Call Center User Guide

HOSTED VOICE WEB PORTAL

SMART CITY |

smartcityvoice.com

Table of Contents

Welcome to Hosted Voice Call Center 4

Hosted Voice Call Center Features 5

Getting Started 6

Accessing the Hosted Voice Portal 7

Working with the Call Center Dashboards 9

Call Center Agent Tasks 10

Navigating the Call Center Agent Dashboard 11

Working with Agent Call Queues 13

Viewing Agent Call Queues 13

Logging In and Out of Individual Call Queues 14

Setting Agent Availability Status 15

Using Phone Star Codes to Set Agent Availability 15

Using the Call Center Agent Dashboard to Set Agent Availability 15

Working with Active Phones 17

Working with Recent Call History 18

Viewing Recent Call History 18

Adding a Disposition Note to a Recent Call 19

Custom Call Center Agent Status 20

Setting Up Custom Agent Status 20

Finding Custom Statuses 22

Custom Agent Status Reporting 23

Viewing Call Center Agent Statistics 24

Viewing My Statistics 24

Viewing My Graphs 26

Call Center Supervisor Tasks 27

Navigating the Call Center Supervisor Dashboard 28

Managing Call Center Queues 30

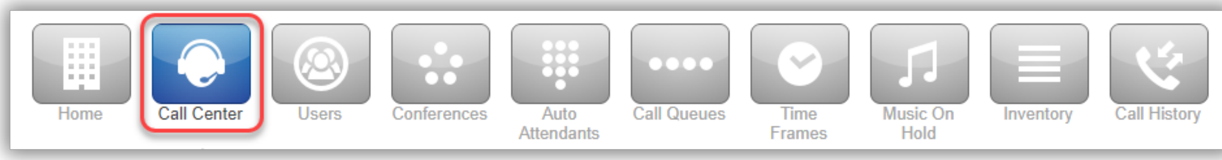
Viewing the Call Queues List 30

Editing Agents in the Call Queue 31

Editing Call Queues *32*
Managing Call Center Agents........ 33
Viewing Agent Statistics........ *33*
Prioritize Calls Waiting in Queues........ 34
Changing Agent Queue Priority Levels........ *36*
Listening, Barging In, or Whispering on an Agent Call *38*
Viewing the Active Calls Graph 42
Managing Real-Time Call Center Statistics 43
Viewing the STATS GRID........ *43*
Customizing the STATS GRID Data *44*
Call Center Reports 47
Setting Call Center Report Options........ 48
Generating Call Center Reports 50
Queue Stats Report *50*
Queue Stats Report Parameters *51*
Agent Statistics Report........ *53*
Agent Stats Report Parameters *53*
Agent Availability Report *56*
Dialed Number Identification Service (DNIS) Statistics........ *57*
DNIS Statistics Report Parameters........ *58*
Abandoned Calls Report........ *60*
Scheduling and Emailing Reports........ 61
Contact Center Analytics 65
Accessing the Contact Center Analytics Main Menu........ 66
Viewing a Board 67
Adding and Editing a Board........ 68
Adding a Card........ *69*
Board Settings........ *71*
Sharing a Board........ *72*

Welcome to Hosted Voice Call Center

Welcome to the Hosted Voice Call Center User Guide! Hosted Voice Call Center is a customizable virtual contact center solution. Hosted Voice Call Center offers expanded call center functionality for call agents who answer incoming calls within a queue. The Call Center module also enables call center supervisors and office managers to view and control call-queue and call-agent settings and statistics, all from a centralized portal.



To access to the Call Center menu icon on the Hosted Voice menu bar, the following requirements must be met:

- Your organization must be licensed for the Hosted Voice Smart Office Max multi-seat plan.
- If you are using the Call Center Agent job role, you must have a Hosted Voice User Scope permission level of ‘Call Center Agent’ and be assigned to one or more call queues.
- If you are using the Call Center Supervisor job role, you must have a Hosted Voice User Scope permission level of ‘Call Center Supervisor.’
- If you are using the Office Manager job role, you must have a Hosted Voice User Scope permission level of ‘Office Manager’ and ‘Call Center Supervisor’ view enabled.

NOTE: *See the “Hosted Voice Administrator User Guide” for more information about User Scopes and Permission Levels.*

NOTE: *This guide focuses on the features and options available for the Call Center module only. For detailed information about using the other Hosted Voice modules that show on the Home Page, see the “Hosted Voice Administrator User Guide” and the “Hosted Voice User Guide.”*

Hosted Voice Call Center Features

The Hosted Voice Call Center module offers the following features:

- **Agent Queue Status** – Use the web portal to view and control the call queues to which a call agent is currently assigned.
- **Agent Availability Status** –Quickly change agent availability status through the web portal or through the use of star codes on the call agent phones.
- **Multiple Call Queues** – Manage several call queues simultaneously and make use of skills-based routing to the right agents for the right reasons.
- **Log In/Out of individual call queues** – Quickly log in and out of all call queues or individual queues as needed.
- **Custom Queue Hold Music and Call Announcement** – Record and upload multiple Music on Hold (MOH) files for different call queues. Record introduction greetings for callers to hear before routing an incoming call.
- **Skills-Based Routing** – Set up tiered call routing based on the skill levels of the available call agents.
- **Automatic Callback** – Give a caller the choice to have their call returned automatically as soon as a call agent is available, which reduces overall hold time.
- **Real Time Supervisor Dashboard** –Use the supervisor-level Call Center dashboard to view and manage call queues and call agent settings, reports, and statistics.
- **Supervisor Listen/Coach** – Listen to current call activity, which helps supervisors provide valuable call-agent coaching opportunities.
- **Call Recording and Storage** – Ensure customer calls are recorded for training or legal purposes.
- **Record Call Dispositions** – Add call resolution detail and notes for each call handled.
- **Call Statistics** – View important call-agent and call-queue statistics in visual format for a specified range of time or as a snapshot view.

Please visit the Hosted Voice support page at https://support.smartcityvoice.com/ if you have any further questions. The support page provides more information about the Hosted Voice solution, including both user guides and instructional videos.

Getting Started

The Getting Started section covers the following topics:

- Accessing the Hosted Voice Portal
- Working with the Call Center Dashboards

Accessing the Hosted Voice Portal

To use the Call Center module, you must first log in to the Hosted Voice Portal. Open a web browser and in the address bar, type the full domain URL provided by your administrator.

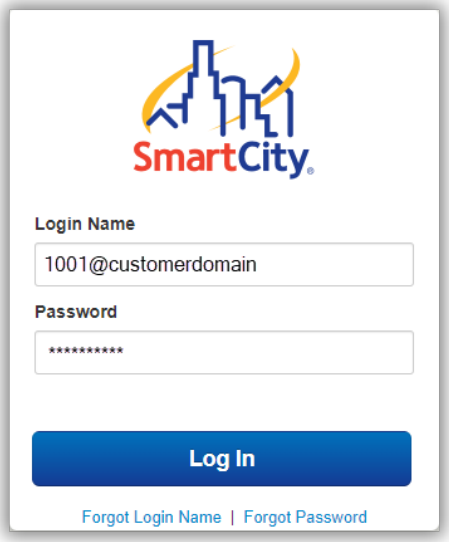
To log in to the Hosted Voice Portal:

1. Open a Web browser. (We recommend you use the Google Chrome browser.)

   In the browser address bar, type the following domain URL and then press **Enter**.

   https://portal.smartcityvoice.com/

   The Smart City Login dialog box displays.



2. Type your pre-assigned **Login Name** in the following format:

   ext@customerdomainname

   The 'ext' is your user extension and 'customerdomainname' is your email address domain (Example: 1001@smartcity).

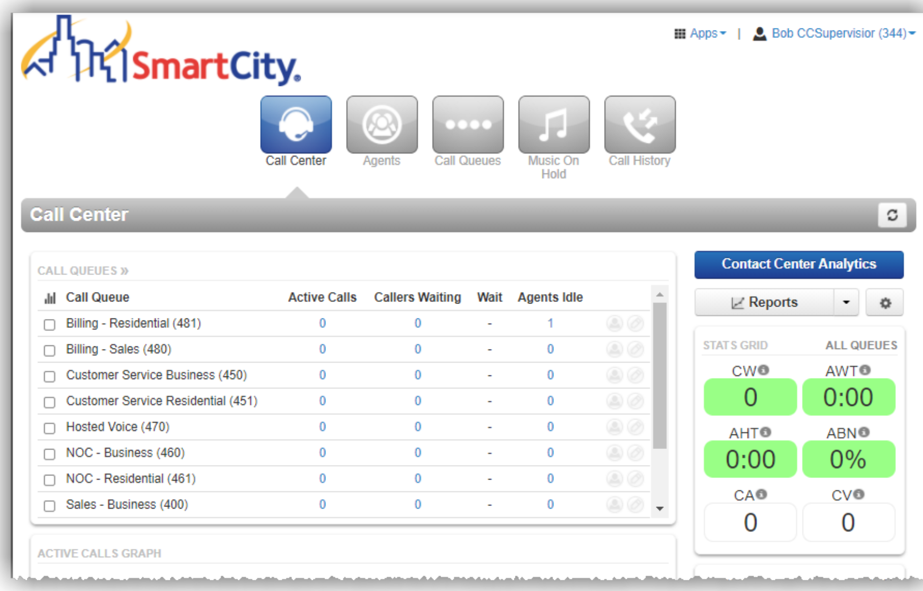
   NOTE: *Do not include '.com' in your login name.*

3. Type your **Password**.

4. Click **Log In**.

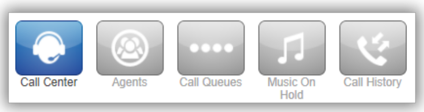
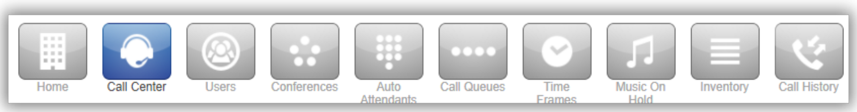
   NOTE: *If you do not know or forgot your login name or password, click the links below the Log In button and follow the instructions. Contact your company's administrator if you have any issues with accessing the Hosted Voice Portal.*

Once you log in to the Hosted Voice Portal, the Home Page displays. The Home Page gives an at-a-glance view of the various Hosted Voice modules available based on your job role and user scope permissions.



The menu bar at the top of the Home Page has icons to navigate through the portal. When you click a menu icon, the page associated with the icon displays below the menu icons, in the dashboard area.

The Call Center menu icon shows on the Hosted Voice menu bar based on your job role, permission settings, and call-queue settings:

Call Agent menu bar	
Call Center Supervisor menu bar	
Office Manager menu bar	

Working with the Call Center Dashboards

Depending on your job role, user scope permissions, and call-queue assignment, you will have access to one or more Call Center dashboards to perform your Call Center work duties.

The following Hosted Voice Call Center dashboards are available:

- If you are logged in to the Hosted Voice Portal as a call center agent, you can use the Call Center Agent dashboard to perform your Call Center work duties.
- If you are logged in to the Hosted Voice Portal as a supervisor or office manager, Call Center has two dashboards available for you to use; the Call Center Supervisor dashboard and the Call Center Agent dashboard.

Important! Call Center Supervisors can use an agent seat to answer inbound calls within a queue. However, we recommend that office managers do not use a call center supervisor seat license.

Call Center Agent Tasks

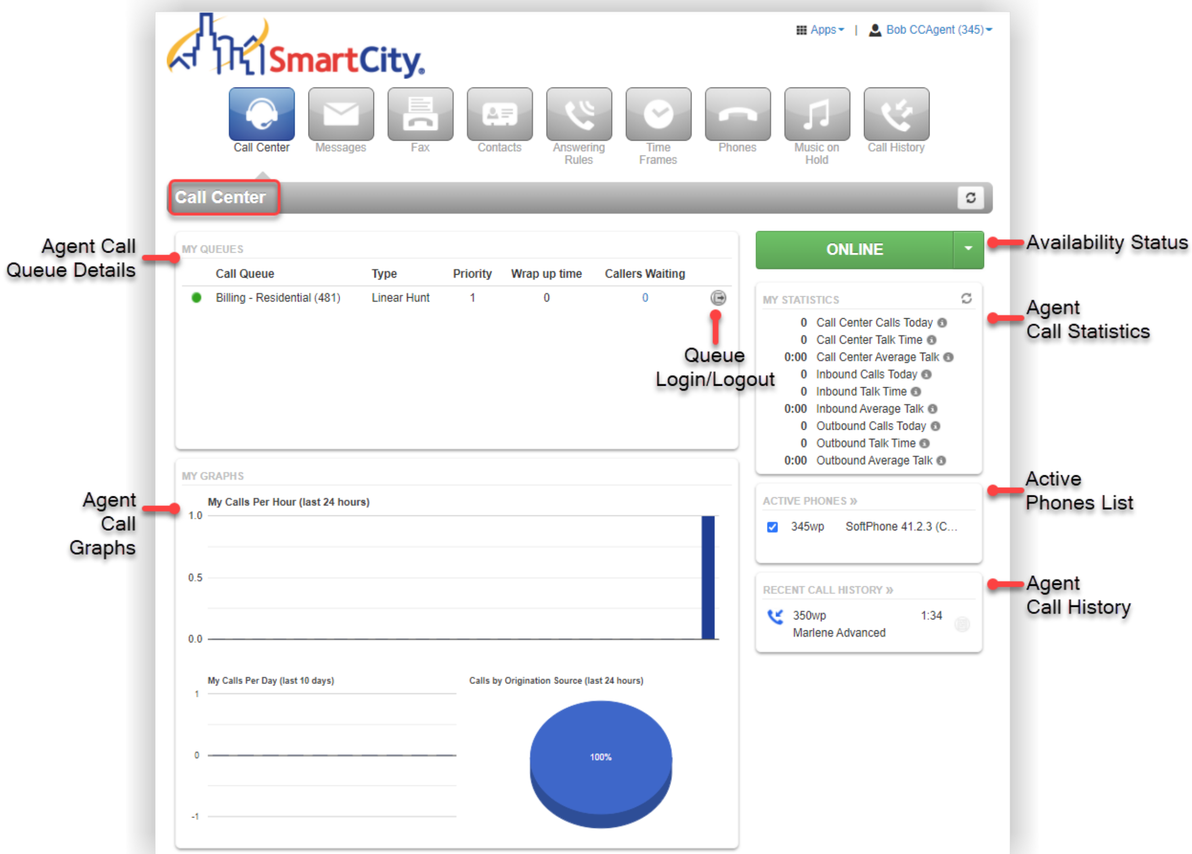
Call Center Agents can use the Call Center Agent dashboard to carry out various call center-related tasks during their workday.

This section covers the following topics:

- Navigating the Call Center Agent Dashboard
- Working with Agent Call Queues
- Setting Agent Availability Status
- Working with Active Phones
- Working with Recent Call History
- Viewing Call Center Agent Statistics

Navigating the Call Center Agent Dashboard

The Call Center Agent dashboard shows detailed call-center activity for the individual call agent. If you are logged in as a call agent, the Call Center Agent dashboard is visible as soon as you click on the Call Center menu icon. If you are logged in as a call-center supervisor or an office manager, the Call Center Agent dashboard is visible when you click the **Call Center** link Call Center on the options bar.



On the Call Center Agent dashboard, you can log in and out of call queues, view and change your availability status, and see individual call statistics. You can also view a list of your recent calls and active phones assigned to you.

NOTE: *The call activity and statistics that display on the Call Center Agent dashboard are based on your logged-in phone extension.*

NOTE: *If you are logged in as a Call Center Supervisor, you can perform call center agent tasks and receive calls from one or more call queues if your agent status is set to 'Online.' See the "Hosted Voice Administrator User Guide" for more information about editing Call Queue agent statuses.*

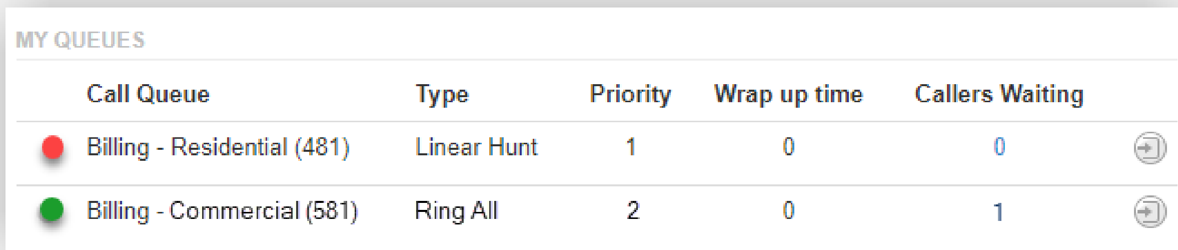
The following table describes each part of the Call Center Agent dashboard:

Call Center Dashboard Widgets	Description
My Queues	Displays an overview of the current queues to which you are assigned. Each call queue shows the type of call queue and the priority level of the queue. This section also shows how much time you have to wrap up details between each incoming call, as well as how many callers are waiting in the queue. You can use the My Queues section to log in and out of individual call queues.
My Graphs	Displays a chart graph view for the number of active calls you have taken for a specific time period.
Availability Status	You can change your availability status through the Hosted Voice Portal and/or by using the pre-assigned star codes on your phone.
My Statistics	The My Statistics and Graphs sections of the Call Center tab allows you to view a snapshot of your personal statistics.
Active Phones	Lists the active phones currently registered to your account that you can send and receive calls from. If you do not see a device listed there that should be, that means that the device is not configured for your account or the device is currently unregistered.
Recent Call History	Displays your last 10 calls with the following color-coded icons: • Green icon – Indicates an outbound call. • Red icon – Indicates a missed inbound call. • Blue icon – Indicates an inbound call was answered. • 5 Blue circles – Indicates a call was placed to a conference bridge. To call back a number, click the **phone number**. Click on **RECENT CALL HISTORY >>** to access the Call History page where you can manage call history detail for all Hosted Voice users.

Working with Agent Call Queues

The MY QUEUES section of the Call Center Agent dashboard displays a list of Call Queues to which an agent is currently assigned. Use this section to see important activity detail for each queue and to log in and out of individual queues.

Viewing Agent Call Queues



You can view the current availability status for each assigned queue. This information shows next to each Call Queue Name and is indicated by a colored circle.

- **Green circle** ● = Indicates an agent is available for calls in the queue.
- **Red circle** ● = Indicates an agent is unavailable for calls in the queue. An agent may be unavailable because they are already on an active call, or because their agent status is not set to 'Online.'

The following table describes each column in the MY QUEUES section:

My Queues Information	Description
Call Queue Name and Number	Shows the name of the call queue along with the call queue's direct extension number.
Type	Indicates the order in which the phones ring and can be adjusted by a user with user scope of office manager or call center supervisor.
Priority	Decides which queue an agent will receive their next phone call from if multiple queues have someone waiting for an agent to become available. This can be adjusted by a user with user scope of office manager or call center supervisor.
Wrap up time	Indicates the amount of time before the agent is automatically set to be available to take a new call after finishing up a call. This can be adjusted by a user with user scope of office manager or call center supervisor.

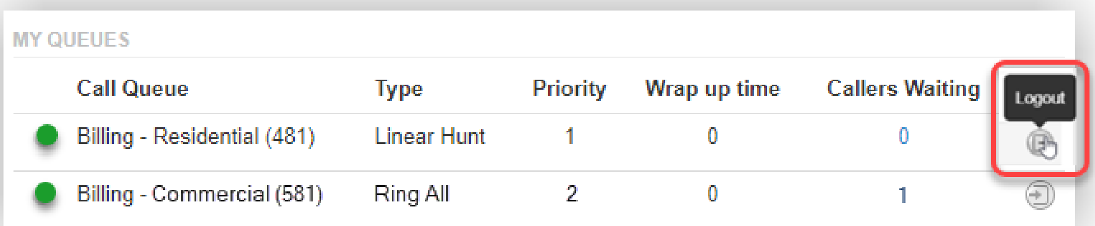
My Queues Information	Description
Callers Waiting	Displays the number of callers currently waiting in each queue for an agent to answer their call. By clicking on the number of callers waiting, agents will be able to view information about the callers that are waiting in the queue.

Logging In and Out of Individual Call Queues

Call Center agents that are in multiple queues can log in and out of individual call queues to which they have been assigned.

To log out of a queue:

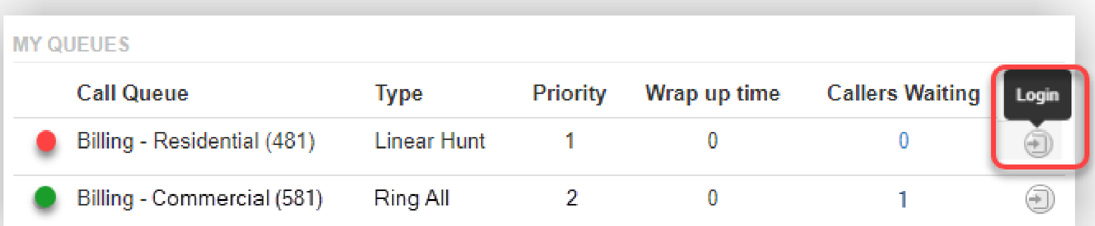
1. Click on the **Login/Logout** button .



Within a few seconds, the system will log you out of that specific call queue, and you are no longer available to answer calls in that queue. Once you are logged out, the indicator circle turns red.

NOTE: *After you click Login/Logout, all call queues may become unavailable for a few seconds. This is because the system is processing and will redisplay with the correct status.*

2. To log back into a specific queue, press the same **Login/Logout** button.



Once you are logged in, the indicator circle turns green, and you are now available to answer calls in that queue.

Setting Agent Availability Status

Call Center agents can use star codes on their phones or use the Call Center Agent dashboard to change their availability status.

Using Phone Star Codes to Set Agent Availability

Using your assigned call agent phone, press the following **Star (*) Codes** and then press **Send**, to log in and out of all call queues or individual queues:

Star Code	Action	Description
***88**	Agent Login to all Queues	Make Agent Available for All Queues
***88<Queue>**	Agent Login to Specific Queue	Make Agent Available for a Specific Queue
***89**	Agent Logout All Queues	Make Agent Unavailable for All Queues
***89<Queue>**	Agent Logout Specific Queue	Make Agent Unavailable for a Specific Queue

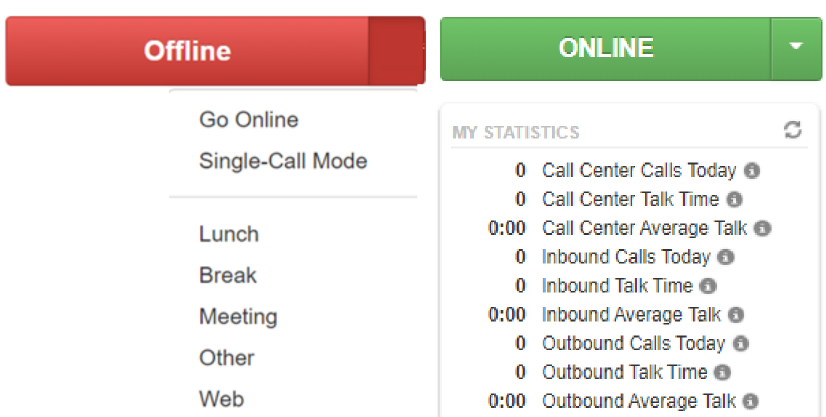
NOTE: *The star codes work for all phones that are assigned to a call queue, including softphones. After you press a star code, Press Send and then you will hear a voice confirming you are now unavailable to answer calls.*

Using the Call Center Agent Dashboard to Set Agent Availability

In the Call Center module, you can access the Call Center Agent dashboard to set agent availability.

To set agent availability:

1. Click the **Availability Status drop-down arrow** on the right side of the dashboard to change the current agent availability status.



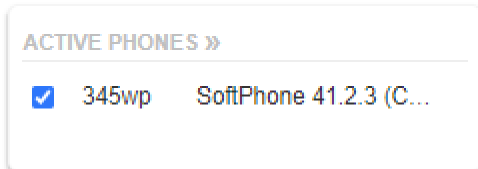
2. Choose from the following options to set agent availability:

Agent Availability Options	Description
Go Online	Sets the status to Online to be available to take inbound calls for assigned queues.
Single-Call Mode	Sets the status to Single Call Mode to be available to take only one inbound call. When the current call is finished, the agent status changes to Offline.
Lunch, Break, Meeting, Other, and Web	Indicates the status category for why an agent is not available to take a call. Each of the status categories makes the call agent unavailable for inbound calls. A call agent can still receive calls that do not originate from a call queue, and the agent can still place outbound calls. *NOTE: It is important to use agent availability options because call center supervisors and office managers can view each agent's status in the portal, at any given time.*
Offline	Sets the call agent status to Offline so that an agent is unavailable to answer calls that originate from a call queue. As a best practice, we recommend that call center agents change their status to Offline when their shift is finished for the day.

Working with Active Phones

Depending on the company, a call center agent is assigned one or more physical or softphones to handle calls within a queue.

Call Center allows you to manage availability for each assigned phone. Use the Call Center Agent dashboard to set active phone status.



To activate a phone:

1. In the ACTIVE PHONES >> section of the Call Center Agent dashboard, click the **check box** next to each phone you want to make active. You can have more than one phone active at a time.
2. Click the **check box** again to clear the checkmark and make the phone inactive.

   When a phone is inactive, no calls are routed to the agent's phone extension that is associated with that phone.

NOTE: *Before a phone can receive inbound calls from a queue, the agent's phone extension must be added to the queue. An Office Manager or Call Center Supervisor can add or remove agent phones from a queue using the Call Queue menu on the Hosted Voice menu bar. See the "Hosted Voice Administrator User Guide" for more information about adding call agent phones to a call queue.*

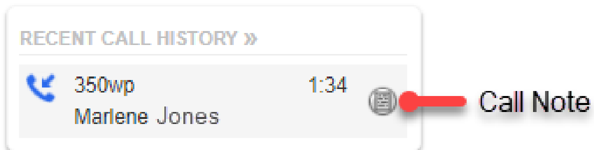
NOTE: *If you are logged in as a call agent, you can click on **ACTIVE PHONES >>** to access the Phones page where you can view your currently assigned phones and access the Smart City Connect mobile app download page. See the "Hosted Voice User Guide" for more information about the Phones page.*

Working with Recent Call History

The Call Center Agent dashboard enables an agent to view their recent call history, make callbacks using the phone numbers in the list, and add disposition reason and notes to a call.

Viewing Recent Call History

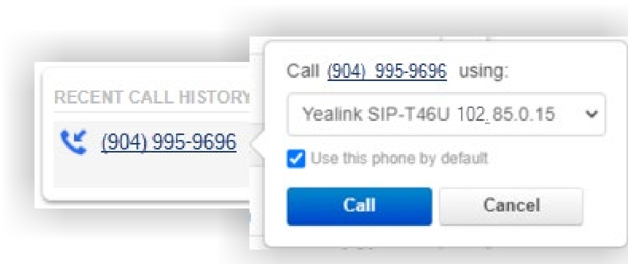
In the RECENT CALL HISTORY >> section, each call displays with the phone number and caller name, if possible, as well as the duration of the call.



A phone icon shows next to each call, which indicates the following call statuses:

-  = A phone icon with a **green arrow** indicates an outbound call.
-  = A phone icon with a **red arrow** indicates a call was not answered.
-  = A phone icon with a **blue arrow** indicates an inbound call was answered.
-  = **5 blue circles** indicate that a call was placed to a conference bridge.

If a phone number shows with a blue hyperlink, you can click the phone number to call it using one of the active phones.



***NOTE:** You can click on **RECENT CALL HISTORY >>** to access the Call History page where you can manage additional call history detail. See the "Hosted Voice Administrator User Guide" and the "Hosted Voice User Guide" for more information about managing call history detail.*

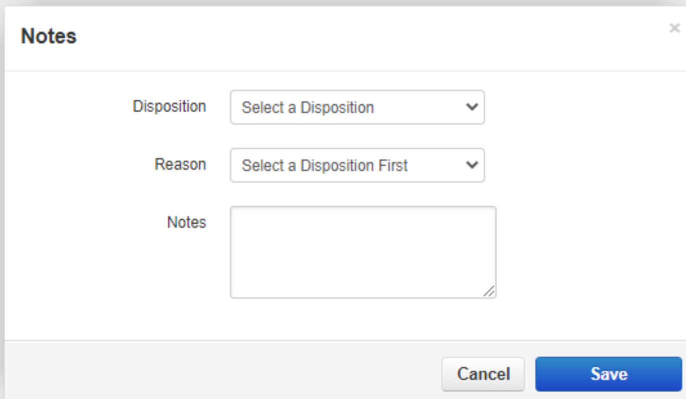
Adding a Disposition Note to a Recent Call

If needed, you can add a call disposition and note to a call.

To add a disposition note to a call:

1. In the RECENT CALL HISTORY >> section, click the **note icon** next to the recent call.

   The Notes dialog box displays.



2. Complete the following **options** and then click **Save** store the call disposition note.

Recent Call Note Options	Description
Disposition	Indicates the outcome of the call.
Reason	Provides a reason for the selected disposition.
Notes	Enables you to type additional notes about the call.

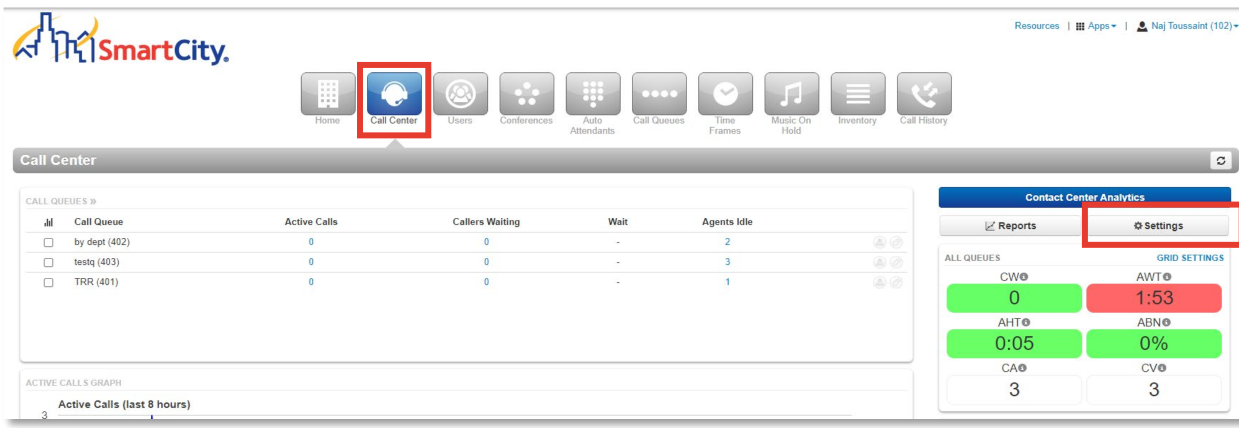
Custom Call Center Agent Status

Call Center Supervisors can add custom agent statuses. Pre-defined statuses are broad descriptions such as "lunch", "break", and "available". A custom status gives the Supervisor increased granularity on Call Center Reports.

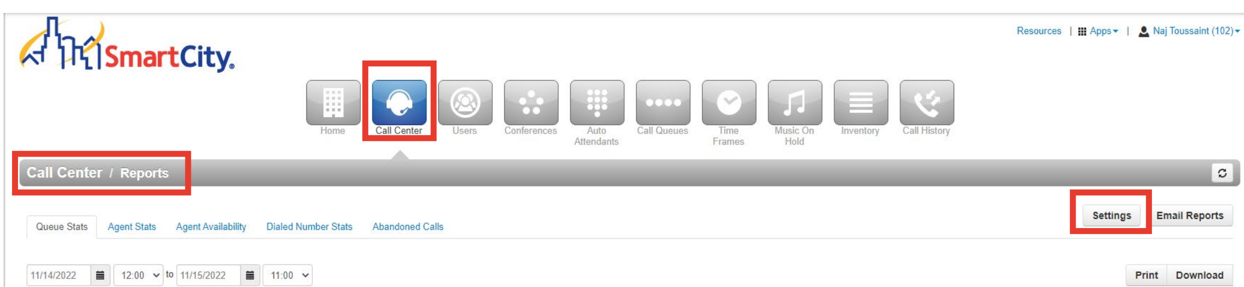
Note that custom statuses are defined as a period of time when the agent is "offline". These are periods of time when the agent is not available to take calls, such as “appointment” or “bathroom”. These custom statuses are shared by all agents in the domain/organization and are limited to 8.

Setting Up Custom Agent Status

1. In the portal, from the Call Center Supervisor or Administrator views, navigate to **Settings** on the **Call Center Home Screen.**



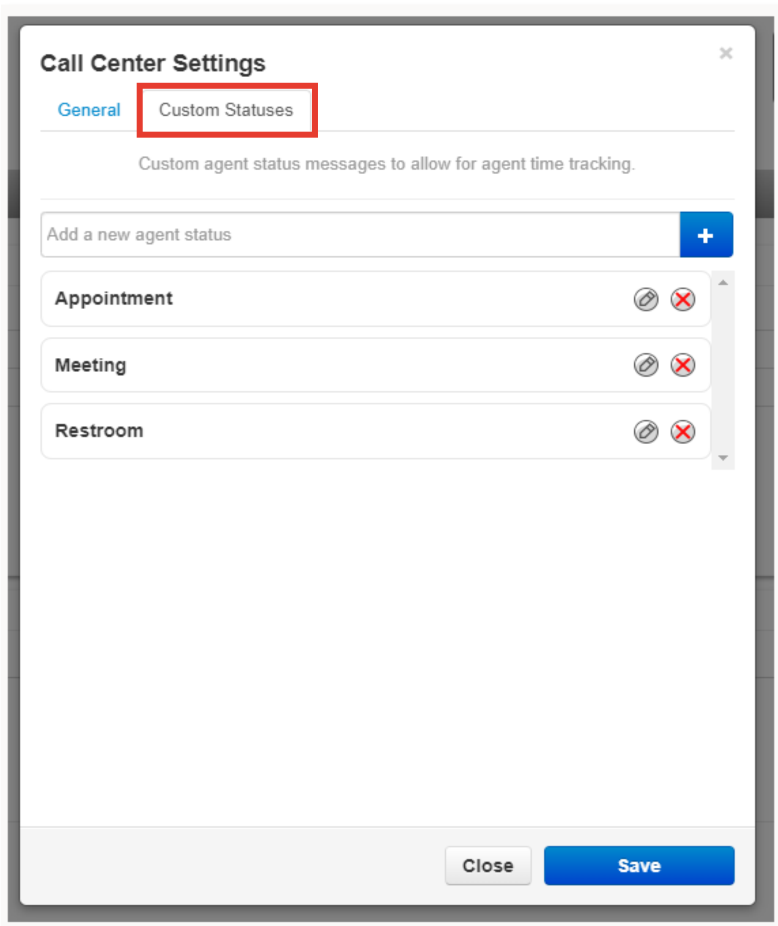
Or navigate to **Reports** from the Call Center screen and click on **Setting**.



2. In the **Call Center Settings** view, navigate to **Custom Statuses** tab.

Click on the blue **+** symbol to add a new custom agent status. There are a maximum of 8 custom statuses that can be added. Each status can be no longer than 20 characters. Remember that all custom statuses indicate that the user is "offline" on reports.

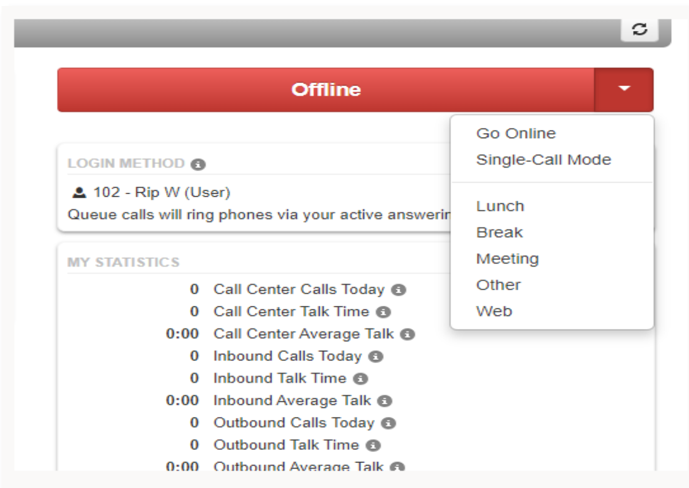
Click on the **pencil** icon to edit an existing custom status.

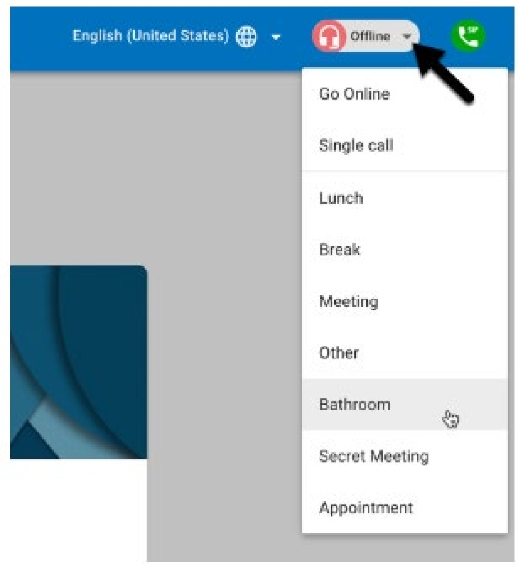


3. Click **Save** to finish making changes.

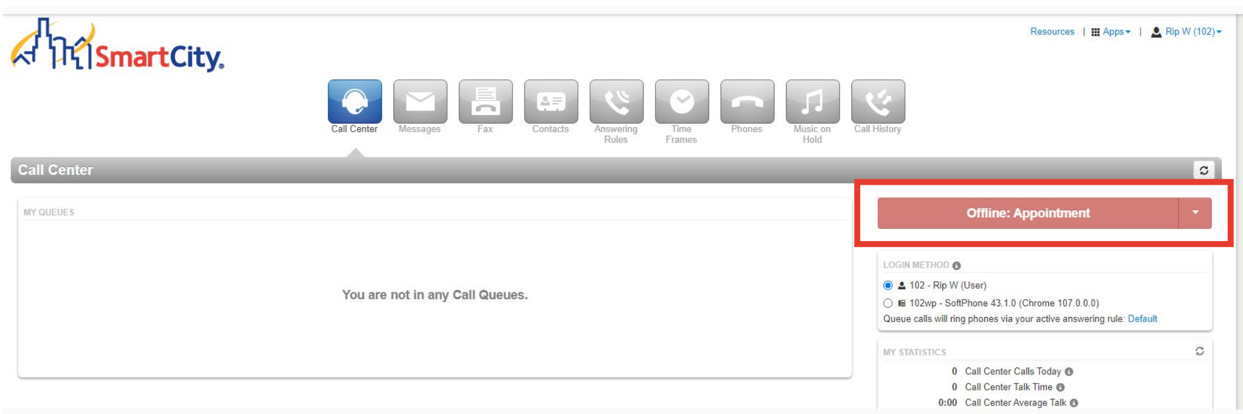
Finding Custom Statuses

Custom statuses are available to agents in two places: in the Call Center Agent home page as part of the portal and in the Smart City Mobile app under the Call Center tab.





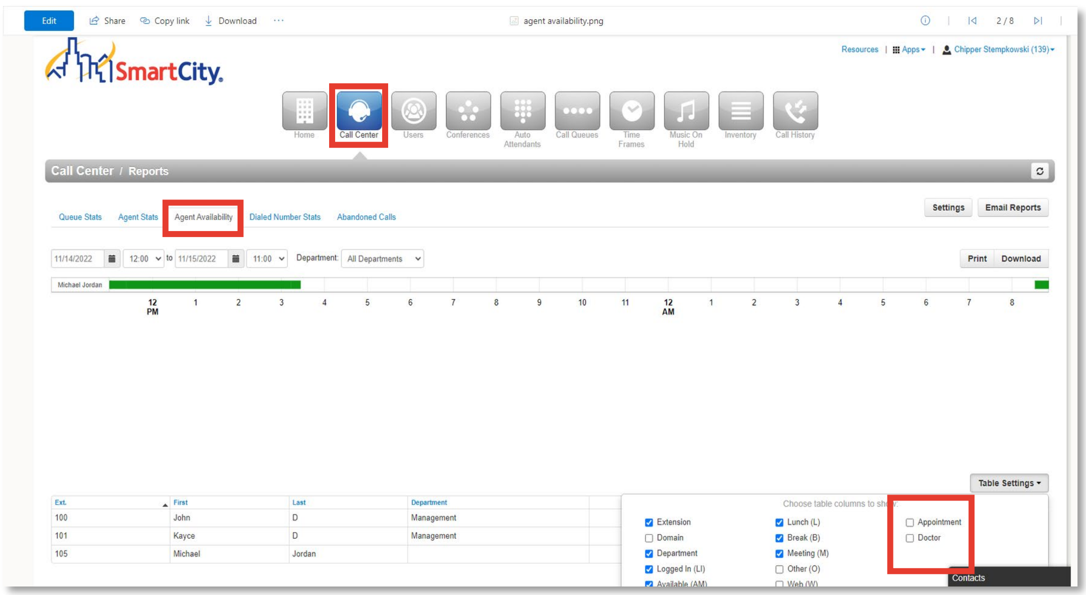
The Call Center Agent is always "offline" when they select a custom status.



Custom Agent Status Reporting

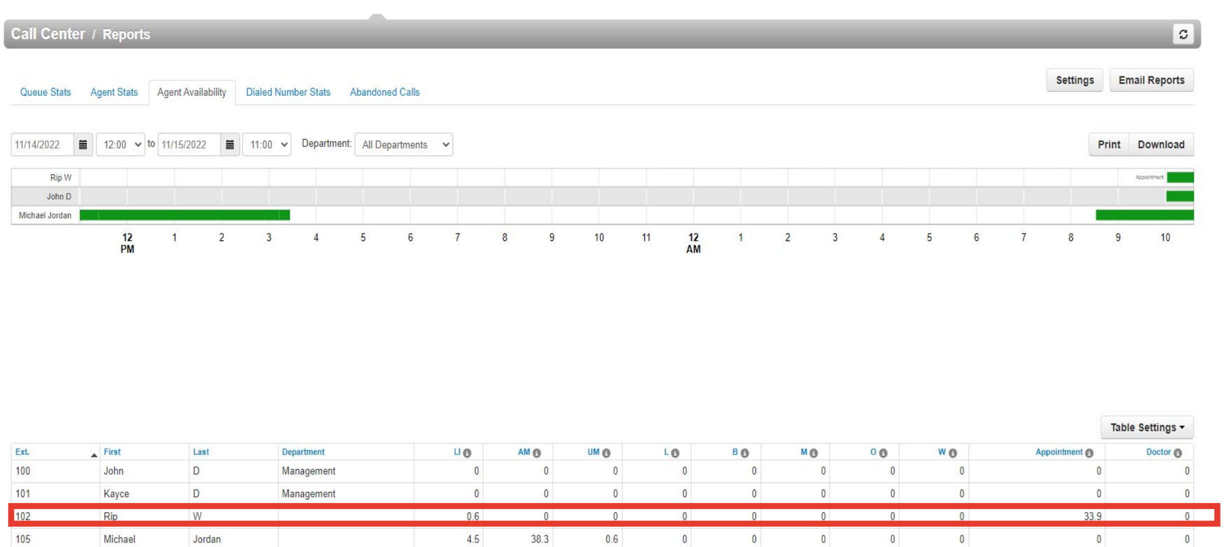
Call Center Supervisors can review and report on the time spent in each custom state.

1. Navigate to the **Agent Availability** tab in **Call Center Reports.** Click **Table Settings** and then check or uncheck custom stats.



2. The **Agent Availability** reporting table displays the new stats in a similar format to the default, canned statuses.

   In the example below, the Call Center Supervisor sees that the user named "Rip " was at an appointment for 33.9 minutes. today (90 seconds) and in the bathroom for 0.2 minutes (20 seconds). Total time is reported in minutes.



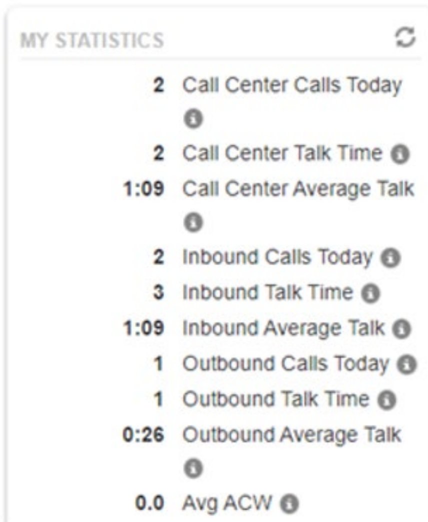
Viewing Call Center Agent Statistics

The Call Center Agent dashboard enables an agent to view their individual call statistics for the current workday, as well as for over a specified time period.

Viewing My Statistics

In the MY STATISTICS section, you can view information about the calls that happened for the current day only.

***NOTE:** Click the **Refresh button** to retrieve the most up-to-date statistics.*



The statistics that show include important information, such as Number of Call Center Calls Taken, Average Talk Time, and number of Inbound and Outbound calls.

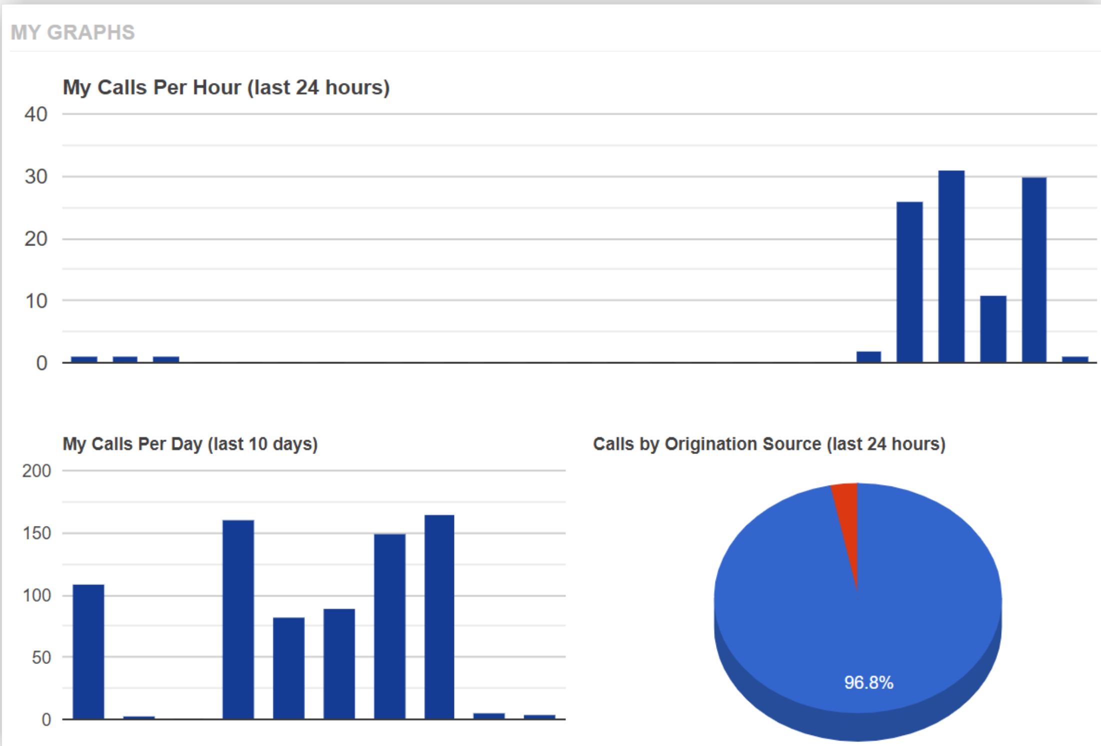
You can hover over the Information Icon next to each statistic to view more information about each one.

The following table describes each type of statistic available in the MY STATISTICS section:

Recent Call Notes Options	Description
Call Center Calls Today	Indicates the number of calls answered for all queues today.
Call Center Talk Time	Indicates the number of calls answered for all queues today.
Call Center Average Talk	Indicates the average number of minutes spent per call on answered queue calls today.
Inbound Calls Today	Indicates the number of attempted calls inbound to agent. Includes call center calls. Excludes on-net calls and conference calls.
Inbound Talk Time	Indicates the number of minutes spent by an agent on inbound calls. Includes call center calls. Excludes on-net calls and conference calls.
Inbound Average Talk	Indicates the average length of time spent by an agent on inbound calls. Includes call center calls. Excludes on-net calls and conference calls.
Outbound Calls Today	Indicates the number of outbound call attempts by agent. Excludes on-net calls and conference calls.
Outbound Talk Time	Indicates the number of minutes spent by an agent on outbound calls. Includes talk and hold time. Excludes call center calls, on-net calls, and conference calls.
Outbound Average Talk	Indicates the number of outbound calls by agent answered by a remote party. Includes calls answered by voicemail. Excludes on-net calls and conference calls.
Avg ACW	Indicates the average after call work, the average time an agent spends between the end of a call and submitting the call disposition.

Viewing My Graphs

The MY GRAPHS section of the Call Center Agent dashboard displays a chart graph of an agent's call totals per hour, over the past 24 hours; and per day, over the last 10 days. This section also displays a pie chart to show from where the agent's inbound calls originated.



NOTE: *You cannot make changes to the data that shows in the MY GRAPHS section.*

Call Center Supervisor Tasks

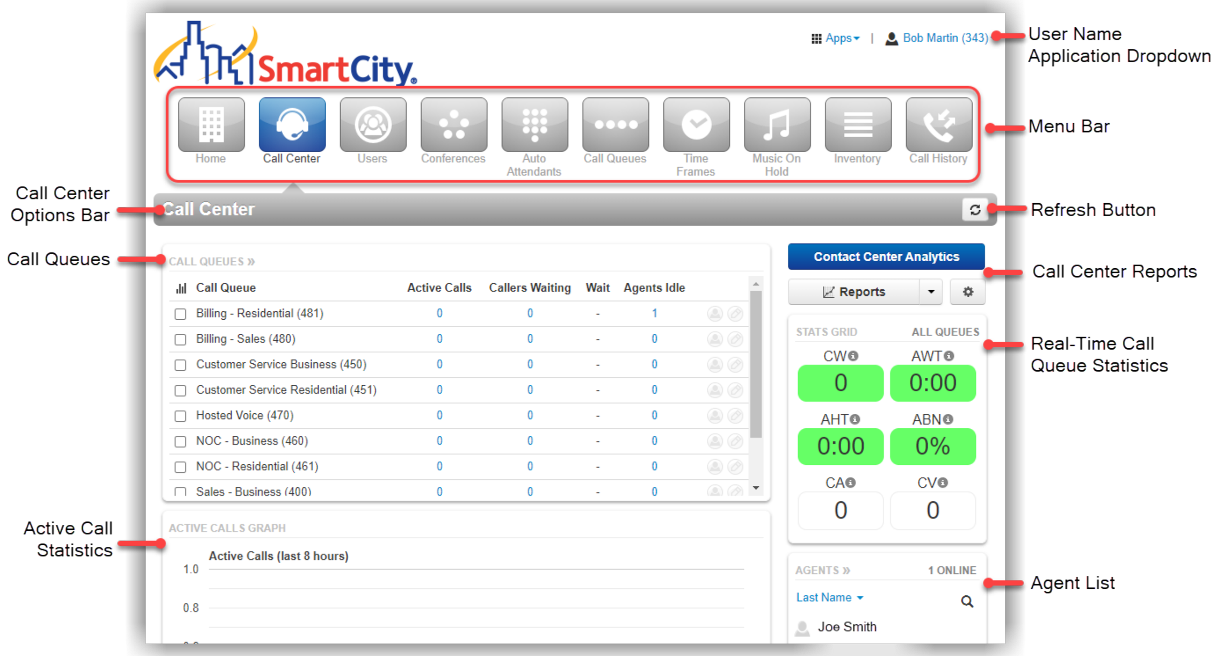
In addition to the Call Center Agent dashboard, call center supervisors and office managers can use the Call Center Supervisor dashboard to view and manage call queues and call agent settings, reports, and statistics.

This section covers the following topics:

- Navigating the Call Center Supervisor Dashboard
- Managing Call Center Queues
- Managing Call Center Agents
- Viewing the Active Calls Graph
- Managing Real-Time Call Center Statistics

Navigating the Call Center Supervisor Dashboard

Click the  **Call Center** menu icon to view the Call Center Supervisor Dashboard. This dashboard is designed for supervisors and office managers. You can see an overview of the call center queues, active call statistics, and available call center agents. You can also use this dashboard to generate call center reports and manage call center settings.



Important! Call Center Supervisors can use an agent seat to answer inbound calls within a queue. Also, Supervisors can only make changes to call queue agents who have Call Center Agent user scope assigned.

***NOTE:** If you are logged in as an office manager, you may need to click the **Manage Organization** link at the top of the Hosted Voice Home Page to see the Call Center menu icon and Supervisor dashboard.*

We recommend that office managers do not use a Call Center Supervisor seat license.

The following table describes each part of the Call Center Supervisor Dashboard:

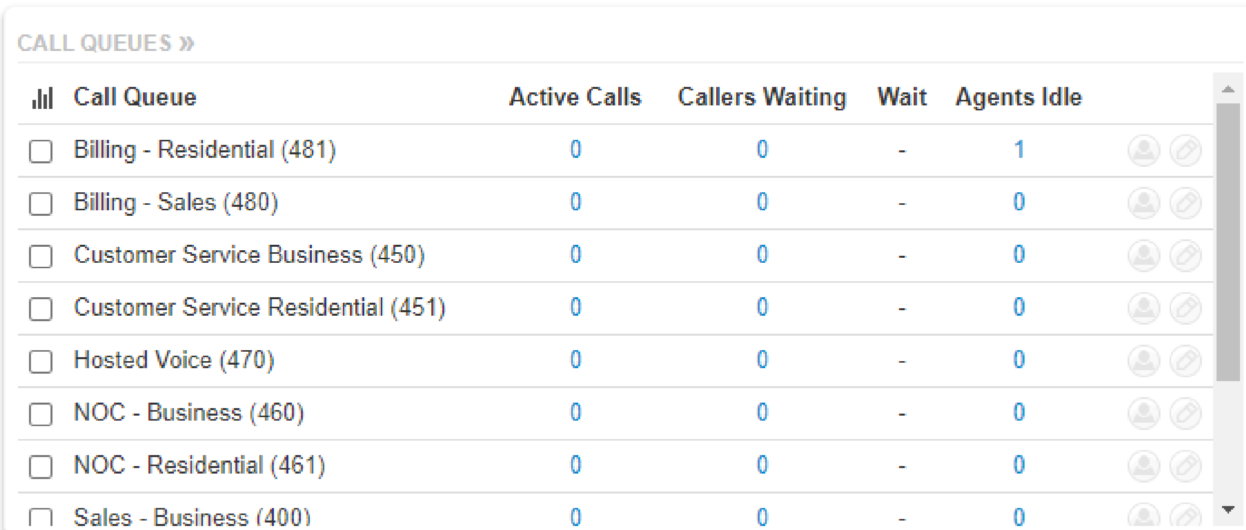
Call Center Dashboard Widgets	Description
Call Queues	Displays an overview of the current queues. Each call queue shows with its assigned extension. The Call Queues section shows how many calls are active, the number of callers on hold, and how long they have waited. This section also shows how many agents within a queue are not currently on an active call.
Active Call Statistics	Displays a visual chart graph view of the number of active calls for specific time periods.
Contact Center Analytics	Opens the Contact Center Analytics tool, which enables you to create highly customizable dashboards or wallboards for call center environments.
Call Center Reports	Enables you to generate reports for call center metrics such as call queue and agent statistics, agent availability, and dialed and abandoned call details. You can print or download the generated reports, as well as email the report output as needed.
Call Queue Statistics	Displays real-time queue statistics such as calls waiting, average wait time, average handling time, and average abandoned calls. Quickly see the call volume and the number of calls answered for a selected queue.
Call Agents	Shows a list of the call agents assigned to one or more call center queues and how many agents in the queue • A green icon next to an agent name shows the agent is online. • A grey icon next to an agent name shows the agent is offline. Click on **AGENTS >>** to access the Users page where you can manage all Hosted Voice users based on your assigned User Scope permissions.

Managing Call Center Queues

Call Center supervisors and managers use Call Queues, also known as Hunt Groups, to manage high call-traffic flows. When all phone lines are in use for a company or group, you can place a caller in a call queue until the next available agent is free to handle the call.

Viewing the Call Queues List

The CALL QUEUES section on the Call Center Supervisor dashboard shows the list of call queues created in Hosted Voice. For each Call Queue column, you can click directly on the blue hyperlink number to access a dialog box that shows the itemized details.


CALL QUEUES »

Call Queue	Active Calls	Callers Waiting	Wait	Agents Idle
Billing - Residential (481)	0	0	-	1
Billing - Sales (480)	0	0	-	0
Customer Service Business (450)	0	0	-	0
Customer Service Residential (451)	0	0	-	0
Hosted Voice (470)	0	0	-	0
NOC - Business (460)	0	0	-	0
NOC - Residential (461)	0	0	-	0
Sales - Business (400)	0	0	-	0

The following table describes each column in the CALL QUEUES section:

Call Queues Information	Description
Active Calls	Shows the number of active calls for the specific call queue.
Callers Waiting	Shows the number of callers waiting in the specific call queue.
Wait	Shows the average caller wait time for the call queue.
Agents Idle	Shows the number available call agents who are not currently handling a call.

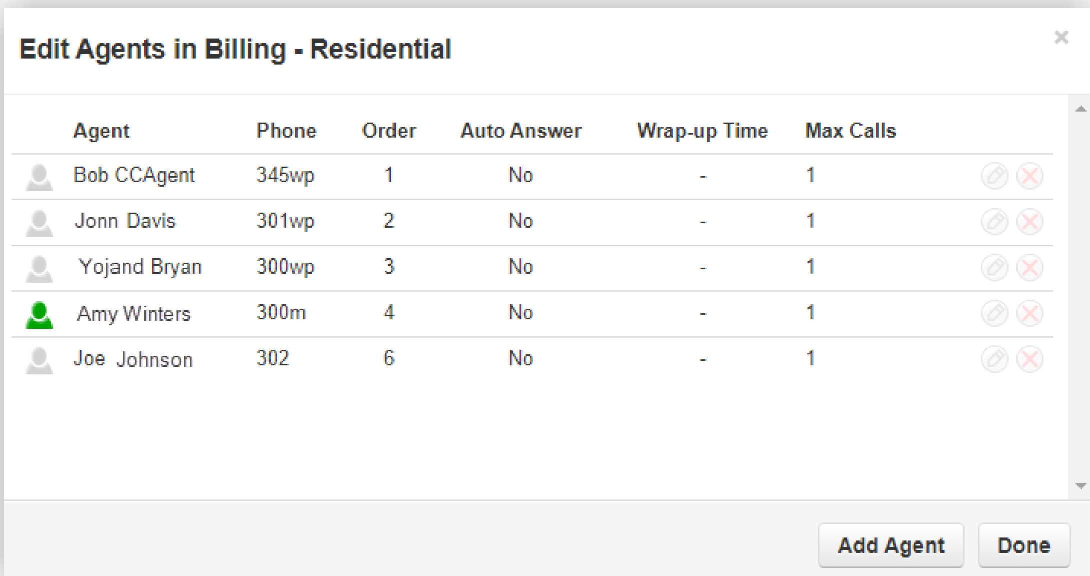
Editing Agents in the Call Queue

Supervisors can use the CALL QUEUES section on the Call Center Supervisor dashboard to make changes to the agents assigned to a call queue. For example, you may need to add or remove agents from a queue, change the agent status, change the ring order or wrap-up times for a call agent.

To edit agents in a call queue:

1. In the CALL QUEUES >> section, click the **Edit Agents** icon  next to a specific call queue.

   The Edit Agents dialog box displays.



2. Make changes to the agent detail as needed. You can add an agent, remove an agent or edit a specific agent’s information.

NOTE: *See the “Hosted Voice Administrator User Guide” for more information about editing call agent settings.*

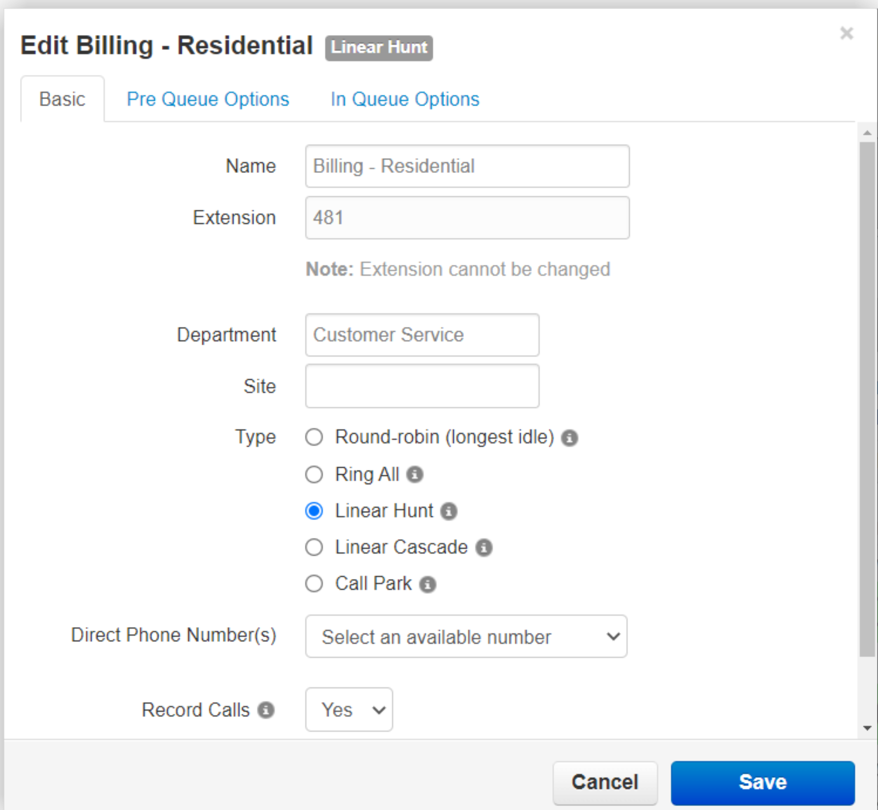
Editing Call Queues

Supervisors can make certain changes to a call queue like changing the queue ring timeout or forwarding unanswered calls. There may be times when you need to make more detailed edits to a call queue, such as changing Basic, Pre-Queue, or In-Queue options.

To edit a call queue:

1. In the CALL QUEUES >> section, click the **Edit Queues** icon next to a specific call queue.

   The Edit Queues dialog box displays.

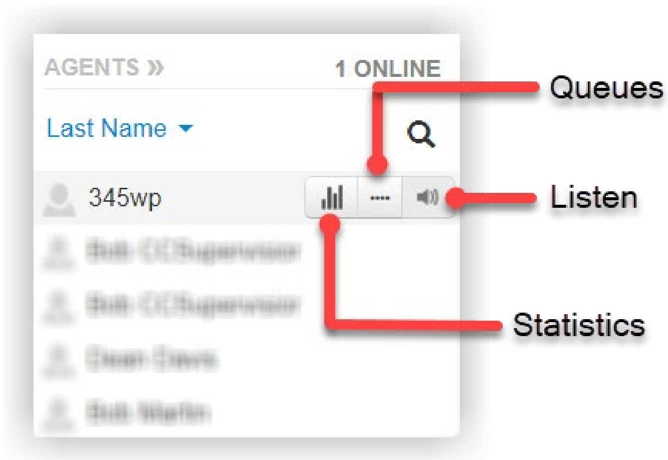


2. Make changes to the call queue detail as needed.

NOTE: *See the "Hosted Voice Administrator User Guide" for more information about editing call queue settings.*

Managing Call Center Agents

Call agent supervisors and office managers can view call center agent information to determine agent call activity and performance levels. For each call agent extension in your domain, you can view agent statistics and call-queue priorities. You can also access call recordings for an agent if call recording is enabled.



The AGENTS >> section of the Call Center Manager dashboard shows a list of agents (phone extensions) assigned to one or more call queues. A green icon next to an agent name shows the agent is online. A grey icon next to an agent name shows the agent is offline.

To navigate the AGENTS >> section:

- Click the blue drop-down arrow to sort the agent list by most recent online agents, agent extension, last name, or first name.
- Click the search icon to find a specific call agent or phone extension.
- Hover over an agent's name to view a popup window to access agent extension statistics, queues, and call recordings.

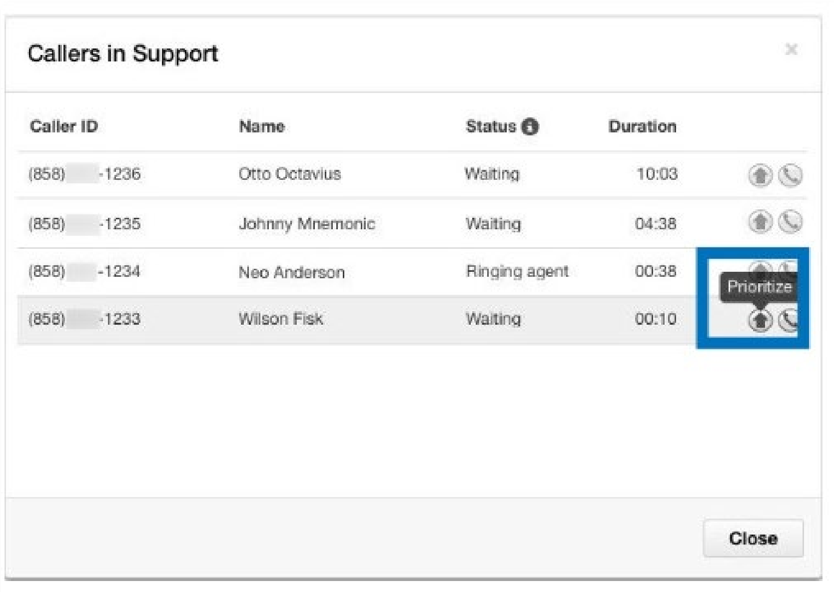
Viewing Agent Statistics

In the AGENTS >> section, click the **Statistics icon** next to a call agent extension to show detailed call statistics graphs for an agent. See "Viewing My Graphs" for more information about the My Graphs section.

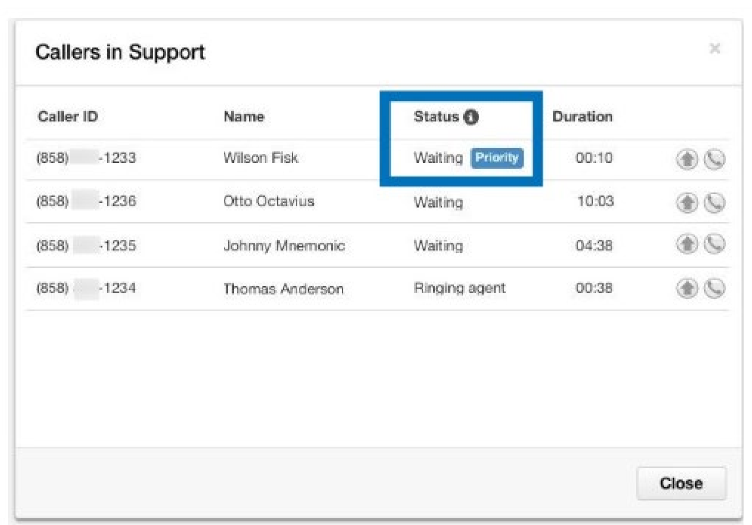
Prioritize Calls Waiting in Queues

The feature to prioritize calls that are waiting in a call queue allows greater control in how calls are being received. When a call is prioritized, it is sent to the top of the queue, and it will be the next to be dispatched to a call center agent. In the case of multiple prioritized calls, the calls will all move to the top of the queue in the order of "longest in the queue" first.

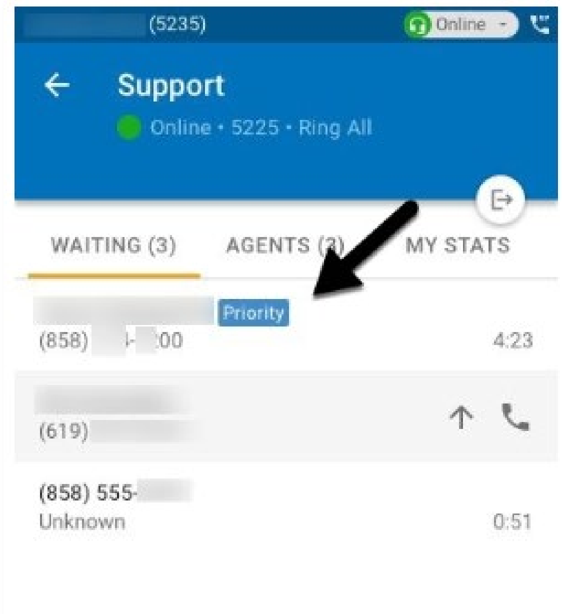
From the scope of a Call Center Supervisor, click the arrow "Prioritize" across from a call to move the call to the top of the list. Call Center Agents cannot prioritize calls.



The caller will move to the top of the call queue list. Their **Status** will now have a "priority" tag. All priority calls move to the top of the queue, in order of longest "Duration".



In the Smart City Connect mobile application, the UI is similar. The caller is moved to the top of the call queue and their call is tagged as “Priority”.



Changing Agent Queue Priority Levels

Call agent supervisors and office managers can change the call-queue priority level for an individual agent handles inbound calls from multiple call queues. When an agent services multiple queues, you might want to apply priority rules to ensure the agent's skills are applied where they are most needed. For example, if you have English and Spanish queues, you may need the Spanish queue to have a higher priority than the English queue for bilingual agents.

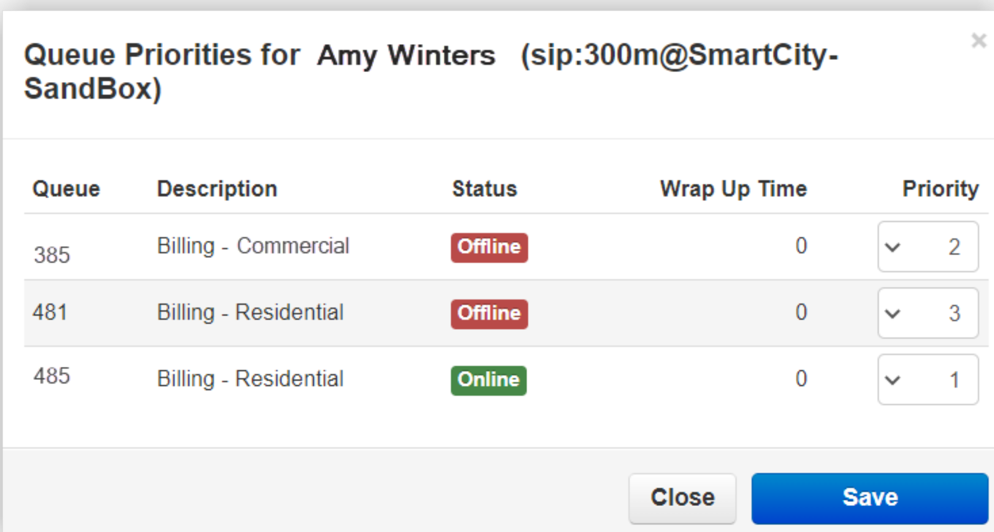
Priority Rules to Know

- Priority applies when an agent services multiple queues and multiple queues have a caller waiting for dispatch to an agent.
- The queue where the available agent has the highest priority (lowest number) will be the serviced queue.

To change agent queue priority levels:

1. In the AGENTS >> section on the Call Center Supervisor dashboard, click the **Queues icon** next to a call agent extension.

   The Queue Priority dialog box displays.



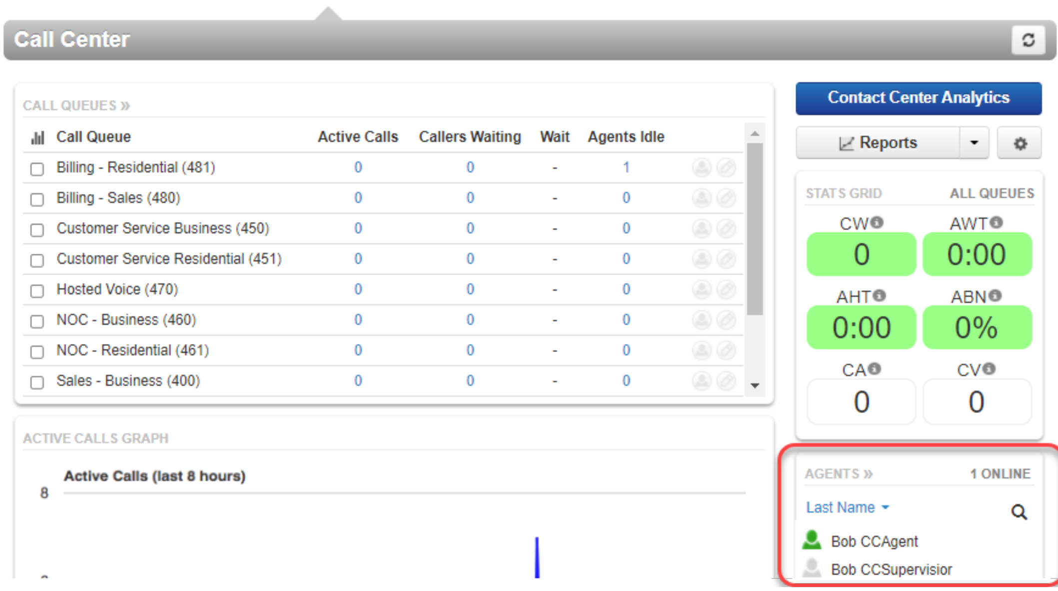
2. Make changes to the **queue priorities** as needed and then click **Save**. Refer to the Call Queue option descriptions on the next page.

The following table describes each column in the Queue Priorities section:

Call Queues Information	Description
Queue	Shows the call queue extension.
Description	Shows a description for the call queue.
Status	Shows the current agent status for the queue. If an agent is logged out of a queue, the status shows as Offline. If an agent is logged in to a queue, the status shows as Online.
Wrap Up Time	Shows the amount of time the agent is allocated to complete paperwork after finishing a call and before a new call is dispatched.
Priority	Enables a supervisor to prioritize each queue for an agent when the agent is assigned to multiple call queues. (1 is the highest priority level.) Click the **drop-down arrow** 2 to choose a priority and then click **Save**.

Listening, Barging In, or Whispering on an Agent Call

If enabled, call center supervisors and office managers can use the AGENTS >> section on the Call Center Supervisor dashboard to interact with a currently ongoing agent call.



When you access a call, you have the choice to listen, barge in, or whisper to an agent while the agent is on a call.

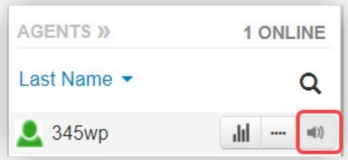
- **Listen** - Allows you to only listen in on an agent's current call. No audio is passed to the agent or the caller to whom they are speaking. With the listen feature, you are an unnoticed observer on the call.
- **Barge-In** – Allows you to access an agent's current call to have a 2-way conversation with both the agent and the caller to whom they are speaking. With the barge feature, you are an active participant on the call.
- **Whisper** – Allows you to access an agent's current call to speak to the agent; however, the caller the agent is speaking with will not hear you speak to the agent. With the whisper feature, you can engage with the agent and yet be invisible to the caller.

Listening to or joining an agent call can help when monitoring or coaching a call agent on their performance, help an agent close a sale, or glean other critical information from a call. Interacting with an agent call can also help you be aware of any potential customer trends that need to be addressed.

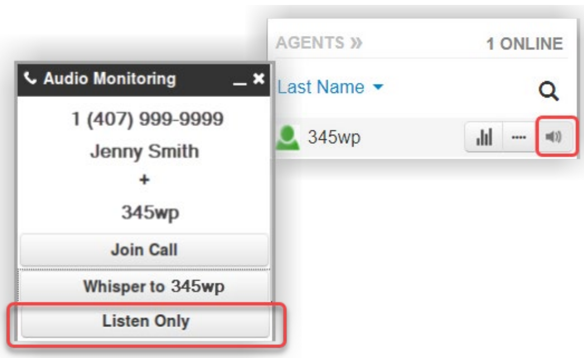
***NOTE:** You can also set up call recording depending on the business need. See the "Hosted Voice Administrator User Guide" for more information about the Call Recording feature.*

To listen in on an agent call:

1. In the AGENTS >> section of the Call Center Supervisor dashboard, hover your mouse over the desired call agent's name, and then click the **Speaker icon** next to the agent's extension.



The Audio Monitoring dialog box displays.



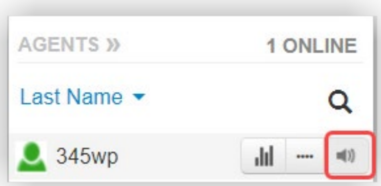
2. Click **Listen Only**.

   The call is sent to your assigned phone.

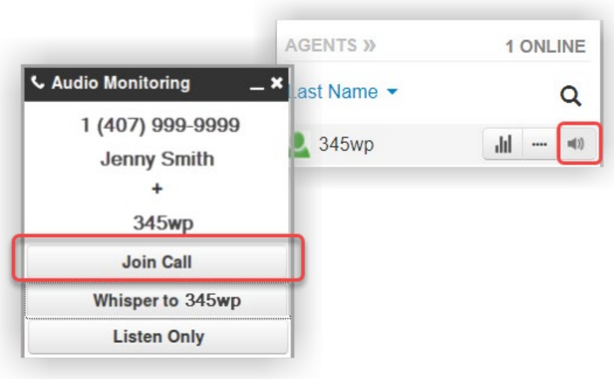
3. Listen in on the agent's current call as needed.

To barge in on an agent call:

1. In the AGENTS >> section of the Call Center Supervisor dashboard, hover your mouse over the desired call agent's name, and then click the **Speaker icon** next to the agent's extension.



The Audio Monitoring dialog box displays.



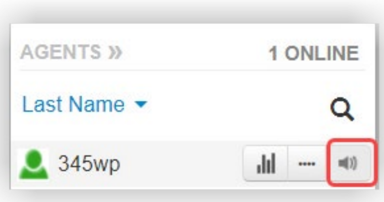
2. Click **Join Call**.

   The call is sent to your assigned phone.

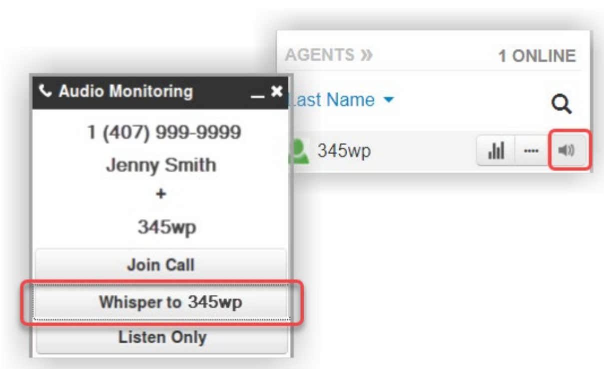
3. Join in on the agent's current call as needed.

To whisper to an agent on their call:

1. In the AGENTS >> section of the Call Center Supervisor dashboard, hover your mouse over the desired call agent's name, and then click the **Speaker icon**  next to the agent's extension.



The Audio Monitoring dialog box displays.



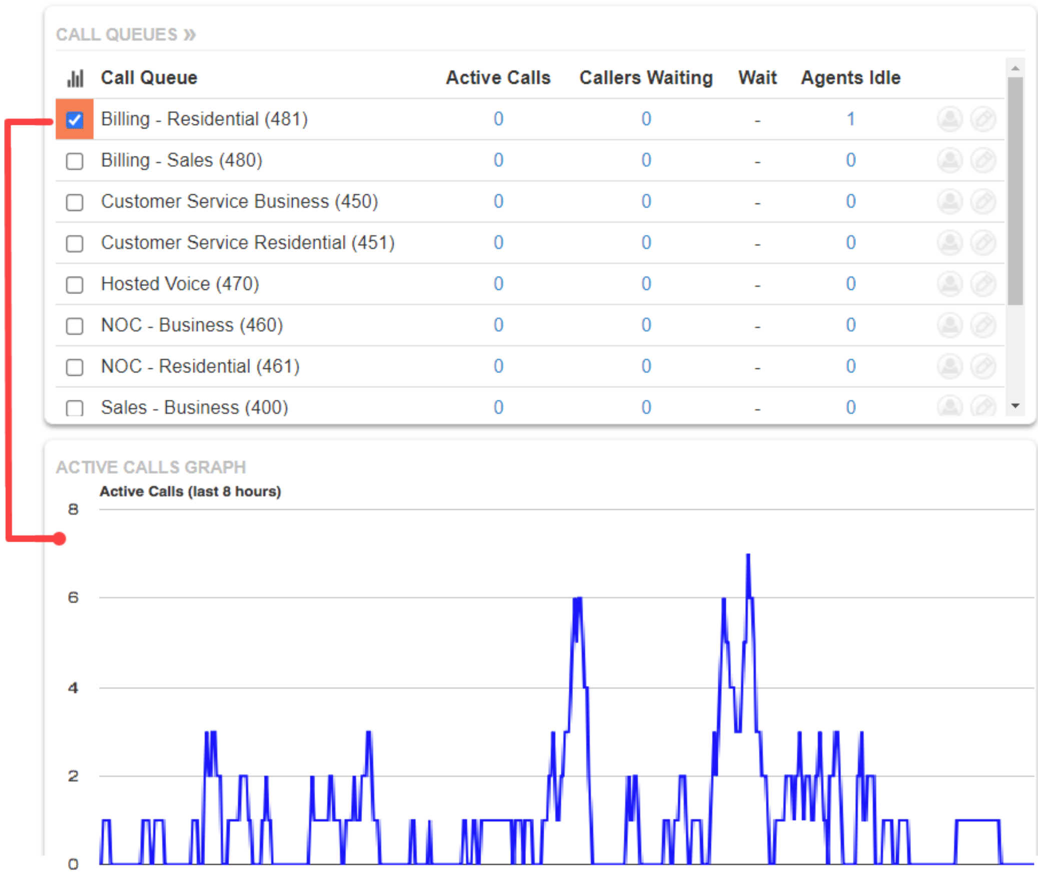
2. Click **Whisper to <Agent Extension>**.

   The call is sent to your assigned phone.

3. Join in on the agent’s current call as needed. You can speak to the agent, but the caller will not hear you.

Viewing the Active Calls Graph

In the ACTIVE CALLS GRAPH section on the Call Center Supervisor dashboard, you can view a graph of one or more call queue's active calls for the last eight-hour time period.



The graph that displays is based on the call queues you select above in the CALL QUEUES >> section. Click the **check box** next to one or more call queue names to display the corresponding graphs in the ACTIVE CALLS GRAPH section.

NOTE: *When multiple call queues are selected, the graphs display in different colors that match the call queue colors in the CALL QUEUES section.*

NOTE: *Click the **Refresh button** on the Call Center Supervisor dashboard to retrieve the most up-to-date information in the graph.*

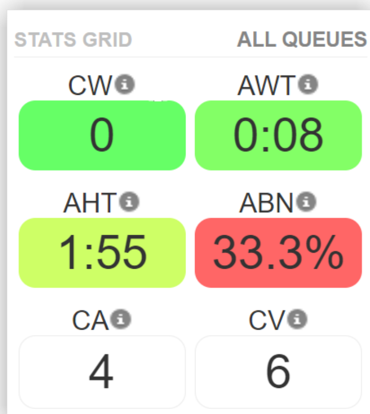
Managing Real-Time Call Center Statistics

The Call Center module has a host of call-queue related statistics that supervisors and managers can use to evaluate daily call center performance. Statistics are available in real-time for the current business day. You can view the STATS GRID section and customize the statistics that show on the grid.

***NOTE:** Click the **Refresh button** on the Call Center Supervisor dashboard to retrieve the most up-to-date statistics.*

Viewing the STATS GRID

In the STATS GRID section on the Call Center Supervisor dashboard, you can quickly view statistical data for key call center activity, such as the average call wait time, call volume, abandoned call rate, and more. Each statistic uses threshold settings and can be set to change colors based on if the statistic values are lower or higher than the defined thresholds.



The values that show in the STATS GRID section are based on the call queues you select in the CALL QUEUES >> section. Click the **check box** next to one or more call queue names to display the corresponding statistics for the selected queues in the STATS GRID section.

When thresholds are set, the statistics are color coded on a scale of red to green. The color-coded stats grid shows the following information:

- **Green** = Indicates the value is within an acceptable range based on the lower and upper threshold values set for the statistic.
- **Yellow** = Indicates the value is within the range of the lower threshold set for the statistic.
- **Red** = Indicates the value meets or exceeds the upper threshold set for the statistic.
- **White** = Indicates no thresholds are configured for the statistic.

Customizing the STATS GRID Data

The statistics that show in the STATS GRID section on the Call Center Supervisor dashboard are based on the options set in the Call Center Settings dialog box.

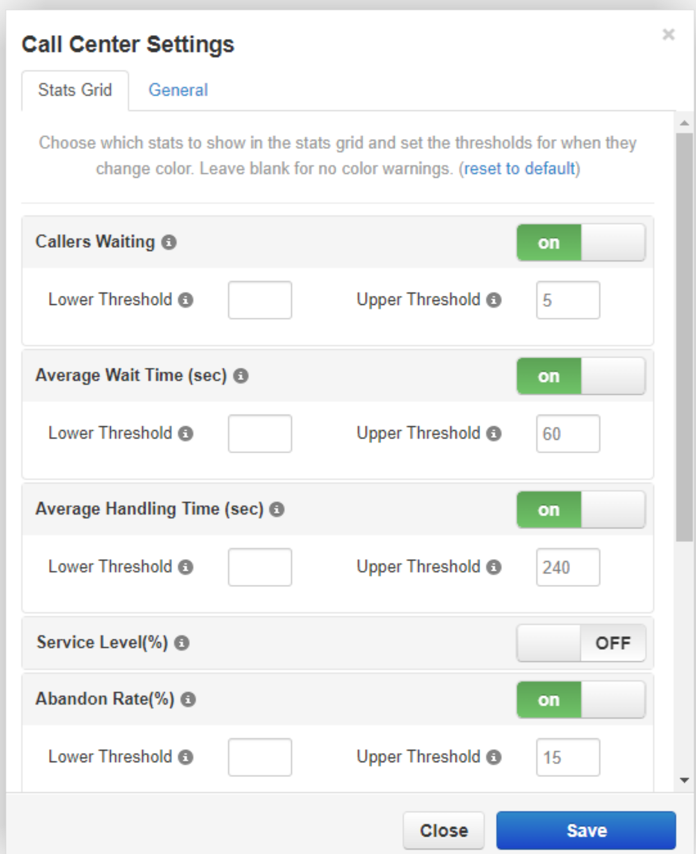
To change which statistics show in the STATS GRID section, click the **Settings button** to display the Call Center Settings dialog box.

The Call Center Settings dialog box has settings you can change on the following tabs:

- Stats Grid tab
- General tab

Stats Grid Tab Options

Use the Stats Grid tab to choose which stats to show in the Stats Grid and to set the thresholds for when each statistic changes change color. If the threshold is left blank, no color warning will display for that statistic.



The following table describes each call center statistic category that can display in the STATS GRID section. For each statistic category, set the following options:

- **On/Off Button** – To enable a statistic to show in the STATS GRID section, click the On/Off button on for the given statistic.
- **Lower Threshold** – Determines when the statistic turns completely yellow. This value should be less than the Upper Threshold value. If the option is left blank, the color will turn yellow at 70% of the Upper Threshold.
- **Upper Threshold** – Determines when the statistic turns completely red. This value should be more than the Lower Threshold value.

Stats Grid Options	Description
Callers Waiting	Indicates the number of callers waiting in the queue.
Average Wait Time (sec)	Indicates the average time a caller waits in the queue before the call is either answered or they hang up the phone.
Average Handling Time (sec)	Indicates the average of the talk time, hold time, and disposition time combined.
Service Level (%)	Indicates the ratio of calls meeting the configurable service level agreement. For the Service Level % option, the higher the number, the better. Therefore, this option has only one Threshold (for the lower limit), which is used to determine when the statistic turns completely red.
Abandon Rate (%)	Indicates the ratio of abandoned calls to calls offered.
Calls Answered	Indicates the total calls answered.
Call Volume	Indicates the overall calls, including calls that never made it all the way through to an auto attendant.
Abandoned Calls	Indicates calls that abandoned the queue before being dispatched to an agent.

General Tab Options

Use the General tab to control various settings for call center reporting and appearance.

The following table describes each setting available on the General tab:

General Options	Description
Service Level Agreement	Determines if a call was answered in an acceptable amount of time (in seconds). This is used to calculate the Service Level (%) statistic stat on the Stats tab.

Call Center Reports

Call Center reporting helps call center managers have insight into their agents' performance and shines a light on agent or customer trends that need to be addressed based on the information that the generated reports provide.

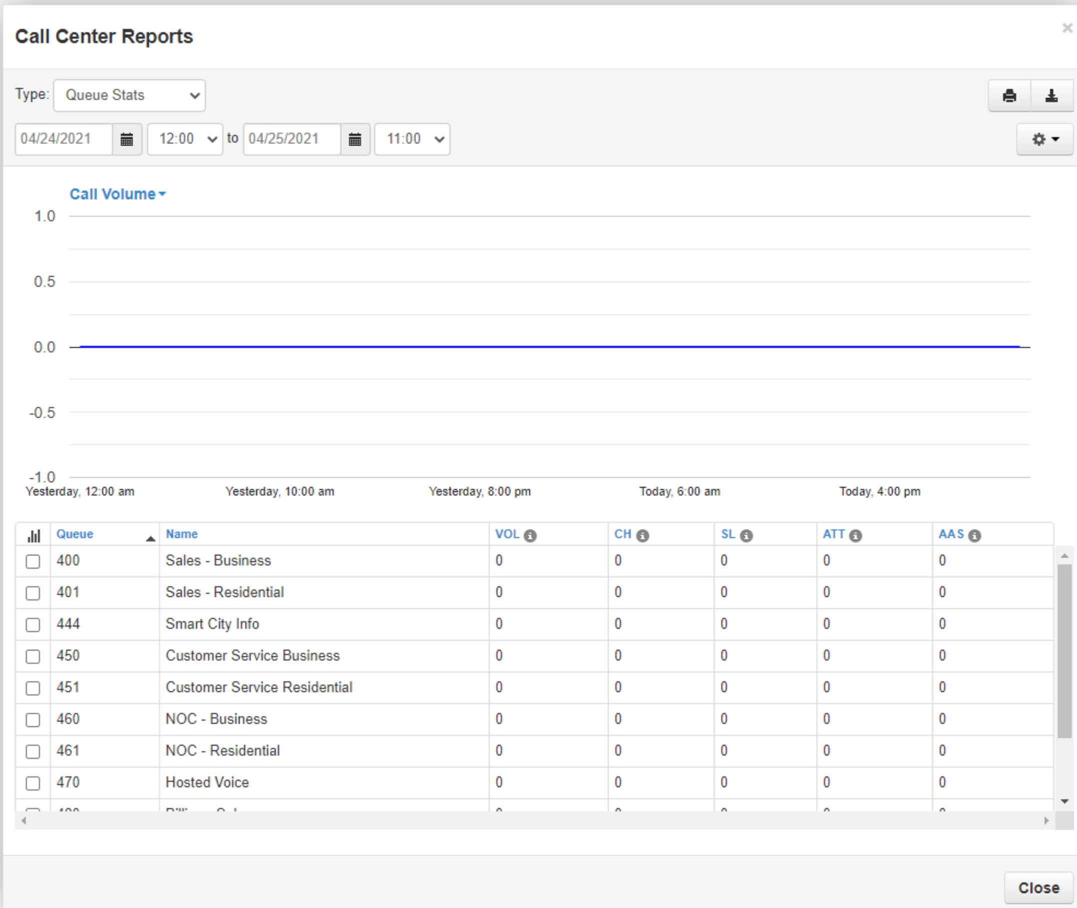
The Hosted Voice Call Center Reports feature provides useful agent-focused and call-queue focused metrics to gauge and improve agent and call center performance. These reports provide a graphical overview of call center statistics over a given period of time. The reports can cover the entire call center, queues, or individual agents. This granularity enables call center supervisors to better monitor their call center.

This section covers the following topics:

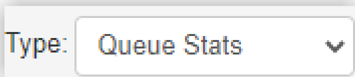
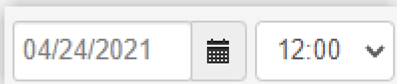
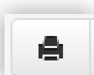
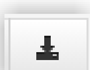
- Setting Call Center Report Options
- Generating Call Center Reports
- Scheduling and Emailing Reports

Setting Call Center Report Options

Click the **Reports button** Reports on the Call Center Supervisor dashboard to display the Call Center Reports dialog box.



The following table describes each setting available on the Call Center Reports dialog box to generate a report:

Report Options	Description
Type  	Indicates the type of call center report to generate. Available report types include: • **Queue Stats** – Generates call queue statistics by date/time range. • **Agent Stats** – Generates agent call queue statistics by department and date/time range. • **Agent Availability** – Generates agent availability statistics by department and date/time range. • **Dialed Number Stats** – Generates dialed number statistics by queue and date/time range. • **Abandoned** – Generates abandoned call statistics by queue and date/time range.
Date and Time Range  	Sets the exact 'From' and 'To' dates and times to specify the report range.
Print Report 	Prints the report to a specific printer or other output type.
Download Report 	Downloads the report as a .csv file.
Table Settings 	Indicates the table columns to show in the generated report.

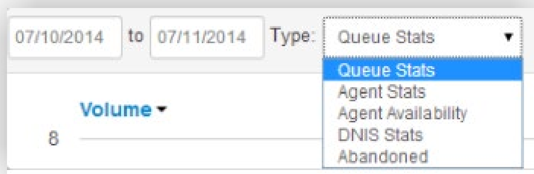
Generating Call Center Reports

This section provides an example of each type of report you can generate in the Call Center Reporting tool. It also describes the individual statistics you can include in the generated reports.

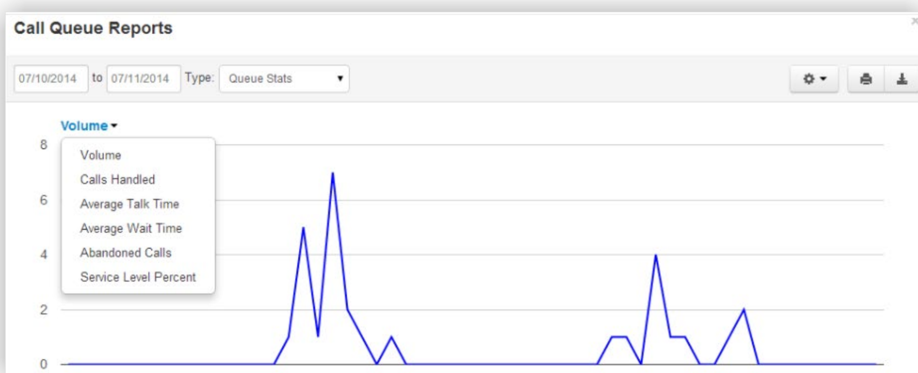
***NOTE**: The list of statistics will change based on the type of report you selected on the Basic tab*

Queue Stats Report

The Queue Stats report allows supervisors to view specific attributes on a queue-by-queue basis based on user-configurable attributes.

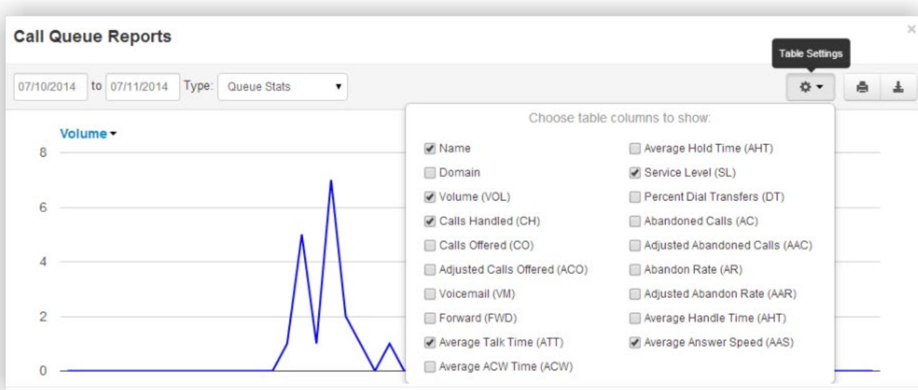


The drop-down list shown below allows you to select the information that will show on the report.



To change the available configuration fields, click the **Settings button**  at the top-right of the dialog box.

A list of check boxes displays. You can click the check box next to each field you want to include in the report graph and uncheck the ones you want to hide.



NOTE: *You can click the check boxes in the first column for Call Queue statistics to graph them individually, as shown in the above figure with the different colored rows. Clicking the first column header, which shows the bar graph icon, toggles all the check boxes On or Off.*

Queue Stats Report Parameters

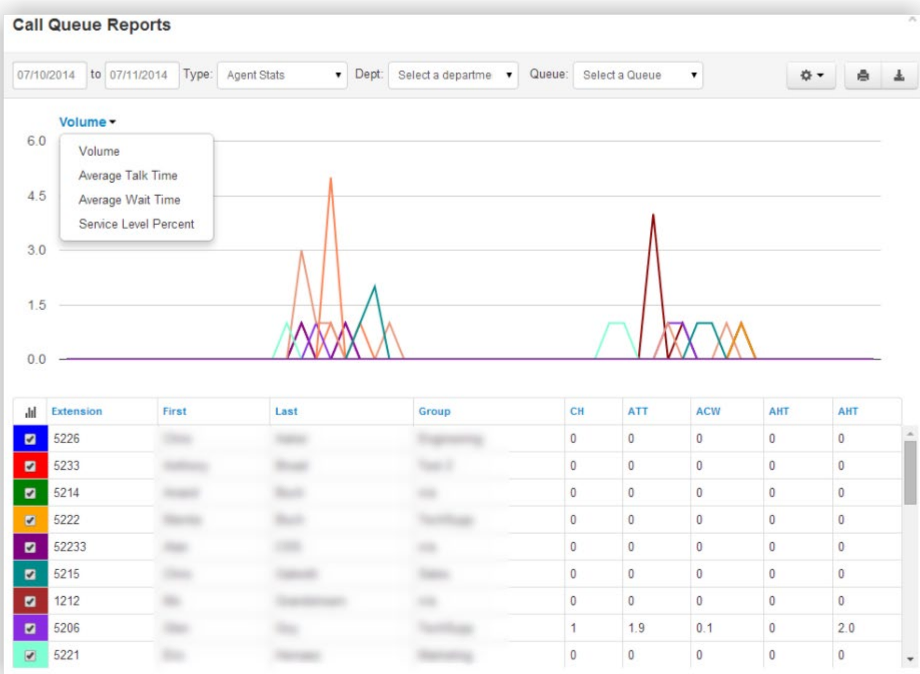
The following table describes each statistic available on the Queue Stats report:

Statistic	Description
Volume (VOL)	Number of calls originating through a Call Queue. Includes answered calls, abandoned calls, forwards, and voicemail.
Calls Handled (CH)	Number of calls answered by agent originating through a Call Queue.
Calls Offered (CO)	Number of calls that reached the queue to be dispatched to agents. Includes abandoned calls. Excludes forwards and voicemail.
Adjusted Calls Offered (ACO)	Adjusted number of calls that reached the queue. Excludes calls abandoned in less than 10 seconds. (Calls Offered CO) - (Adjusted Abandoned Calls AAC).
To Vmail	Number of calls handled by the automated voicemail system.
Forwarded	Number of calls forwarded to another queue or offnet phone number for handling. Includes forwarded calls to voicemail.
Avg Talk Time (ATT)	Average number of minutes spent by agent talking per call on calls originating through a Call Queue. Excludes hold time.

Statistic	Description
Avg After Call Work (ACW)	Average time an agent spends between the end of a call and submitting call disposition.
Avg Hold Time (AH)	Average time a caller spends on hold with an agent. Excludes waiting time in the Call Queue.
Service Level (SL)	Percentage of calls answered originating through the queue within 60 seconds. Other time windows are available
Dial Transfers (DT)	Percentage of calls that landed in the queue and were offered to an agent.
Abandoned Calls (AC)	Number of calls that abandoned the queue before being offered to an agent.
Adjusted Abandon Calls (AAC)	Adjusted number of calls that abandoned the queue. Excludes calls abandoned in less than 10 seconds. (Abandoned Calls) - (Number of calls abandoned in less than 10 seconds)
Abandon Rate (AR)	Percentage of calls offered that were abandoned. (Abandoned Calls AC) / (Calls Offered CO).
Adjusted Abandon Rate (AAR)	Percentage of calls offered that were abandoned in under 10 seconds. (Adjusted Abandoned Calls AAC) / (Adjusted Calls Offered ACO).
Avg Handle Time (AHT)	Average time an agent spent on a call. Includes Talk Time (TT), Hold Time (AH), and Disposition Time (ACW)
Avg Answer Speed (AAS)	Average time a call is in the queue before being dispatched to an agent.

Agent Statistics Report

The Agent Stats report shows various agent statistics over time.



NOTE: An additional UI configuration is required for Inbound, Outbound, and Missed Calls. Please contact your Hosted Voice administrator for more information.

NOTE: You can click the check boxes in the first column for Call Queue statistics to graph them individually, as shown in the above figure with the different colored rows. Clicking the first column header, which shows the bar graph icon, toggles all checkboxes On or Off.

Agent Stats Report Parameters

The following table describes each statistic available on the Agent Stats report:

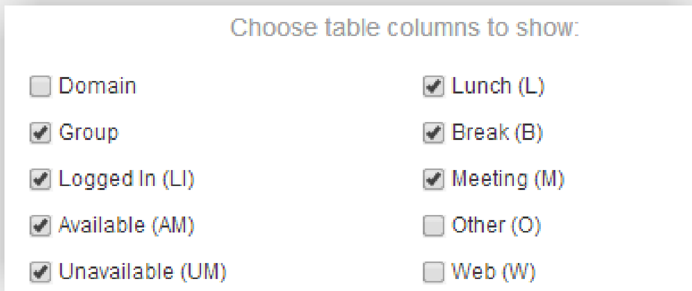
Statistic	Description
Calls Handled (CH)	The number of calls answered by the agent originating through a Call Queue.
Avg Talk Time (ATT)	Average number of minutes spent by agent talking per call on calls originating through a Call Queue. Excludes hold time.
Avg After Call Work (ACW)	Average time an agent spends between the end of a call and submitting call disposition.

Statistic	Description
Avg Hold Time (AH)	Average time a caller spends on hold with an agent. Excludes waiting time in the Call Queue.
Avg Handle Time (AHT)	Average time an agent spent on a call. Includes Talk Time (TT), Hold Time (AH), and Disposition Time (ACW)
Logged in Hours (LI)	Total time an agent status is set to Online.
Talking Time(TT)	Number of minutes spent by agent on answered calls originating through a Call Queue
Available (AM)	Total time an agent is available for calls. Includes time Logged In/Online status. Excludes Break, Lunch, Meeting, Unavailable, Web, and Other statuses.
Unavailable (UM)	Total time an agent is not available for calls. Includes time Logged Off/Offline Status, Break, Lunch, Meeting, Web, and Other statuses. Excludes Available.
Lunch (L)	Total time an agent status is set to Lunch.
Break (B)	Total time an agent status is set to Break.
Meeting (M)	Total time an agent status is set to Meeting.
The Web (W)	Total time an agent status is set to Web.
Other (O)	Total time an agent status is not Available, Break, Lunch, Meeting, or Web.
Outbound Attempt (OATT)	Number of outbound call attempts by agent. Excludes on-net calls and conference calls.
Outbound Answered (OANS)	Number of outbound calls by agent answered by remote party. Includes calls answered by voicemail. Excludes on-net calls and conference calls.
Outbound Minutes (OM)	Number of minutes spent by agent on outbound calls. Excludes call center calls, on-net calls, and conference calls.
Outbound Average (OAvg)	Average length of time spent by agent on outbound calls. Excludes call center calls, on-net calls, and conference calls.
Inbound Answered (IANS)	Number of inbound answered calls to an agent. Includes call center calls. Excludes on-net calls and conference calls.
Inbound Minutes (IM)	Number of minutes spent by an agent on inbound calls. Includes call center calls.

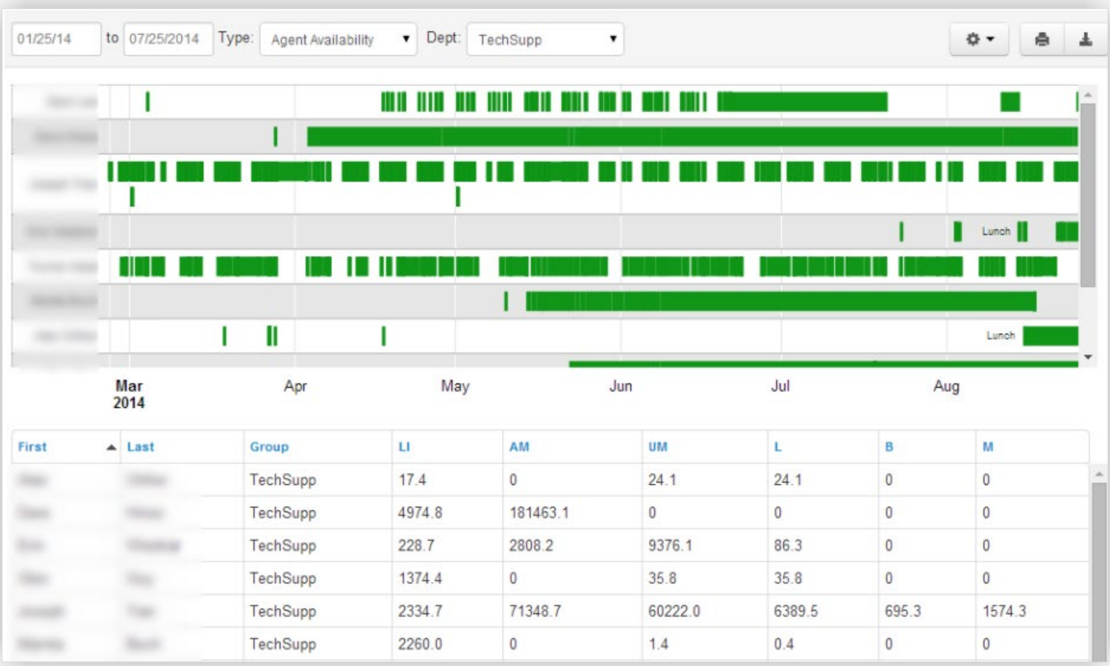
Statistic	Description
	Excludes on-net calls and conference calls.
Inbound Average (IAVG)	Average length of time spent by an agent on inbound calls. Includes call center calls. Excludes on-net calls and conference calls.
Missed Call (MC)	Number of calls originating through a call queue offered to an agent but not answered. This includes multiple attempts if a call loops through all agents, but excludes unanswered simultaneous ring calls. (added in v36)
Calls Handled (CH)	Number of calls answered by agent originating through a Call Queue.

Agent Availability Report

The Agent Availability report shows the availability of agents in the domain or in a department within a domain. You choose the values that are to be graphed from the following options:

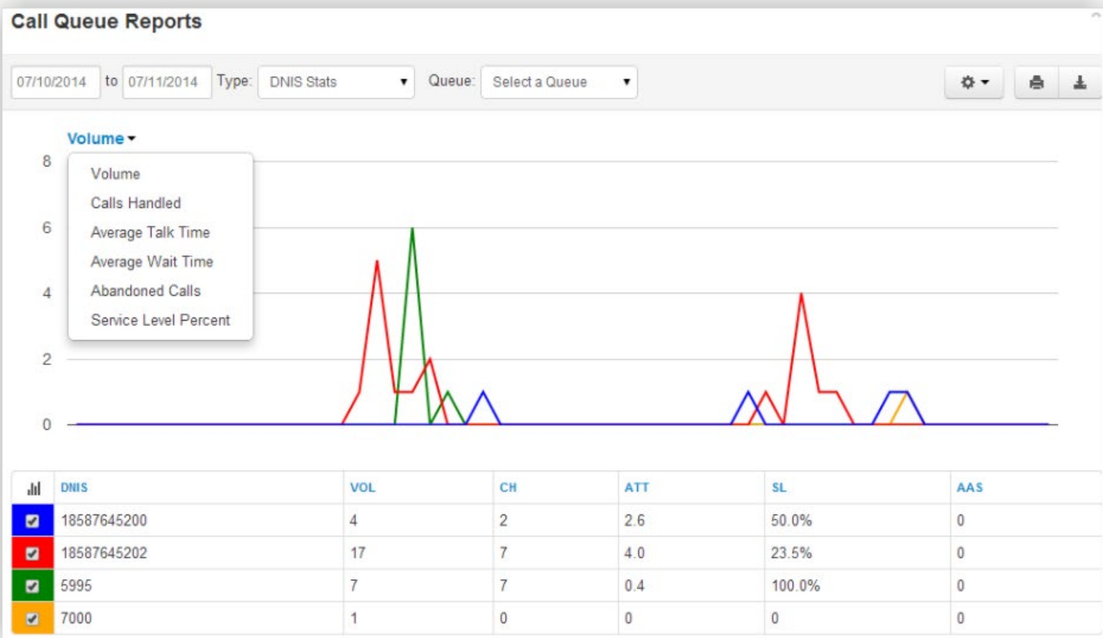


When configured, and when agents have been signing in and out, supervisors can see an agent availability display like the following:



Dialed Number Identification Service (DNIS) Statistics

The DNIS stats report shows information based on the DNIS. DNIS is a telephone service that informs the receiver about a call that the caller dialed. DNIS is a common feature of 800 and 900 services. If you have multiple 800 or 900 numbers to the same destination, the DNIS tells you which number was called.



	DNIS	VOL	CH	ATT	SL	AAS
	18587645200	4	2	2.6	50.0%	0
	18587645202	17	7	4.0	23.5%	0
	5995	7	7	0.4	100.0%	0
	7000	1	0	0	0	0

NOTE: *You can click the checkboxes in the 1st column for DNIS statistics to graph them individually; as shown in the above screenshot with the different colored rows. Also, clicking on the 1st column header (the bar graph icon) will toggle all the checkboxes On/Off.*

DNIS Statistics Report Parameters

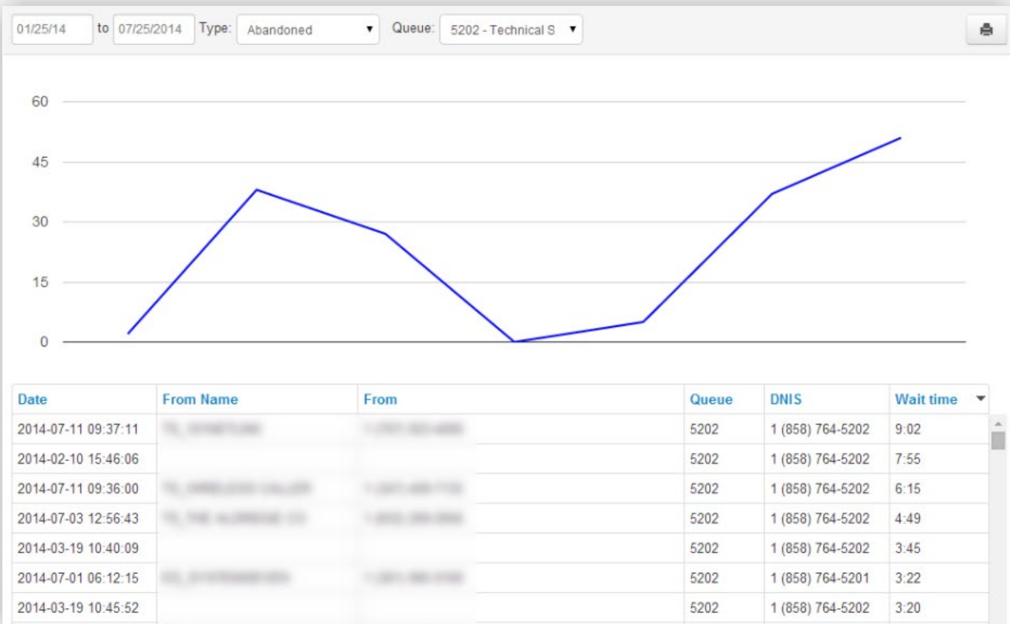
The following table describes each statistic available on the DNIS Stats report:

Statistic	Description
Calls Handled (CH)	The number of calls answered by the agent originating through a Call Queue.
Call Volume (VOL)	Number of calls originating through a Call Queue. Includes answered calls, abandoned calls, forwards, and voicemail.
Calls Handled (CH)	Number of calls answered by agent originating through a Call Queue.
Calls Offered (CO)	Number of calls that reached the queue to be dispatched to agents. Includes abandoned calls. Excludes forwards and voicemail.
Adjusted Calls Offered (ACO)	Adjusted number of calls that reached the queue. Excludes calls abandoned in less than 10 seconds. (Calls Offered CO) - (Adjusted Abandoned Calls AAC).
To Vmail (VM)	Number of calls handled by the automated voicemail system.
Forwarded (FWD)	Number of calls forwarded to another queue or offnet phone number for handling.
Avg Talk Time (ATT)	Average number of minutes spent by agent talking per call on calls originating through a Call Queue. Excludes hold time.
Avg After Call Work (ACW)	Average time an agent spends between the end of a call and submitting call disposition.
Avg Hold Time (AH)	Average time a caller spends on hold with an agent. Excludes waiting time in the Call Queue.
% Service Level (SL)	Percentage of calls answered originating through the queue within 60 seconds. Other time windows are available.
% Dial Transfers (DT)	Percentage of calls that landed in the queue and were offered to an agent.
Abandoned Calls (AC)	Number of calls that abandoned the queue before being offered to an agent.
Adjusted Abandon Calls (AAC)	Adjusted number of calls that abandoned the queue. Excludes calls abandoned in less than 10 seconds. (Abandoned Calls) - (Number of calls abandoned in less than 10 seconds)
Abandon Rate (AR)	Percentage of calls offered that were abandoned.

Statistic	Description
	(Abandoned Calls AC) / (Calls Offered CO).
Adjusted Abandon Rate (AAR)	Percentage of calls offered that were abandoned in under 10 seconds. (Adjusted Abandoned Calls AAC) / (Adjusted Calls Offered ACO).
Avg Handle Time (AHT)	Average time an agent spent on a call. Includes Talk Time (TT), Hold Time (AH), and Disposition Time (ACW)
Avg Answer Speed (AAS)	Average time a call is in the queue before being dispatched to an agent.
Available Minutes (AM)	Total time an agent is available for calls. Includes time Logged In/Online status. Excludes Break, Lunch, Meeting, Unavailable, Web, and Other statuses.
Avg Talk Time (ATT)	Average number of minutes spent by agent talking per call on calls originating through a Call Queue. Excludes hold time.

Abandoned Calls Report

The Abandoned Calls report shows call center graphs for abandoned calls, organized by individual queues. Time is measured along the x-axis and the number of calls abandoned is measured along the y-axis. All of the abandoned calls for the queue appear below the graph, along with statistics about each individual call.



NOTE: *An additional UI configuration is required for Inbound, Outbound, and Missed Calls. Please contact your Hosted Voice administrator for more information.*

NOTE: *You can click the check boxes in the first column for Call Queue statistics to graph them individually, as shown in the above figure with the different colored rows. Clicking the first column header, which shows the bar graph icon, toggles all checkboxes On or Off.*

Scheduling and Emailing Reports

Call Center enables call center supervisors and office managers (with call center functionality enabled) to request emailed reports in a variety of formats and time windows. Advanced settings also allow you to pick a few of the most important statistics to be viewed prominently in the email body.

NOTE: *The 'PORTAL_CALL_QUEUE_MANAGER_EMAIL' UI configuration parameter must be enabled to use the report email feature. Contact your Hosted Voice administrator for more information about UI configuration parameters.*

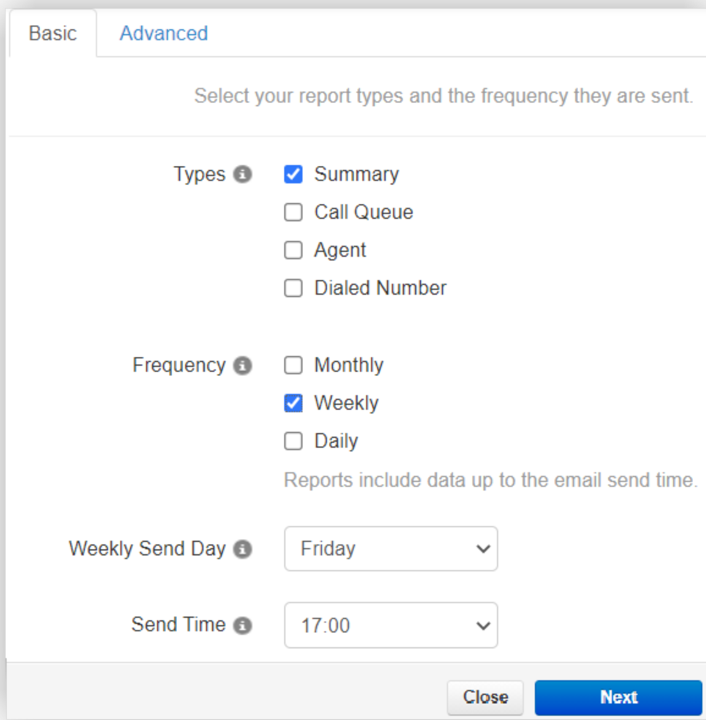
To customize and schedule emailed reports:

1. In the Reports section of the Call Center Supervisor dashboard, click the 

drop-down arrow on the Reports button.

2. Select **Email Reports.**

   The Email Reports dialog box displays with the Basic tab selected.



The Email Reports dialog box lets you select the type of report you want to generate, as well as how often you want to generate and email the report. On the Basic tab, you select the type of report and how often you want the report emailed. When you select one or more report types, the Advanced tab displays for you to customize the information you want to show in the report.

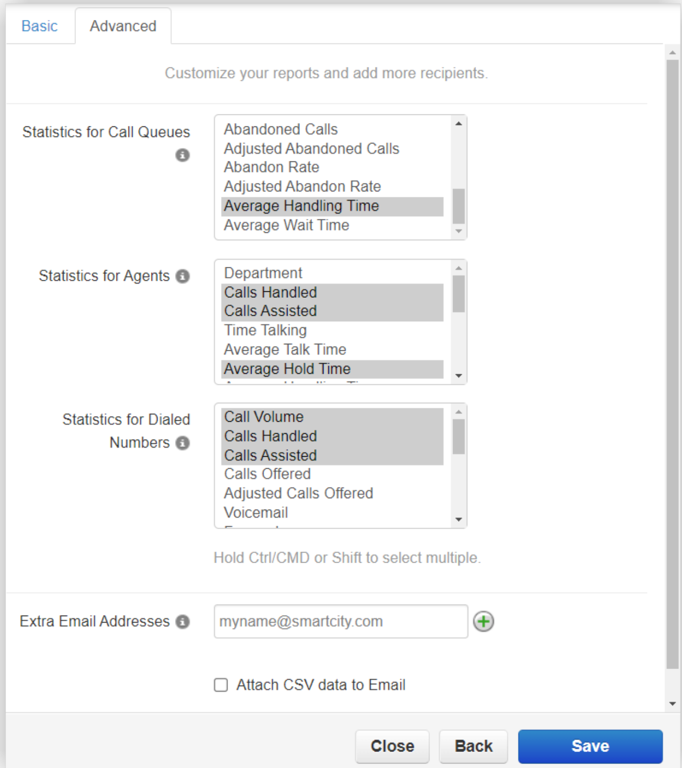
__NOTE:__ When you schedule a report to generate, the report will include data up to the time that the email is sent.

3. On the Basic tab, complete the following email **report options**:

Basic Tab	Description
Types	The following report types are available to select. You can select one or multiple report types to be generated. When you select a report type, you can use the Advanced tab to specify the report attributes to include in the report. • **Call Queue** - Shows specific attributes on a queue-by-queue basis based on the attributes selected on the Advanced tab. • **Agent** - Shows agent-related statistics based on the attributes selected on the Advanced tab. • **Dialed Number** - Shows Dialed Number Identification Service (DNIS) statistics based on the attributes selected on the Advanced tab. • **Summary** - Shows a summary of the top statistics from each of the other report types, consolidated into the email body.
Frequency	Indicates how often to generate and email the selected reports. The following options are available to select and you can choose more than one frequency type. • **Monthly** – Generates the report on a monthly basis. Choose the day of the month to send the report. If you select 1, statistics from the full previous month is generated and emailed. • **Weekly** – Generates the report on a weekly basis. Choose the day of the week and the exact time to send the report. • **Daily** – Generates the report on a daily basis. Choose the exact time to send the report.

4. Click **Next** to go the Advanced tab.

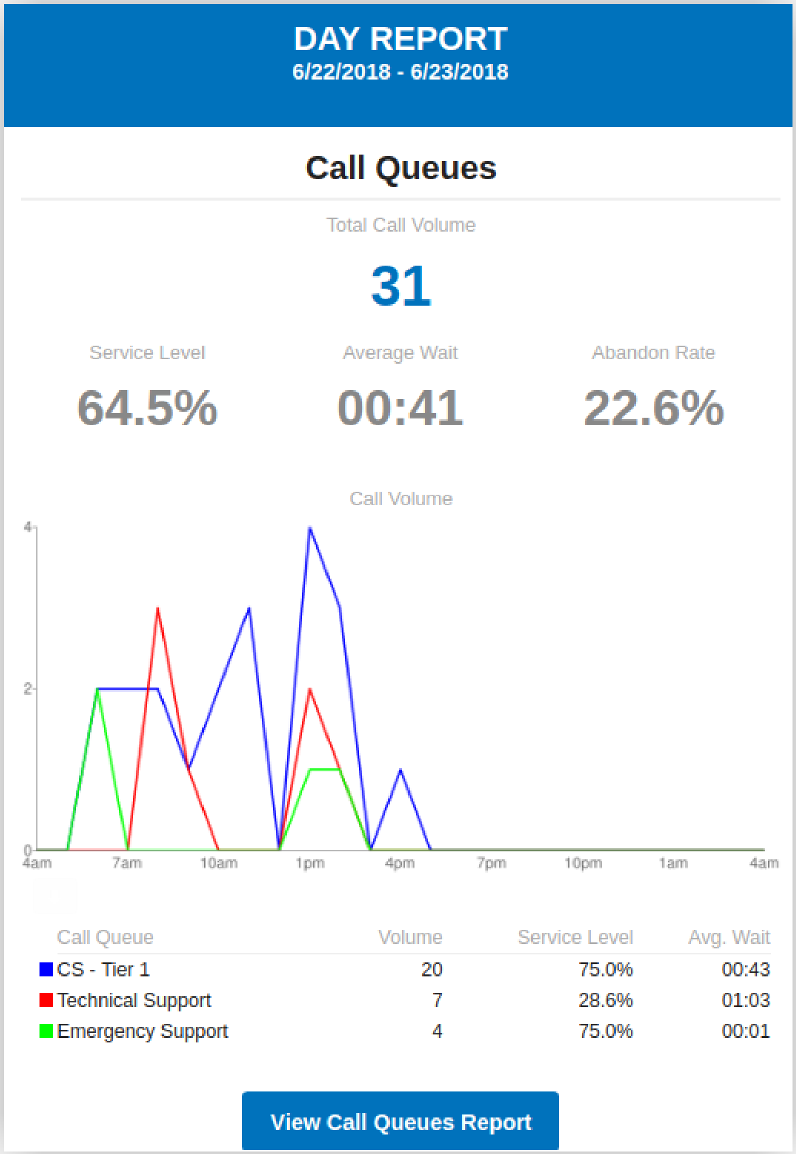
On the Advanced tab, each report type you select will be generated and emailed based on the report frequency options set.



5. Complete the following **options** on the Advanced tab and then click **Save** to schedule the report:

Advanced Tab	Description
Statistics for Call Queues	Select which statistics will show as columns in the Call Queues report table.
Statistics for Agents	Select which statistics will show as columns in the Agents report table.
Statistics for Dialed Numbers	Select which statistics will show as columns in the Dialed Numbers report table.
Extra Email Addresses	Type additional email addresses where you want to send the generated reports. Click the **plus sign** ⊕ and then add up to four email addresses as needed.
Attach CSV data to Email	Click the check box to also receive the raw data for the report in .csv format.

The generated Call Center report is emailed based on the frequency requested.



DAY REPORT
6/22/2018 - 6/23/2018

Call Queues

Total Call Volume

31

Service Level	Average Wait	Abandon Rate
64.5%	00:41	22.6%

Call Volume

Call Queue	Volume	Service Level	Avg. Wait
CS - Tier 1	20	75.0%	00:43
Technical Support	7	28.6%	01:03
Emergency Support	4	75.0%	00:01

View Call Queues Report

Contact Center Analytics

Contact Center Analytics is a live reporting tool that helps Call Centers boost performance and customer satisfaction through actionable analytics. Customizable dashboards and independent views for supervisors and agents, Contact Center Analytics offers real-time detailed insights into a call center's day-to-day operations.

This section covers the following topics:

- Accessing the Contact Center Analytics Main Menu
- Viewing a Board
- Adding and Editing a Board

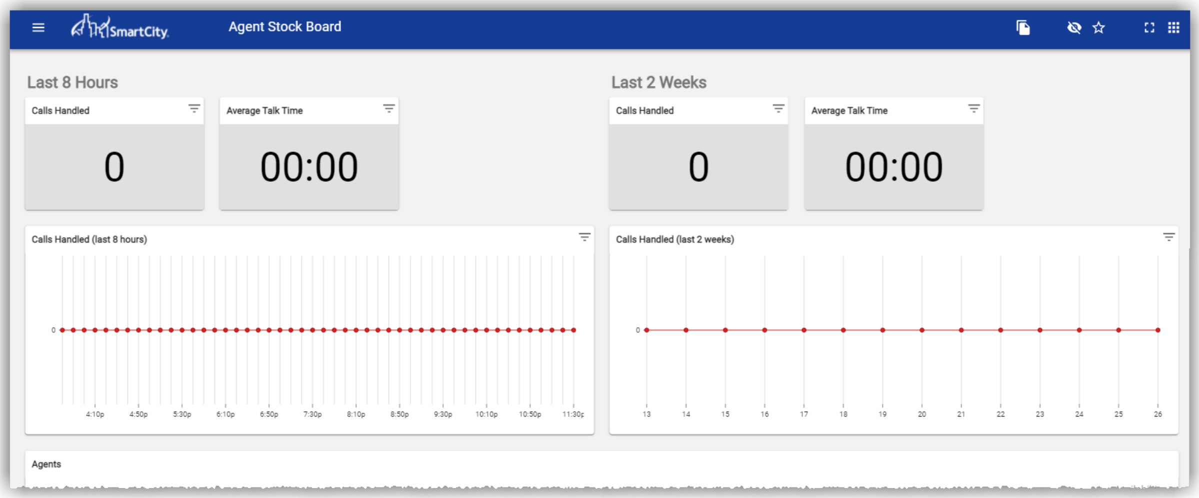
Accessing the Contact Center Analytics Main Menu

Use the Call Center Supervisor dashboard to access the Contact Center Analytics tool.

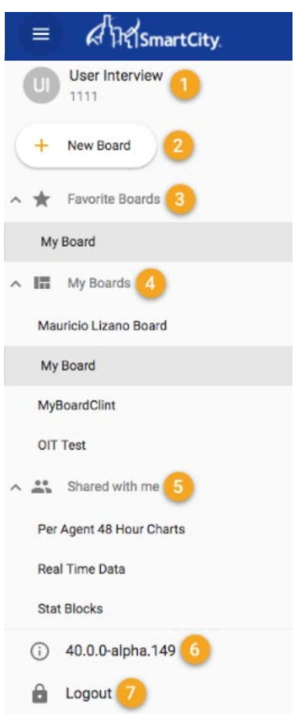
To access Contact Center Analytics:

1. Click the **Contact Center Analytics button** Contact Center Analytics .

   The Contact Center Analytics tool opens and the general navigation and viewing boards display.



2. Click the Main Menu button to show the side navigation panel:



1. Your logged in user name and extension
2. Add a new board button
3. List of boards favorited by you
4. List of boards owned by you
5. List of boards shared with you
6. App version number
7. Log out button

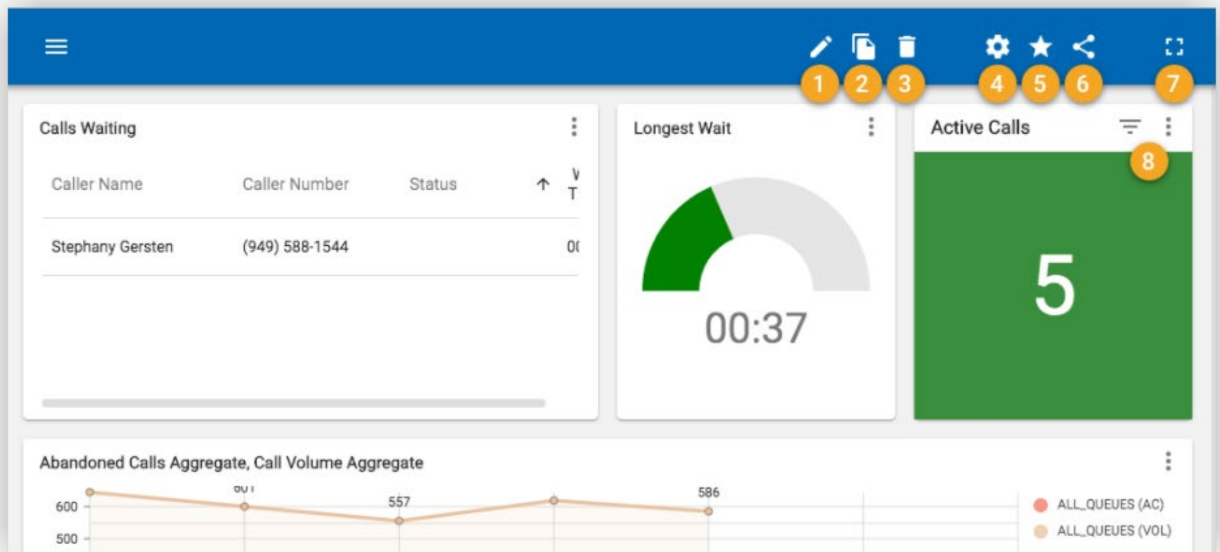
Viewing a Board

Below are some of the buttons and actions you can expect to see in the app bar when viewing a board:

- **Edit board:** Enters the board edit mode where you can change the cards and contents of the board.
- **Copy board:** Copies a board and create a duplicate that will appear in your list of boards. Copied boards have all content and settings from the original board.
- **Delete board:** Permanently deletes a board so that it is no longer viewable.
- **Board settings:** See the "Board settings" section.
- **Favorite board:** Sets the board as a favorite so that it shows in your list of favorite boards on the side navigation panel.
- **Share board:** See the "Sharing a board" section.
- **Enter full screen:** Toggles between normal and full screen viewing.
- **More and filters:** The "more" menu provides a shortcut to specific card actions. If the card has filters on its data set, the filters button will also display.
    - Edit card
    - Copy card
    - Delete card

Adding and Editing a Board

After adding a new board or editing an existing board, the app bar changes color showing you are in Edit mode and the following edit options are available.

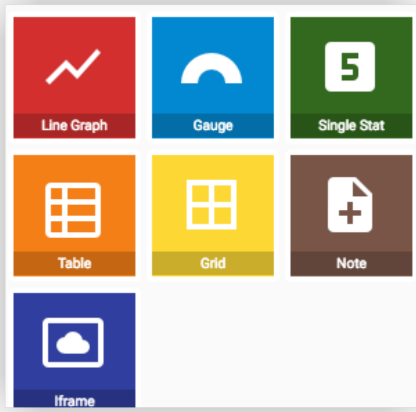


- **Edit board name:** Change the board's name.
- **Save or cancel changes**: After making changes made to a board, save and cancel buttons will appear. You can save or revert any changes made.
- **Add card:** See "Adding a card" section.
- **Add header:** Add a simple text header to help create card groupings or sections. You can adjust header width and font size.
- **Drag and drop cards:** Click and hold on any card, then drag to the desired position.
- **Drag to resize cards:** Click and hold on the corner handle, then drag to resize.
- **Card hover options:** Hover over a card to show some quick actions.
    - Edit card
    - Copy card
    - Filters (if applied)
    - Delete card
- **Back:** Exit edit mode by clicking the back button.

Adding a Card

1. Click the Add card button ADD A CARD.

2. Click the **Choose Type** button CHOOSE TYPE and then select one the following card types:



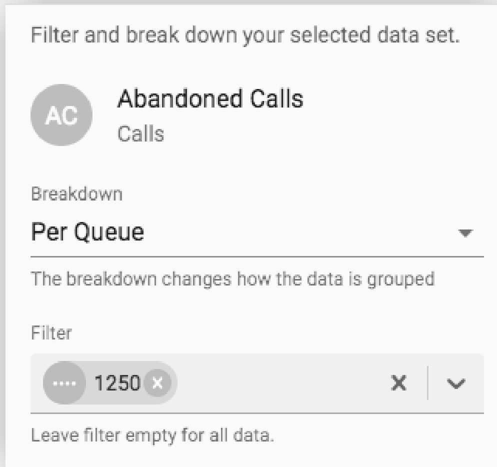
Card Type	Description
Line Graph	One or more lines from a data set plotted over time.
Gauge	A stat value with a gauge that fills to a specified limit.
Single Stat	A single statistic value.
Table	Data with multiple stats or descriptive information available in columns.
Grid	Simple table arranged in a grid format to maximize number of items.
Note	Customizable text content.
Iframe	Display external web sites or resources.

3. Add data to the cards. One or more data sets can be added to cards depending on the selected card type. Select from a list of data sets that are compatible with the chosen card type.

   - Note and iframe card types only take manual text input.
   - If you enabled the custom data sources parameter, the following option will appear at the bottom of the data set list: ANALYTICS_ENABLE_CUSTOM_DATA_SOURCES

4. Select the **Breakdown** for the selected data sets.

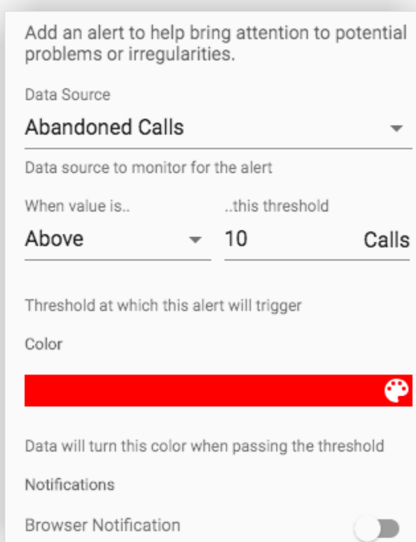
   Data sets are online graphs that can be broken out into separate lines. The breakdown options are: aggregate, per queue, and per agent. Specific breakdown options may be limited depending on the data set.



5. Select the **Filters** for the selected data sets.

   Filters for call queue, departments, sites, and agents can be applied to data sets. (Default filters can be applied to new cards. See "Board Settings" section.)

6. Add an **alert** as needed. Alerts allow you to trigger color changes or browser notifications when a monitored data set crosses a threshold.



7. Select which data set you want to monitor and set the alert to trigger when it's above or below the specified threshold.

NOTE: *Multiple thresholds must have the same threshold trigger direction. If your first alert triggers when it's above a threshold, the rest of your alerts must also be above their specified threshold.*

8. Select the **color** of your alert.

9. Adjust the **style** and change the visual settings to fine-tune your card.

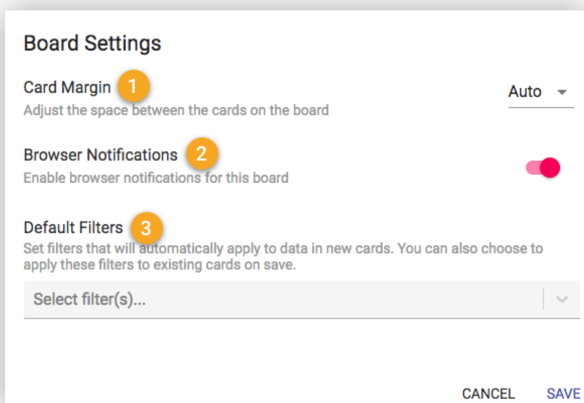
   - Style settings change depending on the card type.
   - Additional style settings can be enabled for some cards using the following parameter:

     ANALYTICS_EXTRA_STYLE_CONTROLS parameter. (See "Enabling additional style controls" section.)

10. Click and drag a card to move and resize your card to the desired position.

Board Settings

Click the **Board Settings icon**  to adjust card layout margins, toggle browser notifications for the board, and set default filters that new cards will inherit for their data sets.



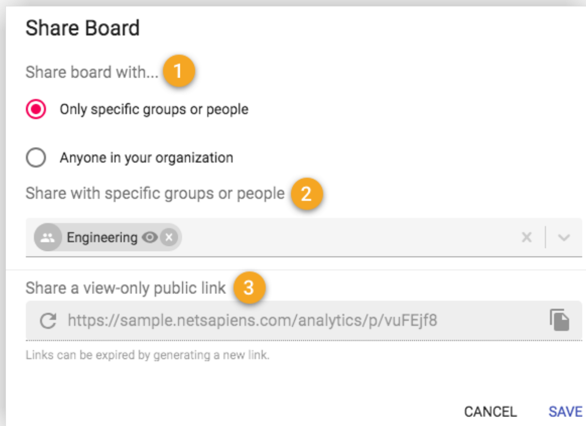
1. **Card Margin:** Adjust the margin space between cards to better fit display resolutions. You can select: auto, 16px, or 24px. The auto option will adjust depending on the view width.

2. **Browser Notifications:** Enable or disable browser notifications for a board. This allows you to turn off notifications on a board.

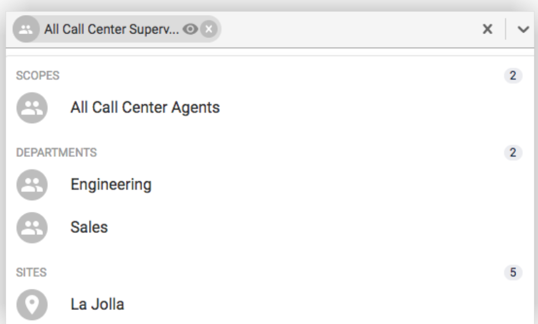
3. **Default Filters:** Set filters that will automatically apply to data sets in all new cards within the board. Updating and saving filters here will also give you the option to update all existing cards with the new filters.

Sharing a Board

Board sharing options are available in Contact Center Analytics and allow you to share your board with specific individuals or broad groups. Boards shared with others will appear in their list of "Boards shared with me" in the side navigation.



1. **Share board with...:** By default, boards are set to be shared only with specific groups or people. You can change this so the board is shared with everyone in the organization and toggle whether everyone can edit.
2. **Share with specific groups or people:** Sharing with specific groups or people requires you to add a list of scopes, sites, departments, or people with whom to share.



- Enter a specific scope, department, site, or person.
- Configure individual settings to set who can view or edit the board.

3. **Share a view-only public link:** If you have the ANALYTICS_PUBLIC_LINK_ENABLED parameter set to "yes," the public link will be enabled. Sharing a public link with others allows them to view a specific board without logging in. (Old links can be expired or invalidated by generating a new link.)

SMART CITY |

smartcityvoice.com