



# Telstra IP Telephony Standard Call Centre for Agents

User Guide

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# Welcome to Standard Call Centre for Agents!



This user guide provides step-by-step instructions and reference information for using TIPT Standard Web Based Call Centre client application Release 19.

## Audience

This document is intended for Standard Call Centre agents and supervisors who use the TIPT Standard Web Based Call Centre Client.

## Need more support?

For more information on the Standard Call Centre procedures used by Customer Administrators, see:

- TIPT Customer Administrator User guide.
- TIPT Call Centre Reporting Guide.

## Conventions used in this guide

The following typographical conventions are used in this guide for simplicity and readability:

- Web addresses, e-mail addresses and hyperlinks are shown in **Regular**, for example [www.telstraenterprise.com.au](http://www.telstraenterprise.com.au).
- Button names and titles/features on your computer screen are shown in **Bold**.

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Telstra IP Telephony Standard Call Centre for Agents

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# Introduction

The TIPT Premium Call Centre web based client is a call console management product for call centre agents and supervisors.

This document describes the TIPT Premium Thin Call Centre clients for supervisors.

TIPT Premium Call Centre delivers the following benefits to users:

- Efficient call handling and Automatic Call Distribution (ACD) state management by Call Centre agents.
- Integration of online directories with Click-To-Dial capability.
- Real-time monitoring of agent and queue activity by Call Centre supervisors.
- Historical reporting on agent and queue activity by Call Centre supervisors.

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

For more information about the capabilities and services assigned to you, ask your group or enterprise administrator.

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

**Note:** Call Centre is only supported with the primary telephony device that is configured for each user in TIPT Commpilot. There are significant known issues when the telephony device being used with Call Centre is configured as a shared call appearance or the primary line instead of the primary telephony device. Please talk to your CGA or Telstra for assistance.

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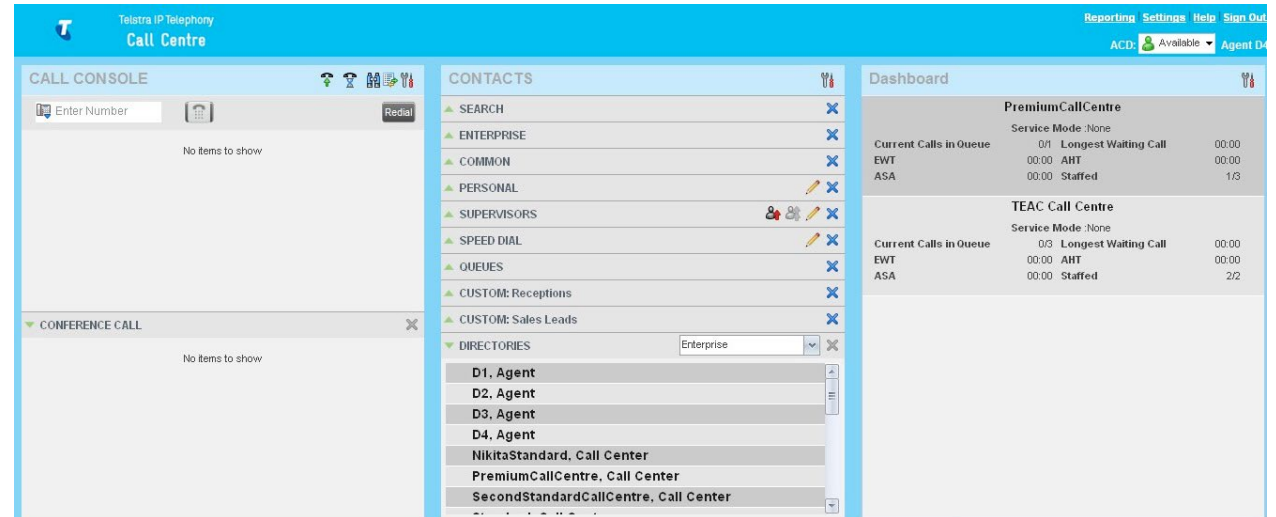
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## Call Centre

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



Call Centre – Agent Main Interface

The interface contains the following work areas:

- **Call Console pane** – You use the Call Console pane 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 Centres you belong to. It allows you to use your contacts to make and manage your calls. Both panes within the Call Console and Contacts windows can be moved within that window - i.e. the Conference Call pane can be moved up or down the screen.
- **Dashboard pane** – Use the Dashboard pane for an overview of the status of the call centres you are part of. Information about the queue and expected wait times will display.
- **Report windows** – You use the Report windows, accessed via the Reporting link, to generate reports about your activity and performance in the Call Centres you are staffing.
- **Settings pages** – You use the Settings pages, accessed via the Settings link, to configure various aspects of Call Centre.

For more information about the Call Centre user interface, refer to Exploring the Workspace.

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# Getting started

Call Centre is hosted on TIPT 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 into a Call Centre using hot desk functionality, that is, sign in from any available desk configured for that purpose. Upon login, that desk's phone is associated with that 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:** Call Centre does not support logging in as different users from the same machine at the same time.

## Sign in from web browser

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

To sign in to Call Centre:

1. In your web browser, enter the URL of the Call Centre client <https://callcentre.tipt.telstra.com/callcentre>

The *Call Centre Sign-in* page appears.



Call Centre Sign-in Page

2. Enter your TIPT **User ID** in the format *user@domain* and your **Password**.
3. If you are unsure of your user ID and password, contact your administrator.
4. Providing the append domain name has been configured in the *Show Options* field, you can also enter just the *user* part of your ID. The system then appends the default domain to it before authenticating you. However, if your domain is different from the default domain, you have to enter your user ID with the domain name.
5. Optionally, if your system has been configured to allow that, you can configure you domain name.

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- Check *Stay signed in* to instruct the client to automatically re-connect and sign in to the server when it detects a network connection.
- This should generally be enabled to help mitigate intermittent internet connections. When disabled, the client signs out the user when the connection is lost.
- To configure your domain name or the Call Centre language, click **Show options**. The area expands displaying advanced options.

The screenshot shows a sign-in form with the following elements:

- User ID: 0353950512@model.tipt.telstra.com
- Password: [Empty text box]
- Stay signed in:
- Sign In: [Dark button]
- Hide options: [Hide options](#)
- Bookmark this page: [Bookmark this page](#)
- Append Domain: [Empty text box]
- Hotel Host: [Enter Host text box]
- Language: English (US) [Dropdown menu]

Call Centre Sign-in Page – Advanced Options

- 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 will append the configured domain instead of the system-wide default domain.
- To change the language, from the *Language* drop-down list, select a new language.
- Click **Sign In**. Call Centre starts and you are signed in.

**Note:** Call Centre must be run as the only tab in a browser window.

### Launch JNLP

Call Centre needs the Java HTTPS server to run desktop integration features, such as *Outlook Integration*, *Popup Notifications*, *LDAP Integration*, *Desktop Shortcut creation* and *Call Event Archival*.

**Note:** You should run Java JRE 1.6 or higher, the latest Java JRE 1.8 is recommended. You must use 32 bit JRE with a 32 bit browser and 64 bit JRE with a 64 bit browser.

As you sign in, Call Centre starts downloading a Java Network Launch Protocol (JNLP) file containing the Java HTTPS server to your machine. Perform the following steps to accept the download and install the server.

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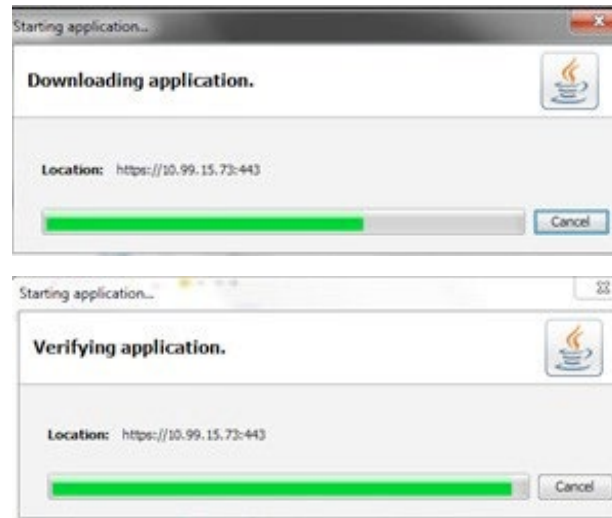
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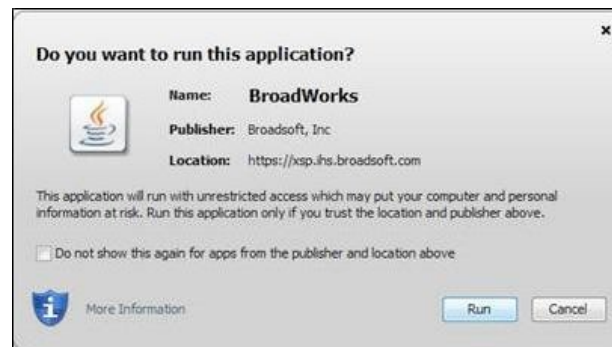
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1. When a file download pop-up window appears in your browser asking you whether you want to open or save the file, select **Save**.

Messages about downloading and verifying the application contained in the file appear, followed by a dialog box asking you whether you want to run the application.



Downloading and Verifying Application Pop-up Window



"Do you want to run this application" Dialog Box

2. Click **Run**. This starts the Java HTTPS server allowing Call Centre to access the desktop integration features. Desktop integration features will not be available if you click **Cancel**.
3. Due to security restrictions, the application may not run. If this occurs, perform the steps specified in section Security Settings for Desktop Integration Features.

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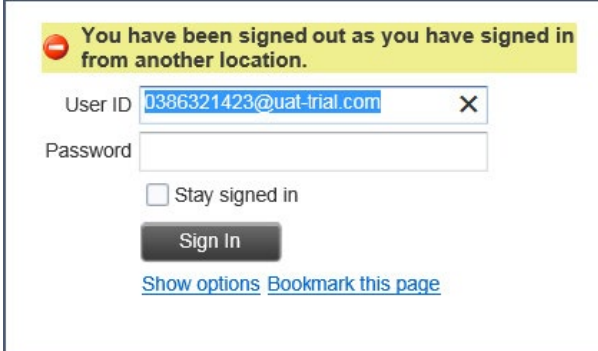
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- If the browser certificate required to run the HTTPS server is not yet imported to your device, a dialog-box appears asking for your permission to install it. Follow the steps in section Certificate for Desktop Integration Features to allow the certificate to be installed. This happens only once when the certificate is not yet imported to the browser. If the certificate is already imported, a message appears informing you that it already exists, and Call Centre continues loading the plug-ins.

**Note:** If you refresh the browser after the local HTTPS server has started, the JNLP file is not downloaded again and the HTTPS server simply continues initializing the desktop integration features.

### Sign-in restrictions

You can only have one active Call Centre 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."



The image shows a sign-in dialog box with a yellow error message at the top: "You have been signed out as you have signed in from another location." Below the message is a form with the following fields and elements:

- User ID: 0386321423@uat-trial.com (with a clear button 'X')
- Password: (empty field)
- Stay signed in: (unchecked checkbox)
- Sign In: (button)
- Show options: (link)
- Bookmark this page: (link)

Sign-in Dialog Box with Error Message



Main Interface (Top of Page) with Error Message

### Changing your password on first time login

The first time you log into the Agent client you are requested to change your password. Your default password restrictions are configured by your Customer Group Administrator.

- In your web browser, enter the URL of the Call Centre client.
- Enter your TIPT user ID in the format *user@domain*
- Enter your password.
- Check *Stay signed in* to instruct the client to automatically re-connect and sign in to the server when it detects a network connection.



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## 5. Click **Sign In**

On first time login, or if you are required to change your password the following screen will display requesting you to enter your old password and enter a new password

Change Password Screen

1. Enter your old (current) Password.
2. Type a **New Password** (Your default password restrictions are configured by your Customer Group Administrator).
3. Confirm your **New Password**.
4. Click the **Change Password** button.
5. The following information appears in the Logo Pane indicating that the password has been changed successfully.



Logo Pane Global Message

## Hoteling sign in

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

To use the hot desk functionality, you must have your Hoteling Guest service turned on. You turn on your Hoteling Guest service using the TIPT web portal or voice portal.

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

1. At the assigned workstation, start a web browser and enter the URL of the Call Centre client. The *Call Centre Sign-in* page appears.
2. Enter your TIPT user ID and password.
3. Click **Show options**. The area expands displaying advanced options.
4. In the *Hotel* text box, enter the user ID of the Hoteling Host that corresponds to the desk/device you are using, for example, "03xxxxxxxx@acme.com"
5. Click **Sign In**
6. You are signed in and Call Centre associates that desk's phone with your user account for the duration of the session.

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**Note 1:** When you sign out from the Call Centre 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 re-used 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 TIPT web portal.

## Get help

Call Centre provides you with on-line access to a PDF version of this guide.



Logo Pane – Help Link

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

## Sign out

1. To sign out of the Call Centre, click **Sign Out** in the top right corner of the main interface.
2. If you are the last agent to sign out of a Call Centre, 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 refresh (F5) the browser.



Pop-Up Dialog Window – Signing Out Last

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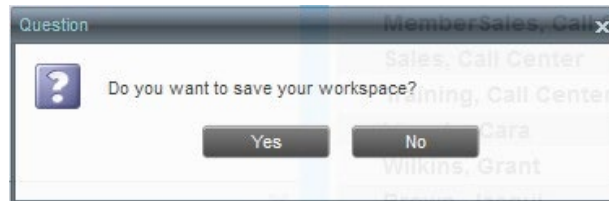
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- To continue signing out, click **Yes**.
- A message appears asking you whether you would like to save your current workspace.



Pop-up Dialog Window – Saving Workspace on Sign Out

- To save your current workspace, click **Yes**. This allows you to retain the same interface setup for your next session.
- If you are signing out from a hot desk, your account is dissociated from the hot desk where you were signed in.

### Set up call centre

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

- Configure the queues you want to join on sign-in.
- Configure your post-sign-in and post-call ACD states. For information, see the section Settings – Application.
- Configure the supervisors whose call status you want to monitor. For information, see Select Supervisors to Monitor.

### Change your password

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

- To change your password, click the **Settings** link in the top right corner or the page.
- Click the **General Tab** and then click **Change Password**.



Changing Password

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

**Note 1:** The Reset button does not reset your password. It only clears the input boxes.

**Note 2:** This password is shared with your web portal and other client applications that share TIPT single logon policy. It has to meet password requirements set on TIPT.

Your default password restrictions are configured by your Customer Group Administrator.

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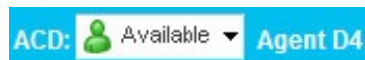
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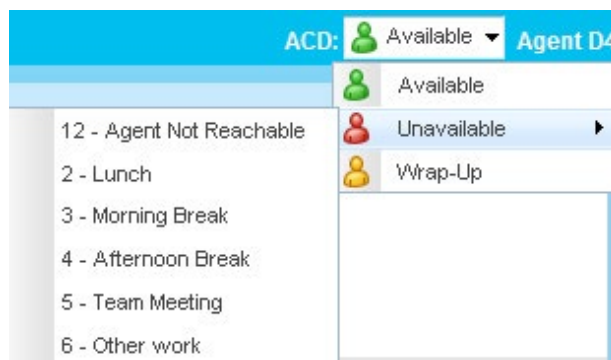
## Change your ACD state (agents)

1. In the *Logo* pane, click the **ACD states** box and select your ACD state from the drop-down list



Logo Pane – ACD State Control

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



Logo Pane – Unavailable Codes

## Enable or disable services

Provided that your Customer administrator has assigned the services to you, you can use the Call Forwarding Always, and Do Not Disturb services in Call Centre.

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

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

**Note:** Do not use the Do Not Disturb feature if you are an agent in a Call Centre. Using this feature will not allow calls to be routed to your extension. It will also not put the agent into the Unavailable mode, which in turn will cause incorrect statistics when reports are run.

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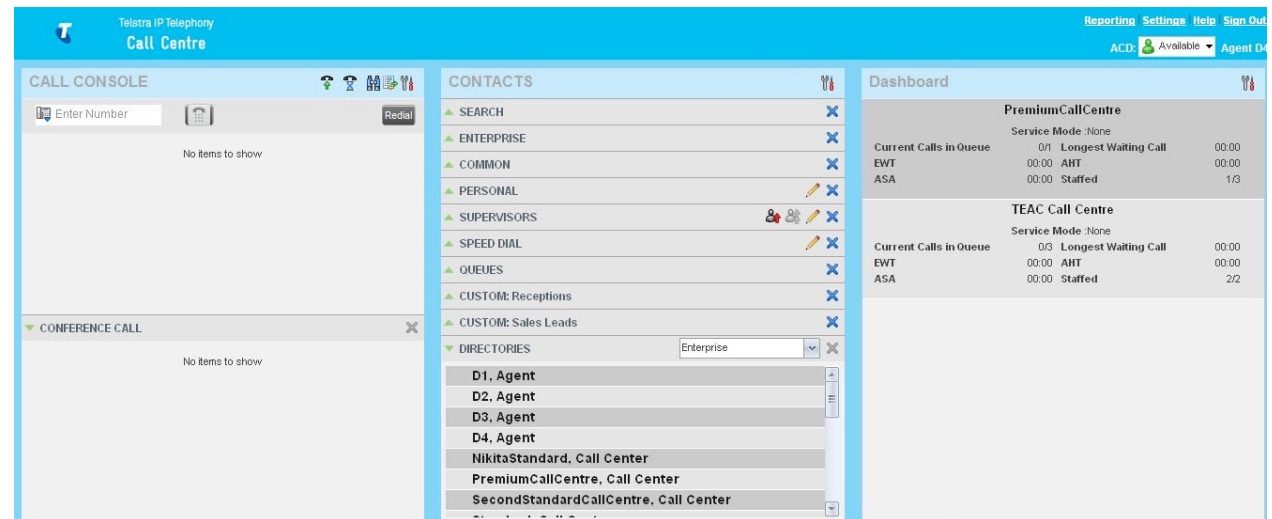
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# Exploring the workspace

Based on the license you have been assigned, when you sign in to Call Centre, 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 Centre, where you perform functions such as configuration and report generation.



Call Centre – Agent Main Interface

Many visual aspects of the Call Centre workspace are configurable. For example, you can change the size of windows on the screen. You can then save your workspace and retrieve it the next time you sign in.

**Note 1:** To work in full screen mode, make sure that the main window is in focus and then click F11. F11 is a toggle button to also take you out of full screen mode.

**Note 2:** The Back, Forward, and Refresh operations of the web browser are not supported by Call Centre; and if performed, the results are inconsistent.

Most Call Centre control button and action buttons are context-based, which means that they appear only when the action they represent can be performed. A list and description of control and action buttons available in Call Centre are documented in the Control section of this document see Chapter.

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Call Centre interface contains the following elements based on the license you have been assigned (Agent or Supervisor):

Interface element	Description
<b>Logo Pane</b>	Located at the top of the main interface, the logo pane displays global messages, information about the logged user, and links to other Call Centre interface functions.
<b>Call Console Pane</b>	The Call Console pane is where you manage your current calls. This pane contains the Calls and Conference pane
<b>Contacts Pane</b>	The Contacts pane contains your contact directories and allows you to manage your contacts, use contacts to make calls or take actions, such as transfer to contact or queue, on existing calls.
<b>Dashboard Pane</b>	Displays and overview of the call centres selected
<b>Reporting Windows</b>	The Reporting windows are accessible from the main page Logo pane via the Reporting link and provide access to Enhanced Reporting allowing you to generate, schedule and view reports. Agents can only generate reports about themselves.
<b>Settings Pages</b>	The Settings pages, accessible from the main page via the Settings link allow you to configure various user-level and application settings.
<b>Controls</b>	You use controls, such as buttons and drop-down lists, to execute actions on calls, contacts, and queues.

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

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

For information about other interface elements, refer to the following sections:

- Managing the Dashboard.
- Generating Reports.
- Managing Calls.
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### logo pane

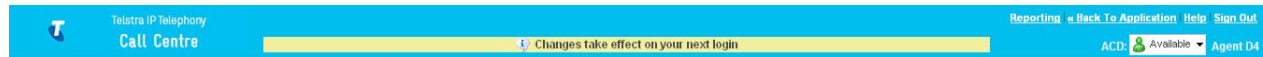
The Call Centre main window interface contains a logo pane, which displays the Call Centre client or company logo, global messages, links to other interface elements or Call Centre functions, and information about the logged user.



Call Centre Logo Pane

### Global Message Area

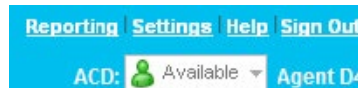
The *Global Message Area* is the center area of the logo pane and is used by Call Centre to display various information, warnings, and error messages to the user. A message is displayed for several seconds and then disappears.



Logo Pane with Global Message

### Links to other interface elements and features

The logo pane displays links to the Report windows, Settings pages, as well as the Help and Sign Out links.



Logo Pane Links

### Logged user information

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

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

1. ACD State

Information about the following services and features is provided:

- Do Not Disturb (DND)
- Call Forwarding Always (CFA)
- Busy phone state
- Voice Messaging

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

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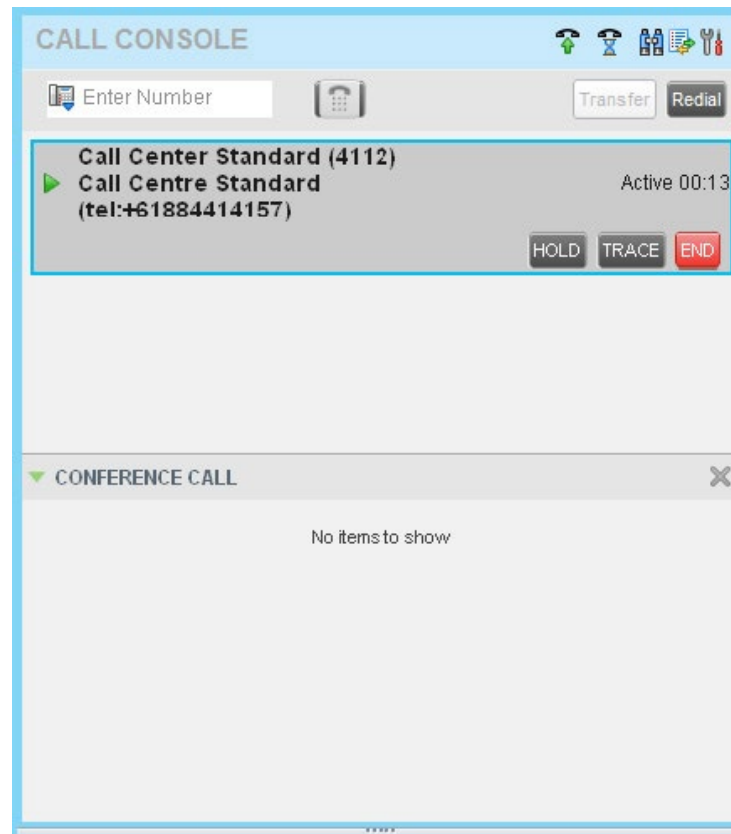
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### Call console pane

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



Call Console Pane

The *Call Console* pane contains the following areas:

- Header Bar.
- Dialer.
- Conference.
- Conference Call Pane.
- Call States.



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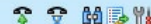
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## Header bar

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

CALL CONSOLE 


Call Console Header Bar

The header bar can contain the following controls:

- **Trace Call button**  – This allows you to attach a trace to the last call.
- **Call History button**  – This allows you to access the list of your previous calls – missed, received and placed calls.
- **Auto Answer button**  – This allows you to enable or disable the automatic answering of calls.
- **Call Waiting button**  – This allows you to enable or disable the Call Waiting service.

## Dialer

The *Dialer*, located at the top of the *Call Console* pane, allows you to make ad-hoc.

Enter Number  Redial

Call Console – Dialler


It contains the following elements:


- The *Enter Number* text box, where 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 Exploring the Workspace, Call Action Buttons.

## Current calls – call console

The *Call Console* displays your current calls, both direct calls and Call centre calls and allows you to take actions on them. Direct calls are calls placed from or received on your own phone number, whereas ACD calls are calls routed to you from a Call Centre 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.

CALL CONSOLE 

Enter Number  Transfer Redial

Call Center Standard (4112)  
▶ Call Centre Standard Active 00:13  
(tel:+61884414157)

HOLD TRACE END

Call Console Pane – Current Calls

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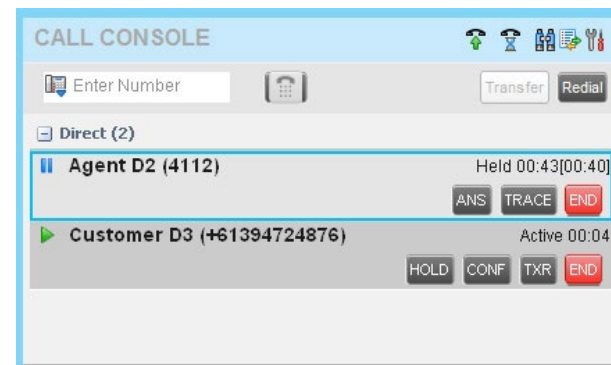
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The following information is displayed for each call:

- **Remote CLID** – This is the name of the remote party (if available) and the phone number in parenthesis.
- **Call State icon** – This is a visual representation of the current state of the call.
- **Call State name** – This is the display name of the call state the call is currently in for details see Exploring the Workspace, Call Console Pane, Call States.
- **Call duration [Held duration]** – This is the duration of the call from the time the call was received from TIPT and it reflects how long the call has been present in the system. In addition, if a call has been placed on hold a held timer will display.

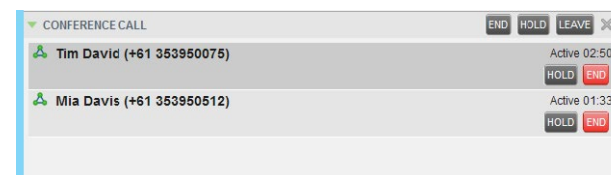
The call entry also displays action buttons for the operations that you can currently take on that call. The actions you can perform depend on the state of the call.



Call Console – Calls in with Action Buttons

### Conference call pane

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



Call Console – Conference Call Pane

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

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

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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 on the Calls panel. For information, see *Current Calls – Call Console*.

For information on managing conferences, see *Managing Calls, Managing Conference Calls*.

**Note 1:** You can only be involved in one conference call at a time.

**Note 2:** The Conference Call pane must be expanded (as shown below in the diagram) for the End, Hold, and Leave buttons to operate as expected.

### Call states

The following table lists the possible call states of calls.

Call State	Display name	Display icon
Ringing In (Local)	Incoming Local	
Ringing In (Remote)	Incoming	
Ringing Out, Outgoing	Outgoing	
Active	Active	
On Hold	Held	
On Hold (Remote)	Remote Held	
Active (In Conference)	Active	
Held (In Conference)	Held	
Ringing In (Recalled Call)	Call Recalled	

### 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 *Managing Calls*. For information about organising and managing your contact directories, see *Managing Contacts*.

500 Personal Contacts can be created in CommPilot, however currently a maximum of 50 can be displayed. When you search you have access to all 500 contacts but the client can only display 50 in the web based client applications.

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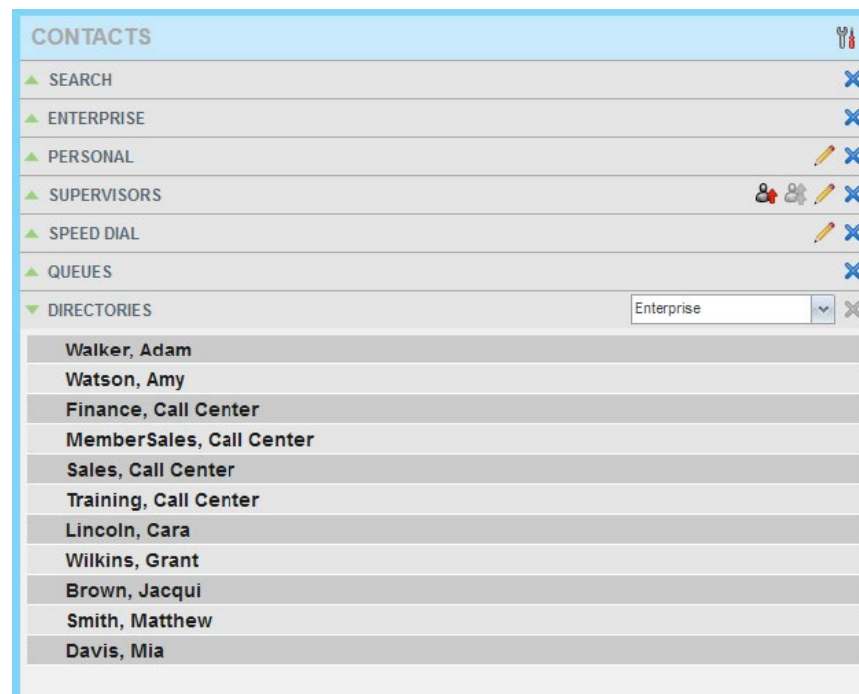
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Contacts Pane

The Contacts pane contains the following panels:

- Search Panel
- Enterprise
- Personal Panel
- Supervisor Panel
- Speed Dial Panel
- Queues
- Custom Directories
- Outlook Panel
- Directories Panel

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

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

To minimise the contact's information, click on the contact again.

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.

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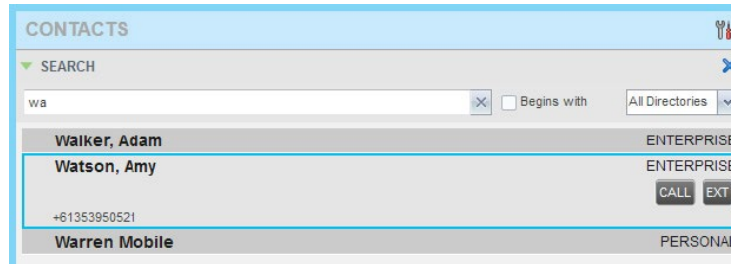
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### Search panel

You use the *Search* panel to look for specific contacts in your contacts directories. When search criteria are entered and a search performed, search results are populated into a single area. For information about performing contact searches, see *Managing Contacts, Searching for Contacts*.



Contacts Pane – Search Panel

### Enterprise panel

The *Enterprise* panel contains the contacts in your TIPT enterprise directory. If your enterprise administrator restricted your access to the enterprise directory, you can only see the contacts from your group.



Contacts Pane – Enterprise Panel

The *Enterprise* panel displays the contact's name and phone number.

When you click on a contact, the entry expands to provide the contact's details, such as all available phone numbers. To minimise the details, click on the contact again.



Enterprise Panel – Contact Details

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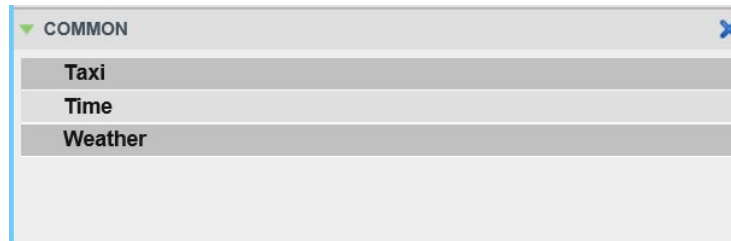
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### Common panel

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

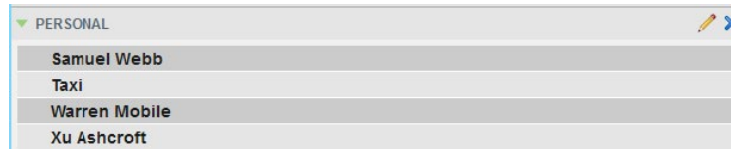


Contacts pane - Common Directory

### Personal panel

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

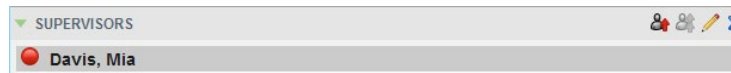
For information about managing your personal contacts, see [Managing Personal Contacts](#).



Contacts Pane - Personal Panel

### 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 quickly contact a supervisor.



Contacts Pane - Supervisors Panel

2. Selected supervisors have their call status displayed. For more information, see [Monitoring Supervisors](#).

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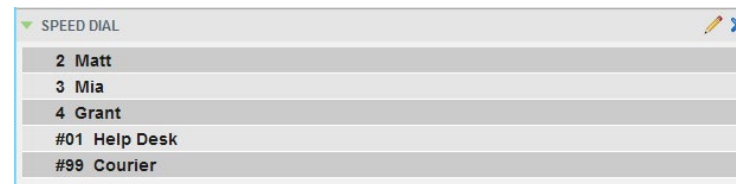
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## Speed Dial Panel

The *Speed Dial* panel displays and allows you to manage your Speed Dial 8 and Speed Dial 100 contacts.

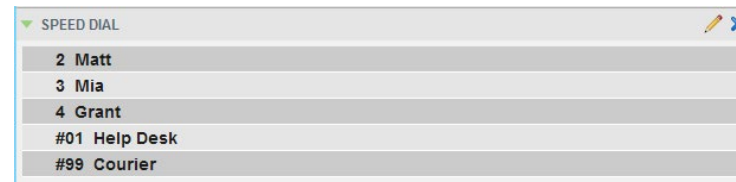
For each speed dial number, Call Centre displays the speed dial code, the description, and the phone number. The description is what you entered when configuring the number.



Contacts Pane – Speed Dial Panel

## Queues panel

The *Queues* panel is available to both agents and supervisors. It lists the Call Centres you are staffing as an agent or monitoring as a supervisor. The primary purpose of this panel is to provide you with a quick way to transfer calls to queues.

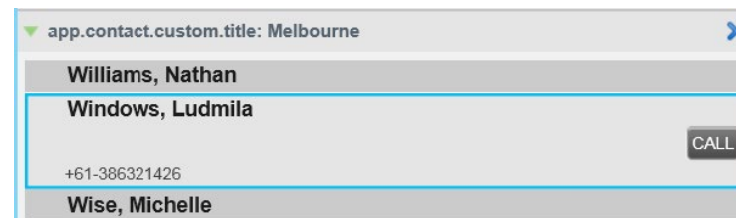


Contacts Pane – Queues Panel

## Custom directories panel

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

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



Contacts Pane – Custom Panel

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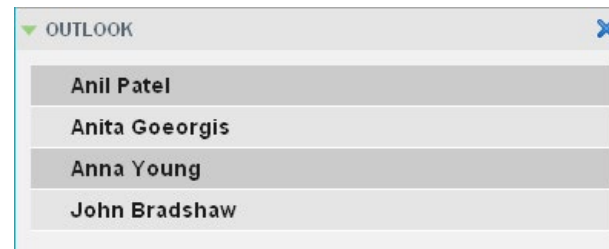
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### Outlook panel

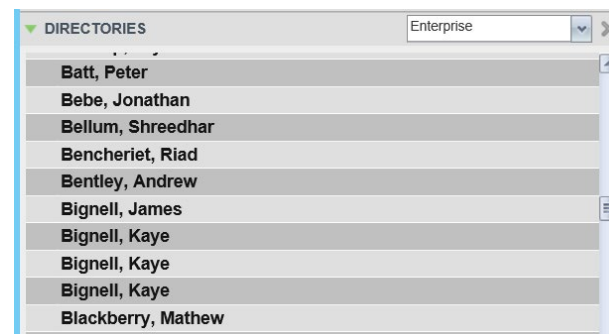
The Outlook panel contains your Outlook contacts.



Contacts Pane – Outlook Panel

### Directories panel

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





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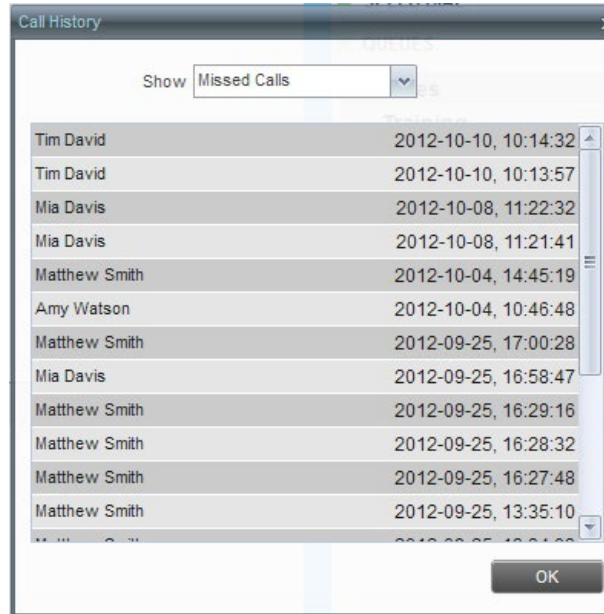
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### Call History

The *Call History* dialog-box, accessed via the Call History button in the *Calls* panel allows you to view your past calls – Missed, Received and Placed. You can place a call to a number from Call History and manage call logs.



Call History

### Dashboard pane

The Dashboard pane displays an overview of queue activity for agents. If thresholds have been configured for the call centre the visual indications will display for the relevant section. For more details see Managing the Dashboard.



Dashboard

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The information displayed is:

**Queue Name** – Name of the queue.

**Service Mode** – Current mode of service.

**Current Calls in Queue** – current number of calls in the queue. This is a ratio actual number of calls/queue length

**Longest Waiting Call** – The amount of time the oldest call has been in the queue.


**EWT** – Estimated Wait Time, the estimated time it will take for calls to be answered once they are in the queue.

**AHT** – Average Hold Time, the average amount of time calls are held in the queue.

**ASA** – Average Speed of Answer, the average time it takes for a call to be answered by an agent once the call has been presented to the agent.

**Staffed** – Number of agents available in the queue. This is a ration of actual number of agents/number of agents assigned to the queue.

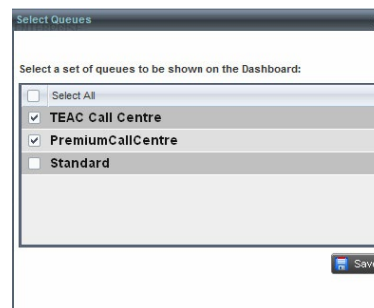
To select the queues to view in the Dashboard:

1. Click on **Options** .
2. Click on **Select Queues**.



Dashboard Options

3. Check the box for the required queues and click **Save**.



Queue Select

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















## 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.

Action buttons are context sensitive and appear on a line/entry only when you move the mouse over that entry and when the corresponding action can be performed on that entry. For example, when you select a contact in the *Enterprise* directory, the relevant buttons may appear on a contact, depending on the call state and the contact's configuration which enable you to perform the appropriate action.

No buttons appear on the remaining lines/entries/calls.

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

Button	Description
 Dial	This dials the number you entered in the Dialler.
 CALL	This places a call to the selected contact or to a number from Call History.
 Redial	This redials the last dialled 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	This will transfer a call to an ad hoc number entered in the Dialler.
 TXR Transfer	This transfers a call to a selected number or contact.
 ANS Answer	This answers an incoming call, answers an unanswered call for a contact, or resumes a held call.
 HOLD Hold	This places a call on hold.
 END End	This ends a call.
 TRACE Trace	This generates a call trace on a call.
 CONF Conference	This establishes a conference call or adds a call to a conference.
 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.
 Delete Call Log	This deletes a call log from Call History.

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## Controls

Call Centre controls are designed as being context sensitive, controls appear only when the action they represent can be performed. For example, when you enter a number or select a contact, a *Dial* button appears allowing you to place a call. The context sensitive controls that correspond to call operations such as dialing, transferring calls, or putting calls on hold are known action buttons.

The following table lists the general controls used in Call Centre and the controls displayed on the panels' headers.

Name	Description
<b>Common controls</b>	
 <b>Options</b>	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.
 <b>Expand/Collapse</b>	This shows or hides the contents of a window or panel.
 <b>Close</b>	This closes an interface element, such as window, pane, or panel.
 <b>Edit</b>	This allows you to edit a list of items, such as agents to monitor or speed dials.
<b>Dialer, call console, directories panel, and search panel controls</b>	
 <b>Trace Call</b>	This allows you to attach a trace to the last call.
 <b>ACD States</b>	This displays your current ACD state and allows you to change it.
 <b>Call History</b>	This displays Call History.
 <b>Auto Answer</b>	This allows you to turn Auto Answering on or off.
 <b>Call Waiting</b>	This allows you to turn Call Waiting on or off. It is available only if you have been assigned the Call Waiting service.
 <b>End Conference</b>	This ends a conference call.
 <b>Leave Conference</b>	This disconnects you from the conference while allowing other participants to continue the call.
 <b>Hold Conference</b>	This holds the conference call.
 <b>Resume Conference</b>	This resumes a held conference.
 <b>Barge In</b>	This allows the agent to barge in on another call, by establishing a Three-Way Call between the supervisor and the two parties involved in the call.

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Name	Description
<b>Dialog box – notification window</b>	
 <b>Web Pop URL</b>	This opens a page in your browser at the configured URL to provide additional information about the caller.
 <b>vCard</b>	This saves the caller's phone number and personal information as a vCard in Microsoft Outlook. It appears only when Outlook is running.
<b>Queued calls pane – call centre queue panel (supervisors)</b>	
 <b>Emergency</b>	This makes an emergency call to a supervisor.
 <b>Escalate</b>	This escalates a call to a supervisor.
<b>Scheduled reports window</b>	
 <b>Load Report</b>	This loads a scheduled report, allowing you to view and modify it.
 <b>Delete Report</b>	This deletes a scheduled report.

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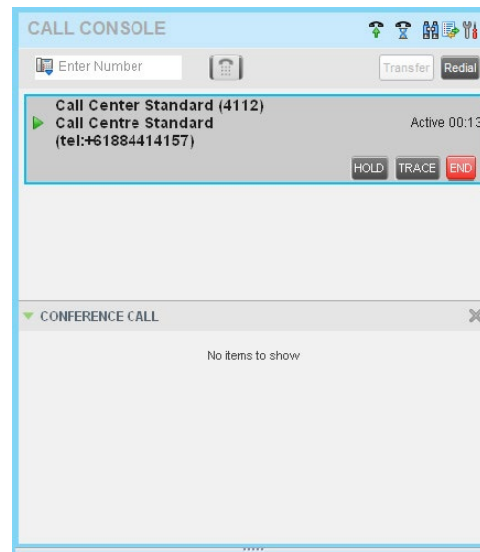
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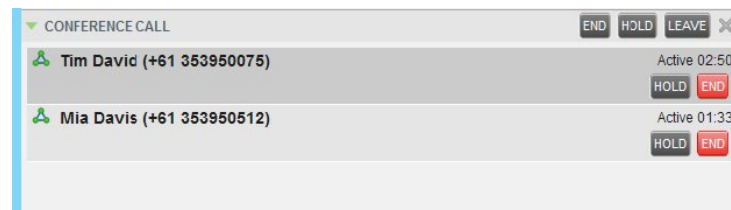
# Managing calls

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*.



Call Console Pane/Calls panel



Call Console Pane/Conference panel

**Note 1:** You can only have one conference at a time.

**Note 2:** To have more than 3 parties in a conference call you will need the N-Way licence assigned. N-Way is a feature of the Executive service pack.

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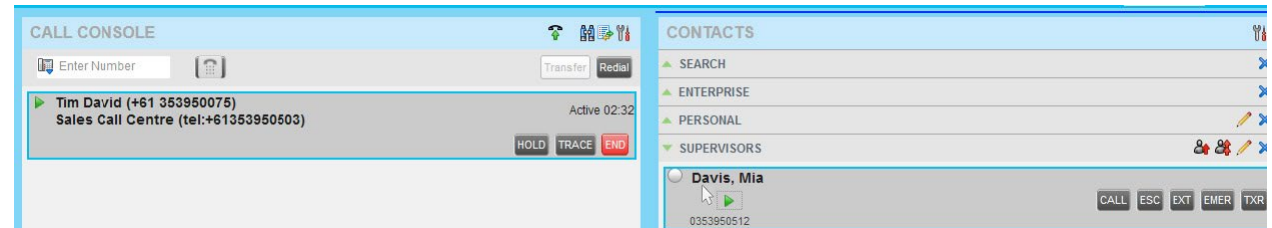
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## Drag and drop call onto contact

In Call Centre, 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.



Dragging Call and Dropping on Contact

## View incoming call details

Inbound calls are displayed in three ways.

- Call Console.
- Call Notification Pop up.

When the Call Notification feature is enabled, a *Call Notification* pop-up window appears on top of the system tray when you receive an inbound call. You are not able to answer the call from the Global Message Area.

### Call Console

For calls to your direct number or extension, the following information is displayed:

- Calling party name.
- Calling party number.

For calls from a call centre, the following information is displayed:

- Calling party name.
- Calling party number.
- Call Centre name, followed by the time the call has been waiting in queue (Wait Time).
- Number of calls in queue (Queued Calls).

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### Call Notification Pop-up

For calls to your direct number or extension, the following information is displayed:

- Calling party name
- Calling party number



Call Notification Pop-up Window for a Non-ACD Call

For calls from a, the following information is displayed:

- Calling party name.
- Calling party number.
- Call Centre name, followed by the time the call has been waiting in queue (Wait Time).
- Number of calls in queue (Queued Calls).



Call Notification Pop-up Window for an ACD Call

**Note 1:** You have to have only one tab open in the browser running Call Centre to receive call notifications.

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



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## Receiving, answering, and ending calls

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

### Answer call

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

To answer a ringing call:

1. In the Calls panel, click **Answer** .

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

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

### Auto answer calls

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

#### To enable auto answer

1. In the Calls panel, click Auto Answer . The button changes to this  to indicate that Auto Answer is on.


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

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

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

### End call

To end a call:

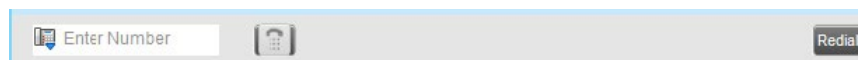
1. Expand the Calls panel.
2. Move the mouse over the call and click **End** .

## Making 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.

### Dial ad-hoc number

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



Dialler – Dialling Ad-hoc Number

To dial an ad-hoc number:

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
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1. In the *Dialer*, enter the phone number, press **Enter** or click **Dial** . The specified phone number is dialed and the call appears in the *Calls* panel.

#### Re-dial number

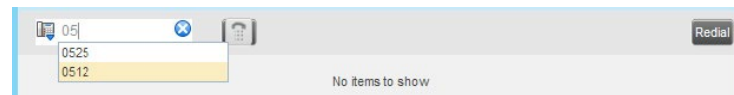
Call Centre keeps up to ten most recently dialed numbers, which you can redial using the *Dialer*.

To redial the last number you called:


1. In the *Dialer*, click **Redial** .
2. Click on the number from the drop down list.

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.




Dialler – Redialling Number

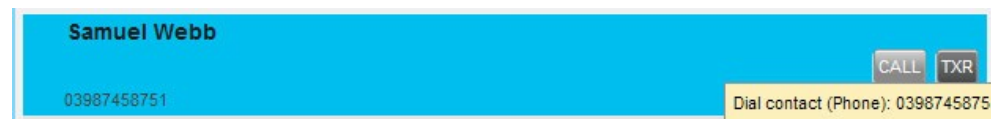
2. Select the number to dial and click **Dial** .

#### 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, click **Call** .



Make a Call

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

OR

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

The contacts mobile number must be configured in CommPilot in the User's Profile for this action button to display.

The phone number is dialed and the call appears in the *Calls* panel.

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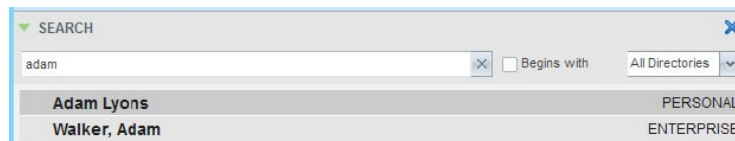
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### Dial from search

You use the *Search* panel in the Contacts pane to search for contacts in your *Contacts* directories.

To dial a number from search:

1. Enter the required information into the Search field.
2. Press **Enter**.
3. Expand the *Search Results* panel for the directory from which you want to select a contact.



Contacts Panel – Search field with results

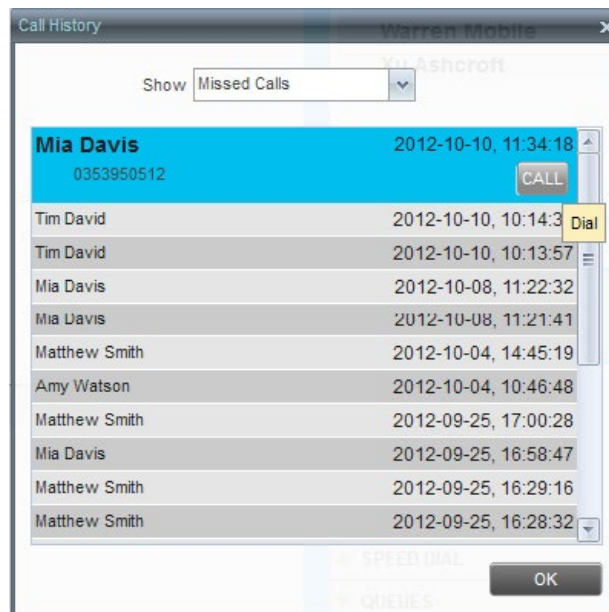
4. Click the target contact to expand it and then click **Call** .

### Dial from history

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

To dial from Call History:

1. In the Call Console pane, click **Call History** .



Call History Dialog Box

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

### Placing calls on hold, resuming calls

You can only put an active call on hold.

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

#### Place call on hold

To place a call on hold:

- Click **Hold**  for the target call.

#### Resume held call

To resume a held call:


- Click **Answer**  for the target call.

### Transferring calls


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

#### Blind transfer

Use this method to transfer a call to another number without providing an introduction to the destination party. To blind transfer a call to an ad-hoc number:


- From the *Call Console* panel, select the call to transfer.
- In the *Dialer*, enter the destination number and click **Transfer** .  
The call is transferred and removed from the *Call Console* panel.

To blind transfer a call to a contact:

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

#### Transfer with consultation

Use this method to transfer a call with an introduction to the destination party. To transfer a call with consultation:

- Make a call to the person to which you want to transfer the call (the original call is automatically placed on hold).
- Wait until the called party accepts your call and introduce the call.
- When ready to transfer, from the *Call Console* panel, select one of the two calls.
- Move the mouse over the non-selected call and click **Transfer** .
- The calls are connected and removed from the *Call Console* panel.

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### 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* panel, select the call to transfer.
2. In the *Contacts* pane, expand the Queues panel.
3. Click the destination queue and click **Transfer**  for that queue.
4. The call is transferred to the selected queue and removed from the Call Console.
5. Alternatively, drag the call onto the target queue and click **Transfer**  for that queue.

### Escalating/emergency calls

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

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

#### Make emergency call

Use this method to escalate a call to a supervisor in an emergency situation. When you make an emergency call, the caller is not placed on hold; instead, a supervisor is immediately added in to the conference call. You can let the Call Centre select the supervisor or select the supervisor yourself. A tone is played to the agent when the supervisor answers an agent's emergency escalate.

To make an emergency call to an available supervisor:

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



Supervisors Panel – Making Emergency Call

This places the call to the first available supervisor and a conference call is started immediately without putting the caller on hold.




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  for that supervisor. Make sure the supervisor you selected is available.

#### 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 on an available supervisor and click the **Escalate** button  for that supervisor. Your original call is placed on hold and a call to the supervisor is initiated.
2. Without waiting for the supervisor to answer, in the *Call Console* panel, select the original call.
3. Move the mouse over the call to the supervisor and click **Transfer** .

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### Escalate with consultation

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


To escalate a call with consultation:

1. In the *Supervisors* panel, click **Escalate**  to let the system select a supervisor.  
OR  
To select the supervisor yourself, move the mouse over 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 *Calls* panel, select the original call.
4. Move the mouse over the call to the supervisor, and click down arrow (if required).
5. Click Transfer **TXR**.

### Escalate with conference or handover

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


To escalate a call with conference or handover:

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

### Escalate with mid-conference hold

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

To escalate a call with mid-conference hold:

1. In the *Supervisors* panel, click **Escalate**  to let the system select a supervisor OR
2. To select the supervisor yourself, move the mouse over an available supervisor and click **Escalate** **ESC** for that supervisor.
3. When the supervisor accepts your call, speak to the supervisor about the issue.
4. In the *Call Console* panel, select the original call.
5. Move the mouse over the call to the supervisor and click **Conference** **CONF**.
6. A conference call is established and the calls appear in the *Conference* panel.
7. In the *Conference Call* panel, click **Hold** **HOLD**.  
This puts both calls on hold but allows the customer and the supervisor to continue their conversation.
8. To drop a specific party from the conference, select their call from the *Conference* panel and click **End** **END**.
9. To leave the call, click **Leave** **LEAVE** in the *Conference Call* panel.

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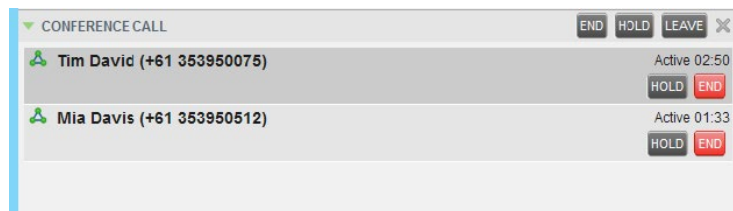
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### Manage conference calls

You manage conferences in the *Call Console* pane.

1. You use the Calls panel to establish a conference and add participants to it.
2. You use the Conference panel to manage or end an active conference call.

You can only have one active conference at a time.



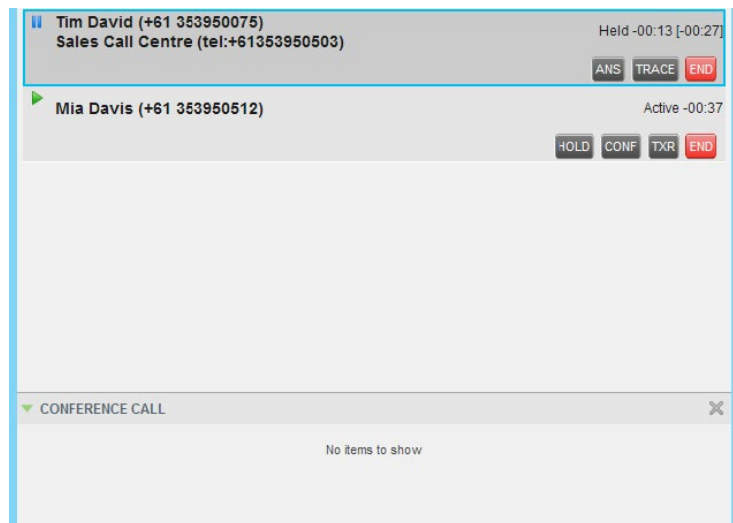
Call Console Pane – Conference Panel

### Start three-way conference

To start a conference call, you need to 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 Making Outbound Calls.

To start a conference:

1. Expand the *Calls* panel and select a call.



Calls Panel – Starting Conference Call

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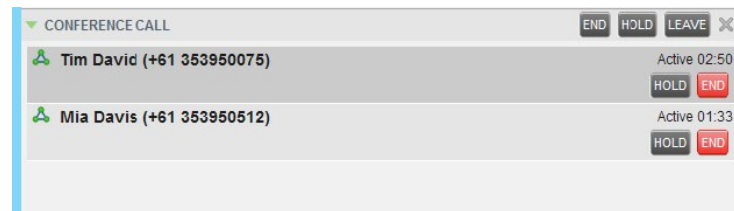
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2. Move the mouse over a non-selected call and click **Conference** **CONF**.  
A three-way conference is established and the connected calls appear in the *Conference* panel.



Conference Panel – Conference Call

### Add participant to conference

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

To add a participant to a conference:

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

The call is added to the conference.

### Hold conference

To put an active conference on hold:

1. In the *Conference Call* panel, click **Hold Conference** **HOLD**.

This allows other conference participants to continue their conversation.

### Resume conference

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

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

### Hold participant

To put a specific conference participant on hold:

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



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### 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 **Resume** .

### Leave Conference


To leave the conference:

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

**Note:** This function is only available for three-way conferences.


### End participant

To end a selected call in a conference:

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

### End conference

To end the conference:

1. In the *Conference Call* panel, click **End Conference** .
- This will release all the calls that participated in the conference.

### Generating call trace

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

**Note:** Tracing calls needs to be set up with the relevant Telstra division prior to this feature being configured in CommPilot by your Customer Group Administrator (CGA). You must be assigned the Customer Originated Trace service to use this capability.

CGA's cannot view the logs of a traced call. Telstra will provide the information to your CGA.

A call trace contains the following information:

- The phone number of the user who initiated the trace.
- The date and time the call was received.
- The identity (name and number) of the caller, if available.

Issuing more than one call trace request has no effect.

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### Generating call trace for selected call


To generate a trace for a selected call:

1. Expand the Calls panel.
2. Move the mouse over the target call and click **Trace**  for that call.

### Generating call trace for last released call

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

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

1. In the Calls panel, click **Trace** .

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# Monitoring supervisors

The Standard Call Centre 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 quickly find a supervisor who is available to take a call.

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.



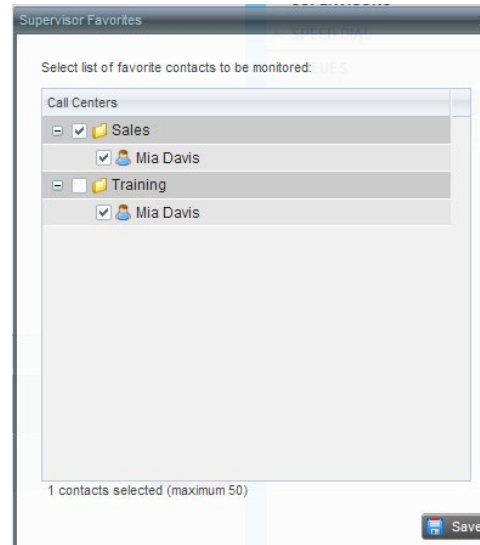
Supervisors Panel

## Select supervisors to monitor

The list of selected supervisors is saved on sign-out, as part of your workspace, and restored on subsequent logins.

To select the supervisors to monitor:

1. In the *Supervisors* panel, click **Edit** .



Supervisor Favorites Dialog Box

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

A supervisor can be assigned to multiple call centres. Check the box of the call centre the supervisor is monitoring that you are an agent of.

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### Supervisor phone states

The following table lists the states a supervisor's phone line can be in:

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.
Call Forwarding Always		Supervisor has enabled the Call Forwarding Always service.
Unknown		Supervisor's phone state is currently unavailable or unknown.

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# Managing call history

Call Centre collects call logs for your placed, received, and missed calls. You can view, organise, and delete call logs using the Call History feature.

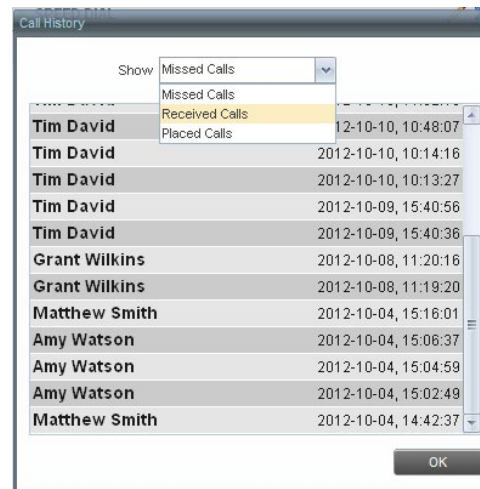
You can call any number available in Call History.

## View call history

You can view your Placed, Received, and Missed calls. To view your call history:

1. In the *Call Console* panel, click **Call History** .

By default the calls are grouped into Placed, Received, and Missed calls.



Call History Dialog Box

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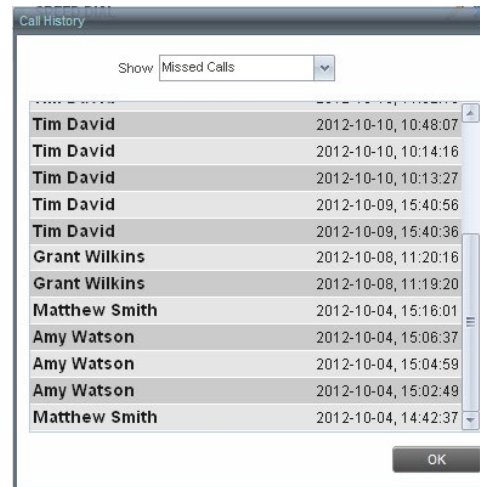
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2. To show calls in a specific group, select that group from the Show drop-down list.



Missed Calls - Call History Dialog Box

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# E-mailing contacts

Call Centre allows you to send an e-mail message to a contact that has e-mail configured in their User Profile in CommPilot. You must also have messaging enabled within Call Centre settings. For information, see 0 Settings – Messaging Settings – Messaging.

The E-mail button appears when you select a contact that has e-mail configured.

## Send e-mail message to contact

To send an e-mail message to a contact:

1. In the *Enterprise* directory move the mouse over a contact that has e-mail address.
2. Click E-mail **EMAIL** this brings up a new e-mail window for the configured messaging service.
3. Write your message and click **Send**.

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# Managing contacts

Use the *Contacts* pane to perform call and monitoring operations on your contacts and to manage your contacts directories.

CONTACTS		
▲ SEARCH		
▲ ENTERPRISE		
▲ PERSONAL		
▲ SUPERVISORS		
▲ SPEED DIAL		
▲ QUEUES		
▼ DIRECTORIES	Enterprise	
Walker, Adam		
Watson, Amy		
Finance, Call Center		
MemberSales, Call Center		
Sales, Call Center		
Training, Call Center		
Lincoln, Cara		
Wilkins, Grant		
Brown, Jacqui		
Smith, Matthew		
Davis, Mia		

Contacts Pane



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Call Centre provides access to the following contact directories:

Interface element	Description
Enterprise	The Enterprise directory contains the contacts in your TIPT enterprise.
Personal	The Personal directory contains all contacts in your Personal Phone List on TIPT.
Speed Dial	The Speed Dial directory contains the numbers configured for you or by you for your Speed Dial services (Speed Dial 8 and/or Speed Dial 100).
Queues	The Queues directory lists the call centres you are either supervising or staffing. It allows you to quickly transfer calls to queues.

Access to certain directories such as Outlook and LDAP depends on your permissions and the system setup. For information about the operations you perform to manage your contact directories, see the following sections:

- Viewing Contacts.
- Organising Contacts.
- Searching for Contacts Managing Speed Dial.
- Managing Personal Contacts.

**Note:** Personal contact can only be modified if the name, when being entered accidentally included a ' / ' or the number entered is less than two digits.



### Viewing contacts

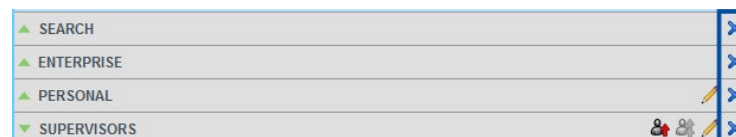
Call Centre allows you to select directories to display in the Contacts pane, show or hide directory contents, and select display order of information in certain directories.

#### Show or hide directories

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

To display or hide a directory:

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



Contacts Pane – Show/Hide Contact Directories

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### 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 use.

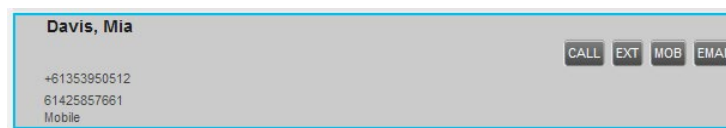
To show or hide contacts in a directory:

1. In the *Search* pane, click the **Show/Hide** button  for that directory.

### Show hide contact details

You can view the details of a contact in the directories. To view contact details:

1. In the *Enterprise* directory, click on the contact. The entry expands displaying the contact's phone numbers configured in that directory.  
To minimise the agent's details, click on the agent again.




Enterprise Panel – Contact Details

### Select display order

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

To specify the contacts' display order:

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



Contacts Pane – Displaying Contacts by First Name, Last Name

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## Organising contacts

### Sort contacts

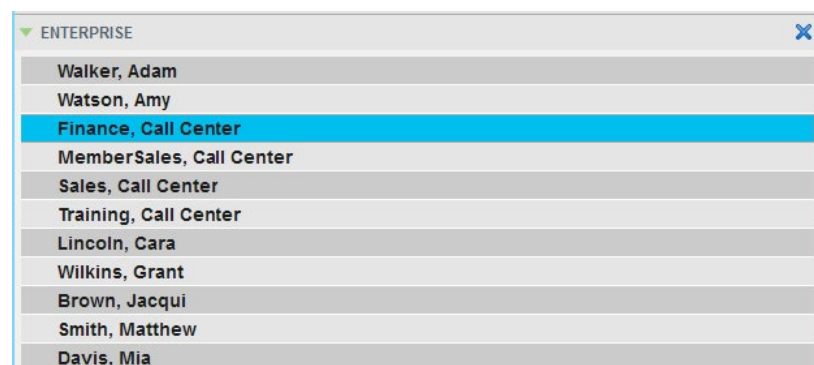
You can sort contacts in the following directories: Enterprise, Queues, and Agents. To order contacts in a directory:

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



Contacts Pane – Sorting Contacts

The screen below shows the directory sorted by the contact's First name.

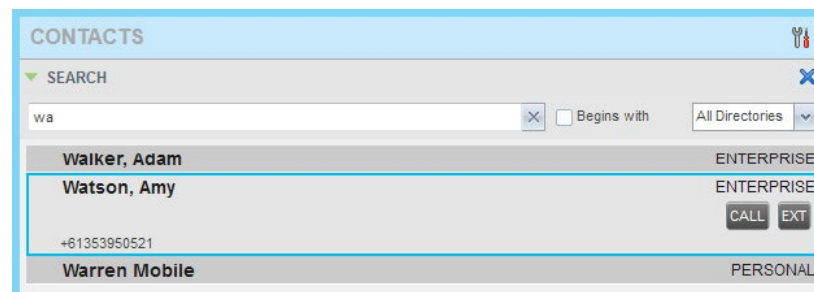


Directory Panel – Contacts Sorted

## Searching for contacts

Call Centre 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.



Contacts Pane – Search Panel

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### 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.

The search is not case-sensitive. The text you enter is matched against all attributes of every entry in the selected directories. Search results are displayed into a single area.

The screenshot shows a search interface with a search box containing 'adam'. To the right of the search box is a 'Begins with' checkbox and a dropdown menu set to 'All Directories'. Below the search box, two search results are displayed in a table:

<b>Adam Lyons</b>	PERSONAL
<b>Walker, Adam</b>	ENTERPRISE

Contacts Pane – Search Results

To view the search results for a specific directory:

1. click the **Search Results** panel for that directory.

Depending on the Call Centre setup, 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 contact with the first names such as "Ann", "Anne", and "Ann Marie", but not "Marianne" or "Mary Ann".

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

**Note 1:** Directories are searched in the following order: Supervisors, Agents, Enterprise. Duplicate search results in TIPT directories are not displayed; the first match for a given contact is displayed.

Duplicate search results in other directories are displayed.

**Note 2:** Contact entries displayed in search results follow the same rules as if that entry was accessed in their own directory. This allows you to perform any operations you need directly from the search results.

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## Managing personal contacts


You can add or remove personal contacts via CommPilot or in Call Centre, and the updates appear in both places. The updates you make via CommPilot appear only in Call Centre at the next sign in.

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

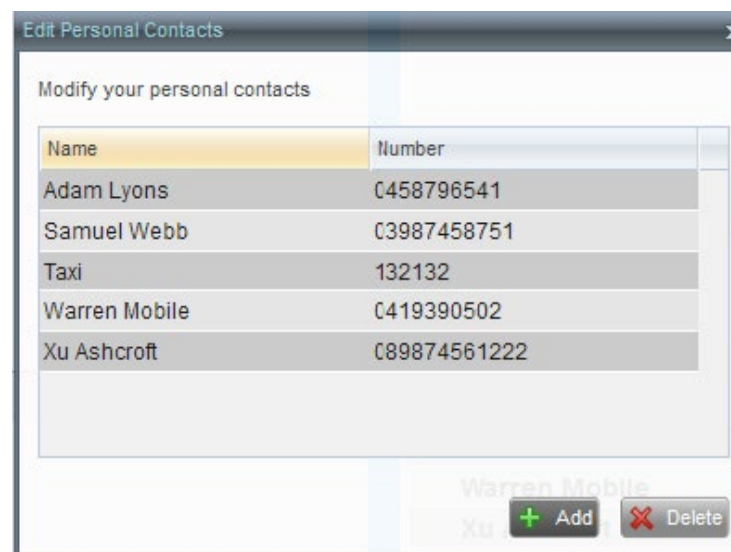
- Add Personal Contact.
- Modify Personal Contact.
- Delete Personal Contact.

### Add personal contact

To add a personal contact:

1. In the *Personal* panel, click **Edit** .
2. Click **Add**.

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



Edit Personal Contact Dialog Box – Adding Entry

3. In the *Name* text box, enter the contact's name or description as you want it to appear in the contacts list.
4. In the *Number* text box, enter the phone number of the contact.
5. Close the dialogue box to save the entry or Click Add to Save the current and add another new entry.

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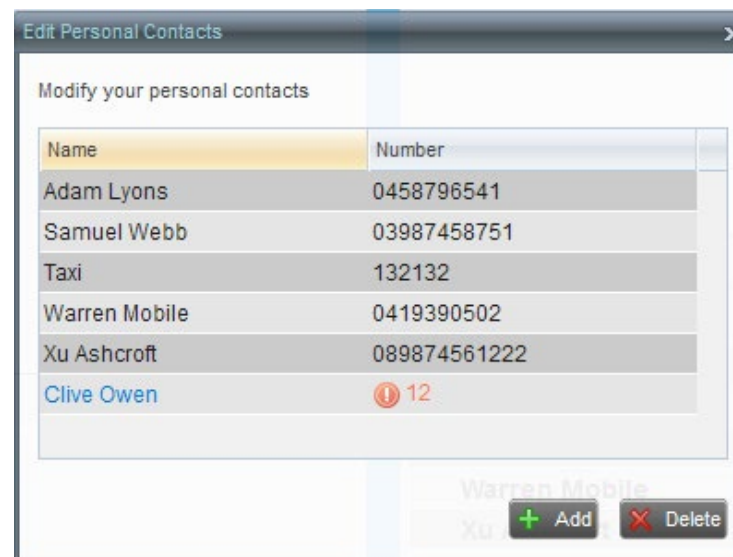
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### Modify personal contact

*Personal contacts can only be modified if the name, when being entered accidentally included a '/' or the number entered is less than two digits To modify a personal contact.*

1. In the *Personal* panel, click **Edit** .
2. **Double-click** the entry to modify.  
The entry becomes modifiable.



Edit Personal Contact Dialog Box – Modifying Entry

3. Modify information as required.
4. Close the dialogue box to save the changes.

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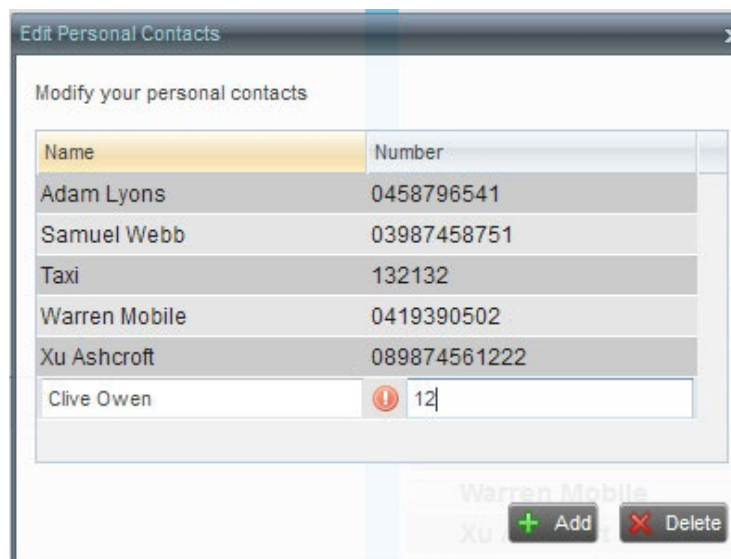
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### Delete personal contact

To delete a speed dial entry:

1. In the Personal panel, click **Edit** .
2. Select the entry to delete and click **Delete**.
3. Click **X** to save the action and close the dialogue box.



Edit Personal Contact Window – Deleting Entry

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### Managing speed dial numbers


You can add or remove Speed Dial numbers via CommPilot or in Call Centre, and the updates appear in both places. The updates that you make via CommPilot appear only in Call Centre at the next sign in.

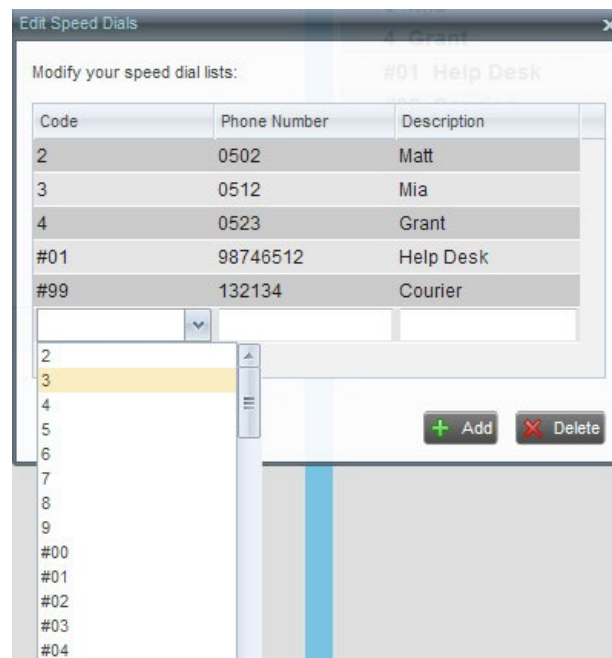
To update speed dial entries using the client, you can perform the following operations:

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

#### Add speed dial entry

To add a speed dial entry:

1. In the *Speed Dial* panel, click **Edit** .
2. Click **Add**. A new line is added below the existing entries, all owing you to define a new entry.



Edit Speed Dials Dialog Box – Adding Entry



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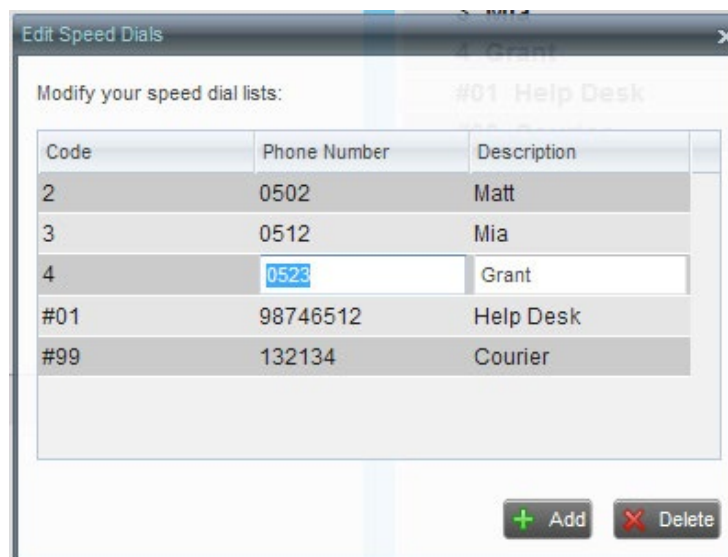
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- From the code drop down list, select a speed dial code.
- In the phone Number text box, enter the phone number to assign to the code.
- In the description text box, enter a description that will allow you to identify the entry.
- Close the dialogue box to save the entry.

### Modify speed dial entry

To modify a speed dial entry:

- In the Speed Dial panel, click **Edit** .
- Double-click** the entry to modify.  
The entry becomes modifiable.



Edit Speed Dials Dialog Box – Modifying Entry

- Modify information as required.
- Press **Enter** to save the information just modified.
- Close the dialogue box.

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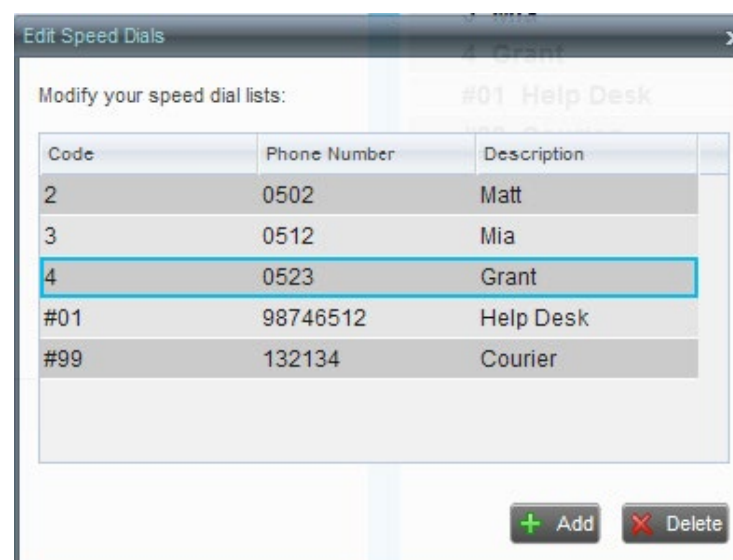
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### Delete speed dial entry

To delete a speed dial entry:

6. In the *Speed Dial* panel, click **Edit** .
7. Select the entry to delete and click **Delete**.



Edit Speed Dials Dialog Box – Deleting Entry

8. Close the dialogue box to save the change.

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# Managing the dashboard

The Dashboard pane displays an overview of queue activity for agents.

Dashboard 			
<b>PremiumCallCentre</b>			
Service Mode :None			
<b>Current Calls in Queue</b>	0/1	<b>Longest Waiting Call</b>	00:00
<b>EWT</b>	07:33	<b>AHT</b>	07:33
<b>ASA</b>	00:00	<b>Staffed</b>	1/3
<b>TEAC Call Centre</b>			
Service Mode :None			
<b>Current Calls in Queue</b>	0/3	<b>Longest Waiting Call</b>	00:00
<b>EWT</b>	00:00	<b>AHT</b>	00:00
<b>ASA</b>	00:00	<b>Staffed</b>	2/2

Dashboard

The information displayed is:

**Queue Name** – Name of the queue.

**Service Mode** – Current mode of service.

**Current Calls in Queue** – current number of calls in the queue. This is a ratio actual number of calls/queue length.

**Longest Waiting Call** – The amount of time the oldest call has been in the queue.

**EWT** – Estimated Wait Time, the estimated time it will take for calls to be answered once they are in the queue.

**AHT** – Average Handling Time, the average time it takes to process a call in the queue (the time from when a call is ringing into the queue to being hung up).

**ASA** – Average Speed of Answer, the average time it takes for a call to be answered by an agent once the call has been presented to the agent.

**Staffed** – Number of agents available in the queue. This is a ration of actual number of agents/number of agents assigned to the queue.

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If thresholds have been set for the call centre/s displayed the dashboard will show the visual indicators.

Account			
Current Calls in Queue	8/10	Longest Waiting Call	05:10
EWT	01:55	AHT	01:45
ASA	00:16	Staffed	3/9
Technical			
Current Calls in Queue	2/20	Longest Waiting Call	00:00
EWT	04:30	AHT	04:30
ASA	00:15	Staffed	1/5
Customer Support			
Current Calls in Queue	16/500	Longest Waiting Call	01:10
EWT	00:40	AHT	00:20
ASA	00:15	Staffed	25/100
Finance			
Current Calls in Queue	10/50	Longest Waiting Call	02:35
EWT	00:06	AHT	02:00
ASA	00:06	Staffed	10/20
Sales			
Current Calls in Queue	0/10	Longest Waiting Call	00:00
EWT	00:00	AHT	00:00
ASA	00:00	Staffed	1/1

Agent Dashboard showing Visual Threshold Indicators in Red and Yellow

Queue	Threshold type	Threshold severity	Threshold colour
Queue (Account)	Longest Waiting Call	2	Red
Queue (Account)	EWT	1	Yellow
Queue (Technical)	EWT	2	Red
Queue (Technical)	AHT	2	Red
Queue (Customer Support)	EWT	1	Yellow
Queue (Finance)	Longest Waiting Call	1	Yellow

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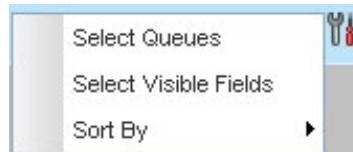
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### Select queues for the dashboard

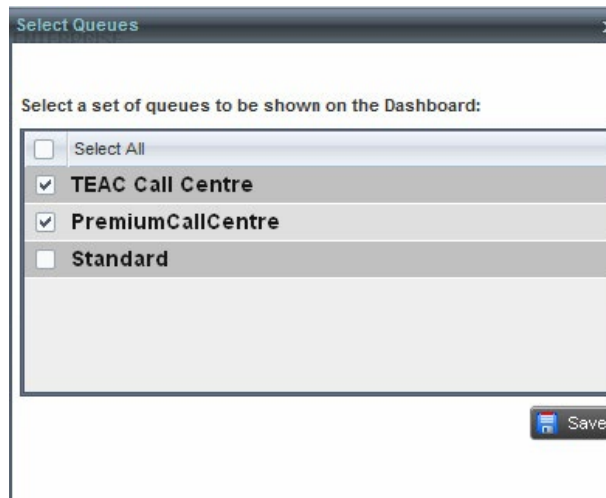
To select the queues to view in the Dashboard:

1. Click on **Options** .
2. Click on **Select Queues**.



Dashboard Options

3. Check the box for the required queues and click **Save**.



Queue Select

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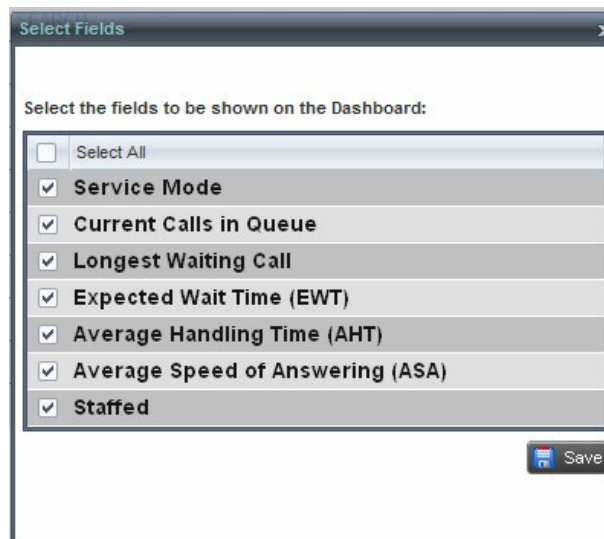
### Select Visible Fields

1. Click on **Options** .
2. Click on **Select Visible Fields**.



Dashboard Options

3. Check the box for the required queues and click **Save**.



Queue Select

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# Generating reports

The Standard Call Centre provides reporting functions to agents and supervisors. Agents can only generate reports about their own activity whereas supervisors have access to reports on activity and performance of agents and Call Centres under their supervision.

The Standard Call Centre supports Enhanced Reporting.

## Enhanced reports

The Enhanced Reporting feature enhances the reporting capabilities of the TIPT Standard Call Centre solution.

Enhanced Reporting allows you to run reports and schedule reports to run in the future using pre-defined templates. Reports can be of type *Agent* or *Call Centre*.

The report templates available to you depend on how your administrator has configured your system. Report templates cannot be amended or customised.

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



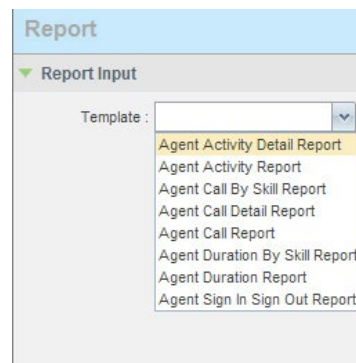
Main Interface (Top of Window)

This section provides an example of an Enhanced report. For the list of canned report templates available on TIPT for report generation as part of Enhanced Reporting, see the TIPT Call Centre Reporting Guide.

## Run enhanced report

To run a report:

1. Click the **Reporting** link at the top right of the main window.



Report Window – Enhanced Reports

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2. Select a report template from the drop-down list.  
Fill in the required information.  
The input that you need to provide depends on the template you select and the report type.

The following table explains all the input parameters for Enhanced reports, Agent and Call Centre. Not all fields appear on all reports.

Input field	Description	Allowed value
Scope	For Agent reports, it allows you to specify the agents to include in the report. You can check All Agents or Agents. If you check Agents, select agents from the drop-down list.  <b>Note:</b> This parameter is disabled when an agent runs the report, since agents can only run reports about themselves.	All Agents, Agents
	For Call Centre reports, it specifies the call centres to include in the report. You can check All Call Centres, Call Centre. If you check Call Centre, select Call Centres from the drop-down list.	All Call Centres, Call Centre
Call Completion	This setting is used to count the number of ACD calls an agent has completed within a service level during the specified interval. The Call Completion service level can be set to 1 through 7200 seconds.	1-72000
Short Duration	This setting is used to count the number of ACD short duration calls completed by an agent during an interval. You can set the maximum length of a short duration call to 1 through 7200 seconds.	1-7200
Service Level	This setting allows you to provide up to five service levels, used to perform service level calculations for each call centre. Each service level can be set to 1 through 7200 seconds.	1-7200
Service Level Options	These settings are used to determine whether certain types of calls should be included in the service level calculations: <ul style="list-style-type: none"> <li>• Check Include overflow time transfers in service level to include calls transferred due to time overflow.</li> <li>• Check Include other transfers in service level to include calls transferred for other reasons.</li> <li>• Select one of the following options for abandoned calls <ul style="list-style-type: none"> <li>– Ignore all abandoned calls to exclude all abandoned calls</li> <li>– Include all abandoned calls to include all abandoned calls</li> <li>– Include all abandoned calls except before entrance completes to include calls abandoned after the entrance message has finished playing</li> <li>– Include all abandoned calls except in interval to include calls abandoned after the time specified by the Abandoned Call Interval parameter.</li> </ul> </li> </ul>	These options can be checked or unchecked.
Abandoned Call Interval	If you selected the Include all abandoned calls except in interval option, enter the desired interval in this text box in seconds.	1-7200
Service Level Percentage	This setting allows you to specify the service-level objective (expressed as percent of calls).	
Type	This can be checked as Historical or Real Time. <ul style="list-style-type: none"> <li>• Historical reports show data from the assigned start date to the assigned end date.</li> <li>• Real-time reports show data from the assigned start date to the present, with the current interval refreshed with real-time data.</li> </ul> <p>Real-time reports for individual agents contain data for each time interval, with the last interval reflecting real-time data, if requested (subject to the refresh rate). When the interval switches over, the final data for the last time period is captured and shown as historical data, and real-time data is reflected in the new time interval.</p>	Historical or Real-time



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Input field	Description	Allowed value
Start Date	This is the date you want the report to start from. It can be set by typing in the text box or clicking the Calendar icon. This is compulsory. The oldest historical date depends on the interval selected: <ul style="list-style-type: none"> <li>• 180 days of half-hour interval statistics</li> <li>• 365 days of hourly interval statistics</li> <li>• 730 days of daily interval statistics</li> </ul>	MMM DD, YYYY
Start Time	This is the time when you want the report to start from. You can select the hour format (A.M., P.M) from the Hour Selection Type. Time is applicable for hourly and minute intervals only.	1-12 AM/PM or 00-23 hr
End Date	This is the date when you want the report to end. It can be set by typing in the text box or clicking the Calendar icon. This is compulsory when a Historical report is selected.	MMM DD, YYYY
End Time	This is the time when you want the report to end. You can select the hour format (A.M., P.M.) from the Hour Selection Type. Time is applicable for hourly and minute intervals only. This is compulsory if a Historical report is selected.	1-12 AM/PM or 00-23 hr
Sampling	The sampling period is only applicable to interval-based report templates and determines how the report information will be presented. For example, an hourly report displays information for each hour of the report timeframe.	15 mins, 30 mins, Hourly, Daily, Weekly, Monthly
Output Format	This allows you to specify in what format you would like the report output to be generated. If you select HTML or PDF the report is displayed in the report window. If you select CSV, a file is created that you can save on your computer.	PDF, CSV, HTML

### 3. Click **Run Report**.

The results of the report are displayed in the Report Output area of the window.

Report Results (Example).

Depending on the report type, the report results can contain the following elements: a pie chart, a bar chart, a table, a high-water marks table, and a line chart (see examples on the next page).

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

This section provides an example of an enhanced report: Abandoned Calls report. For details on the reports available in Call Centre, see the TIPT Call Centre Reporting Guide.

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

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Telstra IP Telephony  
Call Centre

### Report

▼ Report Input

Template : Abandoned Call Report

Scope :  All Call Centers  Call Center  DNIS

[Hide Performance Parameters...](#)

Service Level : 30

Abandoned Call Threshold : 1 5 10 20

Type :  Historical  Real time  Scheduled

Start Date : 07/01/2012 Start Time : 12:00am HH:MM [am/pm]

End Date : 09/30/2012 End Time : 12:00am HH:MM [am/pm]

Sampling : Daily

Output Format : HTML

Run Report

Abandoned Calls Reports – Enter Parameters



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# Configuring agent

You use the Settings page, accessed via the Settings link at the top right of the main page to configure various aspects of the Call Centre 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 set to configure Call Centre.

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

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## Settings – General

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

Setting – General

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

### Account

You use this area to change your TIPT password.

Call Centre shares logon credentials with TIPT. When you change your password in Call Centre, remember to use this new password when accessing your web portal.

**Note 1:** The password you enter has to meet password requirements set on TIPT.

**Note 2:** To ensure secure access, Change Password functionality is only available if HTTPS is used to communicate with the system.

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To change your password:

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

The screenshot shows a web application interface with a top navigation bar containing tabs for 'General', 'Application', 'Services', 'Plug-ins', 'Messaging', 'Report', and 'About'. The 'General' tab is selected. Below the navigation bar, the 'General' settings page is displayed. On the left, there is an 'Account' section. To the right of 'Account', there is a 'Change Password ...' link. A modal dialog box is open, containing three text input fields labeled 'Old Password:', 'New Password:', and 'Confirm Password:'. Below the input fields are three buttons: 'Change Password', 'Reset', and 'Cancel'.

Account – Change Password

- Enter your current and new password and click Change Password.

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

### Hotel guest

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

- In the text box, enter the username of the Hoteling host that corresponds to the desk/device you are using, for example, "03xxxxxxxx@acme.com".

### Screen pop

This feature is currently unavailable.

### Date format

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

- Date Format:** This setting allows you to select the format for displaying dates in reports. The format is used for all dates that are included in the generated report.

### Time format

- Time Format:** This setting allows you to select the format for displaying time in reports. The format is used for all times that are included in the generated report.
- Note that this setting does not impact the format of events durations, which are always reported in the "DD:HH:MM:SS" format in the generated reports.

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## Workspace

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

The following elements can be customized:

- The size and position of the web browser window in which the main interface is displayed.
- The size of the panes (Call Console, Contacts, and Queued Calls).
- The size and position of the Dashboard window.
- The size and position of any report window.

**Note:** The Position functionality does not work in Internet Explorer, due to a technical limitation of Internet Explorer.

**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 Centre 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 customise 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.

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### 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.

Queue	Number	Wrap-Up Policy
<input type="checkbox"/>		
<input checked="" type="checkbox"/>	0353950503	1:00
<input type="checkbox"/>	0353950513	1:00

**Agent Policies**

Post Sign-In ACD State : Available

Post Call ACD State : Wrap-Up

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

Outgoing calls as call center

Outbound Caller Id :

Settings – Application



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## Queue memberships

These settings allow you to select the Call Centre queues you wish to join.

- To join a Call Centre queue, select the check box on the line for the Call Centre.
- To join all queues, select the check box in the header.

Queue	Number	Wrap-Up Policy
<input checked="" type="checkbox"/> Sales	0353950503	1:00
<input type="checkbox"/> Training	0353950513	1:00

**Note:** If you are not allowed to join/leave a queue, the line for the queue is greyed out, and you can only view your join status in the queue. Contact your administrator to change your join status in a queue.

You can select columns to display for queues listed on this page, and sort and group queues by any column.

If you are a member of a call centre that uses skills based routing, the skill level will be displayed.

Queue	Number	Wrap-Up Policy	Skill Level
<input checked="" type="checkbox"/> PremiumCallC...	0884414116	1:00	1

Queue with Skill based routing level

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## 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 Centre.
- 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.
- **Make outgoing calls as Call Centre:** Check this box to display a Call Centre CLID instead of your phone number when you make a call.
- **Outbound Caller ID:** If you checked *Make outgoing calls as Call Centre*, select the number to use from the drop-down list.

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

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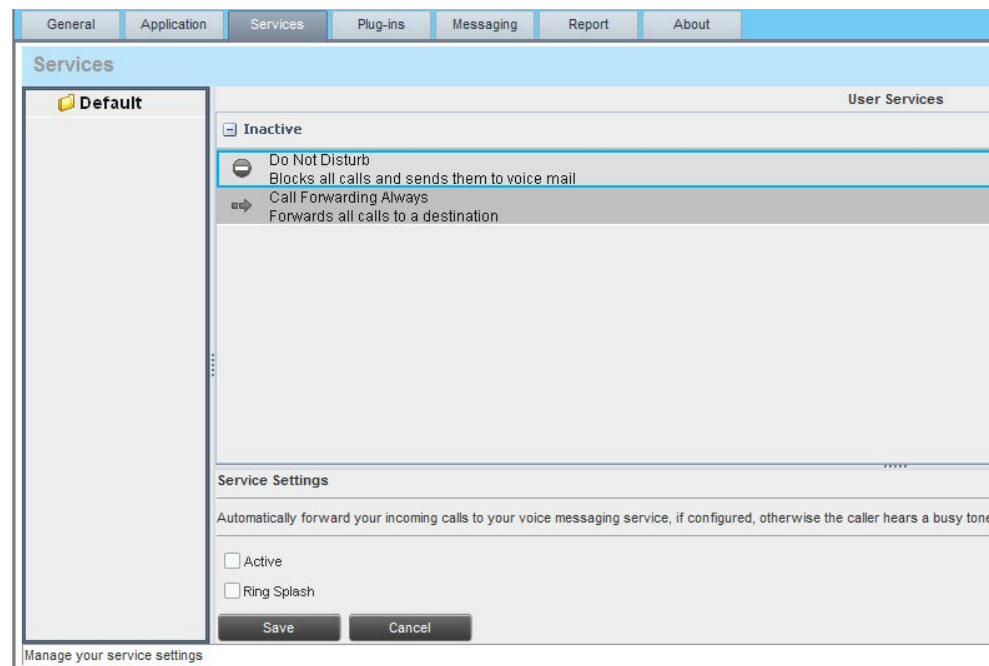
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## Settings – Services

You use the *Services* tab to configure various services assigned to you by your administrator on TIPT and integrated with Call Centre. Those 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.



Settings – Services

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

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

**Call Forwarding Always:** When you activate this service, you need to 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 *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, enter the number to forward your calls to.
3. To generate a ring splash for incoming calls, check the Ring Splash option.
4. To save your changes, click **Save**.

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## Settings – Plug-ins

You use the *Plug-ins* tab to configure the plug-in software used by Call Centre to provide functionality such call notification, program shortcuts, and call log.

Settings – Plug-Ins

### Plug-ins

You use the *Plug-ins* area to specify whether desktop integration features of Call Centre should be enabled or disabled.

- **Disable All Plug-ins** – This setting allows you to enable or disable all desktop integration features. When this option is checked, the JNLP file required to run the desktop integration components will not be downloaded and the desktop integration features will not work.

### 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 running Call Centre is minimized. To restore the Call Centre window, click the “T” icon in the task bar.
- This does not work in Firefox. In Internet Explorer, you have to have only one tab open in the web browser running Call Centre.
- **Show notification for calls:** When this option is checked, Call Centre 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 Centre. Also, if calls come within eight seconds of each other, the Call Notification pop-up window appears only for the first call of that series.

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## Program Shortcuts

You use the *Program Shortcuts* settings to create Call Centre shortcuts on your desktop for convenient access to Call Centre.

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 Centre shortcut on your desktop.
- **Remove Shortcut:** This button, when clicked, removes the previously created Call Centre shortcut. If you did not create a shortcut using the Add Shortcut button, the Remove Shortcut button has no effect.



Settings – Plug-Ins Short Cut

## 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\

where:

- Drive is the drive letter where your profile is stored (typically C).
- Windows\_Username is your Windows user name.
- BW\_UserID is your BroadWorks user ID.

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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 Centre ID	Call Centre 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.	nteger (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.

### Activity archive

- **Enable/Disable Call Event Log Integration:** This double-action button allows you to enable or disable call log archival 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.

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## Settings – messaging

The *Messaging* tab allows you to configure various messaging options for Call Centre. Currently, only e-mail messaging is supported.

Settings – Messaging

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

If you selected the custom SMTP option, you also need to configure the following options:

- **Display Name:** This is the name that will be 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 will appear when you generate and e-mail message in Call Centre.
- **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.

## 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 those values as required when generating reports.

Settings – Report

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## Default threshold

These settings allow you to configure the thresholds that will be 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 counts of the number of ACD short duration calls completed by an agent during an interval. You can set the maximum length of a short duration call to 1 through 7200 seconds.
- **Default Start Day of 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.

## Settings – about

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

General	Application	Services	Plug-ins	Messaging	Report	About
About						
<b>Version</b>	 BroadWorks® Call Center™ R19.0.24					
<b>Profile</b>	BW_Web_Call_Center_19_0_24_rev2_internalLDAP					
<b>Disclaimer</b>	Warning: This computer program is protected by the copyright law and international treaties. Unauthorized reproduction or distribution of this program, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under the law. Copyright © 2012 BroadSoft®. All Rights Reserved. BroadWorks® and BroadWorks® Call Center™ are trademarks BroadSoft® inc.					

Settings – About

The following information is provided on this page.

**Version:** This is the name and software version of TIPT Call Centre client.

**Profile:** This is the Call Centre client profile used.

**Disclaimer:** This is the Call Centre copyright information.



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# Configure web browser

## Firefox settings quick link navigation

In Firefox 24 or later, the `dom.disable_window_flip` preference must be set to “false” for quick link navigation to work. If this setting is not configured, Call Centre does not change focus from the Dashboard to the main application window when the user clicks on a quick link.

1. Open a new tab in Firefox.
2. In the address bar, type “about:config”. A list of preferences appears.
3. Go down to `dom.disable_window_flip` and set its value to “false”.

## Certificate for desktop integration features

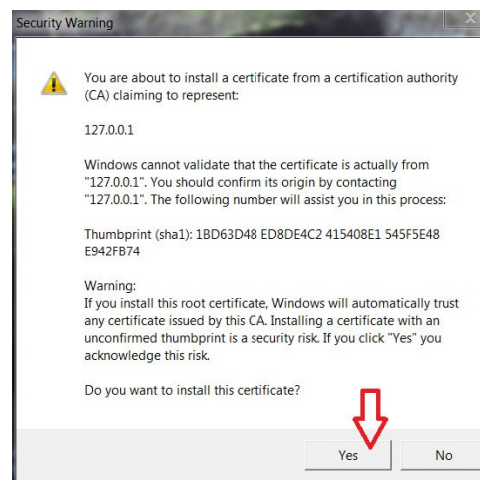
A certificate required to run Call Centre desktop integration features must be added to the browser-specific certificate store location on your machine. For the list of the desktop integration features, see section Settings – Plug-ins.

Chrome	Windows Certificate Store
Internet Explorer	Windows Certificate Store
Firefox	Firefox Certificate Store

**The following subsections provide instructions for allowing the certificate to be added to your device in the different environments.**

## Microsoft windows certificate store

If the Certificate is not yet imported to the certificate storer, the following dialog box appears.



Microsoft Windows- Security Warning

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1. Click **Yes** to install the certificate.

If you are denied access to the certificate trust store to import the certificate, the following dialog box appears.

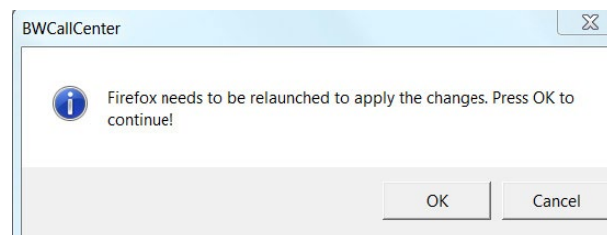


Microsoft Windows – User Account Control

2. Click **Yes** to install the certificate.

### Firefox certificate store

Mozilla Firefox has its own certificate store. If the certificate is not yet imported to the Firefox certificate store and if the browser is open during the current session, the following dialog box appears.



Call Centre – Relaunching Firefox

1. Click **OK** to import the certificate to Firefox.

**Note:** Call Centre client only verifies the last profile to see if the certificate already exists. If you have multiple profiles in Firefox and desktop integration features do not work, create a new profile or delete the certificate from the latest profile by navigating to *Tools → Options → Advanced → View Certificate → Authorities → BroadSoft (127.0.0.1)*. This will import the certificate to all the profiles present.

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## Security settings for desktop integration features

As you sign in to Call Centre, a JNLP file is downloaded, and you are asked to click the link shown in the browser. Due to security restrictions, the application may not run. If this occurs, perform the steps specified in the following subsections.

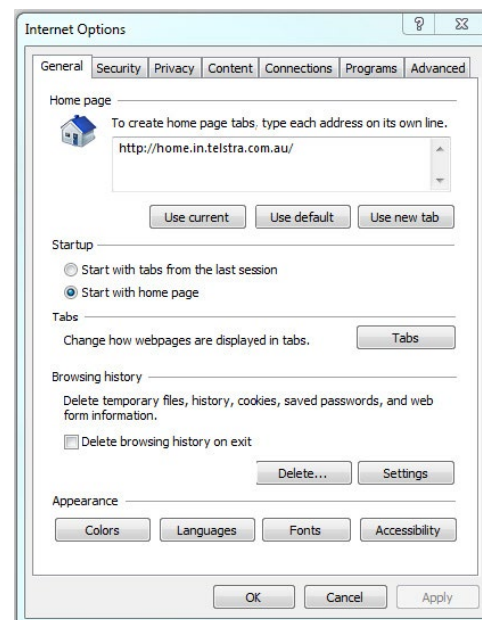
**Note:** You should run Java JRE 1.6 or higher, the latest Java JRE 1.8 is recommended. You must use 32 bit JRE with a 32 bit browser and 64 bit JRE with a 64 bit browser.

## Internet Explorer

If you're running Internet Explorer, you must perform the following steps to run JNLP.

**Note:** You must run Call Centre over HTTPS with Internet Explorer.

1. From the Internet Explorer *Menu* bar, select *Tools* and then *Internet Options*. The *Internet Options* window appears.



Internet Explorer – Internet Options

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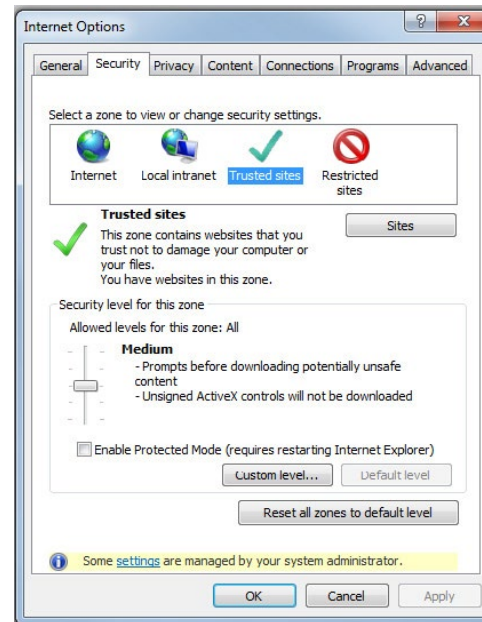
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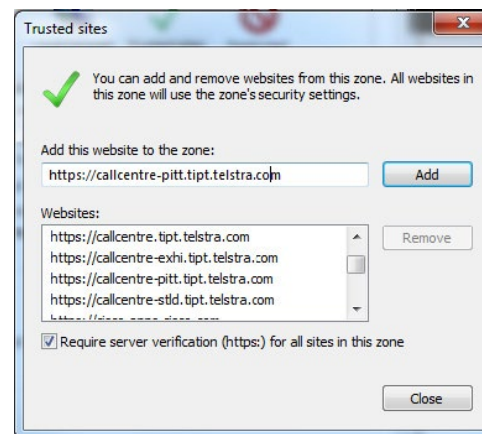
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2. Click the **Security** tab.



Internet Explorer – Internet Options - Security

3. Click **Trusted sites** and then click **Sites**. The *Trusted sites* window appears.



Internet Explorer – Trusted Sites

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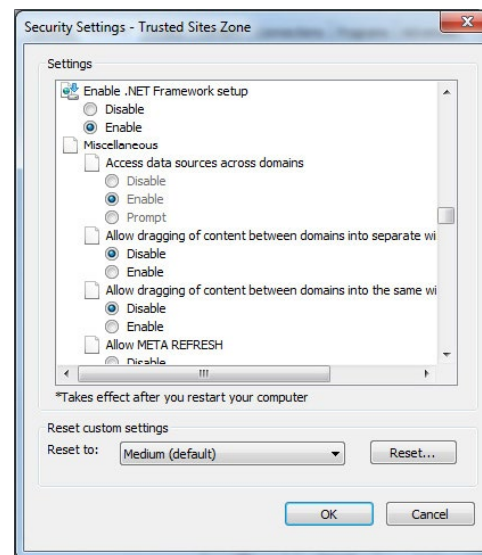
4. In the Add this website to the zone text box, enter each of the following CallCentre client URL's and then click **Add**.

- <https://callcentre.tipt.telstra.com>
- <https://callcentre-exhi.tipt.telstra.com>
- <https://callcentre-stld.tipt.telstra.com>
- <https://callcentre-pitt.tipt.telstra.com>

5. The URL appears in the Websites text box.

6. Click **Close**.

7. In the Internet Options window, click Custom level. The Security Settings – Trusted Sites Zone appears.



Security Settings – Trusted Sites Zone

8. Scroll down to the Miscellaneous settings section and select Enable for the Access data sources across domains.

9. Click **Yes** in the Warning! window that appears.

10. Click OK and then click OK in the Internet Options window.

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# Appendix A: Glossary and Definitions

## ACD states

ACD states specify the agent's availability to take calls. The possible call states are as listed in the following table.

An agent can be in one of the following 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. TIPT 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 behaviour can be overridden if Call Waiting on agents is enabled for the Call Centre, 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 centre configuration. By default, calls are not routed to agents in Wrap-Up state, except when the call centre 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 the Standard Call Centre, an agent can 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 CommPilot.

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### Phone states

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

For supervisors, the phone states are displayed as follows:

Phone state	Icon	Description
Idle		Supervisor's phone is on-hook, which means the supervisor is not on a call.
Busy		Supervisor's phone is off-hook, which means that the supervisor is on a call.
Ringing		Supervisor's phone is in alerting state; a call is currently being delivered to the supervisor.
Do Not Disturb		Supervisor has enabled the Do Not Disturb service.
Call Forwarding Always		Supervisor has enabled the Call Forwarding Always service. (Moving the mouse over this icon displays the number where the calls are forwarded.)
Unknown		Supervisor's phone state is currently unavailable or unknown.

For agents, the phone states are is 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. Whether calls MAY be delivered to agents depends on their call waiting settings, and the call centre'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 agent in the Do Not Disturb call state. This state is NOT RECOMMENDED for Call Centre agents. Agents should use the Unavailable ACD state when they need to temporarily block new incoming calls.
Call Forwarding Always	Any		Agent has enabled the Call Forwarding Always service. (Moving the mouse over this icon displays the number where the calls are forwarded.)
Unknown	Any		Agent's call state is currently unavailable or unknown.

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## Call states

Call states are the states that your current calls can be in.

Call state	Display Name	Icon	Call Actions
Ringing In (Local)		Answer, End	Incoming Local
Ringing In (Remote)	Incoming	➔	Answer, Conference, End
Ringing Out, Outgoing	Outgoing	➔	Conference, End
Active	Active	▶	Transfer, Hold, End, Conference
On Hold	Held		Transfer, Resume, End, Conference
On Hold (Remote)	Held		Transfer, Hold, End, Conference
Active ( In Conference)	Active	👤	Transfer, Hold, End
On Hold ( In Conference)	Held	👤	Resume, Transfer, End
Ringing In (Recalled Call)	Call Recalled	➔	Answer, Conference, End

## Call types

This section defines different types of calls measured in Call Centre statistics.

Name	Description
ACD Call	A call delivered to a call centre pilot number that is directed to an agent via the ACD function.
Inbound Call	A direct call to an agent. Other calls treated as Inbound calls include: <ul style="list-style-type: none"> <li>• Calls that a supervisor retrieves from a queue</li> <li>• Calls that an agent receives due to a transfer from another agent (Note that they may have originated as ACD calls)</li> </ul>
Outbound Call	An outbound call made by an agent.
Held Call	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	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. <b>Note:</b> A timed-out call is a call that is transferred due to exceeding the maximum wait time in a queue.
Answered Call	An ACD call that was answered by an agent.
Abandoned Call	An ACD call that entered the queue, but the caller hung up before the call was answered or transferred.
Received Call	An ACD call that was received and either answered or abandoned. Overflowed calls are not included.
Overflowed Call	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	A Call that is in the Queue waiting to be answered
Bounced Call	A call that has been transferred back to queue because it was not answered by an agent in the specified time.
Stranded Call	A call that is in a queue after all agents assigned to the queue have moved to the Sign- Out ACD state.



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# Appendix B: Keyboard Shortcuts

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

Key	Equivalent Mouse Action	Description
<b>ESC</b>	Click the Close button in a dialog box.	Closes the open dialog box.
<b>ESC</b>	Cancel the changes.	Exits the currently selected editable item, such as a text box.
<b>/1</b>	Click the Dialer text box.	Places the cursor in the Dialer text box; retains the currently selected item (if applicable).
<b>?</b>	Click the Search text box.	Places the cursor in the Search Contacts text box; retains the currently selected item (if applicable).
<b>ARROW DOWN</b>	Click the scroll bar or the next item in a list.	Selects the next item in the Call Console or Queued Calls pane.
<b>ARROW UP</b>	Click the scroll bar or the previous item in a list.	Selects the previous item in the Call Console or Queued Calls pane.
<b>PAGE DOWN</b>	Scroll down one page.	Goes to the next page in the Call Console or Queued Calls pane.
<b>PAGE UP</b>	Scroll up one page.	Goes to the previous page in the Call Console or Queued Calls pane.
<b>1...9</b>	Select a call in the Call Console pane.	Pressing "1" selects the first call; pressing "2" selects the second call; and so on.
<b>SPACEBAR</b>	Click Answer on the selected incoming call in the Call Console pane.	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.
<b>&lt;PERIOD&gt;</b>	Click End on the selected call in the Call Console pane.	Ends the selected call.
<b>ENTER</b>	Click Dial.	If the cursor is placed in the Enter Number text box in the Dialer, dials the entered digits.
<b>ENTER</b>	Click Search.	If the cursor is placed in the Search Contacts text box, performs a search.
<b>+</b>	Click Transfer in the Dialer.	Transfers the selected call to the ad-hoc number entered in the Dialer.
<b>SHIFT+1..9</b>	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.
<b>SHIFT+1..9</b>	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.
<b>SHIFT+1..9</b>	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.
<b>S or s</b>	Click the Settings link.	Goes from the main page to the Settings page.
<b>B or b</b>	Click the Back to Application link.	Goes back from Settings page to the main page.
<b>R or r</b>	Click the Call History button.	Opens the Call History dialog box.
<b>H or h</b>	Click the Help link.	Opens this guide in a PDF format.
<b>D or d</b>	Click the Dashboard link (Supervisor)	Opens the Dashboard or brings the Dashboard to the front if it is already open.
<b>SHIFT+L or SHIFT+l</b>	Click the Sign Out link.	Signs the user out of the application.
<b>SHIFT+A</b>	Select Available (Agent).	Sets the agent's ACD state to Available.
<b>SHIFT+U</b>	Select Unavailable (Agent).	Sets the agent's ACD state to Unavailable.
<b>SHIFT+W</b>	Select Wrap-Up (Agent).	Sets the agent's ACD state to Wrap-Up.

1. 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.