Hosted Call Center User Guide

Agent's Guide

Hawaiian Telcom

HAWAII'S TECHNOLOGY LEADER

Contents

1   Introduction to Call Center

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1.1   Audience

This doucment is intended for Call Center agents who use the BroadWorks Hosted Thin Call Center Client. It will provide step-by-step procedures and reference information for using the service.

1.2   About Call Center

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

BroadWorks Call Center delivers the following real benefits to users:

- o   Efficient call handling and automatic call distribution (ACD) state management by Call Center agents
- o   Intergration of online directories with Click-To-Dial capability
- o   Real–time monitoring of agent and queue activity by Call Center supervisors

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

The Call Center functionality available to you depends on your Call Center function (agent or supervisor), the types of queues you are staffing or monitoring (Standard or Premium), and your own services and settings.

1.3   Call Center – Agent

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

The below screenshot shows the main interface of the Call Center – Agent:
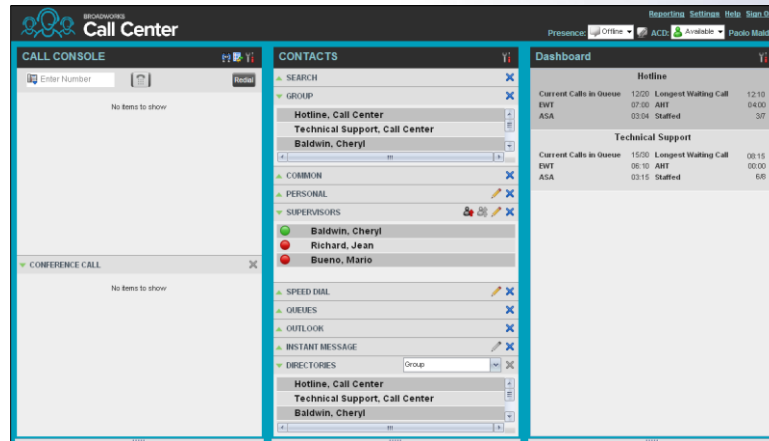
The interface contains the following work areas:

- **Logo pane** – The *Logo* pane displays information about you and contains links to other pages and functions.

- **Call console** – You use the *Call Console* to view and manage your current calls.
- **Contacts pane** – The *Contacts* pane contains your contact directories, the list of your supervisors, and the list of the call centers to which you belong. It allows you to use your contacts to make and manage your calls.

- **Dashboard pane** – The *Dashboard* pane provides real-time summary information about up to 50 call centers selected from the list of call centers to which you are assigned.

- **Call History dialog box** – You use the *Call History* dialog boc to view your past calls and make calls from call history.

- **Report window** – You use the Report window, accessed via the Reporting link, to generate reports about your activity and performance in the call centers you are staffing.

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

For more information about the above Call Center user interface, see section *3 Explore Workspace*.

1.4 **How this Guide is Organized**

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

Section	Overview
Introduction to Call Center	This section provides an overview of Call Center and the functionality available to agents and supervisors.
Getting Started	This section describes how to sign in and out of the Call Center, perform the initial setup, change a password, and obtain help.
Explore Workspace	This section provides an overview of the user interface.
Manage Calls	This section provides information on how to make and manage calls. This includes using your contacts to make calls or perform actions on existing calls.
Manage Call History	This section provides information on managing call logs.
Email Contacts	This section includes information on how to send e-mail messages to contacts.
Manage Contacts	This section provides information on managing contact directories and searching for contacts.
Monitor Supervisors	This section describes how agents can monitor the phone state of selected supervisors.
Monitor Call Centers	This section describes the Dashboard panel available to agents. The Dashboard panel allows agents to view key indicators about selected call centers they are staffing.
Configure Call Center	This section describes the settings you can configure to set up and customize Receptionist for improved usability.
Appendix A: Glossary and Definitions	This appendix contains definitions of terms used in Call Center.
Appendix B: Keyboard Shortcuts	This appendix describes the keyboard shortcuts available in Call Center.

2 Getting Started

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

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

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

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

Note 3: When using the Outlook Integration feature with Microsoft Outlook 2010 (32 or 67-bit edition), make sure Outlook is running before Call Center is launched; otherwise, the Outlook Integration functionality does not work.

2.1 Logging-in to Call Center from the Web Portal

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

To launch Call Center:
1) Log in to: https://bvoip.hawaiiantel.com to access your Hawaiian Telcom web portal.
2) Enter your **User ID**: (10-Digit number)@voip.hawaiiantel.net
3) Enter your Password
4) From the Launch drop-down at the top right-hand side of Hawaiian Telcom logo pane, select the **Call Center Agent**
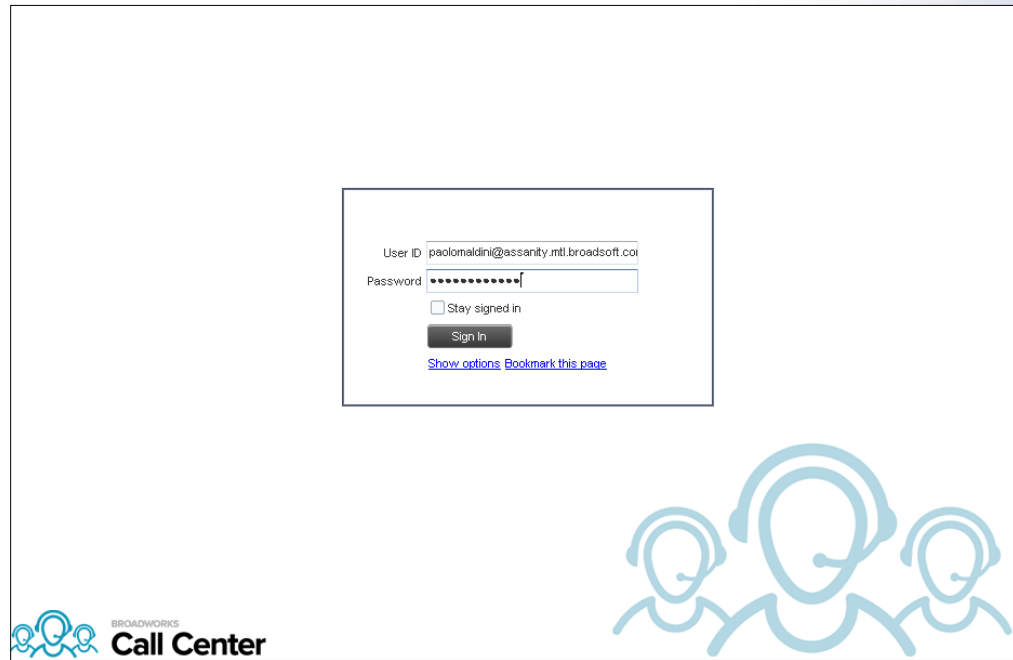
2.2 Sign-in from Web Browser

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

To sign in to Call Center:
1) In your web browser, enter: https://bvoip.hawaiiantel.com/callcenter to access the Call Center client. The following screen will appear:

2) Enter your BroadWorks **User ID:** (10 Digit number)@voip.hawaiiantel.net and enter your **Password**. If you are unsure of your **User ID** or **Password**, contact your administrator.

3) Check **Stay signed in** to automatically reconnect and sign in to the server when it detects a network connection.

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

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

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

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

8) Cick **Sign In**, the Call Center starts and you are signed in.

*Note 2: In some browser/operating system combinations, when you press ENTER instead ot the **Sign In** button, a blank page may apppear instead of the Call Center main interface.*

2.3   Hot Desk Sign-in

If you are a Call Center agent with permission to use a shared phone, you may use your own credentials to log in and the shared phone will temporarily display the user's guest profile until they log out. This is commonly used in a shared workspace enviroment where users working different shifts share a single computer and phone. Hoteling consists of two separate services, **Hoteling Host** and **Hoteling Guest.**

   o **Hoteling Host**, is used to designate a particular user as a host allowing other users with the Hoteling Guest service assigned, to associate their service profile with this user's device.
   o **Hotel Guest**, is used to allow a user to associate the user's service profile with a user's device that has the **Hoteling Host** service assigned.

To use **Hot Desk** functionality, you must have you **Hoteling Guest** service turned on. You turn on your **Hoteling Guest** service using the BroadWorks web portal or voice portal. **To sign in to Call Center as a hot desk user:**

1) At the assigned workstation, start a web browser and enter the URL of the Call Center client.

2) Once the *Call Center Sign-in* page appears, enter your BoradWorks **User ID** and **Password**.

3) Click **Show options**. The area expands, displaying advanced options.

4) In the Hotel Host text box, enter the User ID of the Hoteling Host that corresponds to the desk/device your are using, for example, "station_888@test.com".

5) To change the language of the user interface, from the *Language* drop-down list, select a new language.

6) Click **Sign In**.

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

Note 1: *When you sign out from the Call Center client, the guest session with the host device at the desk is terminated. After sign-out, the host User ID you entered is saved and can be reused on the next sign-in.*

Note 2: *The host/guest association can be configured with a time limit. If the association/session expires while you are signed in to the client, you are automatically signed out from client. The association time limit is specified in either the Hoteling Host or Hoteling Guest service setup on the BroadWorks web portal.*
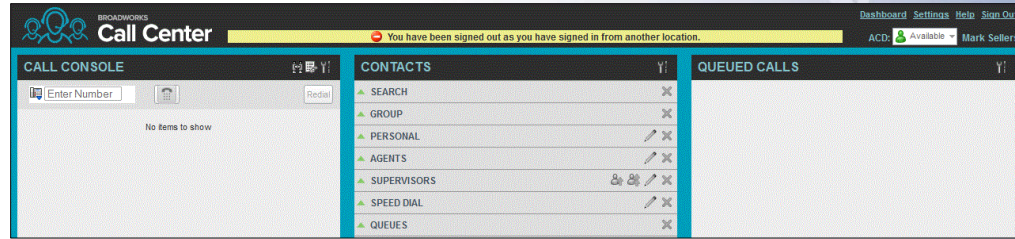
2.4   Sign-in Restrictions

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

Sign-in Dialog Box with Error Message

Main Interface with Error Message

2.5 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.*
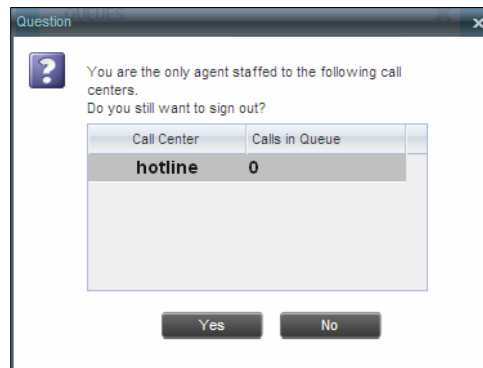
Signing Out Last

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

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

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

Saving Workspace on Sign Out

o To save your current workspace, click **Yes**. This allows you to retain the same interface setup at our next session. For informatino about the elements of the Call Center workspace that can be customized and retained between sessions, see section 10.1.7 Workspace.
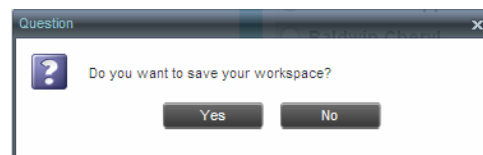
If you are signing out from a hot desk, your account is dissociated from the hot desk where you were signed in.

2.6   **Get Help**

Call Center provides you with online access to a PDF version of the Broadsoft guide.

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

2.7   **Set Up Call Center**

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

- Configure the queues you want to join on sign-in.

- Configure the post sign-in and post call ACD states.
  For information, see section 10.2 Settings – Application.

- Configure the supervisors whose call status you want to monitor. For information, see section 8.1 Select Supervisors to Monitor.

2.8   **Change Your Password**

You can change your password when you are signed in to the 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**.

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

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

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

2.9 Change your ACD State

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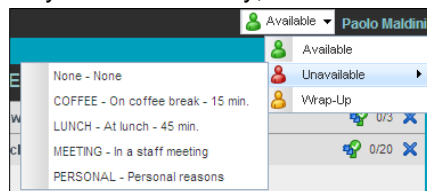
To change your ACD state:

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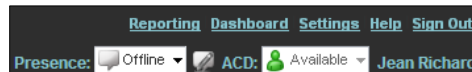
ACD State Control

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

2.10   Enable or Disable Services

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

To enable or disable 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 *is Active* box for the Call Forwarding Always service, in the Forward To text box, enter the phone number to forward your call to.

5) Click **Save**.

For more information, see section 10 Configure Call Center.

3   Explore Workspace

When you sign in to Call Center, the main page appears where you perform most of your call management or monitoring tasks. In addition, the main page provides links to other pages and windows of Call Center, where you perform functions such as configuration and report generation.
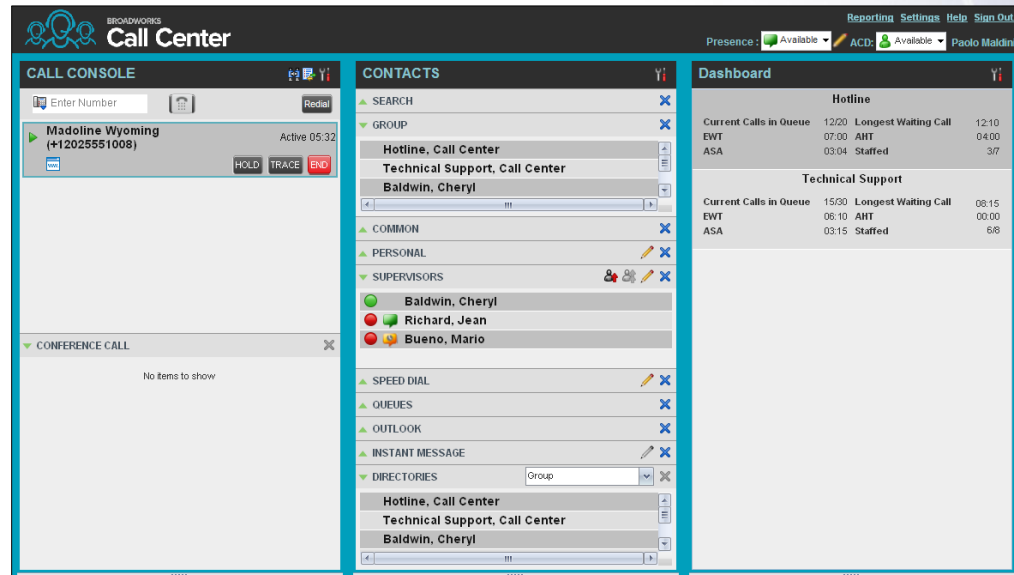
Many visual aspects of the Call Center workspace are configurable. For example, you can change the size and placement of windows on the screen. You can then save your workspace and retrieve it the next time you sign in. For more informatino on saving your workspace settings, see section 10.1.6 Workspace.

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 3.5 Controls. The action buttons are described in section 3.5.1 Call Action Buttons.

The Call Center interface contains the following elements:

Interface Element	Description
Logo Pane	Located at the top of the main interface, the *Logo* pane displays global messages, information about the logged user, and links to other Call Center interface elements and functions.
Call Console	The *Call Console* is where you manage your current calls.
Contacts Pane	The *Contacts* pane contains your contact directories and allows you to manage your contacts and use contacts to make calls or take actions, such as transfer to contact or queue, on existing calls.
Call History Window	The *Call History* window, accessible from the *Call Console* via the Call History button, displays your placed, received, and missed calls, and allows you to make calls from history and delete call logs.
Report Windows	The *Report* windows, accessible from the main page via the Reporting link, provide access to Enhanced Reporting, allowing you to generate, schedule, and view reports. Agents can only generate reports about themselves.
Dashboard Pane	The *Dashboard* pane allows you to view the current state of the monitored call centers.
Settings Pages	The *Settings* pages, accessible from the main page via the Settings link, allow you to configure various user-level and application settings.
Controls	You use controls, such as buttons and drop-down lists to execute actions on calls, contacts, queues, and so on.

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

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

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

- *Dashboard pane* – *Section 9 Monitor Call Centers.*
- *Settings* pages – *Section 10 Configure Call Center.*

3.1   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.

3.1.1   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.

3.1.2   Links to Other Interface Elements and Functions

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

3.1.3   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 and presence state are displayed to the left of your name. 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.

3.2   **Call Console**

You use the Call Console to view and manage your current calls. For information on managing your calls, see section 4 Manage Calls.
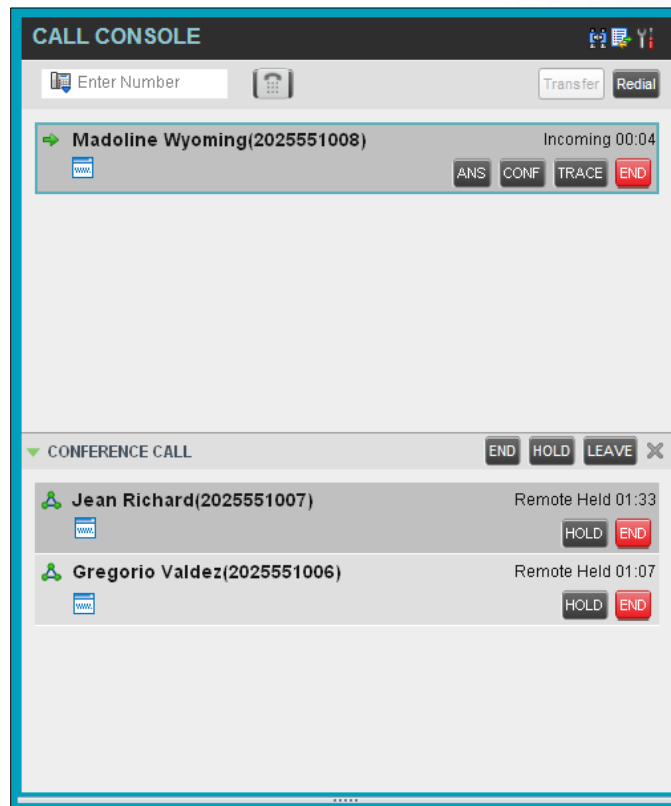

The *Call Console* contains the following areas:

- Header Bar
- Dialer
- Current Calls
- Conference Call

3.2.1 Header Bar

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

The header bar can contain the following controls:

- Disposition Code button – This allows you to assign disposition codes to the last call. The button only appears when you are in *Wrap-Up* state.

- Call History button – This allows you to access the list of your previous calls.

3.2.2 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.


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 3.5.1 Call Action Buttons.

3.2.3 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 form or received on your own phone number, whereas ACD calls are calls routed to you from a call center that you are staffing as an agent.

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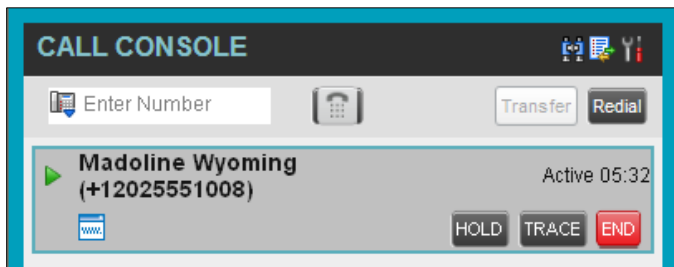
The following information is displayed for each call:

- Call State icon – This is a visual representation of the current state of the call. For more information, see section 3.2.5 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 BroadWorks 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 3.5.1 Call Action Buttons and for the list of actions that can be taken in each call state, see section 3.2.5 Call States and Actions.

3.2.4 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.
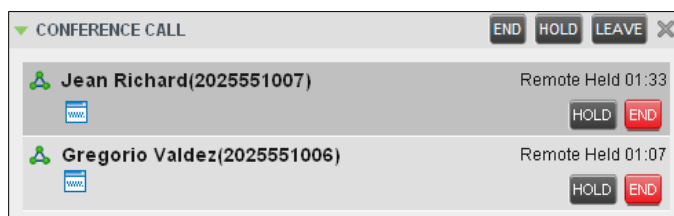
The header bar contains various controls that allow you to manage the conference:

- [END] End Conference button – This allows you to end the current conference.

- [LEAVE] Leave Conference button – This allows you to leave the conference.

- [HOLD] Hold Conference button – This allows you to place the conference on hold.

- [ANS] Resume Conference button – This allows you to resume the conference that you previously placed on hold.

The **Conference Call** panel, when expanded, lists the call legs that make up your current conference. Each two-way call is displayed on a separate line. The information displayed for each call leg is the same as the information displayed for two-way calls. For information, see section 3.2.3 Current Calls.

For more information on managing conferences, see section 4.12 Manage Conference Calls.

3.2.5 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
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

3.3 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 4 Manage Calls. For information about organizing and managing your contact directories, see section 7 Manage Contacts.
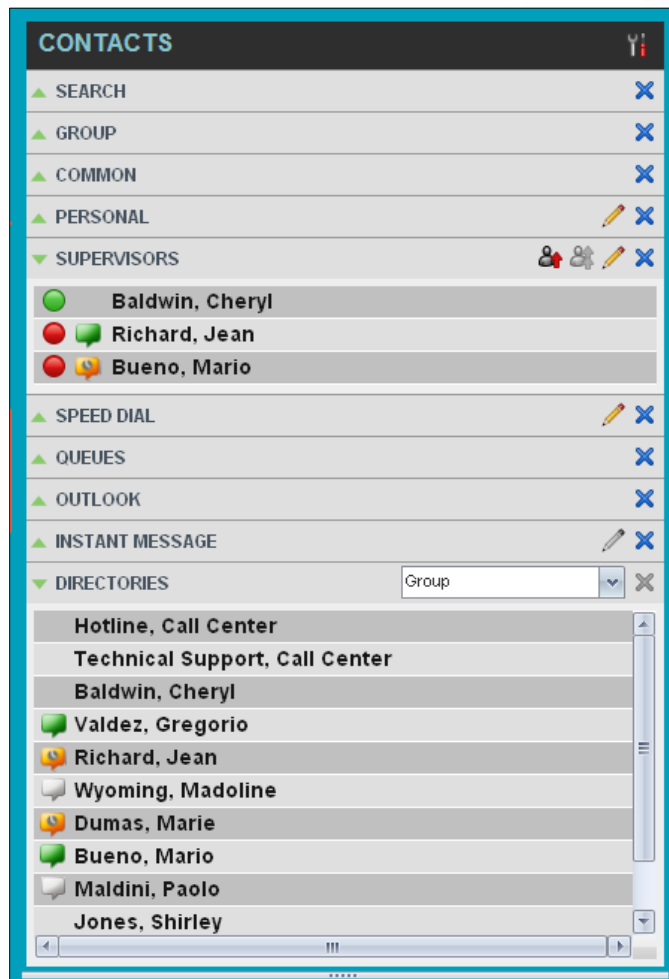
The Contacts pane contains the following panels:

- Search panel
- Enterprise/ Group panel
- Common panel
- Supervisors panel
- Speed Dial panel
- Queues panel
- Custom Directories 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 a 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.

For the list of Call Center action buttons, see section 3.5.1 Call Action Buttons.

3.3.1 **Search Panel**

You use the **Search** panel to look for specific contacts in your contacts' directories and, if available, in the configured LDAP (Lightweight Directory Access Protocol) directory. For information about performing contact searches, see section 7.3 Search for Contacts.
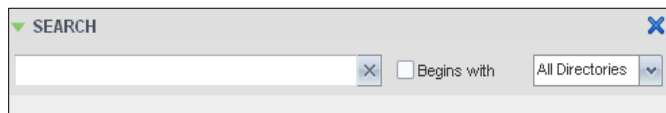
3.3.2   Enterprise/Group Panel

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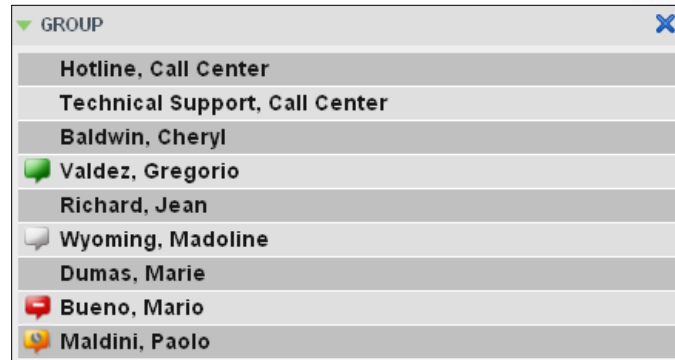

3.3.3   Common Panel

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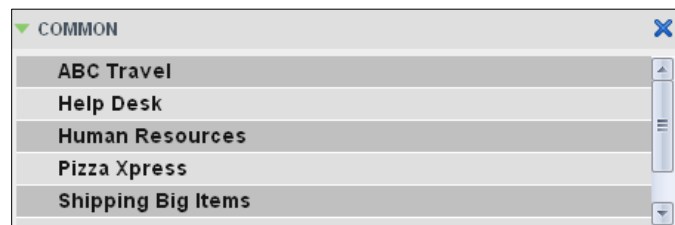
3.3.4   Personal Panel

The **Personal** panel contains the contacts from your BroadWorks Personal Phone List. 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.
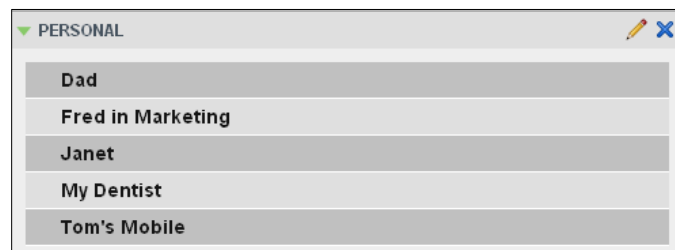
3.3.5   Supervisors Panel

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


Selected supervisors have their call status displayed. For more information, see section 9 Monitor Supervisors.

3.3.6   Speed Dial Panel

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

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

For information about managing your Speed Dial directory in Call Center, see section 7.5 Manage Speed Dial Numbers.
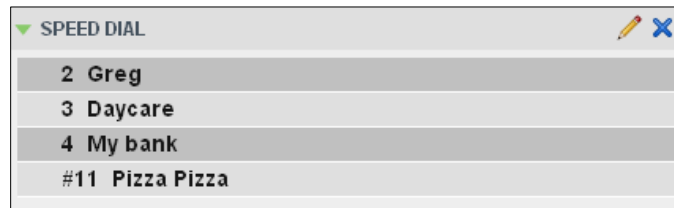

3.3.7   Queues Panel

The Queues panel is available to both agents and supervisors. It lists the call centers you are staffing as an agent 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.
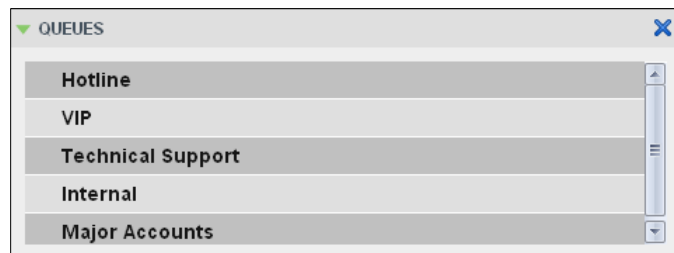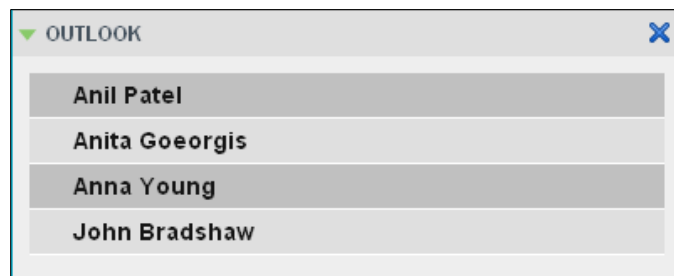
3.3.8 Custom Directories Panels

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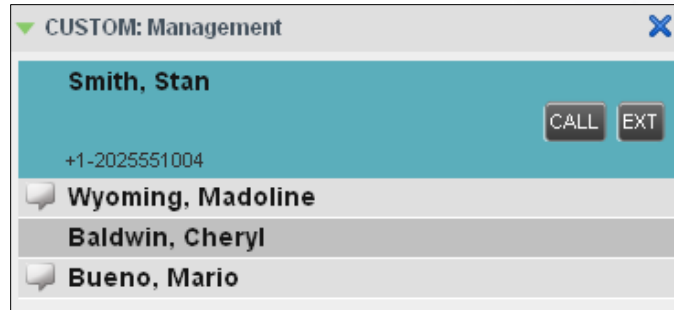
3.3.9 Outlook Panel

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


3.3.10 Directories Panel

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

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.

3.4 Call History

The **Call History** dialog box, accessed from the *Call Console* via the **Call History** button, allows you to view your past calls. You can place a call to a number from **Call History** and manage call logs. For information on making calls from **Call History**, see section 4 Manage Calls, and for information on managing your call logs, see section 5 Manage Call History.
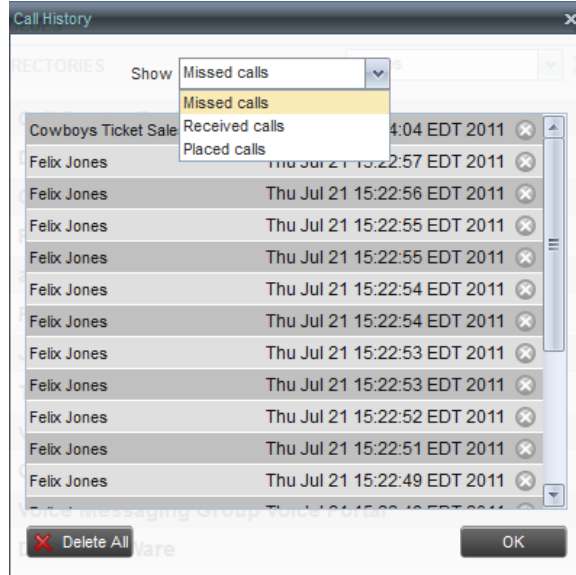
Each call log is displayed on a separate line. Call logs are grouped in three categories: Missed calls, Received calls, and Placed calls. The following information is displayed for each call log:

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

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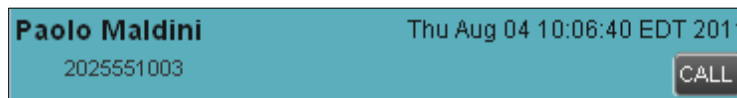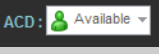

For the list of action buttons available in Call Center, see section 3.5.1 Call Action Buttons.

3.5 Controls

Call Center **Controls** are designed in a contextual manner, that is, most controls appear only when the action they represent can be taken. For example, when you enter a number or select a contact, a Dial button appears, allowing you to place a call. The contextual controls that correspond to call operations such as dialing, transferring calls, or putting calls on hold are called action buttons. They appear on the Dialer, in a call entry, in a directory entry (contact), or in a call log.

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 3.5.1 Call Action Buttons.

Name	Description
Common Controls	
Options	This is located in the upper-right corner of a pane or page. When clicked, it displays a drop-down menu of options that control the display of information in that pane/page. The available options depend on the context.
Expand/Collapse	This shows or hides the contents of a window or panel.
Close	This closes an interface element, such as window, pane, or panel.
Edit	This allows you to edit a list of items, such as agents to monitor or speed dials.
Logo Bar, Dialer, Call Console, Directories Panel, and Search Panel Controls	
Outbound CLID	This allows you to select the phone number to use as your Calling Line ID for the next outgoing call.
Disposition Code	This allows you to apply one or more disposition codes to the last call when you are in *Wrap-Up*.
Disposition :	This allows you to apply one or more disposition codes to the selected call.
ACD : Available ACD State	This displays your current ACD state and allows you to change it.
Call History	This displays Call History.
END End Conference	This ends a conference call.
LEAVE Leave Conference	This disconnects you from the conference while allowing other participants to continue the call.
HOLD Hold Conference	This holds the conference call.
ANS Resume Conference	This resumes a held conference.
Pull Out Directory	This places a selected directory below the Call Console.
Call Notification Pop-up Window	

| Name	Description
vCard	This saves the caller's phone number and personal information as a vCard in Microsoft Outlook. It appears only when Outlook is running.
Supervisors Panel	
Emergency	This makes an emergency call to a supervisor.
Escalate	This escalates a call to a supervisor.

3.5.1 Call Action Buttons

Action buttons allow you to perform actions on calls, such as answering or transferring a call, or actions that result in a call being placed, such as dialing a number or contact. They appear on the Dialer, on a call line, in a call history log or in a directory 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 the image below. Note that other buttons may appear on the line for a contact, depending on the call state and the contact's configuration.

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

Button	Description
Dial	This dials the number you entered in the *Dialer*.
CALL Call	This places a call to the selected contact or to a number from Call History.
Redial Redial	This redials the last dialed number.
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 *Dialer*.
TXR Transfer	This transfers a call to a selected number or contact.
ANS Answer	This answers an incoming call, answers an unanswered call for a contact, or resumes a held call.

Button	Description
HOLD Hold	This places a call on hold.
END End	This ends a call.
CONF Conference	This establishes a conference call or adds a call to a conference.
CAMP Camp	This camps a call on a busy contact.
ESC Escalate Call	This escalates a call to a selected supervisor.
EMER Emergency Call	This places an emergency call to a selected supervisor.

4   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.
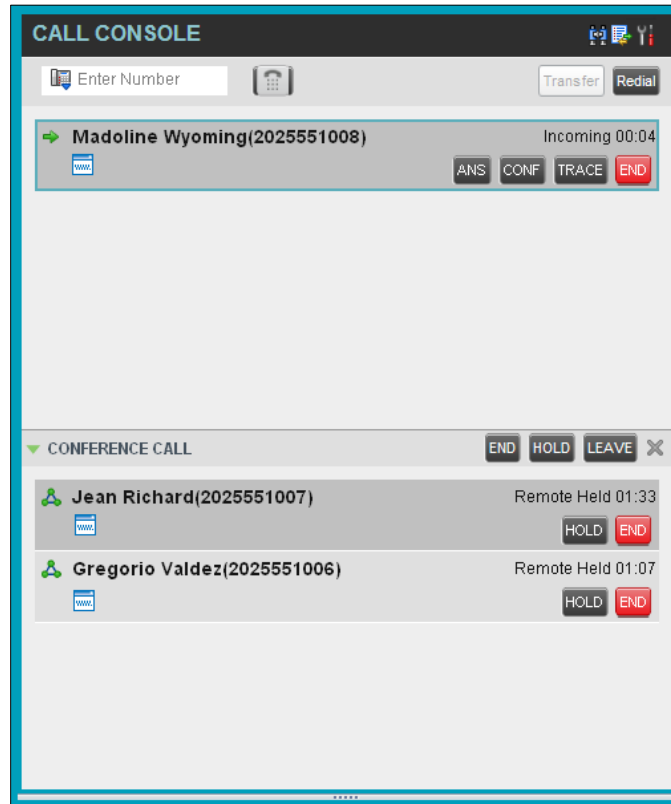
The following subsection provides a quick reference to call management operations. These operations are described in detail in the rest of this section.

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 4.2 Drag and Drop Call onto Contact.*

4.1 Call Management Operations Quick Reference

The following table provides a summary of the actions that you can take to manage calls. Additional information on these actions/ operations are described in the following sections.

Function	Steps
Assign Disposition Code to Selected ACD Call	In the *Call Console*, click the target ACD call and select a code from the drop-down list that appears.
Assign Disposition Code while in Wrap-Up	In the *Call Console*, click the **Disposition Code** button and select a code from the list. The code is applied to the last released call.
Answer Incoming Call	In the *Call Console*, click **Answer** ANS for the target call.
Save a vCard	In the *Call Notification* dialog box for an incoming call, click the **Add vCard** button.
Place Call on Hold	In the *Call Console*, move the mouse over the call and click **Hold** HOLD.
Resume Held Call	In the *Call Console*, move the mouse over the call and click **Retrieve** RETRIEVE.
Blind Transfer Call	Drag the call onto the target contact and click **Transfer** TXR for that contact. Alternatively, enter the target number in the *Dialer* and click **Transfer** Transfer on the *Dialer*.
Transfer with Consultation	While on the call, enter a number in the *Dialer* or select a contact in the *Contacts* pane and click **Dial**. When the new call is connected, consult with the party. When ready to transfer, select the original call. Move the mouse over the new call that is not selected call and click **Transfer** TXR.
Transfer to Queue	Drag the call onto the target queue in the *Queues* panel and click **Transfer** TXR for that queue.
Make Emergency Call to Available Supervisor	In the *Call Console*, select the call to escalate and click the **Emergency** button in the *Supervisors* panel.
Make Emergency Call to Selected Supervisor	Drag the call to escalate onto an available supervisor in the *Supervisors* panel and click **Emergency** EMER for that supervisor.
Blind Escalate Call	In the *Call Console*, select the call to escalate. In the *Supervisors* panel, click **Escalate** or click an available supervisor and click **Escalate** ESC for that supervisor. In the *Call Console*, move the mouse over the call to the supervisor and click **Transfer** TXR before the supervisor answers the call.

Function	Steps
Escalate with Consultation	In the *Call Console*, select the call to escalate. In the *Supervisors* panel, click **Escalate** or click an available supervisor and click **Escalate** for that supervisor. Consult with the supervisor. When ready to transfer, in the *Call Console*, move the mouse over the call to the supervisor and click **Transfer**.
Escalate with Conference	In the *Call Console*, select the call to escalate. In the *Supervisors* panel, click **Escalate** or click an available supervisor and click **Escalate** for that supervisor. In the *Call Console*, move the mouse over the new call and click **Conference**.
Start Three-Way Conference	In the *Call Console*, select a call. Move the mouse over a call that is not selected and click **Conference**.
Add Participant to Conference	In the *Call Console*, move the mouse over a call and click **Conference**.
Hold Conference	In the *Conference Call* panel, click **Hold**.
Resume Conference	In the *Conference Call* panel, click **Resume**.
Hold Conference Participant	In the *Conference Call* panel, select the call to put on hold and click **Hold** for that call.
Take Conference Participant Off Hold	In the *Conference Call* panel, select a held call and click **Resume** for that call.
Leave Conference	In the *Conference Call* panel, click **Leave Conference**.
End Participant	In the *Conference Call* panel, select the target call and click **End**.
End Conference	In the *Conference Call* panel, click **End Conference**.
Set Outbound CLID	In the *Dialer*, click the **Outbound CLID** button and select the number to use as your calling line identity for the next call from the list.
Dial Ad Hoc Number	In the *Dialer*, enter the number to call and click **Dial**.
Re-dial Recent Number	In the *Dialer,* click **Redial** and select a number from the list.

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

4.2   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.
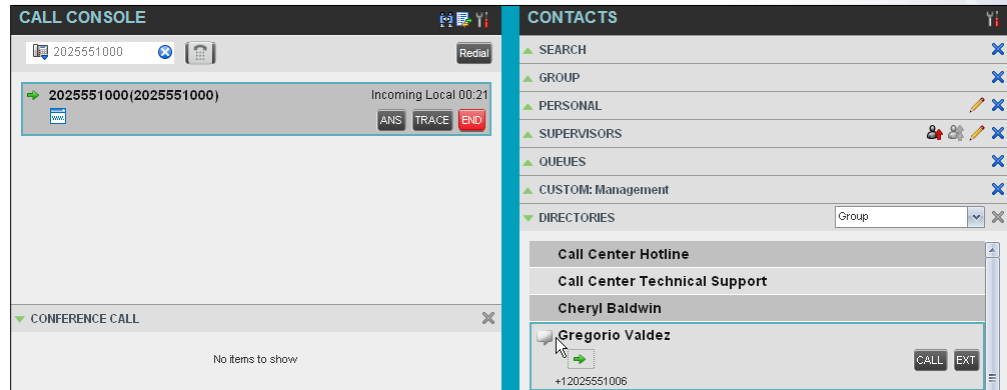
4.3   View Calls

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

4.3.1   View Current Calls

Your current calls are displayed in the Call Console with the calls involved in a conference displayed in a separate pane called Conference Call.
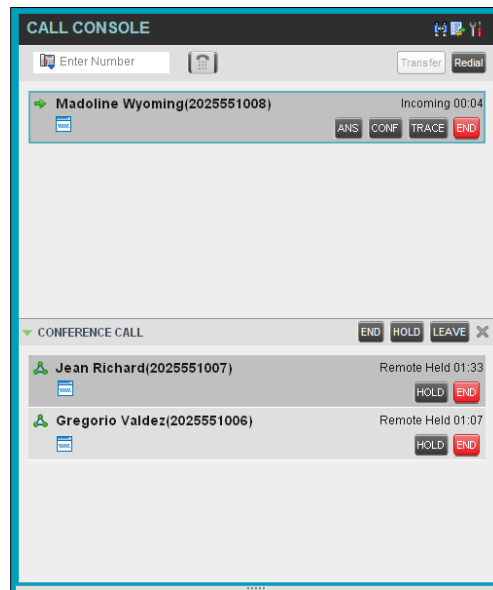
4.3.2   View Incoming Call Details

When the *Call Notification* feature is enabled, a *Call Notification* pop-up window appears on t op 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

Incoming Call:
Cheryl Baldwin
+12025551009
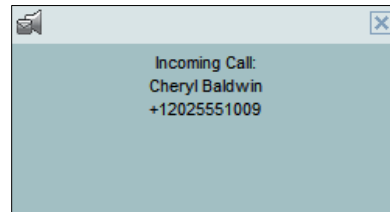
Notification Pop-up Window for Call that is Not ACD Call

- For calls from a Call Center, the following information is displayed:

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

Incoming Call:
Paolo Maldini
(+1 2025551003)
[Hotline - Wait Time: 0]
[Queued Calls:0/15]
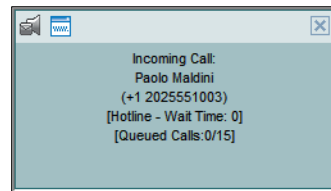
Notification Pop-up Window for ACD Call

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.

4.4 Assign Disposition Codes (Premium Call Center)

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

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

4.4.1 Assign Disposition Codes to Current Call

To assign disposition code to a current call:

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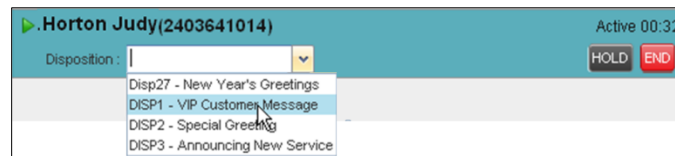
Assigning Disposition Code to Active Call

2) From the list, select a code.

4.4.2 Assign Disposition Codes in Wrap-Up

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

To assign disposition code to the last released call:

1) In the *Call Console*, click **Disposition Code** .

2) From the drop-down list that appears, select a code.
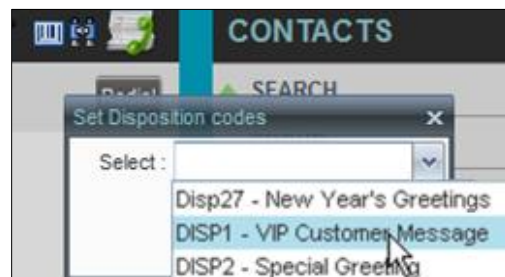
Assigning Disposition Code in Wrap-Up

4.5   Record Calls

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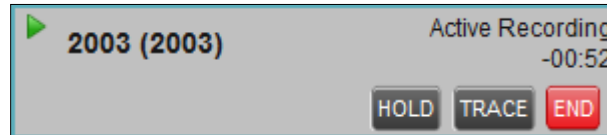
Call Being Recorded

4.5.1   Manually Record

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

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

4.5.2   Automatically Record Calls

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

4.6   Receive, Answer, and End Calls

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

4.6.1   Answer Call

To answer a ringing call:

Click **Answer** ANS for that call.

To answer an incoming call from a *Call Notification* pop-up window:
Click anywhere on the text in the pop-up window.

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

4.6.2   Auto Answer Calls

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

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

To answer calls automatically:

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

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

4.6.3 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.

4.6.4 End Call

To end a call:

Click **End** for that call.

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

4.7 Make Outbound Calls

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

4.7.1 Set Your Outgoing Calling Line Identity (Premium Call Center)

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

To set your outgoing call identity for the next call:

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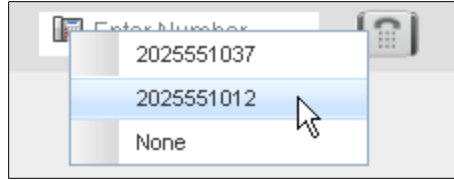
Setting Outbound CLID

For information on permanently setting your outbound CLID, see section 10.2.2 Agent Policies.

4.7.2   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.

To dial an ad hoc number:

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

4.7.3   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.
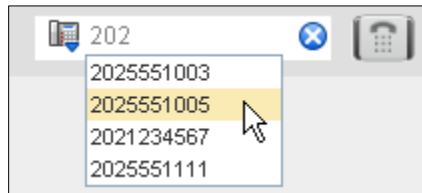
2)   Select the number to dial and click **Dial** [icon].

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

Alternatively, click the **Redial** [icon] button and select the number from the list that appears.
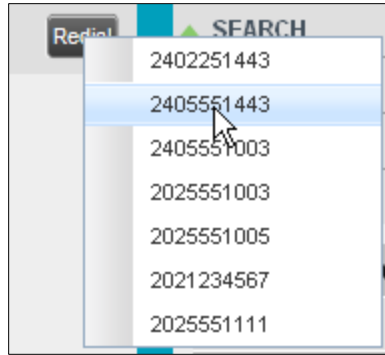
4.7.4 Dial Contact

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** CALL for that contact.

Expanded Contact with Action Buttons

Alternatively, to dial the contact's extension, click **Extension** EXT or to dial the contact's mobile number, click **Mobile** MOB .

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

4.7.5 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** CALL .
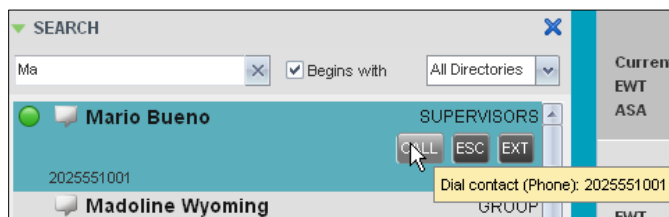
4.7.6   **Dial from History**

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

To dial from Call History:

1)   In the *Call Console*, click **Call History** 📇 . The *Call History* dialog box appears.
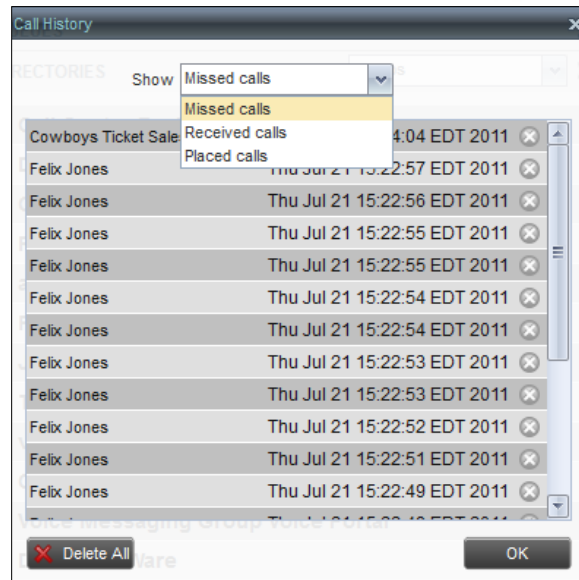
2)   From the *Show* drop-down list, select *Missed Calls*, *Received Calls*, or *Placed Calls.*

3)   Click the call log from which you want to dial and then click the **Call** [CALL] button.

4.8   **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.*

4.8.1   **Place Call on Hold**

To place a call on hold:

Click **Hold** [HOLD] for the target call.

4.8.2   **Resume Held Call**

To resume a held call:

Click **Answer** [ANS] for the target call.

4.8.3   **Conduct Busy Camp On**

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

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

Agents can camp calls on monitored contacts in their *Supervisors* directory and supervisors can camp calls on monitored contacts in their *Agents* directory. For information on monitoring supervisors, see section 8 Monitor Supervisors.

To camp a call on a busy contact:

1)   From the *Call Console*, select an active or held call.

2)   In your *Supervisors* or *Agents* directory, select the contact to camp the call on. The contact's phone state must be *Busy* or *Ringing*.

3)   Move the mouse over the contact and click **Camp** CAMP .

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

4.9   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.

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

4.9.2 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** TXR .

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

4.9.3 Transfer to Queue

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

To transfer a call to a queue:

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

2) In the *Contacts* pane, expand the *Queues* panel.

3) Click the destination queue and click **Transfer** TXR for that queue.

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

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

4.10 Escalate Calls

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

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

4.10.1 Make Emergency Call

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

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

To make an emergency call to an available supervisor:

1) While on the call, click **Emergency** [icon] in the *Supervisors* panel.
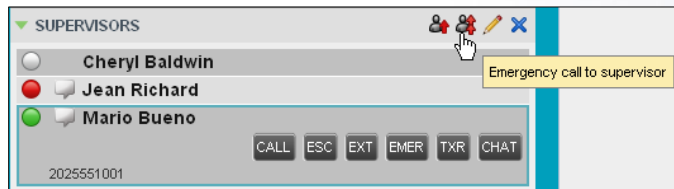
Supervisors Panel – Making Emergency Calls

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

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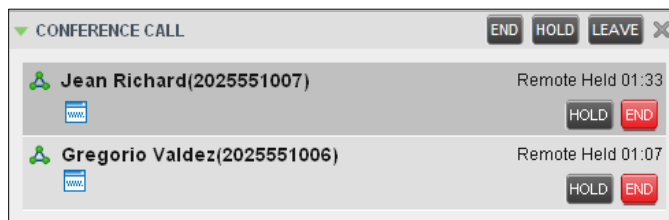
Conference Call Panel – Leave Conference

To make an emergency call to a specific supervisor:
1) While on a call, expand the *Supervisors* panel.

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

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

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

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

4.10.2   Blind Escalate Call

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

To blind escalate a call:

1) In the *Supervisors* panel, click **Escalate** to let the system select a supervisor; or, to select the supervisor yourself, click an available supervisor and click the **Escalate** button

   ESC for that supervisor. Your original call is placed on hold and a call to the supervisor is initiated.

2) Without waiting for the supervisor to answer, in the *Call Console*, select the original call.

3) Move the mouse over the call to the supervisor and click **Transfer** **TXR**.

4.10.3   Escalate with Consultation

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

To escalate a call with consultation:

1) In the *Supervisors* panel, click **Escalate** to let the system select a supervisor; or, to

   select the supervisor yourself, click an available supervisor and click **Escalate** **ESC** for that supervisor.

2) Wait until the supervisor accepts your call and speak to the supervisor.

3) When ready to transfer the call, in the *Call Console*, select the original call.

4) Move the mouse over the call to the supervisor, and click **Transfer** **TXR**.

4.10.4   Escalate with Conference or Handover

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

To escalate a call with conference or handover:

1) In the *Supervisors* panel, click **Escalate** to let the system select a supervisor; or, to

   select the supervisor yourself, click an available supervisor and click **Escalate** **ESC** for that supervisor.

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

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

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

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

4.10.5 Escalate with Mid-Conference Hold

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

To escalate a call with mid-conference hold:

1) In the *Supervisors* panel, click **Escalate** to let the system select a supervisor; or, to select the supervisor yourself, click an available supervisor and click **Escalate** for that supervisor.

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

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

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

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

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

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

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

4.11 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.

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

4.11.1 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 4.8 Make Outbound Calls.

To start a conference:

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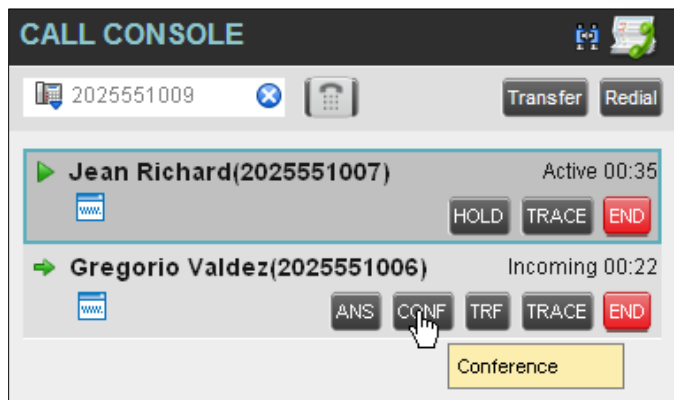
2) Move the mouse over a call that is not selected and click **Conference** CONF. A Three-Way Conference is established and the connected calls appear in the *Conference Call* panel.

4.11.2   Add Participant to Conference

To add a participant to a conference:

1) If the call you want to add to the conference is not yet established, place the call.

2) In the *Call Console*, move the mouse over the call and click **Conference** CONF. The call is added to the conference.

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

4.11.3   Hold Conference

To put an active conference on hold:

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

4.11.4 Resume Conference

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

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

4.11.5 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** `HOLD` .

4.11.6 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** `ANS` .

4.11.7 Leave Conference

To leave the conference:

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

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

4.11.8 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** `END` .

4.11.9 End Conference

To end the conference:

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

5   Manage Call History

Call Center collects call logs for your placed, received, and missed calls. You can call any number available in Call History. For information on making calls from Call History, see section 4 Manage Calls.

This Section explains how to view and delete call logs.

5.1   View Call History

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

To view your call history:

1)   In the *Call Console*, click **Call History** [icon]. The *Call History* dialog box appears displaying your past calls. The calls are grouped into placed, received, and missed calls. By default, missed calls are displayed.
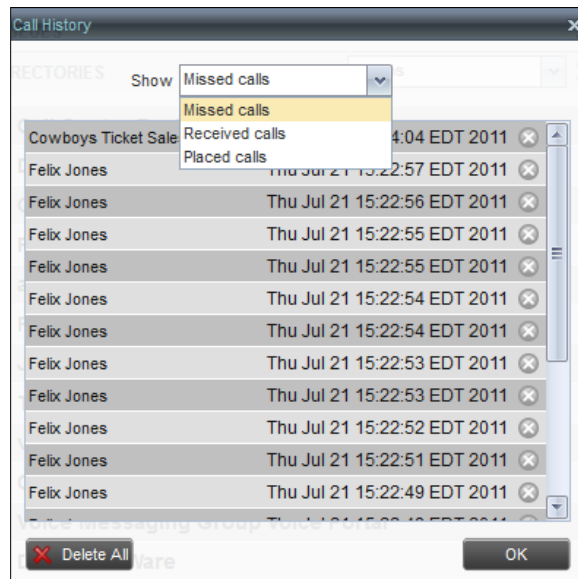
2)   To show calls in a specific group, select that group from the *Show* drop-down list.

5.2   Delete Call History

You can delete a selected call log or all call logs from Call History via the Web Portal only.

To delete calls from Call History:

1)   In the Web Portal, click on **Utilities** in the Options menu on the left. Next, click on **Basic Call Logs** to access you Call History information.

2)   To delete all call logs, click **Select All** and **Apply**. This procedure will have to be done on each tab to delete Placed Calls, Received Calls and Missed Calls.

3)   To delete a selected number, go to the appropriate tab the call is on and click on the box next to that calls call details. Then click **Apply**.

6   E-Mail Contacts

Call Center allows you to send an e-mail message to a contact who has e-mail configured on the   system. You must also have messaging enabled within Call Center settings. For information, see section 10.5 Settings – Messaging.

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

6.1   Send E-Mail Message to Contact

To send an e-mail message to a contact:

1) In the *Group/Enterprise* directory, move the mouse over a contact who has e-mail.

2) Click **EMAIL** EMAIL . This brings up a new e-mail window for the configured Messaging service.

3) Write your message and click **Send**.

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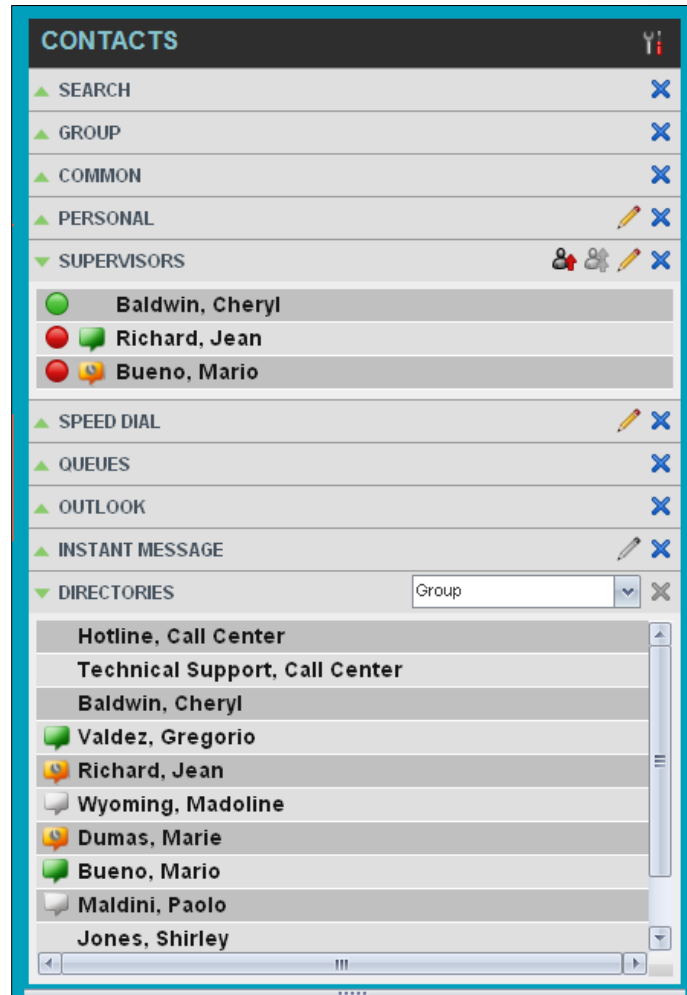
Call Center provides access to the contacts' directories listed in the following table.

Interface Element	Description
Enterprise/Group	The *Enterprise/Group* directory contains the contacts in your BroadWorks group or enterprise directory.
Common	The *Common* directory contains the contacts in the common phone list configured by your administrator on BroadWorks.
Personal	The *Personal* directory contains all contacts in your Personal Phone List on BroadWorks.
Supervisors	The *Supervisors* directory, available only to agents, contains the list of your supervisors and allows you to view their phone state.
Speed Dial	The *Speed Dial* directory contains the numbers configured for you or by you for your Speed Dial services (Speed Dial 8 and/or Speed Dial 100).

Interface Element	Description
Queues	The *Queues* directory lists the call centers and associated DNIS numbers for the call centers you are either supervising or staffing. It allows you to transfer calls to queues quickly.
Custom	A *Custom* directory contains selected contacts from your BroadWorks group or enterprise directory. You can have access to zero, one, or several custom directories. Custom directories are configured by your administrator.
Outlook	The *Outlook* directory contains your Outlook contacts.
LDAP (Search Access Only)	Call Center provides search access to a configured *LDAP* directory. When you make a search on the *LDAP* directory and your search returns results, these results are displayed in the *Search* panel (in the *Contacts* pane). By default, no LDAP contacts are displayed in the *Contacts* pane.

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

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

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

- View Contacts
- Organize Contacts
- Search for Contacts
- Manage Personal Contacts
- Manage Speed Dial Numbers

7.1   View Contacts

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

7.1.1   Show or Hide Directories

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

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

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

To show or hide a directory in the Contacts pane:

1) In the *Contacts* pane, click **Options** .

2) Select *View*, *Directories*, and then select or unselect the directory to display/hide. To display all directories, select *All*.

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

Note: You cannot close the Directories panel.
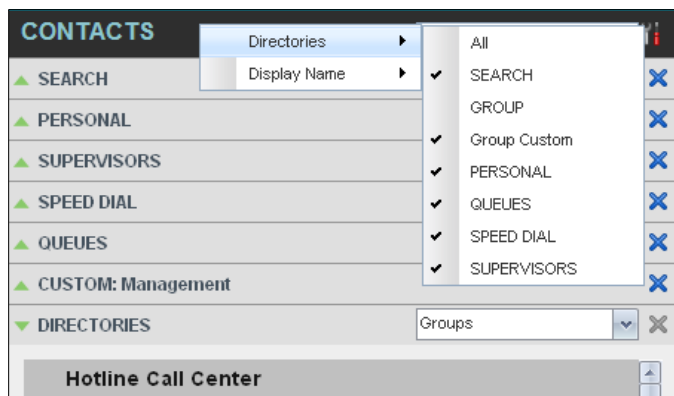
Contacts Pane – Show/Hide Contact Directories

To show a directory in the Directories panel:

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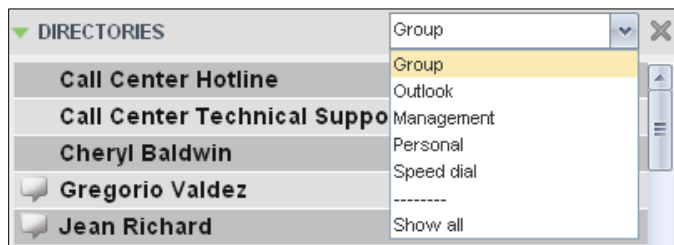
Directories Panel – Selecting Directory to Display

7.1.2   **Display Directory Below Call Console**

To display a directory below the Call Console:

1)   In the *Directories* panel, select *Show all.*
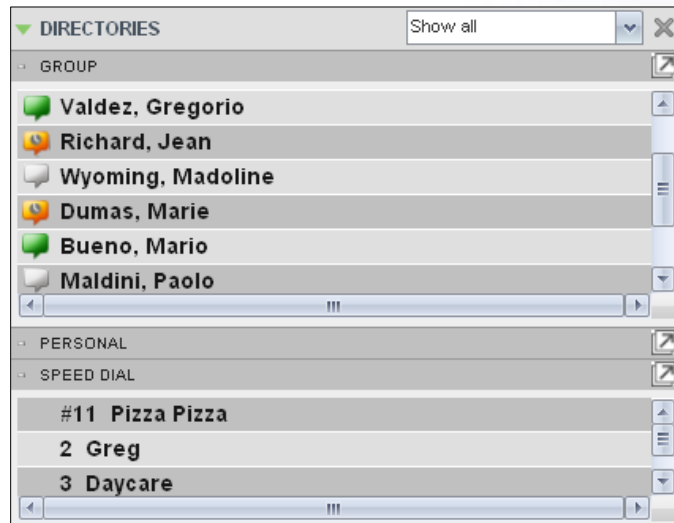
2)   Click the **Pullout Directory** button [icon] for the directory to display.

The directory appears below the *Call Console*.
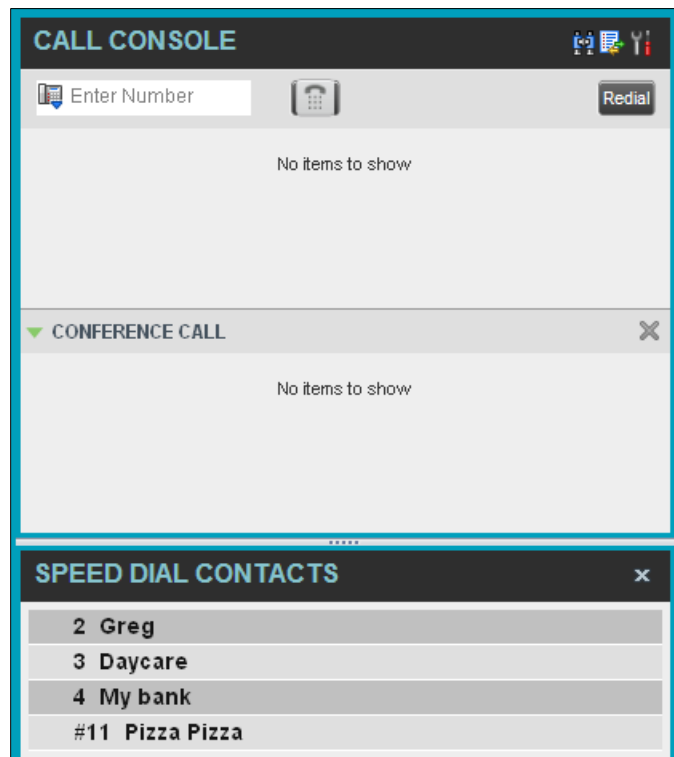
Custom Directory Displayed Below Call Console

To close the directory, click the **Close** button [icon].

7.1.3 Show or Hide Directory Content

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

To show or hide contacts in a directory:

In the *Contacts* pane, click the **Expand/Collapse** button for that directory.
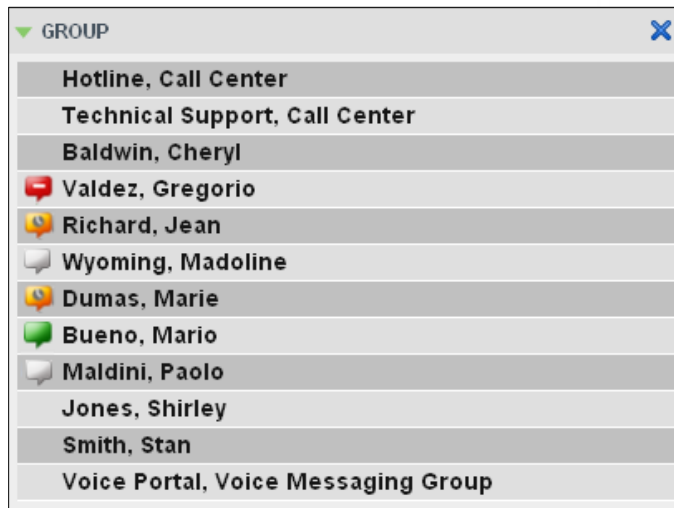
7.1.4 Show Contact Details

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

To view contact details:

1) Expand the target directory.

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

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.
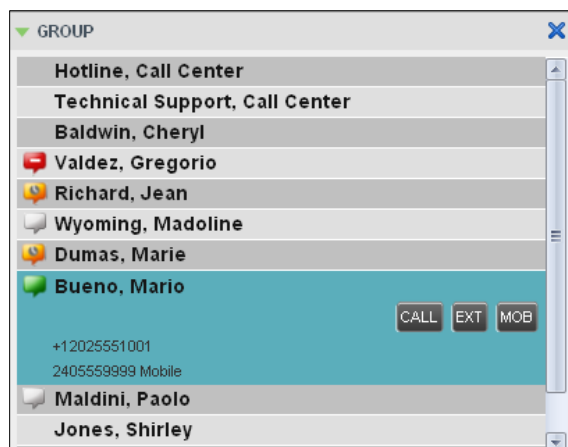
7.1.5 **Select Display Order**

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

To specify the contacts' display order:

1) In the *Contacts* pane, click the **Options** button [icon] .

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*.
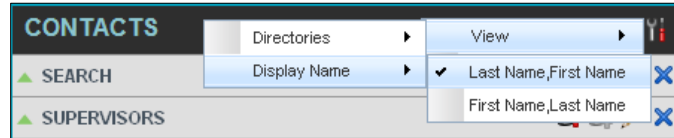
Contacts above, shows supervisors displayed by their last name followed by their first name.

Supervisors Listed by First Name, Last Name

7.2   **Organize Contacts**

7.2.1 **Sort Contacts**

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

To order contacts in a directory:

1) In the *Contacts* pane, click **Options** [icon] .

2) Select *Sort*, followed by the name of the directory in which you want to sort contacts, and then the sorting option.
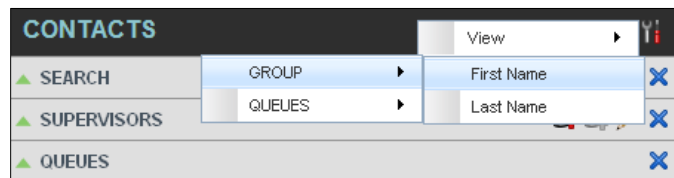
The image below shows a *Group* directory sorted by the contact's first name.

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.
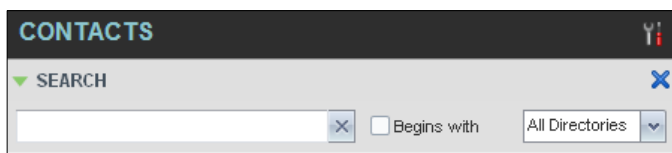
7.3.1   Perform Contact Search

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.

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

Duplicate search results in other directories are displayed.

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 direclty 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** ![edit icon]. 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.
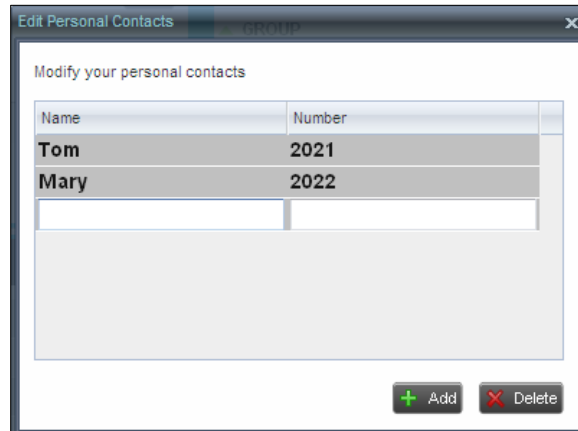
3) In the *Name* text box, enter the contact's name or description, as you want it to appear on the contact's list.

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** ![edit icon]. The *Edit Personal Contact* dialog box appears.

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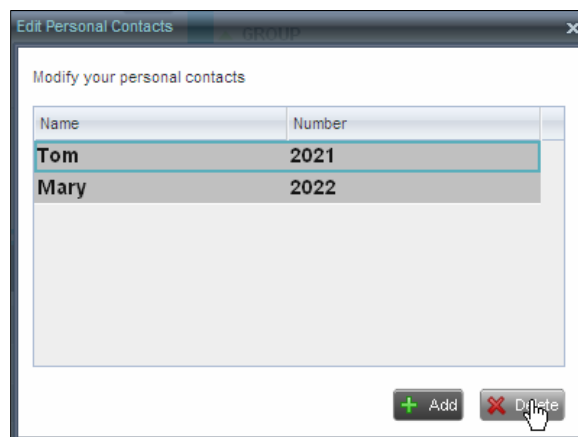
Deleting Entry

7.5 Manage Speed Dial Numbers

You can add or remove speed dial numbers via the web portal or in Call Center, and the updates appear in both places. However, the updates that you make via the web portal appear only in Call Center at the next sign-in.
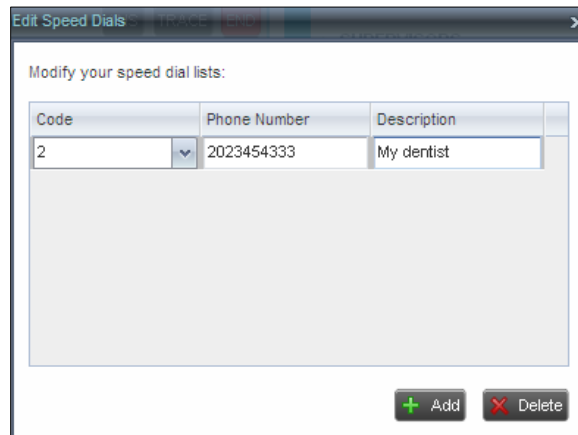
To update speed dial entries using the client, perform the following operations:

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

7.5.1 Add Speed Dial Entry

To add a speed dial entry:

1) In the *Speed Dial* panel, click **Edit** . The *Edit Speed Dials* dialog box appears.

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

Adding Entry

3) From the *Code* drop-down list, select a speed dial code.

4) In the *Phone Number* text box, enter the phone number to assign to the code.

5) In the *Description* text box, enter a description that allows you to identify the entry.

6) To save the changes, click anywhere in the dialog box outside the entry.

7.5.2 Modify Speed Dial Entry

To modify a speed dial entry:

1) In the *Speed Dial* panel, click **Edit** . The *Edit Speed Dials* dialog box appears.

2) Double-click the entry to modify. The entry becomes modifiable.
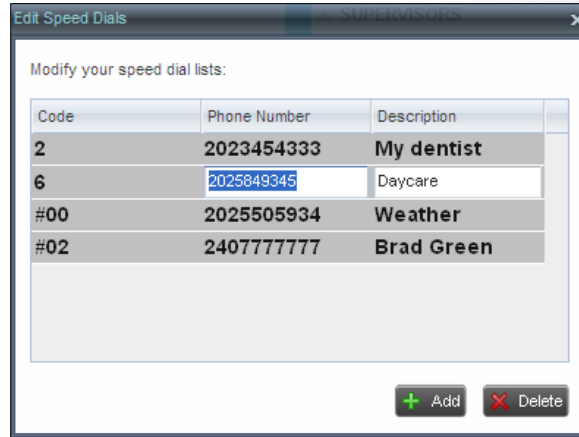
3) Modify information as required.

4) To save the changes, click anywhere in the dialog box outside the entry.

7.5.3   **Delete Speed Dial Entry**

To delete a speed dial entry:

1) In the *Speed Dial* panel, click **Edit** [pencil icon]. The *Edit Speed Dials* dialog box appears.

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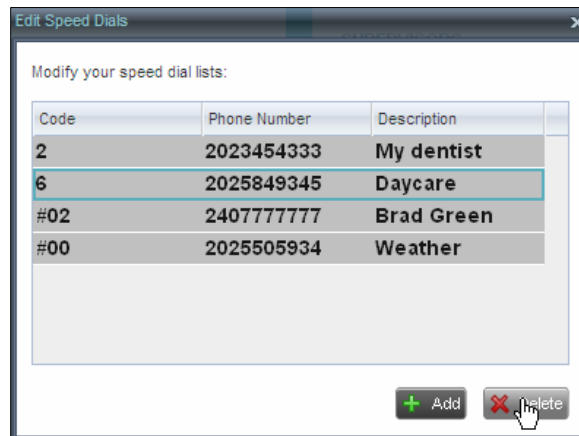
Deleting Entry

8   Monitor Supervisors

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

You use the *Supervisors* panel to view the phone state of selected supervisors and to select supervisors to monitor. Supervisors who are not monitored have their state set to "Unknown*".*
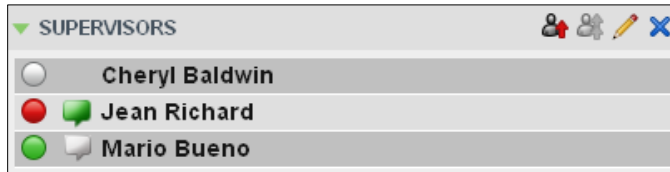
Note: This capability is designed to monitor the supervisor's state related to normal calls. Conference calls are handled differently, and it may happen that the state of a supervisor who was in a conference call is temporarily not reflected properly. For example, if the supervisor is in a conference and then all other parties hang up, the supervisor's status shows as Idle even though their phone may still be off hook.*

8.1   Select Supervisors to Monitor

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

To select the supervisors to monitor:

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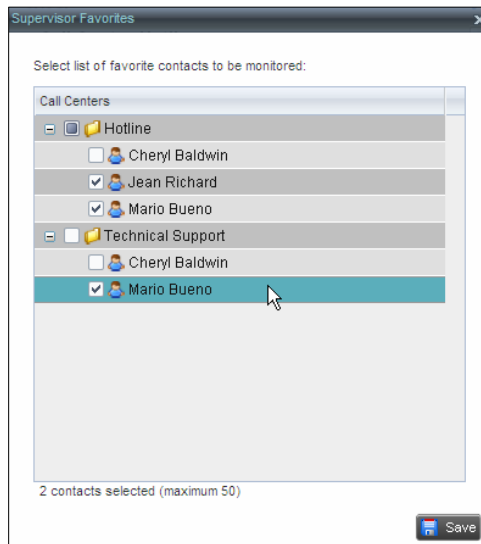
Figure 1 Supervisor Favorites Dialog Box

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

8.2 Supervisor Phone States

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

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

9 Monitor Call Centers

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

9.1 Dashboard Pane

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

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

Severity	Color
0 (no threshold crossed)	No color
1 (yellow threshold crossed)	Yellow
2 (red threshold crossed)	Red

Dashboard Pane (Agents)

The following information is provided for each monitored call center:

- *Call center name* – The name of the call center.

- *Service Mode* (Premium call centers) – The mode in which the call center currently operates. This field can have one of the following values:

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

– *Night Service Override* – The call center has been manually forced to follow the *Night Service* policy.

Note: The *Night Service or Night Service Override* status appears only if the Night Service policy is triggered, either by the *Night Service* schedule or by a manual override, and if the action to apply to incoming calls is set either to "Perform busy treatment" or "Transfer to phone number/SIP-URI". Setting the action to "None" acts as if the Night Service policy was not triggered and the *Night Service/Night Service Override* status is not displayed in Call Center.

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

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

– *Forced Forwarding* – All calls to this call center are forwarded to a specified destination.

– *None* – Call center is in normal mode of operation; none of the above modes are enabled.

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

- **Current Calls in Queue** – This is the number of queued calls expressed as a ratio of the total queue capacity for that call center. For example, "6/10" means that there are six calls in the queue, which can queue a maximum of ten calls.

- **Longest Waiting Call** – This is the waiting time of the call that has been in the queue the longest.

- **EWT** *(Expected Waiting Time)* – This is the estimated time a caller has to wait in this queue before their call is answered.

- **AHT** *(Average Handle Time)* – This is the average time it takes to process a call in this queue.

- **ASA** *(Average Speed of Answer)* – This is the average time a caller spends in the queue before the call is offered to an agent.

- **Staffed** – This is the number of agents that are in *Sign-In*, *Available*, *Unavailable*, or *Wrap-Up* ACD state, as a ratio of all agents assigned to this call center.

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

9.2 Select Call Centers to Monitor

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

To select call centers to monitor:

1) In the *Dashboard* pane, click **Options** and select the *Select Queues* option. The *Select Queues* dialog box appears.
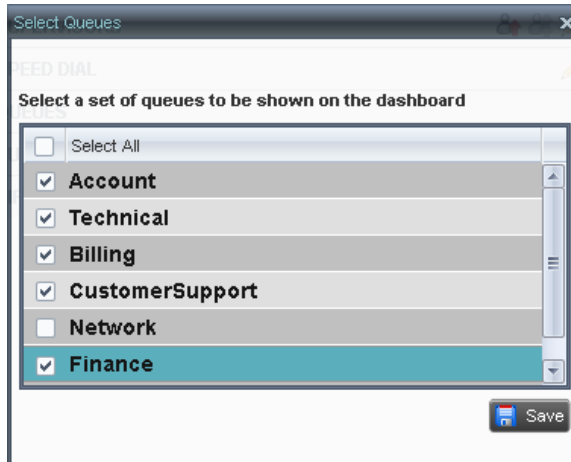
2) Check the call centers you want to monitor and click **Save**.

9.3 Select Information to Display

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

To select information to display:

1) In the *Dashboard* pane, click **Options** and select the *Select Visible Fields* option. The *Select Fields* dialog box appears.
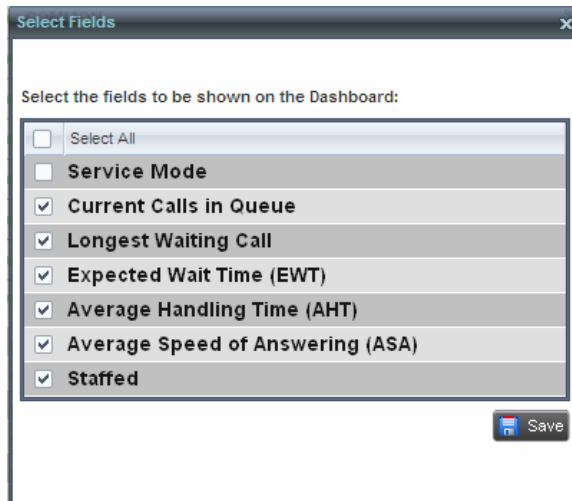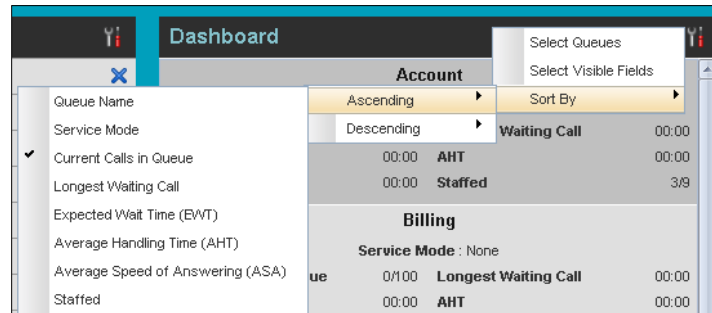
2) To display all performance indicators, check *Select All*. Or to show or hide some fields, check to uncheck the corresponding check boxes.

3) Click **Save**.

9.4 Order Call Centers

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

To change the order of call centers:

1) In the *Dashboard* pane, click **Options**

2) Select *Sort By* and then select the ordering options you want.

Dashboard – Options – Sort By

10 Configure Call Center

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

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

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

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

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

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

10.1 Settings – General

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

Setting – General

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

10.1.1 Account
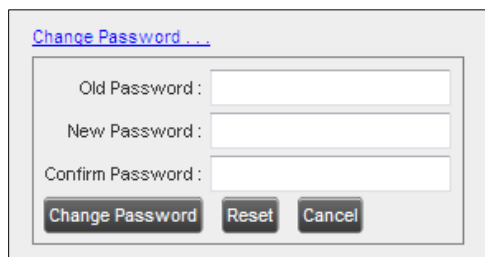
You use this area to change your BroadWorks password.

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

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

To change your password:

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

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

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

10.1.2 Hotel Guest

This setting allows you to configure the Hoteling Host, which is required when you use Call Center from a Hoteling desk/device. This way you do not need to enter this information every time you sign in to Call Center if you use the same Hoteling device.

In the text box, enter the user name of the Hoteling Host who corresponds to the desk/device you are using, for example, "station_224@test.com".

10.1.3 Language

The language settings allow you to select the language of the Call Center user interface.

- The drop-down list lists the languages available in your edition of Call Center. To change the language, select a new language from the list.

- *Synchronize language to my profile* – This box, when checked, synchronizes the Call Center language with your BroadWorks profile and ignores the language selection on this page.

10.1.4 Date Format

This setting allows you to select the format for displaying dates in reports. The format is used for all dates that are included in generated reports. The possible options are:

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

10.1.5 Time Format

This setting allows you to select the format for displaying time in reports. It is used for all times that are included in generated reports. The selected time format is also used to display the time in the chat logs. The possible options are:

- AM/PM
- 24 hours

Note that this setting does not impact the format in which event duration is reported in generated reports, which is always *DD:HH:MM:SS*.

10.1.6 Workspace

Call Center allows you to customize elements of your workspace, such as the size and placement of windows on the desktop. The system remembers the setup between sessions.

The following elements can be customized:

- The size and position of the *Dashboard* window
- The size and position of any *Report* window

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

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

Note 3: When a window is vertically resized, the panes do not always resize to fill the window. To resize a window, drag the window from the bottom right-hand corner or collapse and then expand the panes after resizing to adjust them to the window.

- *Save Workspace* – This button, when clicked, saves the current workspace.
- *Load Workspace* – This button, when clicked, arranges your workspace according to the last saved configuration.
- *Restore To Default* – This button, when clicked, restores the workspace to the system default configuration.
- *Always save workspace on signout* – When you sign out from the client, Call Center asks you whether you want to save your current workspace. To save your workspace automatically when signing out, without being asked, check the *Always save workspace on signout* box.

To customize your workspace:

1) Arrange the windows the way you like.

2) Click the **Save Workspace** button to save the current configuration. To restore the system default, click **Restore To Default**.

3) At any time to return to the last saved configuration, click the **Load Workspace** button.

10.2 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.

Settings – Application (Agent)

10.2.1 Queue Memberships

These settings allow you to select the call center queues you wish to join.

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.

10.2.2 **Agent Policies**

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

- *Post Sign-In ACD State* – To configure your post sign-in ACD state, select a state from the *Sign-In State* drop-down list. Your ACD state is automatically set to the selected state when you sign in to Call Center.

  If you selected *Unavailable* and unavailable codes are enabled for your organization, select an unavailable code from the drop-down menu.

- *Post Call ACD State* – To configure your post call ACD state, that is your ACD state upon completion of a call, select a state from the *Post Call State* list.

  If you selected *Unavailable* and unavailable codes are enabled for your organization, select an unavailable code from the drop-down menu.
  In most cases, when you select *Wrap-Up*, you must also configure your wrap-up timer.

- *Set Wrap-Up Timer to* – To set your post call wrap-up timer, check the *Set Wrap-Up Timer to <mm:ss> for queues without a policy* box and enter the time in minutes and seconds. Your ACD state automatically changes from *Wrap-Up* to *Available* after the specified period of time.

Note: Your post call wrap-up timer setting may be overridden if your administrator sets the timer to a smaller value on BroadWorks.

- *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.

10.3 Settings – Services

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

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

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

- *Do Not Disturb* – When you activate this service, you are not available to take calls, and all your calls are automatically sent to your voice mail.

- *Call Forwarding Always* – When you activate this service, you must provide the phone number to forward your calls to. When the service is active, all your calls are forwarded to the specified number.

To activate a service:

1) Select the service and check the *Is Active* box. The service is moved from the *Inactive* to *Active* category.

2) If you enabled the Call Forwarding Always service, in the *Forward To* box that appears, enter the number to forward your calls to.

3) To generate a ring splash for incoming calls, check the *RingSplash* option.

4) To save your changes, click **Save**.

10.4 Settings – Plug-ins

You use the **Plugins** tab to configure the plug-in software used by Call Center to provide functionality such as call *Notification*, Program Shortcuts, and call log.

Settings – Plugins

10.4.1 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.

10.4.2 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 BroadWorks.

■ *Retrieve contacts from* – This option allows you to specify where to look for your Outlook contacts.

■ *Use Outlook contacts as preferred CLID lookup* – When this option is checked, Call Center uses Outlook to try to identify a caller, when the caller ID is unknown.

Note*: The Outlook Integration feature provides the following functionality: CLID lookup, saving vCards, and accessing and searching Outlook contacts. When using Microsoft Outlook 2010 (32- or 64-bit edition), Outlook must be running before Call Center is launched for these functions to work.*

10.4.3 LDAP (Lightweight Directory Access Protocol) v3

LDAP settings allow you to integrate an LDAP directory with Call Center. These options are only visible if LDAP integration is enabled in Call Center. If you do not know the appropriate settings, contact your system administrator.

Make sure you have correctly imported a valid certificate in the Java Keystone (JKS) with the keytool.

To import a certificate:

1) Click **Start** and then select *Run…*

2) Type "cmd" and click **OK**.

3) Type "<Java Runtime Path>\bin\keytool -import -alias <aliasname> -file <path><certificate file name> -keystore %JAVA_HOME%\jre\lib\security\cacerts".

To verify the certificate:

1) Click **Start** and select *Run…*

2) Type "cmd" and click **OK**.

3) Type "<Java Runtime Path>\bin\keytool -printcert -file <path><certificate file name>".

The LDAP directory options are as follows:

- **Enable/Disable LDAP Integration** – This determines whether Call Center provides LDAP directory lookup services. Clicking the **Enable LDAP Integration** button enables the controls for LDAP settings.

- **LDAP Hostname** – This is the network address of the LDAP server.

- **LDAP Port** – This is the port number for the LDAP server. This is compulsory and can be obtained from your system administrator.

- **Search Base**:

    - The text box determines the location in the LDAP server tree that Call Center looks in when executing a search.

    - The check box, when checked, searches all sub-trees within the search base until the specifications are found.

- **Encrypt Connection** – This option determines whether Call Center uses encryption when connecting to the LDAP server. Note that if encryption is enabled, you may have to use of a different port.

- **("cn=_ _Search_ _Text")** – This option specifies an additional search filter to apply to all directory searches. For example, to include the search criteria in the filter you must include (cn=*__SEARCH_TEXT__*). Alternatively, in another example, (telephoneNumber=*) restricts search results to users who have a telephone number assigned.

- **Attribute Mapping** – This table controls the way that Call Center maps attributes returned from the directory server to columns displayed on the list of search results.

    In each row of the table, enter an LDAP attribute in the *Remote Attribute* column. In the *Local Attribute* column, enter a corresponding local attribute. Typical Remote Attribute values are "cn", "sn", "telephoneNumber", "mobile", "homePhone", and "mail".

- **Authentication Required** – When this box is checked, Call Center must provide a user name and password to the directory server to conduct searches.

- **DN** – This is the user name Call Center uses when connecting to the LDAP server when *Authentication Required* is checked.

- **Password** – This is the password that corresponds to the authentication *DN*.

10.4.4 Program Shortcuts

You use program shortcuts settings to create call center shortcuts on your desktop for convenient access to Call Center.

The program shortcuts plug-in allows for the creation of desktop shortcuts on a Windows platform, which when clicked, launches the applications in your default web browser.

- **Add Shortcut** – This button, when clicked, creates a call center shortcut on your desktop.

- **Remove Shortcut** – This button, when clicked, removes the previously created Call Center shortcut. If you did not create a shortcut using the Add Shortcut button, the Remove Shortcut button has no effect.

10.4.5 **Call Event Log**

This plug-in software provides the ability to store call event statistics content locally on your computer.

- ■ *Enable/Disable Call Event Log Integration* – This double-action button allows you to enable or disable call log archives on your computer.

- ■ *Rotate Log* – This parameter allows you to specify the frequency with which the call log is rotated. You select the frequency from the drop-down list.

- ■ *Open Log Location* – Click this link to go to the place on your computer where the log is stored.

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

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

where:

- – *Drive* is the drive letter where your profile is stored (typically C)

- – *Windows_Username* is your Windows user name

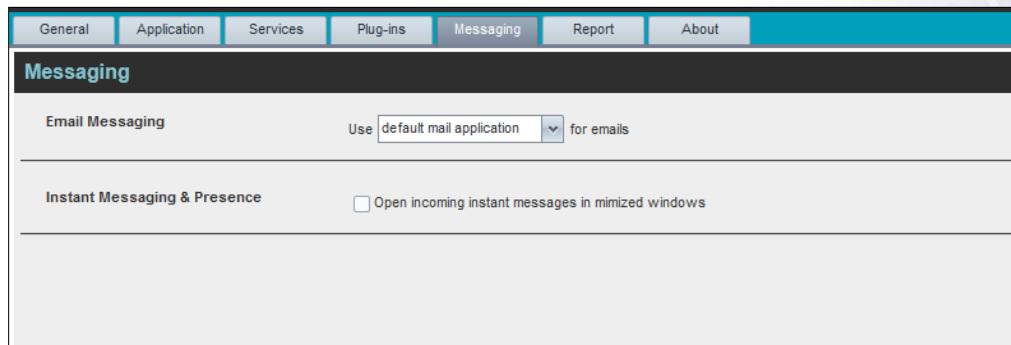- – *BW_User_ID* is your BroadWorks user ID

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

Statistic	Description	Allowed Values	Example Value
BroadWorks User ID	BroadWorks user ID	String	jsmith@abc.net
Call Center ID	Call Center ID for inbound ACD calls only	String, null	ABCSales
Availability	Agent's joined state	Joined, Not Joined, null	Joined
ACD State	Agent's ACD state	Sign-On, Available, Unavailable, Wrap-Up, Sign-Out, null	Null
Call ID	ID of the call	String, null	192.168.1.5:1
Call State	State of the call	Idle, Incoming, Outgoing, Active, Held, Remote Held, Detached, Released, null	Incoming
Personality	The personality of the call. It indicates whether the user originated this call or whether the call was placed to the user.	Integer (0, 1, 2): ■ 0 = BroadWorks Originator ■ 1 = Originator ■ 2 = Terminator	0
Remote Name	External caller name	String or null	Null
Remote Number	External caller number	String or null	5555551234
Last Redirected Name	Last redirected name	String or null	Jane Doe
Last Redirected Number	Last redirected number	String or null	Null
Time	Date stamp of record	Long Date/Time Format	2008-04-03 12:08:17.859

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

10.5 Settings – Messaging

The Messaging tab allows you to configure various messaging options for Call Center. Currently, e-mail messaging and instant messaging are supported.

10.5.1 E-mail Messaging

These options allow you to specify the mail client you use for sending e-mail messages.

From the drop-down list, select the mail client to use for e-mails.

If you selected the custom Simple Mail Transfer Protocol (SMTP) option, you also need to configure the following options:

- *Display Name* – This is the name that is displayed in the *From* field.
- *Reply-to Address* – This is the address where reply messages can be sent.
- *Default Subject* – This is the subject that appears when you generate an e-mail message in Call Center.
- *SMTP Host* – This is the IP address of the SMTP host.
- *SMTP Port* – This is the port of the SMTP host.
- *Outgoing SMTP Server requires Authentication* – When this option is set, authentication is required to send e-mails.
- *Username* – This is the name you must enter to authenticate yourself.
- *Password* – This is the password part of your authentication credentials.
- *Mail Type* – This is the type of mail to use.
- *Mail Template* – This is the mail template to use.

10.6 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.

10.6.1 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.

10.6.2 Default Start Day of the Week

The following setting allows you to configure the day of the week to start reports.

- *Default Start Day of Week* – This setting applies to interval-based reports, when the selected sampling period is "Weekly". It can be set to any day of the week.
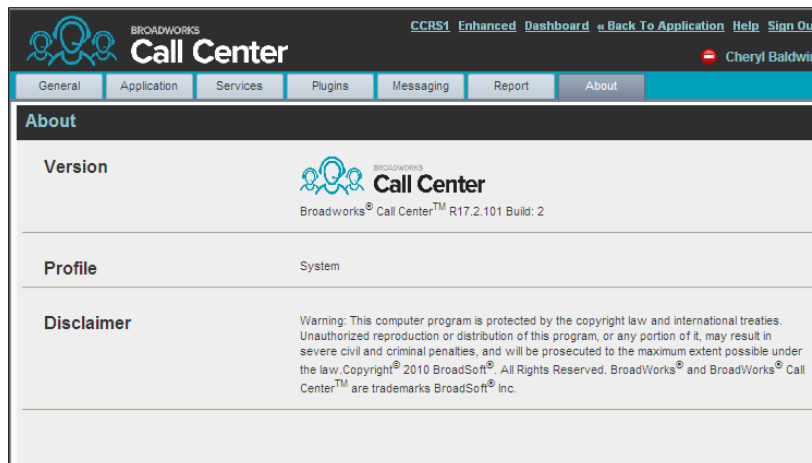
10.6.3 Default Service-level Calculations

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.

10.7 Settings – About

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

The following information is provided on this page:

- *Version* – This is the name and software version of BroadWorks Call Center client.

- *Profile* – This is the Call Center client profile used.

- *Disclaimer* – This is the Call Center copyright information.

11 Appendix A: Glossary and Definitions

11.1   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
Available		Agent is available to receive ACD calls.
		(Agent can also receive direct calls.)
		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.
		ACD calls **may** be delivered to an agent who is in an *Available* state.
		BroadWorks uses both the ACD state **and** the phone state of the agent to determine whether to route a call to the agent.
		By default, agents receive calls when they are available **and** their phone is *Idle*. However, this behavior can be overridden if Call Waiting on agents is enabled for the call center, which allows for new calls when the agent is available **and** on an active call.
Unavailable		Agent is unavailable to receive ACD calls.
		(Agent can still receive direct calls.)
		The *Unavailable* state should be used when the agent is away from their workstation and not available to take calls.
		ACD calls are not delivered to agents in an *Unavailable* state.
		This state should be used when the agent is at lunch, on a break, in a meeting, or engaged in some other activity while they are at work, but unavailable to take calls.
Wrap-Up		Agent is performing post call work.
		This state is designed to allow the agent to complete paperwork or other post call procedures associated with the last call.
		Calls **may** be delivered to agents in *Wrap-Up* state depending on the call center configuration.
		By default, calls are not routed to agents in *Wrap-Up* state, except when the call center is configured to enable calls to agents in the *Wrap-Up* state.
Sign-In		The *Sign-In* state is equivalent to a "clock in", which means that the agent is at their work location but not yet ready to accept incoming calls. Calls are not delivered to the agent in this state.
		Sign-In is a transitional state and agents do not remain in this state; rather they transition to their post sign-in state.
		It is recommended that agents only be in this state between the time they arrive at work and the time they become available to accept calls.
Sign-Out		The *Sign-Out* state is equivalent to a "clock out", which means that the agent's workday or shift is completed and they are leaving.
		Calls are not delivered to the agent in this state.
		It is recommended not to use this state when agents leave for lunch or breaks during the day. The *Unavailable* state should be used for that.

In Call Center, an agent can only set their ACD state to "Available", "Unavailable", or "Wrap-Up". A supervisor can set the ACD state of an agent to "Available", Unavailable", Wrap-Up", or Sign-Out".

The *Sign-In* state can only be assigned to an agent through the web portal.

11.2 Phone States

Phone states show the state of the monitored agent's telephone line:

For agents, the phone states are combined with their ACD states and are displayed as follows:

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

11.3 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
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

Call State	Display Name	Display Icon	Call Personality	Call Actions
On Hold	Held		Any	Transfer, Resume, End, Conference
On Hold (Remote)	Held		Any	Transfer, Hold, End, Conference
Active (In Conference)	Active		Conference	Transfer, Hold, End
On Hold (In Conference)	Held		Conference	Resume, Transfer, End
Ringing In (Recalled Call)	Call Recalled		Terminator	Answer, Conference, End

11.4 Call Types

This section defined different types of calls measured in Cell 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: ▪ Calls that a supervisor retrieves from a queue ▪ Calls that an agent receives due to a transfer from another agent (Note that they may have originated as ACD calls.)
Outbound Call	This is an outbound call made by an agent.
Held Call	This is an ACD call that was placed on hold by an agent. Each time an agent places a call on hold, it is counted as a held call.
Transferred Call	This is an ACD call that was transferred to another number. Transfers can be the result of manual transfers by agents, transfers to voice mail because the calls were timed out, and transfers by supervisors to alternate queues. **NOTE**: A timed-out call is a call that is transferred due to exceeding the maximum wait time in a queue.
Answered Call	This is an ACD call that was answered by an agent.
Abandoned Call	This is an ACD call that entered the queue, but the caller hung up before the call was answered or transferred.
Received Call	This is an ACD call that was received and either answered or abandoned. Overflowed calls are not included.
Overflowed Call	This is an ACD call that was received, but immediately transferred to another destination due to the queue's exceeding the configured maximum queue size or the configured maximum wait time.
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 *Sign-Out* ACD state.

12   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 **Close** button in a dialog box.	This closes the open dialog box.
ESC	Cancel the changes.	This exits the currently selected editable item, such as a text box.
/	Click the *Dialer* text box.	This places the cursor in the *Dialer* text box; it retains the currently selected item (if applicable). **NOTE**: In Internet Explorer 8, the "/" shortcut key does not always work. Pressing the key clears the default *Enter Number* text, but does not place the cursor in the input box.
?	Click the *Search* text box.	This places the cursor in the *Search* text box; it retains the currently selected item (if applicable).
ARROW DOWN	Click the scroll bar or the next item on a list.	This selects the next item in the *Call Console* or the *Queued Calls* pane.
ARROW UP	Click the scroll bar or the previous item in a list.	This selects the previous item in the *Call Console* or the *Queued Calls* pane.
PAGE DOWN	Scroll down one page.	This goes to the next page in the *Call Console* or the *Queued Calls* pane.
PAGE UP	Scroll up one page.	This goes to the previous page in the *Call Console* or the *Queued Calls* pane.
1….9	Select a call in the *Call Console*.	Pressing **1** selects the first call, pressing **2** selects the second call, and so on.
SPACEBAR	Click **Answer** on the selected incoming call in the *Call Console*.	This answers the selected incoming call or if no call is selected, the incoming call that has been waiting the longest. Pressing the SPACEBAR again answers the next longest waiting incoming call, which puts the previously answered call on hold.
<PERIOD>	Click **End** on the selected call in the *Call Console*.	This ends the selected call.
ENTER	Click **Dial**.	If the cursor is placed in the *Enter Number* text box in the *Dialer*, the entered digits are dialed.
ENTER	Click **Search**.	If the cursor is placed in the *Search* text box, a search is performed.
+	Click **Transfer** in the *Dialer*.	This transfers the selected call to the ad hoc number entered in the *Dialer*.
SHIFT+1..9	Select a ringing call and click **Answer**.	Pressing **SHIFT+1** selects and answers the first ringing call, pressing **SHIFT+2** selects and answers the second ringing call, and so on.
SHIFT+1..9	Select an active call and click **Hold**.	Pressing **SHIFT+1** selects and places on hold the first active call, pressing **SHIFT+2** selects and answers the second active call, and so on.
SHIFT+1..9	Select a held call and click **Retrieve**.	Pressing **SHIFT+1** selects and retrieves the first held call, pressing **SHIFT+2** selects and retrieves the second held call, and so on.
S or s	Click the **Settings** link.	This goes from the main page to the *Settings* page.

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