available to take ACD calls.
<i>Ringing</i>	<i>Available</i>		Agent's phone is ringing and the agent is available to take the call.
<i>Any</i>	<i>Unavailable, Sign-In, Sign-Out</i>		Agent is not available to take ACD calls.
<i>Idle, Ringing</i>	<i>Wrap-Up</i>		Agent is performing post call work. They may or may not be available to take calls.

Phone State	ACD State	Icon	Description
<i>Busy</i>	<i>Available, Wrap-Up</i>		Agent's phone is off-hook, which means that the agent is on a call. Calls <b>may</b> 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>	Any		Agent has enabled the Do Not Disturb service. ACD calls are <b>not</b> delivered to agent in the <i>Do Not Disturb</i> call state. This state is <b>not recommended</b> 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>	Any		Agent has enabled the Call Forwarding Always service.
<i>Private</i>	Any		Agent has enabled phone state privacy. <b>NOTE:</b> 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>	Any		Agent is currently not monitored.

### 8.3 View Agent's Details

Clicking an agent expands the entry to show all joined queues and all the agent's current calls, in order of arrival. For each call, the following information is displayed:

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

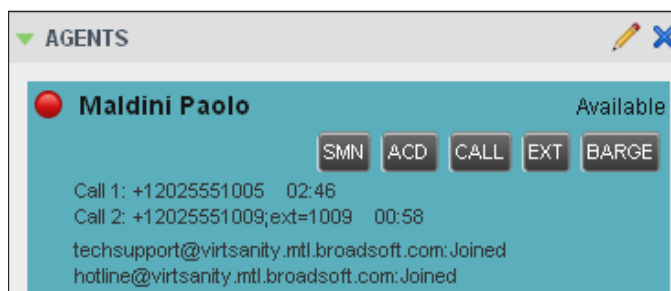


Figure 57 Agents Panel – Expanded Contact

## 8.4 Change Agent ACD State

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

### To change an agent's ACD state:


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



Figure 58 Agents Panel – Agent ACD States

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

## 8.5 Silently Monitor Agent's Call

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

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

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

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


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

- 1) In the *Contacts* pane, expand the *Agents* panel and click the agent to monitor. The agent must have exactly one active call.

- 2) Click **Monitor**  for that agent.

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

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

- 1) In the *Contacts* pane, expand the *Agents* panel.
- 2) Click the target agent and click **Monitor Next Call**  for that agent. A monitoring call is established for the selected agent.

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

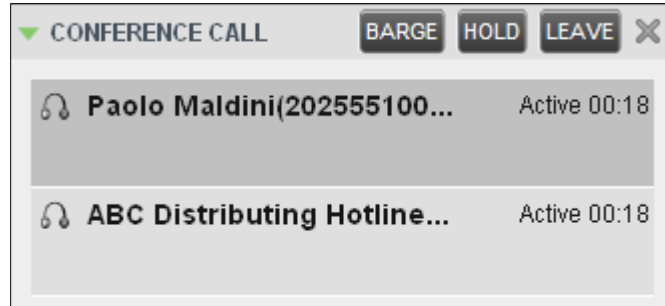



Figure 59 Silently Monitored Call

**To barge in on a call you are silently monitoring:**


In the *Conference Call* panel, click **Barge In** . You are conferenced in to the call. For information on operations that can be performed on conference calls, see section [6.7 Manage Conference Calls](#).

**8.6 Barge in on Agent’s Call**

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

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

**To barge in on an agent’s call:**

- 1) In the *Contacts* pane, expand the *Agents* panel and select an agent. The agent must have exactly one active call.
- 2) Click the agent to expand the entry and click **Barge In** . A Three-Way Conference is established.

For information on operations that can be performed on conference calls, see section [6.7 Manage Conference Calls](#).

**8.7 Pick Up Agent’s Ringing Call**

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


**NOTE 1:** This functionality is only available if your group has been assigned the Call Pickup service.

**NOTE 2:** A call that is retrieved using Call Pickup is treated in the Call Center reports as a direct inbound call to the retrieving party and not as an ACD call, because it was not answered by the agent selected using the ACD process.

**NOTE 3:** Supervisor Call Pickup is only supported if the agent and supervisor are in the same group. In an enterprise, this function can be disabled.



**To pick up an unanswered call for an agent:**

- 1) In the *Agents* panel, select an agent whose phone is ringing.
- 2) Move the mouse over the agent and click **Answer**  .  
You are now answering the call, and the call appears in the *Call Console*.

## 9 Manage Queued Calls

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

Section [9.1 Queued Calls Pane](#) describes the *Queued Calls* pane. The rest of this section describes the operations you perform to manage queued calls:

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

### 9.1 Queued Calls Pane

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


The *Queued Calls* pane displays the monitored call centers and lists the calls queued in each call center. For information about selecting call centers to monitor, see section [9.2 Select Call Centers to Monitor](#).

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

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



Figure 60 Queued Calls Pane


- Service Mode button  – This identifies the service mode of the supervised call center. Clicking the button launches the *Edit Queued Calls Favorites* dialog box and allows you to activate Night Service Override or Forced Forwarding. The call center can be in one if the following service modes:
  - *Night Service* – The call center is processing calls according to the *Night Service* schedule and policy.
  - *Night Service Override* – The call center has been manually forced to follow the *Night Service* policy.

**NOTE:** The *Night Service* or *Night Service Override* mode appears only if the *Night Service* policy is triggered. It is triggered either by the *Night Service* schedule or by a manual override, and if the action to apply to incoming calls is set by a XO Hosted PBX administrator to either *Perform busy treatment* or *Transfer to phone number/SIP-URI*. Setting the action to “None” acts as if the *Night Service* policy was not triggered, and as a result, the *Night Service/Night Service Override* mode is not displayed.

- *Holiday Service* – *\*Holiday Service is not available but will be in a future release\**

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

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





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

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

By default, calls are listed according to their position in the queue, with the oldest call first. They can be grouped by the priority bucket. For more information, see section [9.6 Group Queued Calls](#).

The following information is provided for each call:

- Call Status icon – A graphic representation of the state of the queued call:

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

Clicking a call expands the call to show additional data:

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

When the call is expanded, the action buttons for actions that can be performed on the call appear. For the list of action buttons available in Call Center, see section [5.4.1 Call Action Buttons](#).

## 9.2 Select Call Centers to Monitor

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

To select call centers to monitor:

- 1) In the *Queued Calls* pane, click **Options**  and select the *Edit Call Center Dialog* option.

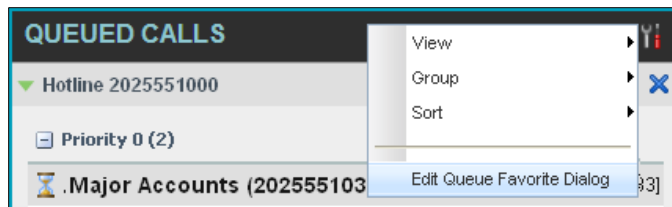


Figure 61 Queued Calls – Options – Edit Queue Favorite Dialogue

The *Edit Queue Favorites* dialog box appears.

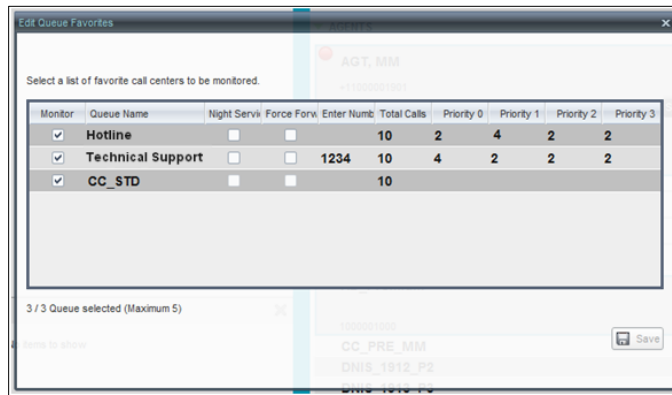



Figure 62 Edit Call Centers Box

- 2) Select the *Monitor* check boxes in the rows of the call centers to monitor.
- 3) Click **Save**.

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

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

For information about showing or hiding a call center in the *Queued Calls* pane, see section [9.4 Show or Hide Call Center Panels](#).

### 9.3 Modify Number of Calls to Display


For each Call Center you can modify the maximum number of calls that can be displayed in each priority bucket. The total number of calls to display for a call center cannot exceed 50.

- 1) In the *Queued Calls* pane, click **Options**  and select the *Edit Call Center Dialog* option. The *Edit Call Centers* dialog box appears.
- 2) For each Call Center you are monitoring, set the number of calls to display in each priority bucket. The total number of call in all priority buckets cannot exceed 50.

### 9.4 Show or Hide Call Center Panels

You can show or hide call center panels for monitored queues in the *Queued Calls* panel. This is not the same as selecting queues to be monitored. For more information about monitoring call centers, see section [9.2 Select Call Centers to Monitor](#).

**To show/hide call center panels:**

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

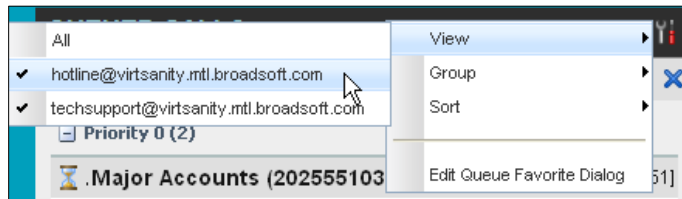



Figure 63 Queued Calls – Options – View

To hide a call center, you can also click the close button . The call center is removed from the display but continues to be monitored.

### 9.5 View Queued Calls

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

**To view queued calls for a call center:**

Click the *Expand*  button for that call center.


**To view call details of a selected call:**

Click that call.

### 9.6 Group Queued Calls

You can group queued calls by their priority bucket.

**To group or ungroup queued calls:**

- 1) In the *Queued Calls* pane, click **Options** .

- From the drop-down list, select *Group*, and then select or deselect *Group by Priority*. This action applies to all monitored call centers.

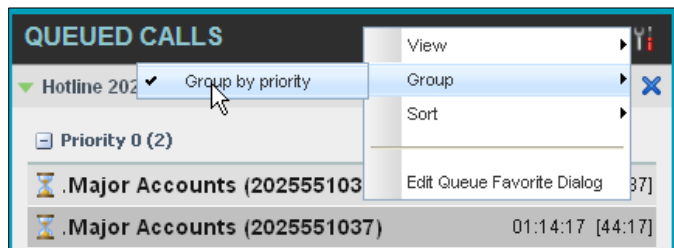



Figure 64 Queued Calls – Options – Group

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

## 9.7 Order Queued Calls

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

### To order queued calls:

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

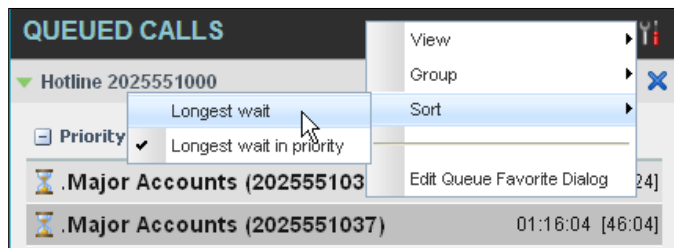


Figure 65 Queued Calls – Options – Sort


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

## 9.8 Monitor Next Call

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

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

### To monitor the call center's next call:

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

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

**To barge in on a call you are silently monitoring:**

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

For information on operations that can be performed on conference calls, see section [6.7 Manage Conference Calls](#).

**9.9 Enable Night Service Override or Forced Forwarding**

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

**To enable Night Service Override and/or Forced Forwarding:**

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

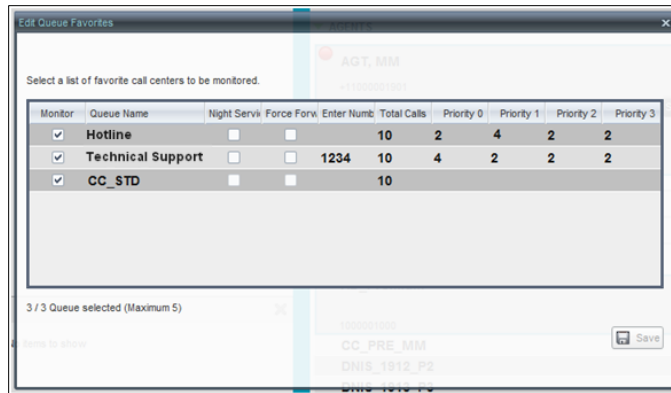


Figure 66 Edit Queue Favorites Dialog Box


- 2) For each call center for which you want to override the time schedule and manually initiate Night Service, check the *Night Service Override* check box.
- 3) For each call center for which you want to divert calls to a specified destination temporarily, check the *Force Forwarding* box and enter the phone number to which to forward the calls in the *Enter Number* box.

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

**9.10 Retrieve Call from Queue**

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

**To retrieve a call from a queue:**

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

Once you retrieve a call, the call appears in the *Call Console* and you treat it as any other call. For example, you can transfer it to an ad hoc number or to another queue. For more information, see section [6 Manage Calls](#).




### 9.11 Promote Call in Queue

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

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


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

- 1) In the *Queued Calls* pane, expand a *Call Center* panel.
- 2) Click the call you want to promote and click **Promote**  for that call.

The queued call is promoted to the end of the next highest priority bucket.

### 9.12 Transfer Call to Another Queue


**To transfer a queued call to another queue:**

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

The call is transferred and removed from the queue.

### 9.13 Transfer Call from Queue to Agent

**To transfer a call from a queue to an agent:**

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

The call is transferred and removed from the queue.

### 9.14 Transfer Call to Ad Hoc Number

**To transfer a call to an ad hoc number:**


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




Figure 67 Ad Hoc Queue Transfer

The call is transferred and removed from the queue.

### 9.15 Change Position of Call in Queue

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

**To change a call's position in a queue:**

- 1) In the *Queued Calls* pane, click the target call to expand it.
- 2) Click **Reorder**  and select the new position in the queue from the list that appears.  
The call is placed in the new position.

**NOTE 1:** You cannot place a call ahead of a bounced call.


**NOTE 2:** The list can contain a maximum of 24 reorder positions you can choose from to reorder a call in queue, in addition to *Send to back* and *Sent to front* options.

### 9.16 Transfer Call to Top of Queue

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

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

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

- 1) In the *Queued Calls* pane, click the target call to expand it.
- 2) Click **Reorder**  and select *Send to Front* from the list that appears.

## 10 View Real-Time Statistics

Call Center provides you with real-time information about supervised agents and queues. This information is displayed in the Dashboard.

### 10.1 Display Dashboard

**To access the Dashboard:**

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

The screenshot shows a web browser window titled "Call Center Dashboard" with the following data tables:

Call Centers		Current		Averages		Agents				
Name	Status	Calls In Queue	Longest Waiting Call	EWT	AHT	ASA	Staffed	Idle	Unavailable	Show Agents
Demo Call Center		05	00:00	00:00	00:00	00:02	2/2	1	0	<input checked="" type="checkbox"/>

Agents		Memberships		Current		Averages			
Name	Call Centers (Total)	Sign-in Time	Sign-in Duration	Call State (Time)	Agent State (Time)	% Available	Avg Busy In	Avg Busy Out	Avg Wrap-Up
Agent 1, Call Center	1	14:56:54	44:37	On Call (01:30)	Available (23:49)	97%	00:42	00:00	00:30
Agent 2, Call Center	1	13:56:09	01:45:22	Idle (00:59)	Available (01:40:57)	99%	01:09	00:00	00:29

Figure 68 Dashboard

The *Dashboard* is divided into two parts with queue information in the top half and agent information in the bottom half. The information is updated in real time.

By default, information about agents is hidden.

**To view agents staffing a call center:**

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

## 10.2 Queue Information

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

- *Name* – This is the name of the call center to which the queue belongs.
- *Status*– This displays the status of the call center, which can be one of the following:
  - *Night Service* – The call center is processing calls according to the Night Service schedule and policy.
  - *Night Service Override* – The call center has been manually forced to follow the Night Service policy.

**NOTE:** The *Night Service* or *Night Service Override* status appears only if the Night Service policy is triggered, either by the *Night Service* schedule or by a manual override, and if the action to apply to incoming calls is set 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* – **\*\*Holiday Service is currently not available. It will be available in a future release.\*\***

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

- *Forced Forwarding* – All calls to this call center are forwarded to a specified destination.
- *Normal* (which indicates none of the above)
- *Calls in Queue* – This is the number of queued calls expressed as a ratio of the total queue capacity for that call center. For example, “6/10” means that there are six calls in the queue, which can queue a maximum of ten calls.
- *Long Waiting Call* – This is the waiting time of the call that has been in the queue the longest.
- EWT (Expected Waiting Time) – This is the expected waiting time of calls in the queue.
- *AHT (Average Handle Time)* – This is the average handling time for calls in the queue.
- *ASA (Average Speed of Answer)* – This is the average amount of time a caller spends in the queue before the call is offered to an agent.
- *Staffed (Agents)* – This is the number of agents managed by you that are in *Sign-In*, *Available*, *Unavailable*, or *Wrap-Up ACD* state, as a ratio of all agents managed by you for this call center.
- *Idle (Agents)* – This is the number of agents who are in the *Available ACD* state but presently not on a call.

- *Unavailable* – This is the number of agents who are signed in to the call center but not available to take calls.
- *Show Agents* – When this check box is selected, the agents who are joined in the call center are displayed in the *Agents* area of the *Dashboard*.

### 10.3 Agent Information

The *Dashboard* displays information about the agents for the selected queues. You select the queues for which you want to view agents' information by checking the *Show Agents* box on the lines for the queues in the *Queues* area of the *Dashboard*. The following information is provided for each displayed agent:

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

The *Dashboard* is designed to be used together with the *Queued Calls* pane and the *Agents* panel in the *Contacts* pane. The *Dashboard* provides you with a real-time view of agents and queues, while the *Agents* panel and *Queued Calls* pane allow you to take actions on monitored agents and ACD calls. For more information about the actions you can take to manage agents and queued calls, see sections [8 Manage Agents](#) and [9 Manage Queued Calls](#).

### 10.4 Select Information to Display

By default, Call Center displays information about call centers and agents as described in sections [10.2 Queue Information](#) and [10.3 Agent Information](#). You may however modify what information you want to appear in the *Dashboard*.

#### To select information to display:

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

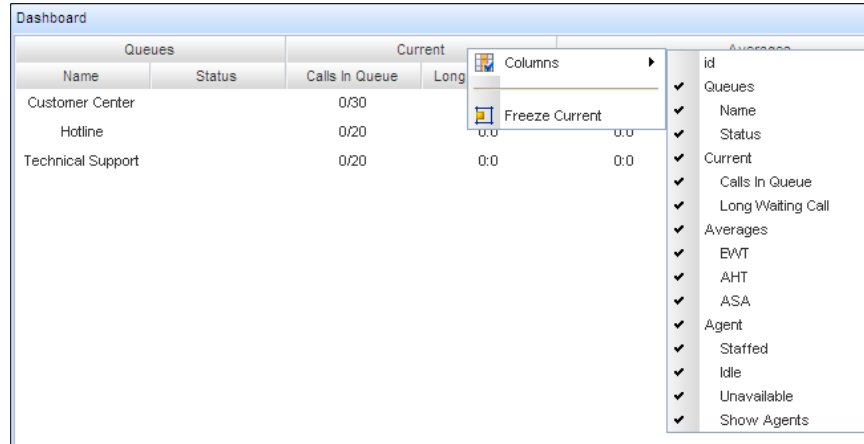


Figure 69 Dashboard – Select Columns to Display

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

## 11 Generate Reports

Call Center provides reporting functions for supervisors to report on activity and performance of agents and call centers under their supervision.

### 11.1 Reporting

Reporting provides the Call Center agents historical information about their call center performance which allows them to know their statistical performance as a call center. This section provides an example of Reports available. For the list of canned report templates available for report generation as part of Enhanced Reporting, see the *XO Hosted PBX Call Center Reports Guide*.

#### 11.1.1 Run Reports

- 1) To run a report, click the Reporting link at the top right-hand side of the main window. A Report window appears. Select a report template from the drop-down list. The page displays the input parameters for the report.



Figure 70 Report Window – Reporting Link

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

Figure 71 Abandoned Call Report – Running Report

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

Input Field	Description	Allowed Value
Scope	<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><b>NOTE:</b> 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> <ul style="list-style-type: none"> <li>▪ If you check <i>Call Center</i>, select call centers from the drop-down list.</li> <li>▪ 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>.</li> </ul>	All Call Centers, Call Center, DNIS
Call Completion	This setting is used to count the number of ACD calls an agent has completed within a service level during the specified interval. The Call Completion service level can be set to "1" through "7200" seconds.	1 through 72000
Short Duration	This setting is used to count the number of ACD short duration calls completed by an agent during an interval. You can set the maximum length of a short duration call to "1" through "7200" seconds.	1 through 7200
Service Level	This setting allows you to provide up to five service levels, used to perform service-level calculations for each call center or DNIS. Each service level can be set to "1" through "7200" seconds.	1 through 7200



Input Field	Description	Allowed Value
<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> <ul style="list-style-type: none"> <li>▪ Check <i>Include overflow time transfers in service level</i> to include calls transferred due to time overflow.</li> <li>▪ Check <i>Include other transfers in service level</i> to include calls transferred for other reasons.</li> <li>▪ Select one of the following options for abandoned calls:               <ul style="list-style-type: none"> <li>▪ <i>Exclude Abandoned Calls</i> to exclude all abandoned calls</li> <li>▪ <i>Include All Abandoned Calls</i> to include all abandoned calls</li> <li>▪ <i>Include All Abandoned Calls Except Before Entrance Completes</i> to include calls abandoned after the entrance message has finished playing</li> <li>▪ <i>Include Abandoned Calls Except in Defined Interval</i> to include calls abandoned after the time specified by the abandoned call interval parameter.</li> </ul> </li> </ul>	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> <ul style="list-style-type: none"> <li>▪ Historical reports show data from the assigned start date to the assigned end date.</li> <li>▪ Real-time reports show data from the assigned start date to the present, with the current interval refreshed with real-time data.</li> </ul> <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"> <li>▪ 180 days of half-hour interval statistics</li> <li>▪ 365 days of hourly interval statistics</li> <li>▪ 730 days of daily interval statistics</li> </ul>	MMM DD, YYYY
<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.	1:00am through 12:59am, 1:00pm through 12:59pm, 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.	1:00am through 12:59am, 1:00pm through 12:59pm, or 0:00 through 23:59

Input Field	Description	Allowed Value
<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 an Enhanced Report.

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

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

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

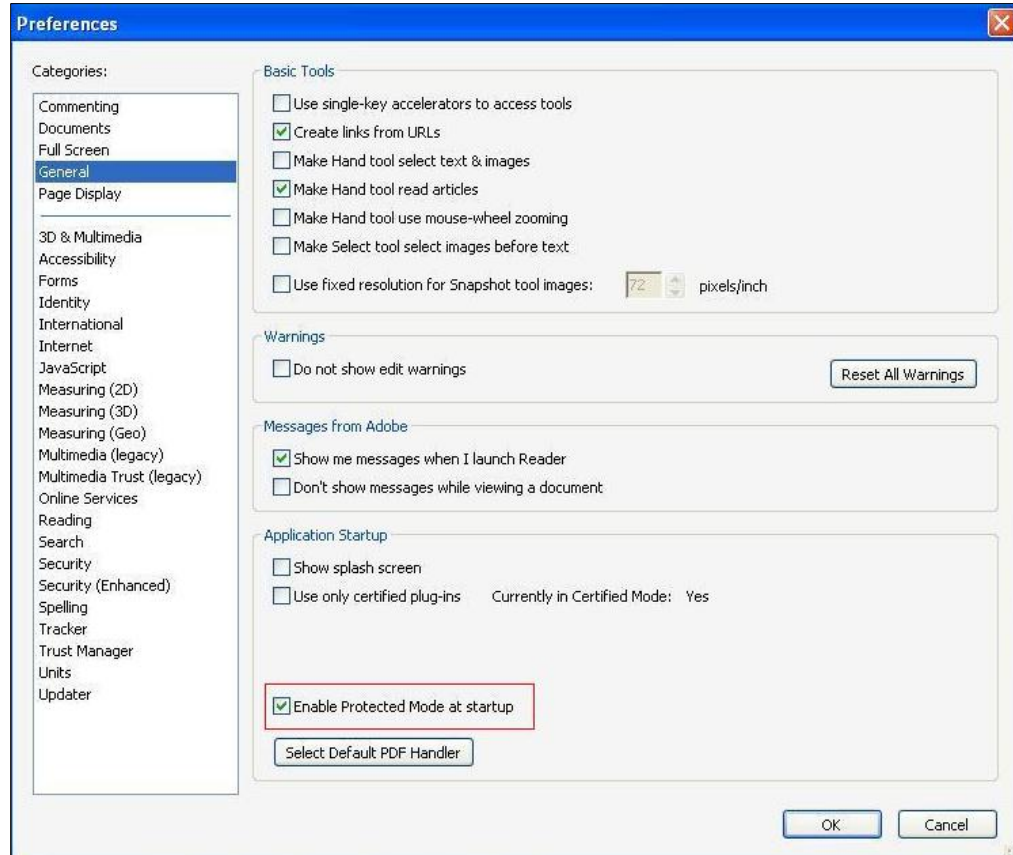


Figure 72 Preferences – General

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

#### 11.1.1.1 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 an Enhanced Report: Abandoned Calls Report. For more information on the reports available in Call Center, see the *XO Hosted PBX Call Center Reports Guide*.

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

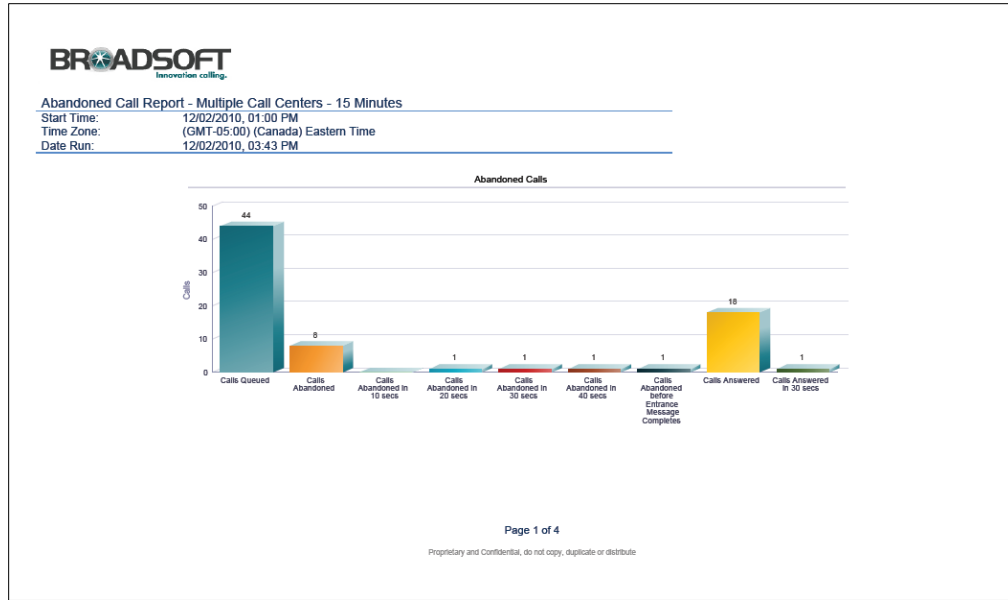


Figure 73 Abandoned Calls Report – Bar Chart

**BROADSOFT**  
Innovation calling.

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	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
	IS7035_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	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
	IS7044_CalCenterPremium	2	1	50.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	1	50.0%	0	0.0%	00:11:15
	Summary	5	2	40.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	1	20.0%	1	20.0%	00:11:15
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 74 Abandoned Calls Report – Table (Fragment)

### 11.1.2 Schedule Report

To schedule a report:

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

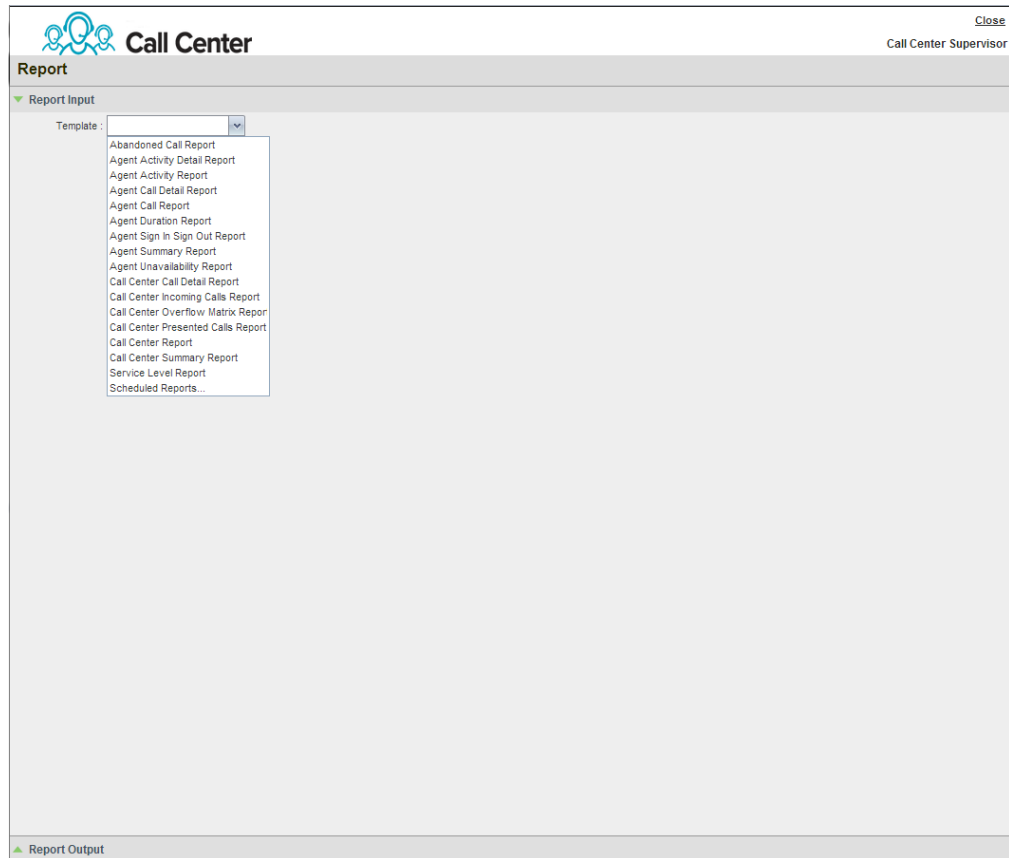


Figure 75 Report Window – Enhanced Reports

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

Figure 76 Agent Activity Report – Scheduling Report

- 3) For *Type*, select *Scheduled*.
- 4) Provide the name and the description of the report.
- 5) Specify the recurrence pattern. From the *Recurrence* drop-down list, select the type of recurrence for the report from the following options: *Never*, *Daily*, *Weekly*, *Monthly*, or *Yearly*. *Never* signifies that this is a one-time report.
  - If you selected *Never*, enter the date and time when you want the report to be generated.

Figure 77 Report Recurrence – Never

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

Figure 78 Report Recurrence – Daily

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

Figure 79 Report Recurrence – Weekly

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

Figure 80 Report Recurrence – Monthly

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

Figure 81 Report Recurrence – Yearly

- If you selected a recurring report, specify when the reporting should end. Select from the following options:
  - *Never*
  - *After <X> occurrences*, and enter the number of occurrences
  - *Date*, and select a date from the calendar

Figure 82 Report Recurrence – End

- 6) Specify the report time frame.
  - For a report that is not recurrent, specify the actual time frame of the report.

Figure 83 Report Time Frame for Report that is Not Recurrent

- For a recurrent report, specify the report start date, time, and the time frame relative to the report generation time.

Figure 84 Report Start Date and Time Frame for Recurrent Report

**NOTE:** A report time frame specifies the period for which the report is requested and it always has a beginning date and time and an end date and time. For a report that is not recurrent, enter the actual dates and times. For a recurring report, the time frame is specified relative to the moment when the report is run, and can be previous <x> hours, days/weeks, months, or years.

The start date and time (and for weekly reports for day of the week) determine when the report is run for the first time. At execution time, the relative time frame is converted to the actual dates and times. 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.

- 7) Enter the e-mail addresses of the recipients of the report.
- 8) Enter the remaining parameters, as required. For the description of the remaining parameters, see the XO Hosted PBX Call Center Reports Guide.**Error! No bookmark name given.**
- 9) Run Report
- 10) Click **Schedule Report**.

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

### 11.1.3 Manage Scheduled Reports

You can list, modify, and delete scheduled reports.



**To manage scheduled reports:**

- 1) Click the **Reporting** link at the top right-hand side of the main window. A *Report* window appears.
- 2) From the drop-down list, select *Scheduled Reports*. A *Scheduled Reports* dialog box appears, listing the reports that you have scheduled.

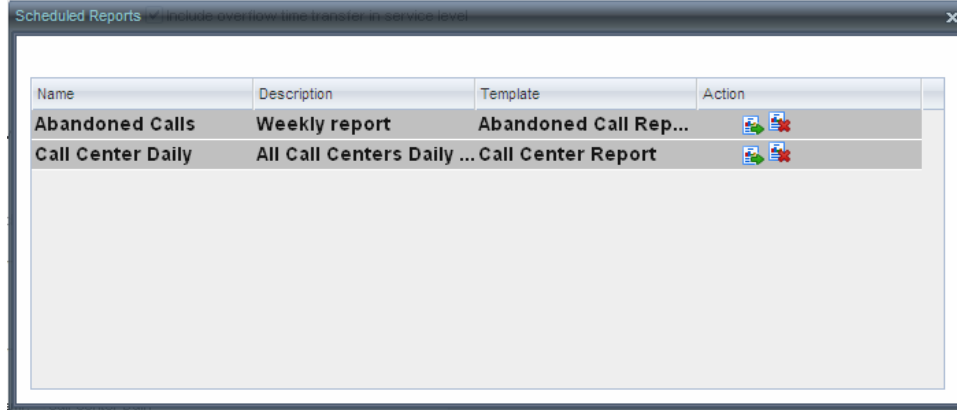




Figure 85 Scheduled Reports Dialog Box

- 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.

- [Settings – General](#)
- [Settings – Application](#)
- [Settings – Services](#)
- [Settings – Plug-ins](#)
- [Settings – Report](#)
- [Settings – About](#)

### 12.1 Settings – General

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

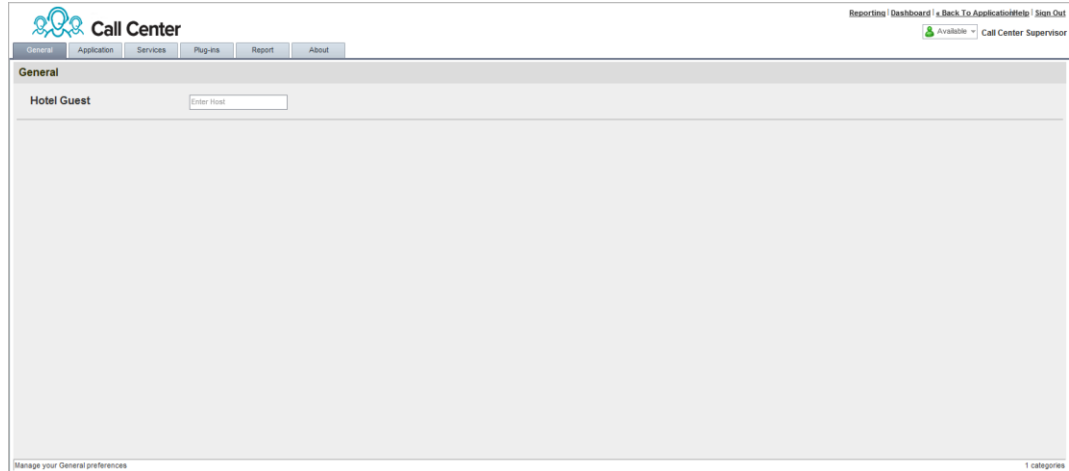


Figure 86 Setting – General

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

#### 12.1.1 Hotel Guest

This setting is not active at this time. It is reserved for future feature enhancements.

## 12.2 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.

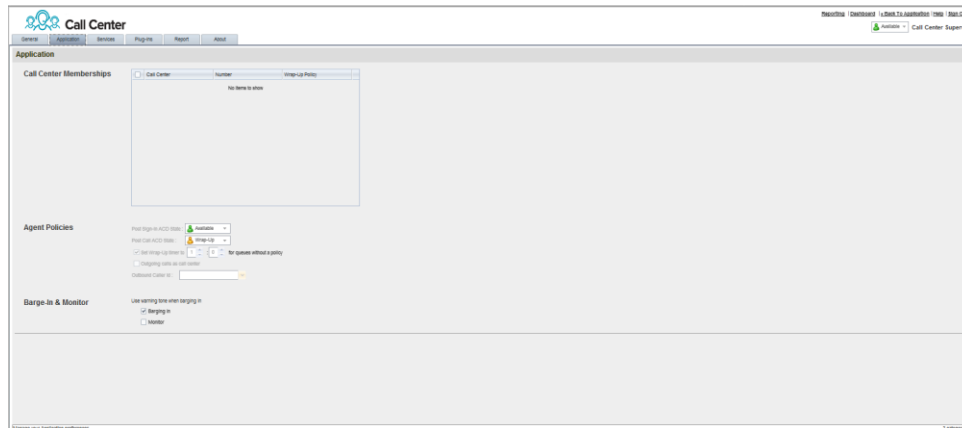


Figure 87 Settings – Application (Agent)

### 12.2.1 Call Center Memberships

*This setting is only active if your Site Administrator has activated you as both a Supervisor and an Agent.*

It allows you to select the call center queues you wish to join as an Agent.

- 1) To join a call center queue, select the check box on the line for the call center.
- 2) To join all queues, select the check box in the header.

**NOTE:** If you are not allowed to join/leave a queue, the line for the queue is dimmed and you can only view your join status in the queue. To change your join status in a queue, if you are not allowed to do it yourself, contact your administrator.

### 12.2.2 Agent Policies

*This setting is only active if your Site Administrator has activated you as both a Supervisor and an Agent.*

You use agent policies settings to specify your post sign-in ACD state, post call ACD state, wrap-up timer, and outbound CLID:

- **Post Sign-In ACD State** – To configure your post sign-in ACD state, select a state from the *Sign-In State* drop-down list. Your ACD state is automatically set to the selected state when you sign in to Call Center.  
If you selected *Unavailable* and unavailable codes are enabled for your organization, select an unavailable code from the drop-down menu.
- **Post Call ACD State** – To configure your post call ACD state, that is your ACD state upon completion of a call, select a state from the *Post Call State* list.  
If you selected *Unavailable* and unavailable codes are enabled for your organization, select an unavailable code from the drop-down menu.

In most cases, when you select *Wrap-Up*, you must also configure your wrap-up timer.

- *Make outgoing calls as call center* – Check this box to display a call center CLID instead of your phone number when you make a call.
- *Outbound Caller ID* – If you checked *Make outgoing calls as call center*, select the number to use from the drop-down menu.
- *Set Wrap-Up Timer to* – To set your post call wrap-up timer, check the *Set Wrap-Up Timer to <mm:ss> for queues without a policy* box and enter the time in minutes and seconds. Your ACD state automatically changes from *Wrap-Up* to *Available* after the specified period of time.

**NOTE:** Your post call wrap-up timer setting may be overridden if your administrator sets the timer to a smaller value on XO Hosted PBX.

### 12.2.3 Barge-In & Monitor

The following options are only apply if you have the Directed Call Pickup with Barge-in and/or Call Center Monitoring services assigned.

*Use warning tone when:*

- *Barging In* – When this option is set, the agent hears a warning tone when you barge in on their call.
- *Monitoring* – When this option is checked, the agent hears a warning tone when you start silently monitoring their call.

### 12.3 Settings – Services

You use the Services tab to configure various services assigned to you by your administrator on the XO Hosted PBX service, which are integrated with Call Center. These settings are only available if you have been assigned such services. For more information, see your administrator.

The services are grouped into two categories: Active and Inactive.

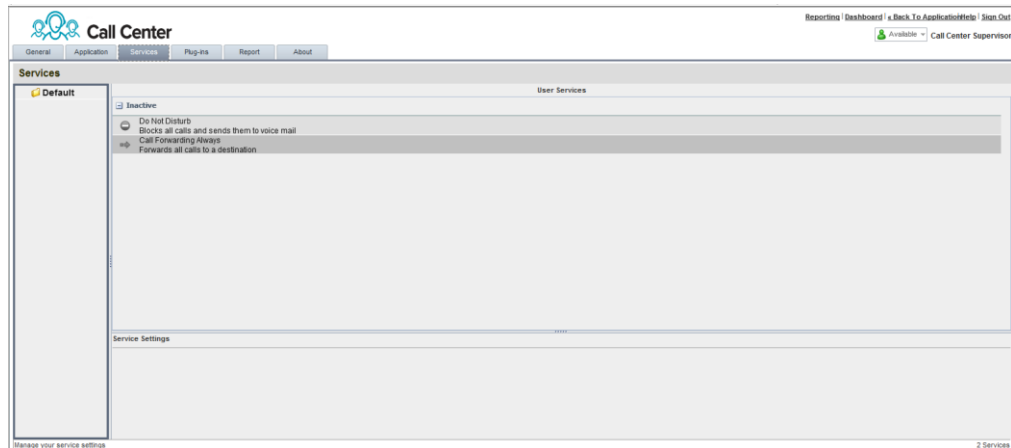


Figure 88 Settings – Services

The services that you can configure (if you have been assigned the services) are:

- *Do Not Disturb* – When you activate this service, you are not available to take calls, and all your calls are automatically sent to your voice mail.
- *Call Forwarding Always* – When you activate this service, you must provide the phone number to forward your calls to. When the service is active, all your calls are forwarded to the specified number.

**To activate a service:**

- 1) Select the service and check the *Is Active* box. The service is moved from the *Inactive* to *Active* category.
- 2) If you enabled the *Call Forwarding Always* service, in the *Forward To* box that appears, enter the number to forward your calls to.
- 3) To generate a ring splash for incoming calls, check the *RingSplash* option.
- 4) To save your changes, click **Save**.

## 12.4 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.

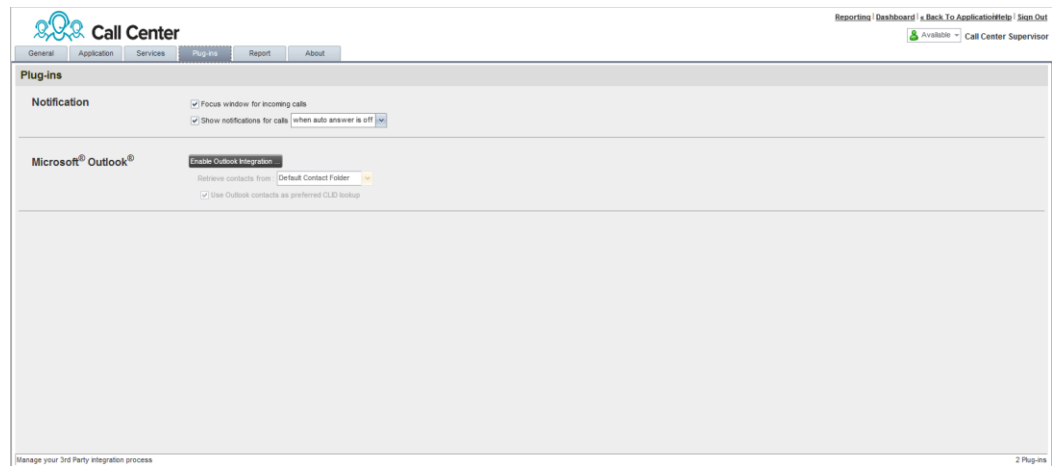


Figure 89 Settings – Plugins

### 12.4.1 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.

## 12.4.2 Microsoft Outlook

The Microsoft Outlook options control Outlook integration with Call Center. They are only visible if Outlook integration is enabled in Call Center.

The options you can set are as follows:

- *Enable/Disable Outlook Integration* – This determines whether Call Center integrates with Outlook to provide you with access to your Outlook contacts. If Outlook integration is disabled, the corresponding desktop plug-in software components are not downloaded from XO Hosted PBX.
- *Retrieve contacts from* – This option allows you to specify where to look for your Outlook contacts.
- *Use Outlook contacts as preferred CLID lookup* – When this option is checked, Call Center uses Outlook to try to identify a caller, when the caller ID is unknown.

## 12.5 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.

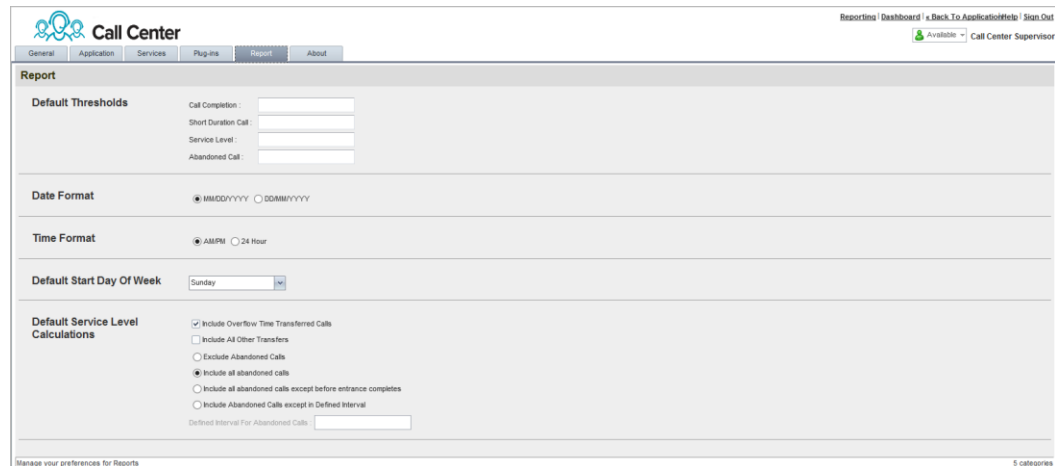


Figure 90 Settings – Report

### 12.5.1 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.
- *Service Level* – Defines in seconds how long it takes to answer calls. A call is said to be within a service level if it is answered within the provided time threshold and the percent (%) in service level is calculated as the number of calls answered within the provided threshold value divided by the number of answered calls.

- *Abandoned Call* - This counts the number of calls abandoned within a specified time threshold. Up to four thresholds can be specified, resulting in up to four different counts. Threshold: 1 through 7200 seconds

### 12.5.2 Date and Time

The following settings allow you to configure day and time formats used in reports as well as the day of the week to start reports.

- *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 the generated report.
- *Time Format* – This setting allows you to select the format for displaying time in reports. The format is used for all times that are included in the generated report.

Note that this setting does not impact the format of events durations, which are always reported in the “DD:HH:MM:SS” format in the generated 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.

### 12.5.3 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.

## 12.6 Settings – About

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

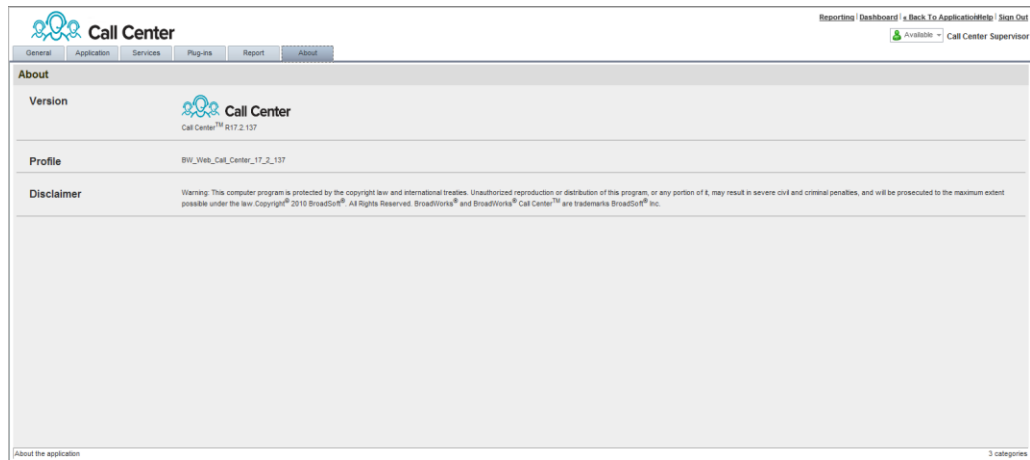


Figure 91 Settings – About

The following information is provided on this page:

- *Version* – This is the name and software version of XO Hosted PBX Call Center client.
- *Profile* – This is the Call Center client profile used.
- *Disclaimer* – This is the Call Center copyright information.






## 13 Appendix A: Glossary and Definitions

### 13.1 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 <b>may</b> be delivered to an agent who is in an <i>Available</i> state.</p> <p>XO Hosted PBX uses both the ACD state <b>and</b> 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 <b>and</b> 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 <b>and</b> 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 <b>may</b> 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.








## 13.2 Phone States



Phone states show the state of the monitored agent's telephone line or the supervisor's telephone line.

The supervisors' 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. <b>NOTE:</b> 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>Unknown</i>		Supervisor is currently not monitored.










The agents' 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>		Agent's phone is on-hook and the agent is available to take ACD calls.
<i>Ringing</i>	<i>Available</i>		Agent's phone is ringing and the agent is available to take the call.
<i>Any</i>	<i>Unavailable, Sign-In, Sign-Out</i>		Agent is not available to take ACD calls.
<i>Idle, Ringing</i>	<i>Wrap-Up</i>		Agent is performing post call work. They may or may not be available to take calls.
<i>Busy</i>	<i>Available, Wrap-Up</i>		Agent's phone is off-hook, which means that the agent is on a call. Calls <b>may</b> 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>		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 <b>not recommended</b> 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>		Agent has enabled the Call Forwarding Always service.

Phone State	ACD State	Icon	Description
<i>Private</i>	Any		Agent has enabled phone status privacy. <b>NOTE:</b> 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>	Any		Agent is currently not monitored.

### 13.3 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		Click To Dial	Answer, End
<i>Ringing In (Remote)</i>	Incoming		Terminator	Answer, Conference, End
<i>Ringing Out, Outgoing</i>	Outgoing		Originator	Conference, End
<i>Active</i>	Active		Any	Transfer, Hold, End, Conference
<i>On Hold</i>	Held		Any	Transfer, Resume, End, Conference
<i>On Hold (Remote)</i>	Held		Any	Transfer, Hold, End, Conference
<i>Active (In Conference)</i>	Active		Conference	Transfer, Hold, End
<i>On Hold (In Conference)</i>	Held		Conference	Resume, Transfer, End
<i>Ringing In (Recalled Call)</i>	Call Recalled		Terminator	Answer, Conference, End

### 13.4 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"> <li>▪ Calls that a supervisor retrieves from a queue</li> <li>▪ Calls that an agent receives due to a transfer from another agent (Note that they may have originated as ACD calls.)</li> </ul>
Outbound Call	This is an outbound call made by an agent.

Name	Description
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	<p>This is an ACD call that was transferred to another number.</p> <p>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.</p> <p><b>NOTE:</b> A timed-out call is a call that is transferred due to exceeding the maximum wait time in a queue.</p>
Answered Call	This is an ACD call that was answered by an agent.
Abandoned Call	This is an ACD call that entered the queue, but the caller hung up before the call was answered or transferred.
Received Call	This is an ACD call that was received and either answered or abandoned. Overflowed calls are not included.
Overflowed Call	This is an ACD call that was received, but immediately transferred to another destination due to the queue's exceeding the configured maximum queue size or the configured maximum wait time.
Queued Call	This is an ACD call that is not immediately diverted using the Night Service, Holiday Service, Forced Forwarding, or Overflow, and goes to a queue to be distributed to an agent or to wait for an available agent.
Bounced Call	This is a call that has been transferred back to queue because it was not answered by an agent in the specified time.
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.

## 14 Appendix B: Keyboard Shortcuts

When using keyboard shortcuts, make sure that the main interface window is in focus.

Key	Equivalent Mouse Action	Description
ESC	Click the <b>Close</b> 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). <b>NOTE:</b> 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 <b>1</b> selects the first call, pressing <b>2</b> selects the second call, and so on.
SPACEBAR	Click <b>Answer</b> 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 <b>End</b> on the selected call in the <i>Call Console</i> .	This ends the selected call.
ENTER	Click <b>Dial</b> .	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 <b>Search</b> .	If the cursor is placed in the <i>Search</i> text box, a search is performed.
+	Click <b>Transfer</b> 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 <b>Answer</b> .	Pressing <b>SHIFT+1</b> selects and answers the first ringing call, pressing <b>SHIFT+2</b> selects and answers the second ringing call, and so on.
SHIFT+1..9	Select an active call and click <b>Hold</b> .	Pressing <b>SHIFT+1</b> selects and places on hold the first active call, pressing <b>SHIFT+2</b> selects and answers the second active call, and so on.
SHIFT+1..9	Select a held call and click <b>Retrieve</b> .	Pressing <b>SHIFT+1</b> selects and retrieves the first held call, pressing <b>SHIFT+2</b> selects and retrieves the second held call, and so on.
S or s	Click the <b>Settings</b> link.	This goes from the main page to the <i>Settings</i> page.

Key	Equivalent Mouse Action	Description
B or b	Click the <b>Back to Application</b> link.	This goes back from the <i>Settings</i> page to the main page.
R or r	Click the <b>Call History</b> button.	This opens the <i>Call History</i> dialog box.
H or h	Click the <b>Help</b> link.	This opens this guide in a PDF format.
D or d	Click the <b>Dashboard</b> link ( <b>Supervisor</b> )	This opens the <i>Dashboard</i> or brings the <i>Dashboard</i> to the front if it is already open.
SHIFT+L or SHIFT+I	Click the <b>Sign Out</b> link.	This signs the user out of the application.
SHIFT+A	Select <i>Available (Agent)</i> .	This sets the agent's ACD state to "Available".
SHIFT+U	Select <i>Unavailable (Agent)</i> .	This sets the agent's ACD state to "Unavailable".
SHIFT+W	Select <i>Wrap-Up (Agent)</i> .	This sets the agent's ACD state to "Wrap-Up".

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