



OfficeSuite eQueues

Tenant Administrator Reference Guide

Version 2.6

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Introduction & Getting Started

Thank you for choosing OfficeSuite eQueues for your call queuing and recording requirements. Broadview Networks now offers this ACD (Automatic Call Distribution) functionality to work directly with its OfficeSuite hosted voice service. All OfficeSuite eQueues and recording functionality is hosted in the cloud and is highly redundant and reliable.

OfficeSuite eQueues allows your business to distribute calls to your best available Agents according to the rules that you define. When your staff is busy with other callers, OfficeSuite eQueues answers calls on your behalf and gives those callers a custom message that you create and manage. As soon as qualified Agents become available, those queued calls are distributed out to them. To help you understand how effectively your team has responded to the call load, OfficeSuite eQueues presents real-time displays of active and queued calls and delivers a variety of informative reports.

This Administrator Reference Guide is designed to provide the information required to set up and manage the numerous features of OfficeSuite eQueues. It is organized to match how these features are presented in the left-side menu of the application portal. For related questions about the OfficeSuite hosted voice service, please refer to OfficeSuite documentation at <http://broadviewnet.com/CustomerCenter/OfficeSuite.asp>

Initial Time Zone Setting

Your business may span multiple time zones. To avoid confusion, all of the data collected and presented by OfficeSuite eQueues is based on a single time zone that you choose before the service is first turned up. Time stamps shown in reports are relative to that time zone. Days start and end at midnight for the selected time zone.

The selected time zone can be changed, but changing the time zone will not alter the time stamps on data previously collected. Before starting, make sure the system is configured with the preferred time zone.

Electing the Call Recording Option

Before OfficeSuite eQueues services are turned up, your business also needs to decide whether it wants to record calls through its Queues. Call Recording is a premium option of OfficeSuite eQueues.

If the Call Recording Option is purchased, the Tenant Administrator will have an extra check-box for every Voice Queue. It determines whether or not new calls through that queue will be recorded. If checked, then all answered calls will be recorded. If not, then no calls will be recorded through that queue.

Those who select the Call Recording Option will also have the ability to create ***Evaluation Forms*** and use those forms to evaluate the content of their call recordings. The evaluation system will automatically score the results, and Evaluation Reports can be generated to evaluate the way an Agent or a team of Agents is handling calls.

If you haven't done so already, talk to your Broadview Representative about the Call Recording Option and the associated Evaluation Forms.



Getting Started

To get started quickly, do the following:

1. Read the section below about Phone-Based Sign In. Make sure all of your Agents have programmed ACD Sign In keys on their phones. If you prefer, make ACD Sign In keys part of an OfficeSuite key profile, and then assign that profile to all Agents.
2. Read the section titled “Navigating the User Interface” to familiarize yourself with how to navigate the ACD web portal.
3. Know the names and extensions of the users you wish to make into ACD Agents and Administrators. Then go to the Agents and ACDs section and follow the instructions there to set up your initial Agents and Voice Queues.
4. Use the remaining sections in this document to learn about and start using the other components of OfficeSuite eQueues.

Phone-Based Sign-In

Agents sign in and out of queue duty using a programmable key on their OfficeSuite phone. Once a tenant has been configured for ACD services (and not before), the ACD Sign In option becomes available for OfficeSuite's supported Mitel® phone models. It is configured identically to any other OfficeSuite programmable phone key. (Instructions for programming phone keys are found in the OfficeSuite Administrator's Guide.) After the ACD Sign In key is added to the phone, cycling that key (once) on and off will synchronize the state of the key with the ACD system. After that, when the key is lit, the Agent is Signed In and ready and will be delivered queued calls. When the key is dark, the Agent is signed out and the ACD system will not attempt to deliver any more queued calls to this Agent. This key has no effect on any other calls to or from this extension.

★ Important: If the programmable key is lit when the Agent logs out of their phone, ACD calls will still be offered to that extension. Those calls will go to whatever OfficeSuite forwarding target or coverage (including mobile twinning) that is established for that extension. This allows the Agent to deliver their ACD calls to their home phone, their cell phone, or to a different OfficeSuite extension. In other words, ACD Agents can take full advantage of OfficeSuite's mobility options. However, if not used intentionally, logging out of the phone while remaining signed in for queue duty can result in ACD calls being delivered to unintentional destinations, like a personal voicemail box. Unless specifically taking advantage of OfficeSuite's mobility features, the recommended practice is to sign out of queue duty (extinguish the lit programmable key) before logging out of an Agent phone.

Navigating the User Interface

The user interface is accessed through a web browser. Recommended browsers are:



- Internet Explorer 10 or 11
- Mozilla Firefox 12 or 13

As newer releases of these browsers become available, Broadview Networks will periodically test and then update this list.

When using Firefox, the Windows Media Player plug-in is required to listen to audio content. When this document was published, the necessary plug-ins could be obtained as follows:

Windows/Firefox:

<http://port25.technet.com/pages/windows-media-player-firefox-plugin-download.aspx>

Macintosh/Firefox:

<http://www.apple.com/downloads/macosx/video/windowsmediaplayerformacosx.html>

Linux/Firefox:

<http://mplayerplug-in.sourceforge.net/install.php>

Logging In

Point the browser to:

`http://officesuiteacd.broadviewnet.com/?domain=<WebURL>`

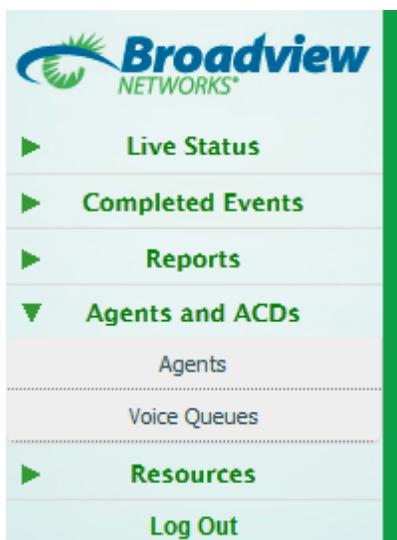
where <WebURL> is replaced with the last part of the URL used to log into the OfficeSuite portal, without the slash (/). Non-working examples:

`http://officesuiteacd.broadviewnet.com/?domain=2125551212`

`http://officesuiteacd.broadviewnet.com/?domain=debbiesdeli`

If you have the URL correct, you will see a Broadview branded page and be prompted to log in. Bookmark this address, saving it as a favorite.

Use your OfficeSuite extension and password (numeric PIN) to log in. This is the same extension and PIN used to log into the OfficeSuite portal and the OfficeSuite phone.



The Navigation Bar, Menus, and Sub-menus

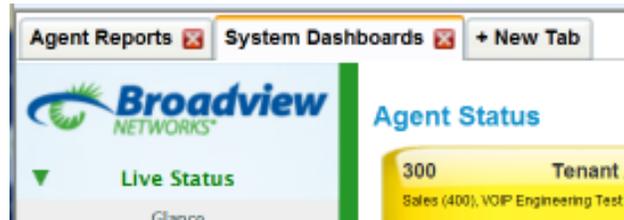
Once logged in, the Navigation bar will appear on the left side. Menu items that have right-facing arrows can be clicked to display a sub-menu. Clicking on a sub-menu item will then display the selected function to the right of the Navigation Bar.

Altogether the Navigation Bar presents all Tenant Administrators with all of the OfficeSuite eQueues options that your company has purchased.

General UI Information

Tabs

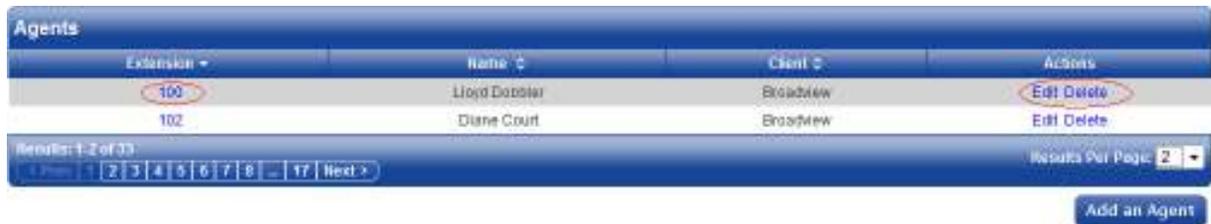
Tabs are provided at the top of the page to facilitate working with multiple views into the system. Some new tabs are opened automatically when a sub-menu, a link or a button is clicked. To open a new tab on your own, click "+ New Tab". To close a tab, click the red and white X.



★ **Important:** While most browsers have a **Back** button, the best practice is to avoid the browser's Back button. Instead, to change views, click a new option or click **X** to close the current tab.

Links

Links appear in blue text. The cursor will change form when hovering over them.



Buttons

Buttons are used throughout the application. For example, to create a new item the **Add...** button is often located at the lower right hand corner of the page.



Required Fields

Configuration pages will often have fields that must be filled in for the new data to be accepted. Required fields will have a red asterisk (*) in front of the field name.

ACD Queue Details For Ext 500	
* Extension Number:	500
* Name:	Dedicated Eng
Note:	
Priority:	1
* ACD Timeout (sec):	240
Timeout Redirect Extension:	None/Remove

Searches

Many web pages present opportunities to search for specific data. When trying to match a string of letters or digits, asterisks can be used to match any possible substring. For example, searching for >*Jones*< will match "Jones Real Estate" and "2125551234 Robert Jones, Jr."

Results Per Page

Pages that list multiple results often allow for adjusting the number of results displayed. Use Results Per Page to temporarily increase this number.



Sorting Based on a Column

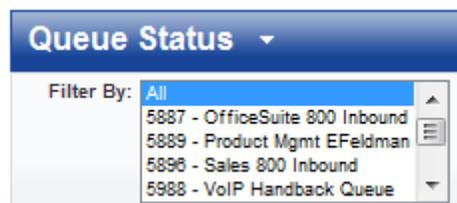
Individual page listings can be sorted based on the data in a particular column by clicking on the column header. Clicking a second time reverses the sort order.

Main Menu: Live Status

Overview

The "Live Status" pages show real-time information related to Voice Queues, Agents, and Active Calls. These are often called dashboards. With a projector or a large-screen monitor, dashboards can be displayed where the entire team can track them.

At the top of each Live Status page there is a title line, e.g. "Queue Calls" and "Queue Status". Clicking on the title line opens a "Filter By" window. For example:





This allows the user to select which subset of the Queues will displayed on this page. Shift-click to display two Queues and all the Queues between. Control-click to display multiple individual Queues.

Note: When a subset of the Queues is selected on the "Voice Queues" Live Status page, the graph will not display, only the Queue Statistics summarized for the selected Queues.

Queue Calls

The Queue Calls Dashboard displays all calls in progress to and through all queues. For example, in the screenshot below, the call from 3478230075, NEW YORK NY has been connected to extension 300 for 6 seconds and has a total duration of 17 seconds.

The screenshot shows the 'Queue Calls' dashboard. At the top, there is a 'Filter By:' dropdown menu with the following options: 'All', '5887 - OfficeSuite 800 Inbound', '5889 - Product Mgmt EFeldman', '5896 - Sales 800 Inbound', and '5988 - VoIP Handback Queue'. Below the filter, there are two call detail sections. The first section is for '5887 - OfficeSuite 800 Inbound' and shows a table with columns: Connect Time, Caller ID, Agent, Call Duration, State Duration, and State. The data row shows: 12:31 PM, Ken Glossbrenner - 3333, (blank), 00:00:04, 00:00:04, and Waiting. The second section is for '5889 - Product Mgmt EFeldman' and shows a table with columns: Connect Time, Caller ID, Agent, Call Duration, State Duration, and State.

Connect Time	Caller ID	Agent	Call Duration	State Duration	State
12:31 PM	Ken Glossbrenner - 3333		00:00:04	00:00:04	Waiting

Field Definitions

- **Connect Time:** the time at which the call was first received by the ACD.
- **Caller ID:** the phone number for the caller (if provided by the PSTN).
- **CNAM (Caller Name):** a text description of the caller (as provided by the PSTN).
- **Queue:** the Queue where the call is being served.
- **Agent:** the Agent to which the call has been connected (if connected).
- **Call Duration:** the elapsed time since the call was answered by the queue.
- **State Duration:** the elapsed time of the current state.
- **State:** the current state of the call: Waiting or Connected.

Voice Queues

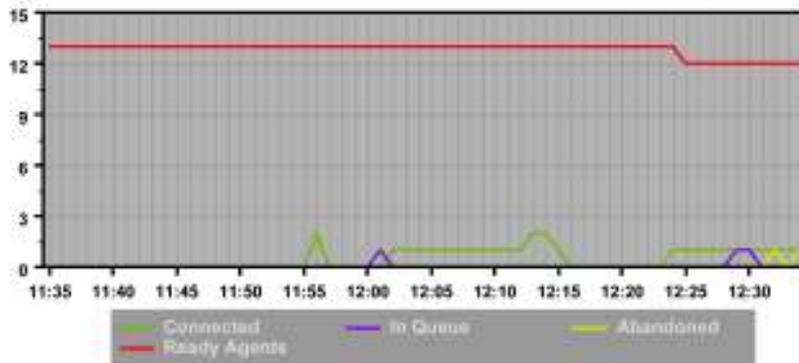
The Voice Queues Dashboard displays a graph of Queue and Agent activity across all voice queues.

Queue Status

Filter By: [dropdown]

- 5587 - OfficeSales 300 Inbound
- 5588 - Product Mgmt BPalmer
- 5590 - Sales 300 Inbound
- 5592 - VoIP Handback Queue

60 Minutes of Queue Activity



Queue Statistics				
Connected	Ready Agents	In Queue	Abandoned in Last Hour	Longest Wait
0	12	1	2	00:00:05

Field Definitions

- **Connected:** the number of calls currently connected to Agents.
- **Ready Agents:** the number of Agents who are currently signed and ready.
- **In Queue:** the number of callers currently waiting in Queues.
- **Abandoned in Last Hour:** the number of abandoned calls. See the definition of Abandoned Call for more detail.
- **Longest Wait:** among all callers currently waiting in all Queues, the longest time any of them has been waiting.

The 60 minute graph on this page is updated once a minute. At the instant of the update the graph plots:

- The number of Agents currently signed in and ready for queued calls.
- The number of ACD calls currently connected to Agents.
- The number of calls currently in Queue waiting for an Agent to answer.
- The total number of calls abandoned during the previous full minute of operation.

Note: Between the beginning and end of any single minute interval, the numbers of connected calls, ready Agents, and calls in queue could vary widely. These variations would not show on this graph. However, that variation would be seen in the real-time table presented below the graph.

Main Menu: Completed Events

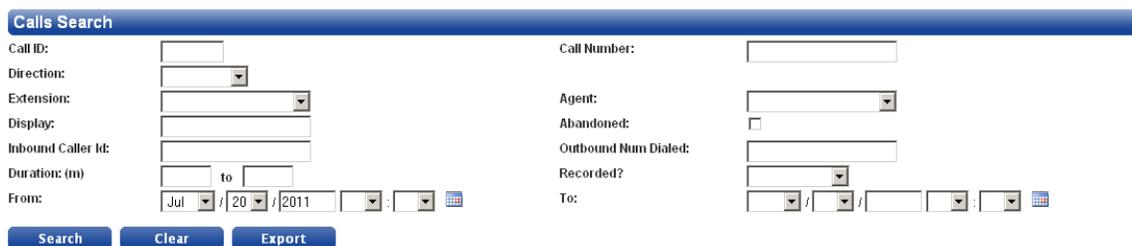
Overview

Completed Events provides the ability for Tenant Administrators to search and review recently completed ACD activity. If the Call Recording Option is purchased, Completed Events also presents the ability to locate and listen to recorded calls, build a Recording Library of important recordings, and search for Evaluations of recorded calls.

Calls

Clicking on the Calls sub-menu item brings up the Calls Search which searches for completed calls matching chosen criteria. Once a call is found, clicking on View reveals more details.

Note: By default, call details are available for 365 days and call recordings are available for 30 days. Speak to a Broadview Representative regarding the possibility of longer storage.



The screenshot shows the 'Calls Search' interface with the following fields and controls:

- Call ID:** Text input field
- Direction:** Dropdown menu
- Extension:** Dropdown menu
- Display:** Text input field
- Inbound Caller Id:** Text input field
- Duration (m):** Two text input fields with 'to' between them
- From:** Date and time selection fields (Month: Jul, Day: 20, Year: 2011)
- Call Number:** Text input field
- Agent:** Dropdown menu
- Abandoned:** Check box
- Outbound Num Dialed:** Text input field
- Recorded?:** Dropdown menu
- To:** Date and time selection fields
- Buttons:** Search, Clear, Export

Field Definitions

- **Call ID:** Match one of the call identifier called Call ID.
- **Call Number:** Match the other call identifier called Call Number.
- **Direction:** Match on the direction of the call (all queued voice calls are Inbound).
- **Extension:** Match calls that entered this queue.
- **Agent:** Match calls answered by this Agent.
- **Display:** Match calls by the content of the Display field (calling name and calling number).
- **Abandoned:** When checked, match only abandoned calls.
- **Inbound Caller ID:** Match calls by the content of the Display field (calling name and calling number).
- **Outbound Num Dialed:** Reserved for future use.
- **Duration:** Match call duration in minutes. When the first field is blank, match only calls shorter than the 'to' value. When the 'to' field is blank, match only calls longer than the first field.
- **Recorded?:** When Yes, match only recorded calls (Yes). When No, match only unrecorded calls.
- **From:** Match on when the call began, beginning with this date and time. If blank, match all calls prior to the To: value.



- **To:** Match on when the call began, ending with this date and time. If blank, match all calls since the From value.

The search results will be displayed on the same page:

Call ID	Time	Dur.	Dir.	Display	Source	Destination	Agent/Device	Rec?	Call Number	Actions
62747	7/18/11 2:08:25 PM	00:00:05	Inbound	9738488800 - NEWARK NJ	trunk	200 - Support2		N	CAS-545E2PF798CK	View
62745	7/18/11 2:07:14 PM	00:00:03	Inbound	9738488800 - NEWARK NJ	trunk	200 - Support2		N	CAS-545E14BLJYK98	View
62721	7/18/11 2:05:08 PM	00:01:09	Inbound	9738488800 - NEWARK NJ	trunk	501 - escalation	dr J (104) 104 - 104	Y	CAS-545DYBZGRM2	View
62717	7/18/11 2:04:24 PM	00:00:31	Inbound	9738488800 - NEWARK NJ	trunk	200 - Support2	dr strangokwa (103) 103 - 103	Y	CAS-545DKD2CHKRUQ	View
62715	7/18/11 2:03:46 PM	00:00:12	Inbound	9738488800 - NEWARK NJ	trunk	200 - Support2	dr strangokwa (103) 103 - 103	Y	CAS-545DANJEBDD00	View
62711	7/18/11 1:58:11 PM	00:00:22	Inbound	9738488800 - NEWARK NJ	trunk	200 - Support2		N	CAS-545DP58090Q1	View
62709	7/18/11 1:57:32 PM	00:00:09	Inbound	9738488800 - NEWARK NJ	trunk	200 - Support2		N	CAS-545DNAP0RZEW	View
62707	7/18/11 1:57:10 PM	00:00:05	Inbound	9738488800 - NEWARK NJ	trunk	200 - Support2		N	CAS-545DMJAUPLJYC	View
62704	7/18/11 1:56:31 PM	00:00:17	Inbound	9738488800 - NEWARK NJ	trunk	200 - Support2		N	CAS-545DLWFA5FN	View
62699	7/18/11 1:55:48 PM	00:00:37	Inbound	9738488800 - NEWARK NJ	trunk	501 - escalation		N	CAS-545DL0Y4B880	View

Results: 1-10 of 55
 < Prev 1 2 3 4 5 6 Next > Results Per Page: 10

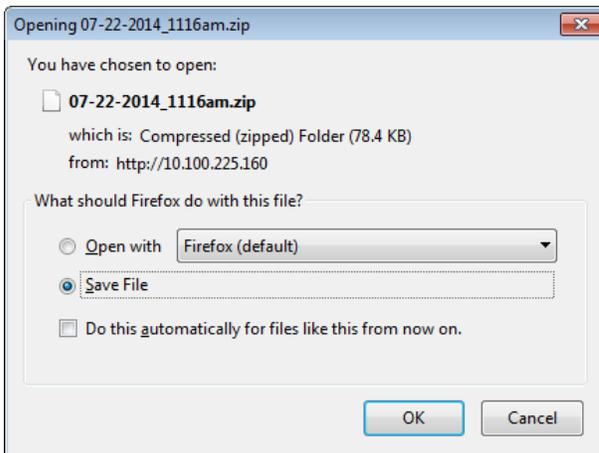
Field Definitions

- **Call ID:** A system-wide call identifier.
- **Time:** Time the call was received by the queue.
- **Dur:** Duration. The time that elapsed between when the queue received the call and when the call terminated.
- **Dir:** Direction of the call (all queued calls are Inbound).
- **Display:** Calling number and Caller Name taken from the PSTN.
- **Source:** The call source (all queued calls are trunk).
- **Destination:** The final queue to which the call was routed.
- **Agent/Device:** The Agent who answered the call, if any.
- **Rec?:** 'Y' if the call was recorded, 'N' otherwise.
- **Call Number:** A system-wide call identifier.
- **Actions:** The "Call Details" page can be accessed by clicking the **View** link.

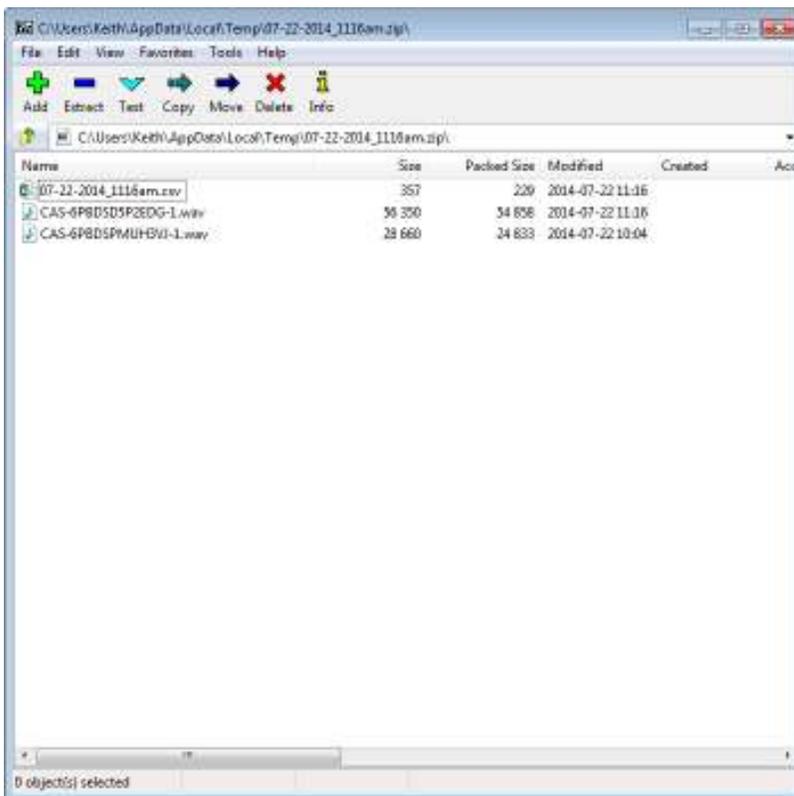
Bulk Download

To bulk download call details and recordings, check in the left column the calls (rows) to download and click **Download**. To select all displayed calls, check the box in the header.

You can either open or download the zip file.



The zip file contains a .wav file for each of the Call IDs you selected, as well as .csv file. The .csv file lists the call details for all of the selected calls including their "Call Number". The "Call Number" is incorporated in the name of the .wav file with the recording of that call.



After clicking on the View link for a particular call, the "Call Details" page shows.

Call Details Page

Call Details for Call 62717 Jump to Call #

DID:	None	Start Time:	7/18/11 2:04:24 PM
Caller ID:	9738488800 - NEWARK,NJ	Duration:	00:00:31
Extension:	200	Direction:	Inbound
Agent/Device:	dr strangelove (103)	Call Result:	Answered

Recordings

Start Time	Stop Time	Duration	Status	Actions
7/18/11 2:04:45 PM	7/18/11 2:04:55 PM	00:00:10	Available	Listen Evaluate Add to Library

Call Path

Action	Description
	Inbound call from '9738488800 - NEWARK,NJ' to '200' at 7/18/11 2:04:24 PM'
	Routed to ACD '200-Support2' at 7/18/11 2:04:24 PM
	Call leaves ACD '200-Support2' at 7/18/11 2:04:45 PM
	Connected to agent 'dr strangelove (103)' at 7/18/11 2:04:45 PM
	Agent 'dr strangelove (103)' hung up at 7/18/11 2:04:55 PM
	Ended at 7/18/11 2:04:55 PM

Evaluations

Form Title	Evaluator	Score	Actions
< Prev Next > Results Per Page: <input type="text"/>			

The top section of the “Call Details” page repeats the information from the “Calls Search” page. The Recordings section enables those customers who purchased call recordings to listen, evaluate and add the recording to the Recording Library. The Call Path section provides details about the call from the moment it entered a queue until the moment the call terminated. The Evaluations section lists the Evaluations that have already been performed on the recording of this call, if any.

Actions

If the tenant has purchased the Call Recording Option and this particular call was recorded, the Recordings section of the “Call Details” page has links to **Listen** or **Evaluate** the recording, or store it in the Recording Library.

Listen

Clicking the **Listen** link brings up the embedded media player and allows the user to play, pause and rewind the recording. There is also a Download link on the media player that allows the user to download the .wav file to a selected location on his/her PC.

Evaluate

Clicking the **Evaluate** link displays the list of available Evaluation Forms. If only one form is available, the following menu will not display. Instead, the evaluation will begin using the one available form.

Select an Evaluation Form

Form Title	Date Created	Actions
service evaluation	2011-07-18 14:10:28	Use
Sales Evaluation	2011-09-09 18:15:49	Use

Results: 2 Results Per Page:

[< Prev](#) | [Next >](#)

Click **Use** to select an evaluation form. The form will open, the Evaluation Information and Call Information sections will be pre-populated and the form will be presented ready to be filled out. Click the **Listen to Recording** button at the top of the page to listen to the recorded call during the evaluation. Scroll down and complete the evaluation. Be certain to click the **Save** button at the bottom of the page to save the evaluation.

Evaluation

Was the Agent professional?

How well did the Agent answer the question?
 Extremely
 Very
 Reasonably
 Not well

*** Strictly Confidential *** Page 1 of 1

Save

Add to Library

In addition to scoring Agents, it's often helpful to save noteworthy recorded calls. The Recordings Library is the repository of saved recordings. Click the **Add to Library** link to add this recording to the library. You will be prompted to enter a title and a descriptive note. These fields will be searchable, so include words that will be helpful in finding this recording later.

Add to Recordings Library

Please fill out the following information to add this recording to the library:

Agent: Tenant Admin (300)

Title:

Note:

Save

Click **Save** to move the recording to the Recording Library. The recording, its Call Details and its completed Evaluation Forms will all be retained.

★ Important: Recordings not moved to the Recording Library will be deleted after the agreed time period has elapsed (by default, 30 days.) Recordings moved to the library will be retained indefinitely, limited only by total storage.

Recording Library (Call Recording Option Only)

Clicking on the Recording Library sub-menu displays the "Recordings Library search" page which searches for all saved recordings matching the chosen criteria. Once a call is found, clicking on View reveals more details about the call.

Recordings Library

Agent: <input type="text"/>		Note: <input type="text"/>	
Title: <input type="text"/>		To: <input type="text"/>	
From: <input type="text"/> / <input type="text"/> / <input type="text"/>			

Search **Clear**

Field Definitions

- **Agent:** Match the Agent that answered the call.
- **Title:** Match the title of the entry in the library.
- **Note:** Match the contents of the note in the library.
- **From:** Match a recording based on when the call began, beginning with this date at midnight. If blank, match all calls prior to the To: value.
- **To:** Match a recording based on when the call began, ending with this date at midnight. If blank, match all calls since the From value.

Matching recordings will be listed on the same page:

Recordings Library

Agent:

Title:

Note:

From: / /

To: / /

Start Time	Stop Time	Title	Note	Ext	Agent	Actions
3/13/11 10:23:28 PM	3/13/11 10:23:42 PM	Recording#1	This is a recording	500 - Sales Main	Thomas Edison (103)	View Call Edit Delete
3/10/11 3:45:19 PM	3/10/11 3:46:36 PM	Recording#2	Check this out	500 - Sales Main	Thomas Edison (103)	View Call Edit Delete

Results: 2

[< Prev](#) | [Next >](#)

Results Per Page:

Field Definitions

- **Start Time:** start time of the recording.
- **Stop Time:** stop time of the recording.
- **Title:** title assigned to the recording.
- **Note:** note associated with the recording.
- **Ext:** ACD in which the call was recorded.
- **Agent:** Agent who answered the call.
- **Actions:**
 - **View Call:** shows the "Call Details" page for this call.
 - **Edit:** change the title and/or note associated with the recording.
 - **Delete:** delete this entry from the library.

Evaluations (Call Recording Option Only)

The Evaluations sub-menu allows Administrators to search for and view individual evaluated recordings.

Evaluation Search

Agent:

Evaluation Form:

From: / /

To: / /

Field Definitions

- **Agent:** Match the Agent that was evaluated.
- **Evaluation Form:** Match the form used for the Evaluation.
- **From:** Match Evaluations based on when the Evaluation was done, beginning with this date immediately after midnight. If blank, match all Evaluations prior to the To: value.
- **To:** Match an Evaluation based on when that Evaluation was done, ending with this date just before midnight.

Click **Search** to display the results.

Average Score: 38.9%

Created	Agent	Evaluator	Title	Overall Score	Actions
2010-11-05 20:45:22	BroadView Admin1 (Badmin1)	supportadmin	TEST	0%	View Edit Delete
2010-08-31 17:39:08	BroadView Admin1 (Badmin1)	Kenneth Glosbrenner (kglosbrenn@)	Ken's Judgement Day	80%	View Edit Delete
2010-08-24 19:56:19	Kenneth Glosbrenner (kglosbrenn@)	BroadView Admin1 (Badmin1)	Standard Agent Form	0%	View Edit Delete
2010-08-24 15:51:56	Kenneth Glosbrenner (kglosbrenn@)	BroadView Admin1 (Badmin1)	Standard Agent Form	100%	View Edit Delete
2010-08-19 15:49:49	Kevin Croskey (KevinC)	Kenneth Glosbrenner (kglosbrenn@)	Evaluation Form #2	0%	View Edit Delete
2010-07-07 17:03:03	Agent3	BroadView Admin 3 (Badmin3)	Standard Agent Form	73.33%	View Edit Delete

Results: 6
Results Per Page: 10

- **Created:** the date the Evaluation was performed.
- **Agent:** the Agent who was evaluated.
- **Evaluator:** the person who performed the Evaluation.
- **Title:** the title of the Evaluation form used.
- **Overall Score:** the percentage of basis points received.
- **Actions:**
 - **View:** view the completed form.
 - **Edit:** edit the completed form.
 - **Delete:** remove the evaluation record from the database.

Main Menu: Reports

Overview

Reports available in OfficeSuite eQueues provide Tenant Administrators with aggregated information about past events. There are three reports included with the core product and one additional report provided if Call Recording is purchased.

★ **Important:** Report data are only compiled every four hours (Datamart) and thus reports constructed for the current day will not include events that occurred since the latest run of Datamart.

Creating and Managing Reports

All reports are displayed, exported and saved as follows.

Change Report Date

Start Date: November / 5 / 2010 

End Date: November / 5 / 2010 

ACD

- All
- 8001 - demo acd
- 8002 - Second Queue
- 8003 - Brett's Queue
- 8004 - NewarkEFMACD

Hold Ctrl to select multiple items.

Display Report **Export** **Save Report**

Display a Report

1. From the *Reports* menu, choose "Agent Performance", "Voice Queues", "Calls", or "Calls Abandoned."
2. In the *Start Date*, enter the month, day and year for the beginning of the report or use the calendar icon to select the report start date.
3. In the *End Date*, enter the month, day and year for the end of the report or use the calendar icon to select the report end date.
4. For the Voice Queues, Calls, and Calls Abandoned Reports, select the ACD(s) on which to report. Select multiple ACDs by either selecting "All" or by using control-click to select multiple individual queues.
5. For the Agent Performance Report, select the Agent(s) on which to report. Select multiple Agents by using control-click.
6. For the Calls Abandoned Report, select one or more reasons. Select multiple reasons by selecting "All".¹
7. When creating a Calls Abandoned report, one can also choose to exclude abandoned calls shorter than a few seconds. This will help eliminate calls that were simply misdialed.

Click **Display** or **Display Report** to see the results.

Export a Report

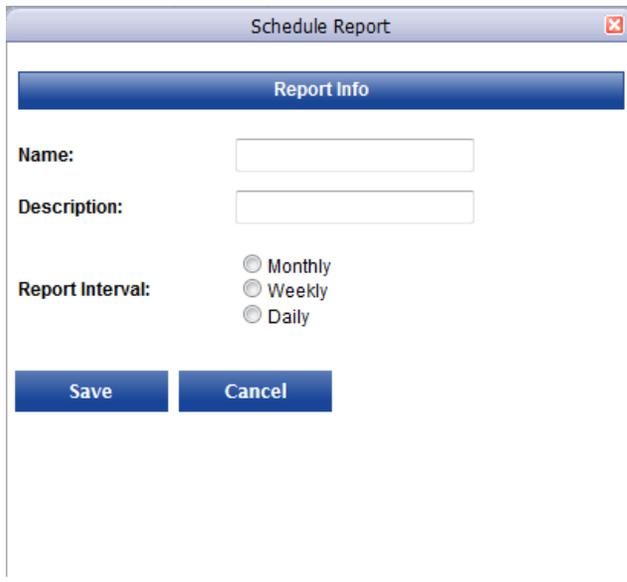
Exporting a report allows the Administrator to copy the report results to their PC and use them in another application, such as a spreadsheet or database. The data will be contained in a .csv (Comma Separated Value) file which can be opened with common PC applications like Microsoft® Excel. When prompted by the browser, take the opportunity to pick the target directory and change the name of the file.

Schedule a Report

Scheduling a report saves the report to the Scheduled Reports page.

Click **Schedule Report**.

¹ The "DTMF Key" option is not applicable for OfficeSuite eQueues customers.



Enter a name and description for the report. After you select the Report Interval, you have to fill in details specific to your selection. Enter an email address and the time of next day delivery. Click **Save**. The report is saved to the Scheduled Reports page.

Note: To preserve actual report data, export the report.

Click **Save Report**.



Enter a name for the saved report parameters. Optionally, enter a description. Click the Save button. The report will be saved in the list found at the Saved Reports sub-menu.

Note: To preserve actual report data, export the report.

Scheduled Reports

Scheduled Reports		
Title	Note	Actions
hellotesting	hellotesting	Edit Delete
Test Scheduler	Test Scheduler	Edit Delete

Results: 2 Results Per Page: 100 ▾

< Prev 1 Next >

Click **Edit** to edit the Scheduled Report. Change the schedule parameters as necessary and click **Save**.

Edit Scheduled Report

Agent:

Hold Ctrl to select multiple items.

View:

Name:

Description:

Report Interval:

 Monthly

 Weekly

 Daily

Last Date of Report:

Email address:

Time of next day delivery:

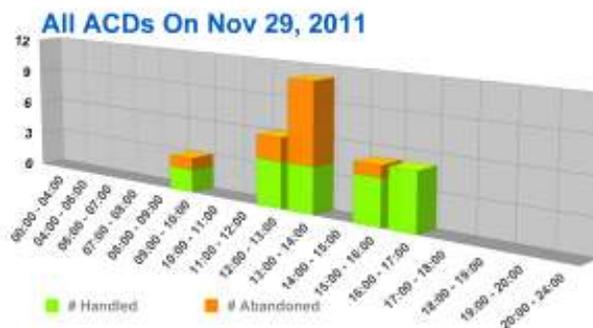
Click **Delete** to delete the Scheduled Report.

Voice Queues

The Voice Queues report displays a graph and table of calls presented to the selected queues during the selected report period. If the report covers a single day, the report facilitates comparisons among time intervals spanning the day. If the report spans multiple days, it facilitates comparison of day-to-day results.

Note: The graph will not display when more than 5 queues are selected.

ACD Activity Report



The table below the graph includes the following data.

Time	# Calls	# Hndl	# Abnd	Abnd %	Avg Abnd	ASA	Total Talk	Avg Time	SrvLvl %	Agent Tm	Occ. %	Transfer Out
PERIOD TOTAL:	30	19	11	36.67%	00:00:34	00:00:17	00:06:08	00:00:19	60%	15:16:10	0.67%	2
00:00 - 04:00	0	0	0		00:00:00	00:00:00	00:00:00	00:00:00		00:00:00		0
04:00 - 06:00	0	0	0		00:00:00	00:00:00	00:00:00	00:00:00		00:00:00		0
06:00 - 07:00	0	0	0		00:00:00	00:00:00	00:00:00	00:00:00		00:00:00		0
07:00 - 08:00	0	0	0		00:00:00	00:00:00	00:00:00	00:00:00		00:00:00		0
08:00 - 09:00	0	0	0		00:00:00	00:00:00	00:00:00	00:00:00		00:00:00		0
09:00 - 10:00	3	2	1	33.33%	00:02:00	00:00:05	00:00:35	00:00:17	66.67%	00:00:00		2
10:00 - 11:00	0	0	0		00:00:00	00:00:00	00:00:00	00:00:00		00:02:24	0%	0
11:00 - 12:00	0	0	0		00:00:00	00:00:00	00:00:00	00:00:00		01:00:00	0%	0
12:00 - 13:00	6	4	2	33.33%	00:00:17	00:00:22	00:00:22	00:00:05	66.67%	01:26:39	0.42%	0
13:00 - 14:00	11	4	7	63.64%	00:00:27	00:00:10	00:01:23	00:00:20	36.36%	02:17:48	1%	0
14:00 - 15:00	0	0	0		00:00:00	00:00:00	00:00:00	00:00:00		02:59:52	0%	0
15:00 - 16:00	5	4	1	20%	00:00:30	00:00:24	00:02:10	00:00:32	60%	02:38:39	1.37%	0
16:00 - 17:00	5	5	0	0%	00:00:00	00:00:19	00:01:38	00:00:19	100%	02:59:40	0.91%	0
17:00 - 18:00	0	0	0		00:00:00	00:00:00	00:00:00	00:00:00		01:51:08	0%	0
18:00 - 19:00	0	0	0		00:00:00	00:00:00	00:00:00	00:00:00		00:00:00		0
19:00 - 20:00	0	0	0		00:00:00	00:00:00	00:00:00	00:00:00		00:00:00		0
20:00 - 24:00	0	0	0		00:00:00	00:00:00	00:00:00	00:00:00		00:00:00		0

Field Definitions

- **Time:** start and end times of this period.
- **# Calls:** number of calls presented to the queue(s) (Offered Calls).
- **# Hndl:** number of calls that came into queue(s) and were answered by an Agent.
- **# Abnd:** number of calls that came into the queue(s) and were subsequently abandoned. See the definition of Abandoned Call for more detail.
- **Abnd %:** percentage of offered calls that were abandoned.
- **Avg. Abnd:** average time abandoned calls stayed in the queue(s) before abandoning.
- **ASA:** (Average Speed of Answer) average time an answered call waited in the queue(s) before an Agent answered.
- **Total Talk:** total amount of time Agents were connected to calls from these queues.
- **Avg. Time:** average amount of time Agents were connected to calls (Total Talk / # Hndl).
- **Srv Lvl %:** percentage of Offered Calls that were answered (Handled) in less than the Service Level seconds configured for their queue.
- **Agent Tm:** The total time member Agents were signed in for queue duty during this period. (If there were 5 Agents signed in for the entire period, Agent Tm will be 5 times the length of the period.)
- **Occ. %:** (Occupancy %) percentage of time signed-in Agents were connected to calls (Talk Time / Agent Tm) * 100.
- **Transfer Out:** The number of ACD calls answered by VM or answered by an Agent and subsequently transferred.

Calls

The Calls report contains the same information as the Voice Queues report with the following exceptions.

1. There is no graphical presentation of the data.

2. The Call report displays summary call statistics in 15 minute intervals.

The following is a segment of the Calls report. The columns are the same as in the Voice Queues Report.

ACD Daily Report

Nov 29, 2011

Time	# Calls	# Hndl	# Abnd	Abnd %	Avg Abnd	ASA	Total Talk	Avg Time	SrvLvl %	Agent Tm	Occ. %	Transfer Out
PERIOD TOTAL:	30	19	11	36.67%	00:00:34	00:00:17	00:06:08	00:00:19	60%	15:16:10	0.67%	2
00:00 - 00:15	0	0	0		00:00:00	00:00:00	00:00:00	00:00:00		00:00:00		0
00:15 - 00:30	0	0	0		00:00:00	00:00:00	00:00:00	00:00:00		00:00:00		0
00:30 - 00:45	0	0	0		00:00:00	00:00:00	00:00:00	00:00:00		00:00:00		0

Calls Abandoned

The Calls Abandoned report displays details of abandoned calls. See the definition of Abandoned Call for more information. When a call "times out", it can be redirected to another queue (e.g. as an escalation).

Abandoned Calls Report

Call Start	ACD Entry	ANI	DNIS	ACD Start	ACD End	Abnd Time	Abnd Reason	Redirect	Call End	Duration to Abnd	Total Call Duration
7/1/11 9:00:36 AM	7/1/11 9:00:36 AM	ANDAZ 5TH AV	5991	Voice Activations	Voice Activations	7/1/11 9:01:07 AM	Hang Up		7/1/11 9:01:07 AM	00:00:31	00:00:31
7/1/11 9:37:51 AM	7/1/11 9:37:51 AM	NWYRCYZN01 NY	5991	Voice Activations	Voice Activations	7/1/11 9:37:59 AM	Hang Up		7/1/11 9:37:59 AM	00:00:08	00:00:08
7/1/11 10:17:44 AM	7/1/11 10:17:44 AM	WIRELESS CALLER	5991	Voice Activations	Voice Activations	7/1/11 10:19:31 AM	Hang Up		7/1/11 10:19:31 AM	00:01:47	00:01:47
7/1/11 12:06:34 PM	7/1/11 12:06:34 PM	BOSTON MA	5991	Voice Activations	Voice Activations	7/1/11 12:08:21 PM	Hang Up		7/1/11 12:08:21 PM	00:01:47	00:01:47
7/1/11 12:27:51 PM	7/1/11 12:27:51 PM	STJOACHIM	5991	Voice Activations	Voice Activations	7/1/11 12:28:41 PM	Hang Up		7/1/11 12:28:41 PM	00:00:50	00:00:50
7/1/11 1:17:04 PM	7/1/11 1:17:04 PM	BROADVIEW NTWKS	5992	CARE HANDOFF	Care Handoff Voicemail	7/1/11 1:18:47 PM	Timeout		7/1/11 1:18:47 PM	00:00:00	00:01:43

Field Definitions

- **Call Start:** start time of the call.
- **ACD Entry:** time the call entered this particular Queue. This may be different from Call Start if the call first entered a different Queue.
- **ANI:** Caller ID and Caller Name as presented by the PSTN.
- **DNIS:** Queue extension.
- **ACD Start:** Queue the call first entered.
- **ACD End:** Queue the call was in when it was abandoned.
- **Abnd Time:** time the call was abandoned.
- **Aband Reason:** reason the call was abandoned, Hang Up or Timeout.
- **Redirect:** destination where the abandoned call was redirected. Timeout Reason only.
- **Call End:** time the abandoned call was eventually disconnected. This is different from Abnd Time only when the Reason was Timeout.
- **Duration to Abnd:** time the call was in this queue before abandonment.
- **Total Call Duration:** total duration of the abandoned call in the ACD system.

Evaluations (Call Recording Option Only)

The Evaluations Report summarizes all of the evaluations that have been conducted that match the parameters selected at the top of the page. The processes for creating the Evaluation Forms and for performing the evaluations are described elsewhere.

Evaluations Report

Agent: <input type="text"/> Evaluator: <input type="text"/> From: <input type="text"/> / <input type="text"/> / <input type="text"/>	Evaluation Form: <input type="text"/> To: <input type="text"/> / <input type="text"/> / <input type="text"/>
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[Generate Report](#)
[Save Report](#)

Field Definitions

- **Agent:** Match only evaluations done on this Agent.
- **Evaluation Form:** Match only evaluations done using this Form.
- **Evaluator:** Match only evaluations performed by this Evaluator.
- **From:** Report only on evaluations done since the beginning of this date at midnight. If blank, match all evaluations prior to the To value.
- **To:** Report only on evaluations done prior to midnight on this date. If blank, match all evaluations following the From value.

To generate the report, click **Generate Report**.

Evaluations Report

Agent: <input type="text"/> Evaluator: <input type="text"/> From: <input type="text"/> / <input type="text"/> / <input type="text"/>	Evaluation Form: <input type="text"/> To: <input type="text"/> / <input type="text"/> / <input type="text"/>
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[Generate Report](#)
[Save Report](#)

service evaluation

Total Evaluations: 1

Average Score: 33.33%

Fields:

- how was your response ?
live - 100%, 1
- Was this call responded under 5 secs
unchecked - 100%, 1
- did you like what you hear
yes - 100%, 1

The Report shows a summary of evaluation results for the requested Agent(s), Evaluation Form(s), Evaluator(s), and date range.

- Each section of the report will be headed by the form name.
- **Total Evaluations:** total number of evaluations reported in this section.
- **Average Score:** average percentage of basis points received across all evaluations reported in this section.
- Individual fields summarize how each question was answered across all evaluations reported in this section.

Main Menu: Agents and ACDs

Overview

This is the section of the web portal where Agents are identified and custom call distribution methods are defined.

On the Agents sub-menu Administrators select which OfficeSuite extensions are eligible to answer queued calls.

On the Voice Queues sub-menu Administrators build and maintain the actual Voice Queues. This page is rich in features, allows the assigning (and reassigning) of Agents within queues, and is the place where hold treatments are customized for each queue.

Agents

The “Agents” page displays all Agents currently available to be assigned as members of Voice Queues. The maximum number of extensions that can be set up as Agents is limited by contract, but can be changed with a call to OfficeSuite support.

Click **Refresh Extensions** to copy all the current extensions and users from OfficeSuite. Then edit each extension and user involved with the ACD service. Click it again when new extensions or users are added or deleted on the OfficeSuite side.

Agents			
Quick Search: <input type="text"/>			Search
Extension ▲	Name ⇅	ACD Agent? ⇅	Actions
1012	Bartley	Y	Edit Delete
1013	Kevin Conroy	N	Edit Delete
1014	Ken Glossbrenner	N	Edit Delete
1015	Greg Test User	Y	Edit Delete
1016	Location	N	Edit Delete
1020	Homer Simpson	Y	Edit Delete
1021	Lisa Simpson	N	Edit Delete
1022	Bart Simpson	N	Edit Delete
1023	Comic Book Guy	N	Edit Delete
1024	Hans Moleman	N	Edit Delete
1025	Maggie Simpson	N	Edit Delete
1026	C. Montgomery Burns	N	Edit Delete
1027	Nelson Muntz	N	Edit Delete
1028	Ralph Wiggum	N	Edit Delete
1029	Professor Frink	N	Edit Delete
1030	Milhouse Van Houten	N	Edit Delete

Results: 28 Results Per Page: 100 ▼

< Prev 1 Next >

[Refresh Extensions](#) [Add an Agent](#)

Field Definitions

- **Extension:** Agent's extension in OfficeSuite.
- **Name:** First and last name.
- **ACD Agent:** whether the Agent is an ACD Agent.
- **Actions:**
 - **Edit:** click to modify the Agent details.
 - **Delete:** click to delete the Agent.
 - **Refresh Extensions:** refreshes the list of Extensions that agents are currently logged into.
 - **Add an Agent:** click to add an agent

Create or Edit an Agent

(To Create a New Agent in OfficeSuite eQueues, the intended Agent must first have an extension in OfficeSuite.) From the "Agents" page, click **Add an Agent** or click **Edit** for an existing Agent.

Add a New Agent

<p>* Extension: <input style="width: 90%;" type="text"/></p> <p>* First Name: <input style="width: 90%;" type="text"/></p> <p>Timezone: <input style="width: 90%;" type="text" value="5:22 PM - New York City, United States"/></p>	<p>* Seconds to ring: <input style="width: 90%;" type="text"/></p> <p>* Last Name: <input style="width: 90%;" type="text"/></p>
---	---

Role

Agent Tenant Admin

Save

Cancel

- **Extension:** extension of the Agent in OfficeSuite.²
- Note:* The extension entered here is not validated with OfficeSuite. An incorrect extension will ring the wrong phone. An invalid extension will result in the Voice Queue moving on immediately to the next member Agent.
- **Seconds to ring:** when any Voice Queue rings this Agent it will wait only so long for an answer before moving on to try the next member Agent. **Seconds to ring** is the amount of time all Voice Queues will ring this Agent before moving on.

² This must be an existing User or Location extension in OfficeSuite. That User/Location must have an ACD Sign in key configured for its phone. The extension entered on this New Agent page is not validated. When/if a Queue attempts to ring an Agent at an invalid extension, OfficeSuite will immediately reject the call and the Queue will immediately move to the next member Agent.

★ **Important:** If the Agent extension has OfficeSuite Call Coverage enabled and if the Voice Queue is still ringing the Agent when the call is sent to coverage, the coverage target will also ring and the call can be answered there. This is particularly important to note when coverage is to voicemail. Make a conscious decision about whether to include or exclude the coverage target when choosing "Seconds to ring". Note that each ring included in the call coverage setting takes 4 seconds.

- **First Name:** Agent's first name.
- **Last Name:** Agent's last name.
- **Timezone:** Time zone where this administrator resides.³
- Choose a **Role** for the Agent. Assign "Tenant Admin" to Agents who are trusted to manage ACDs and see Dashboards and Reports. Assign "Agent" to those who will only answer calls. Every Tenant Administrator automatically has Agent permissions, so checking both boxes is unnecessary.

Click **Save** or **Cancel**

Voice Queues

The "Voice Queues" (ACD Queues) page displays all Queues currently set up in the Tenant. The maximum number of Voice Queues that can be set up is limited by contract, but can be changed with a call to OfficeSuite Support.

A new Queue requires configuration, prioritized member Agents, and a custom hold treatment. Even when the queue is in use, the Tenant Administrator can return and edit any of these three aspects.

 **Note:** Voice Queue changes are effective with the next call to arrive in this Queue. Changes to the Queue configuration are not effective until the **Save Details** button is clicked.

ACD Queues						
Number	Name	Note	Priority	Type	# of Members	Actions
502	Marketing		1	Longest Idle	3	Edit Delete
501	Escalation Queue		1	Longest Idle	2	Edit Delete
500	Sales Main		2	Round Robin	5	Edit Delete

Results: 3
 < Prev | 1 | Next >
 Results Per Page: 5
 Add an ACD

Field Definitions

- **Number:** this Queue's extension within OfficeSuite. Any calls routed for any reason to this extension will be answered and distributed by this Voice Queue.
- **Name:** Voice Queue name. Also seen in the OfficeSuite portal on the "ACD Applications" page.
- **Note:** As authored on the "ACD Queue Details" page.

³ As of this writing, Timezone settings for Agents have no effect and should not be changed. See instead the section titled "Time Zone".

- **Priority:** when an Agent serving two or more queues becomes available to answer a call, the queued call from the highest **priority** Queue (smallest integer) will be delivered before any calls waiting in lower priority Queues.
- **Type:** discipline used to distribute calls among the member Agents.
- **# of Members:** number of member Agents for this Queue.
- **Actions:**
 - **Edit:** click to modify the Queue details.
 - **Delete:** click to delete the Queue.

Create or Edit a Voice Queue: ACD Queue Details

From the “ACD Queues” page, click **Add an ACD** or click **Edit** for an existing ACD.



Field Definitions

- **Extension Number:** extension that will represent the Queue in OfficeSuite. The value must be a valid and otherwise unused OfficeSuite extension. The number of digits must match other extensions for this tenant. The first digit of the extension must put the extension in the OfficeSuite User/Location range.

Note: The extension for this Queue will be reserved in OfficeSuite and cannot be reused until the queue is deleted. When successfully built, the extension and the queue name will both be visible in the OfficeSuite portal on the “ACD Applications” and “Phone Inventory” pages.

- **Name:** the name of the Queue. The first nine characters of the name will be visible on the OfficeSuite desk phone when this Queue is ringing or answered by an Agent.

Note: Names can only contain letters, numbers and spaces.

- **Note:** a brief free-form description or note.
- **Priority:** a positive integer indicating the priority of the Queue relative to other Queues. When an Agent serving two or more Queues becomes available to answer a call, the queued call from the highest priority Queue (smallest integer) will be delivered before any queued calls from lower priority Queues.
- **ACD Timeout (sec):** if a queued call is not answered or abandoned first, this is the time (in seconds) the caller will wait before the ACD system will take action on its own (see **Timeout Redirect Extension**).

Note: To avoid timing out, this value can be set as large as 30,000 seconds (over 8 hours).

- **Timeout Redirect Extension:** the extension to which the call will be directed if the **ACD Timeout** is reached. This can be any other ACD or, with "Other", this

can be any valid OfficeSuite extension (User, Location, Group, or Auto Attendant) or telephone number. By redirecting to an OfficeSuite extension with immediate coverage to Voicemail, callers who time out can be given an opportunity to leave a message.

✍ **Note:** If “None/Remove” is selected, the system will drop the call on timeout.

- **Timeout immediately if ACD is empty:** When this option is enabled, and no agents assigned to this queue are available to answer its calls, new calls entering the queue will immediately be sent to its Timeout Redirect Extension.

✍ **Note:** For this option an Agent using phone-based sign-in is considered “available” if their sign-in key is lit. Even busy phones with lit sign-in keys are considered “available”.

✍ **Note:** This option is only tested when a new call enters a queue. If the last “available” Agent goes unavailable while there are still calls in queue, callers already waiting in the queue will still wait up to the full timeout for an Agent to again become available and take their call.

- **Require Agent Confirmation:** require the answering Agent to press a digit on their phone to confirm their willingness to take the call. To enable **Require Agent Confirmation**, a **Whisper Announcement** must also be selected.

✍ **Note:** The Agent must press a digit before their *Seconds to ring* timer expires (see Agent creation).

- **Whisper Announcement:** the audio file to play to an Agent after they answer but before they are connected to the queued call. If the Agent hangs up before the Whisper Announcement completes, the queued call will not be delivered.

✍ **Note:** Audio files used as Whisper Announcements should be shorter than Agents' *Seconds to ring* timers to allow time for ringing the Agent's phone as well as the time for the Whisper Announcement to play in full.

✍ **Note:** Whisper Announcements used in conjunction with Require Agent Confirmation should normally include a reminder to "press any digit to accept the call".

- **Record Inbound Calls? (Call Recording Option Only)** enable call recording on all calls answered from within this Queue.
- **Wrap-up Time (sec):** the minimum amount of time (in seconds) between when a call from this Queue ends and any new queued call might be delivered to this Agent. This allows the Agent time to wrap-up efforts on the earlier call.
- **ACD Type:** the discipline by which incoming calls are distributed among member Agents.
 - **Round Robin:** Agents are rung in an unchanging order with each new call going first to the next available Agent in the cycle, and if not answered there, on to the next available Agent in the cycle, and so on.
 - **Longest Idle:** The available Agent who has been the longest idle will be rung first. If that Agent doesn't answer, the next Agent rung will be the second longest idle and so on. 'Longest idle' means longest time since last connected to a queued call from any Queue at all.
 - **Fewest Calls:** The available Agent who has answered the fewest total ACD calls since they signed in will be offered the call first. Then the Agent will be offered the call who has answered the second fewest calls since they signed in, and so on.

✍ **Note:** If the members of this Queue have different priorities, the discipline will be applied first to the set of available Agents who all have the same highest priority



(smallest integer). If no Agent answers the call from that set, the discipline is applied to the set of members who share the second highest priority, and so on.

Note: If each member has a different priority, available Agents will simply be attempted sequentially in descending priority order (increasing numeric order), regardless of **ACD Type**.

Note: If any discipline goes through the entire set of available Agents and no one takes the call, the discipline starts over from the beginning, again with the highest priority Agents.

- **Service Level (sec):** The Voice Queues Report and Calls Report compute the percentage of calls that are answered before this timer expires (**Srv Lvl %**). This value does not in any way affect how the queue holds or distributes calls.

Click **Save ACD** to save this configuration for a new Voice Queue. Click **Save Details** to save changes to an existing Voice Queue.

Queue Members

Queue Members are those Agents assigned to receive calls distributed by this Queue. The list of members assigned to work a Queue can be updated at any time.

ACD Queue Details For Ext 200

* Extension Number:	200	Record Inbound Calls?	Y
* Name:	Support@	Wrap-up Time (sec):	2
Note:		ACD Type:	Round Robin
Priority:	0	Service Level (sec):	15
* ACD Timeout (sec):	30		
Timeout Redirect Extension:			
Require Agent Confirmation:	N		
Wager Announcement:	None/Timers		

[Edit Details](#) [Back](#)

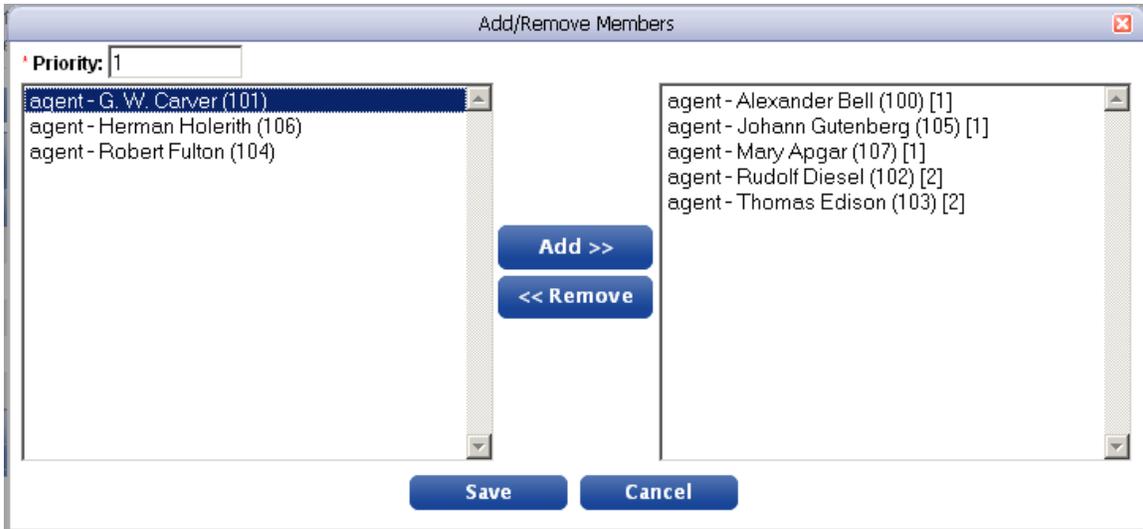
Queue Members

Priority	Extension	Name	Actions
1	102	Dr Quinn	Edit Delete
1	103	dr strangelove	Edit Delete
1	104	dr J	Edit Delete

Results: 3
[< Prev](#) | [Next >](#) Results Per Page: **5**

[Add/Remove Members](#)

To alter the list of members click **Add/Remove Members**.



Highlight the Agent(s) by clicking on them. Control-click or Shift-click to select several. When adding, select a positive integer as these Agents' priority within this Queue. Then click the **Add>>** or the **<< Remove** button. The Agents will move from one side of the window to the other.

Priority	Type	Extension	Name	Note	Actions
1	agent	100	Alexander Bell	N/A	Edit Delete
1	agent	105	Johann Gutenberg	N/A	Edit Delete
1	agent	107	Mary Appgar	N/A	Edit Delete
2	agent	102	Rudolf Diesel	N/A	Edit Delete
2	agent	103	Thomas Edison	N/A	Edit Delete

Results: 5 | Results Per Page: 5 | Add/Remove Members

The Administrator can also change the priority of an Agent already assigned to a queue by clicking **edit** in that Agent's row.



★ Important: Agents' priorities are used for skills-based routing. The Agents best qualified for serving this queue should be assigned the highest priority here (the smallest positive integer values). The distribution discipline (ACD Type) will always look for an available Agent with the highest priority before looking for available Agents with the next lower priority and so on. See the section on ACD Type for more information about distribution of queued calls to Agents.

Hold Treatments

Hold Treatments provide messages to callers and keep them on the line while they are waiting for an Agent. Among other things, Hold Treatments can include marketing

messages, special announcements, music, and ringing in any combination. To modify the message given to callers, Hold Treatments can be updated at any time.

The playing of the Hold Treatment terminates when an Agent accepts the call.

Creating the ACD Hold Treatment

To create or modify a Hold Treatment, click **Add Command** and then select a command. This will add it as the next in the sequence of steps comprising the entire Hold Treatment. With click-and-drag, these steps can easily be rearranged.

- **Announcement:** this will first prompt for the selection of an audio file from the Audio Library. An audio file used as an Announcement will be played in its entirety before the Hold Treatment progresses to the subsequent command.
- **Music:** this will first prompt for the selection of an audio file from the Audio Library. An audio file used as Music will play for the duration indicated by the subsequent Wait command.
- **Go To:** this command determines which step will be executed next. It is used to point backward to repeat one or more commands indefinitely.
- **Wait:** sets the length of time the immediately preceding Music or Ringing command will play. A Wait command should always and only follow Music and Ringing commands.
- **Ringing:** will play ringback to the caller. Ringback ringing encourages the caller to believe a phone is ringing on their behalf. Ringing will play for the duration indicated by the subsequent Wait command.

Note: Audio files for Music and Announcements are created and edited in the Audio Library in the Resources menu.

Hold Treatments		
Step	Command	Actions
1	Play announcement file: Announcement: Thank you for Calling	Delete
2	Play on-hold music: Music: Funky Jazz Piano	Delete
3	Wait for 20 seconds	Delete
4	Play announcement file: Announcement: All continue to be busy	Announcement Music Go To Wait Ringing
5	Go to step 2	
Results: 5		Result
< Prev 1 Next >		Add Command: <input type="text"/>

Field Definitions

- **Step:** the number of this particular command. Used in Go To commands.
- **Command:** the command to execute. If the command is an Announcement or Music, clicking the link causes the media player plug-in to play the file.
- **Actions:** Delete is the only possible action.



Once inserted in the Hold Treatment, Commands can be clicked anywhere in their row (except on their links), held, and dragged to rearrange their order. The Commands are automatically renumbered.

✍ **Note:** Always follow a “Music” or a “Ringing” Command with a “Wait” Command.

✍ **Note:** Changes to the Hold Treatment apply to the next call that enters the Queue.

Delete an ACD

An existing Voice Queue can be deleted by clicking on the **Delete** link on the “Voice Queues” page. The Delete dialog box will be displayed. Click the **Confirm Delete** button.

✍ **Note:** This action will also delete the Voice Queue from the OfficeSuite portal on the “ACD Applications” page. Within a few hours the SIP terminal created for this Queue will also disappear from the “Phone Inventory” page.

Main Menu: Resources

Overview

Resources for OfficeSuite eQueues are developed and managed here. These include the Audio Library and Evaluation Forms (Call Recording Option only).

Audio Library

The Audio Library supplies the audio files selectable for Hold Treatments and Whisper Announcements. Professionally recorded announcements are provided here to encourage callers to be patient. Stock Whisper Treatments can inform Agents about queued calls. The same stock song available for OfficeSuite Hold Announcements is also available to play to queued callers.

Just as importantly, custom audio files can be added to the Audio Library. Custom audio files can be uploaded from the PC, or recorded using the "Call In" feature.

Audio Library				
Audio ID	Note	Created	Modified	Actions
391087	Announcement: All continue to be busy	2011-12-28 13:03:04		Listen Download Edit Delete
885626	Announcement: Please stay on the line	2011-12-28 13:03:04		Listen Download Edit Delete
607667	Announcement: Thank you for Calling	2011-12-28 13:03:04		Listen Download Edit Delete
149057	Music: Cheerful Piano	2011-12-28 13:03:03		Listen Download Edit Delete
359836	Music: Eastern Sounds	2011-12-28 13:03:03		Listen Download Edit Delete
987387	Music: Expressive Orchestration	2011-12-28 13:03:03		Listen Download Edit Delete
362877	Music: Funky Jazz Piano	2011-12-28 13:03:03		Listen Download Edit Delete
289195	Music: Light Airy Guitar	2011-12-28 13:03:03		Listen Download Edit Delete
980606	Music: Midtempo Piano	2011-12-28 13:03:03		Listen Download Edit Delete
222503	Music: Optimistic Synth Sounds	2011-12-28 13:03:04		Listen Download Edit Delete
412890	Music: Slow Piano and Funky Bass	2011-12-28 13:03:04		Listen Download Edit Delete
622742	Music: Slower Piano	2011-12-28 13:03:04		Listen Download Edit Delete
456630	Music: Soft Guitar and Strings	2011-12-28 13:03:04		Listen Download Edit Delete
865033	Music: Steady Piano and Percussion	2011-12-28 13:03:04		Listen Download Edit Delete
353603	Music: Sweet Twanging Guitar	2011-12-28 13:03:04		Listen Download Edit Delete
452761	Whisper: Call from Queue	2011-12-28 13:03:04		Listen Download Edit Delete
242620	Whisper: Call from Queue, Agent Confirmation	2011-12-28 13:03:04		Listen Download Edit Delete

Results: 17 Results Per Page: 20

< Prev 1 Next >

[Add New Entry](#)

Field Definitions

- **Audio ID:** a system-assigned code used when editing the audio file.
- **Note:** the name of the audio file.
- **Created:** the date the audio file was installed on the system.
- **Modified:** the date the audio file was most recently modified.
- **Actions:** Click to Listen, Download, Edit, or Delete these files.

Listening to an audio file makes use of your browser's media player plug-in.

Create a New Audio File

The Audio Library offers two ways to add new audio files: uploading a .wav file or calling in to record an audio file via the telephone.

Click **Add a New Entry**.

Adding Audio File

* **Description:**

WAV File to Upload: [Browse...](#)

(.wav audio file, 5 megabytes or smaller)

[Call In](#)
[Cancel](#)
[Save/Upload](#)

1. In the **Description** enter a name for the new audio file.
2. To upload an audio file:
 - a. Click **Browse**. Your PC's File Upload window will open.

- b. Browse and select the .wav audio file from your PC's directory structures.
- c. Click the **Save/Upload** button. The file has now been added to the Library.

✍ **Note 1:** An uploaded audio file must be:

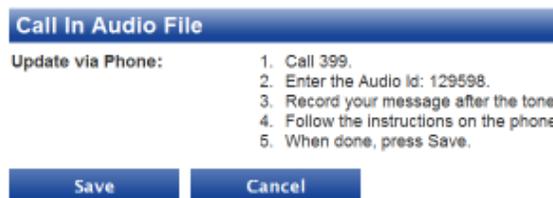
- a valid audio file in a Microsoft .wav wrapper
- and be 5 Megabytes or smaller

✍ **Note 2:** The two supported audio formats inside the .wav wrapper are 64kb/s PCM mu-law and GSM.

- With no additional user effort, a built-in conversion program will convert many other .wav wrapped audio formats (e.g., PCM A-law, ADPCM, etc.) into a supported format. However, neither the success nor the quality of these conversions is guaranteed. After uploading, immediately test the audio by playing it both from the web portal and from within its intended application, (e.g. as a Hold Treatment or Whisper Announcement).

3. To record an audio file using Call In:

- a. Click the Call In button.



- b. Follow the printed instructions and the audible instructions presented during the call.

✍ **Note:** The Call In number is the ACD Services Extension created at service turn-up.

- c. When the recording is completed to your satisfaction and saved, hang up.

4. Click **Save**.

Evaluation Forms (Call Recording Option Only)

Evaluation Forms are available to customers who purchased the Call Recording Option. These forms enable the systematic evaluation of recorded phone calls. Evaluated calls and Evaluation Reports can be used in mentoring and reviews.

There are six elements that are combined in various ways to create a complete Evaluation Form.

- **Checkbox:** Used for questions with yes/no answers: True/False, Did/Didn't achieve a particular goal.
- **Radio Group:** Used for multiple choice questions; the Evaluator can put a "tick mark" next to the correct answer.
- **Combo Box:** Used for multiple choice questions; the Evaluator selects the correct answer from a drop-down list. Unlike Radio Groups, Combo Boxes can

be configured so that the Evaluator can skip the question. If skipped, the points for that question do not factor into the calculation of the overall percentage score.

- **TextArea:** Used for open ended (discussion) questions, the evaluator has 350 free characters to answer. TextArea questions are not scored.
- **Heading:** Headings are not questions. Headings are displayed in the Evaluation Form in larger font to delineate different portions of the questionnaire.
- **Text:** The Text element is not a question. Text elements are displayed in the form to provide annotations and reminders to the Evaluator.

When a form is filled out about a call recording, an overall percentage is automatically calculated. Checkbox, Radio Group, and Combo Box questions all Pts Calculated (basis points) that factor into that calculation. Different answers award different numbers of those points (Weights). If the question has 200 basis points and the answer selected receives 150 points, that's 75% of the points for this question. The total Evaluation score sums all of the points awarded by answers and divides them by all of the basis points. This creates the overall percentage.

List Evaluation Forms		
Form Title	Date Created	Actions
Evaluation Question Types	2011-03-10 11:21:01	Edit Delete
Sample Form	2011-03-11 10:59:22	Edit Delete
Service Performance	2011-03-11 14:02:26	Edit Delete

Results: 3 Results Per Page: 5

[Add a New Evaluation Form](#)

Field Definitions

- **Form Title:** The title of the form.
- **Date Created:** The date the form was created.
- **Actions:**
 - **Edit:** click to edit the form.
 - **Delete:** click to delete the form.

Create or Edit an Evaluation Form

From the “List Evaluation Forms” page, click **Add a New Evaluation Form** or click **Edit** for an existing Form.

Form Title:

Efficiency evaluation
[individual evaluation title will go here]

Evaluation Information

The sections enclosed in [braces] will be automatically filled out per evaluation.

Agent Name:	[agent being evaluated]
Evaluator Name:	[name of the evaluator]
Evaluation Date/Time:	[when the evaluation was filed]

Call Information

Call Date/Time:	[date and time of the call]
Recording Duration:	[duration of the call]
Direction:	[in/out direction of the call]
Display:	[caller id of the call]

Field Definitions

- **Form Title:** The title of the form.
- **Evaluation Information** and **Call Information:** These fields will be populated automatically whenever the form is used to evaluate a call recording. Note that the **Agent Name** can be overwritten if someone other than the intended Agent answered that Agent's call.

Evaluation

[Add a New Field](#)

*** Strictly Confidential ***

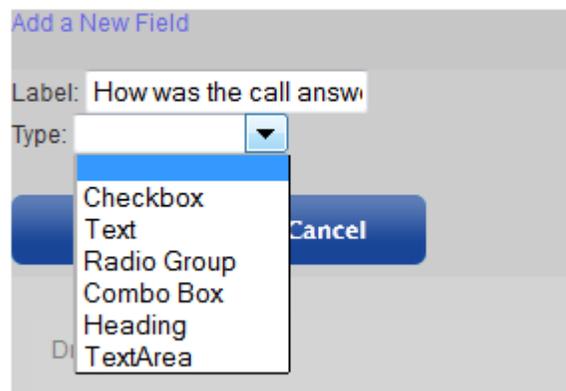
Page 1 of 1

Save Details

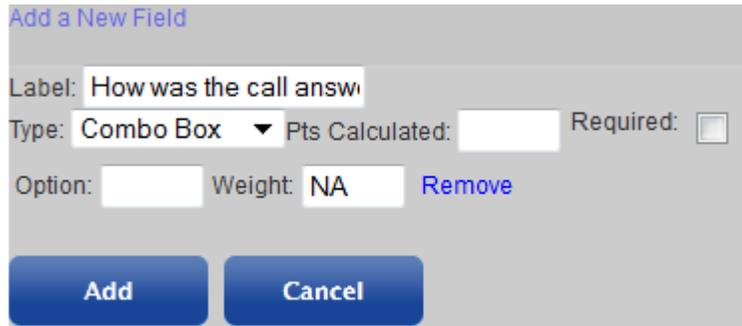
Cancel

To add a new question to the form, in the *Evaluation* section, click **Add a New Field**.

Evaluation



- **Label:** the full text for the question.
- **Type:** the question type, selected from the dropdown.



- **Pts Calculated:** For Checkbox, Radio Group and Combo Box questions this is the total point basis for this question and is used in the denominator when calculating the final percentage. If Pts Calculated is not populated, its value for this question is taken as the largest of the Weight assigned to any of its answers.

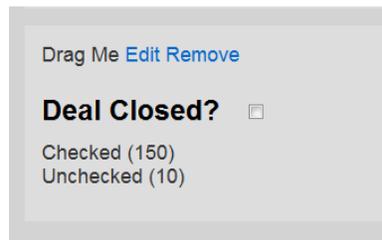
Note: The larger the *Pts Calculated* for an individual question, the more its answer affects the overall percentage score.

- **Required:** For Combo Box questions only, checking this field will force the Evaluator to choose an answer. If it is not checked, the Evaluator can choose "N/A" in which case this question and its *Pts Calculated* are excluded from the calculation of the overall percentage score for this recording.
- **Option:** For Radio Group and Combo Box questions, this is the full text of an answer choice. Click **Remove** to remove a previously defined answer choice.
- **Weight:** For Radio Group and Combo Box questions, this is the points (Weight) awarded when this answer is chosen. For Checkbox questions, assign Weights to the pre-defined answers "Checked" and "Unchecked".

Note: The Weight assigned to a particular answer can be larger than the Pts Calculated. This allows for results like, "In this area the Agent achieved 110% of objective!"



- Click **Add**. The question will be added to the form



✍ **Note:** When the form is presented to the Evaluator it does not show the points for the question nor the points associated with the answer choices.

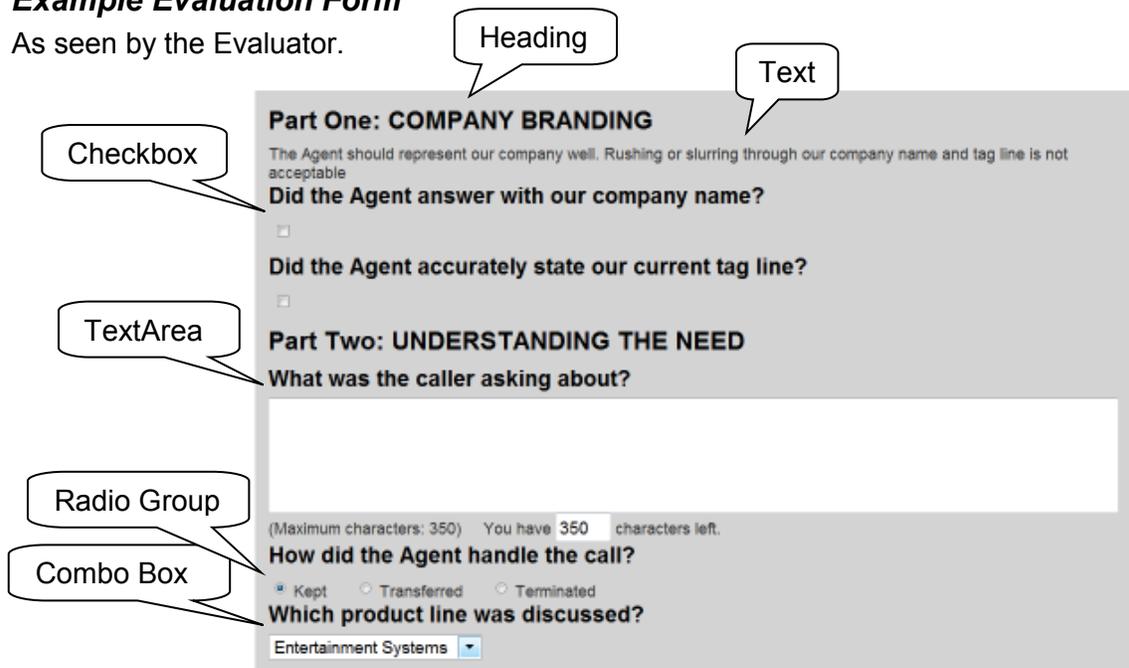
- Repeat the steps above until all of the questions have been added.
- **Edit** or **Remove** a question by clicking on the appropriate link.
- Re-arrange the order of the questions by clicking, holding, and dragging the **Drag Me** link.

When the form is complete, click **Save Details** at the bottom of the page.

★ **Important:** Even though changes to the Evaluation Form appear to be saved as they are entered, they are not preserved until the **Save Details** button is pressed.

Example Evaluation Form

As seen by the Evaluator.



The screenshot shows an evaluation form with the following sections and callouts:

- Heading:** Part One: COMPANY BRANDING
- Text:** The Agent should represent our company well. Rushing or slurring through our company name and tag line is not acceptable
- Checkbox:** Did the Agent answer with our company name?
- Checkbox:** Did the Agent accurately state our current tag line?
- Text:** Part Two: UNDERSTANDING THE NEED
- Text:** What was the caller asking about? (Text area)
- Text:** (Maximum characters: 350) You have 350 characters left.
- Text:** How did the Agent handle the call?
- Radio Group:** Kept Transferred Terminated
- Text:** Which product line was discussed?
- Combo Box:** Entertainment Systems

Delete an Evaluation Form

An existing Evaluations Form can be deleted by clicking on the **Delete** link on the “List Evaluation Forms” page. The Delete dialog box will be displayed. Click the **Confirm Delete** button.

★ **Important:** If an Evaluation Form is deleted, evaluation results based on that form will also be deleted.

Operational Notes

OfficeSuite and ACD Applications

In OfficeSuite, calls are routed to extensions. Because ACD Applications (Queues) are also extensions, except for being a part of a Call Group⁴, anything that can be done to route a call to an OfficeSuite extension also can be used to route that same call to an ACD. ACD Applications can be dialed directly and/or transferred to. ACD Applications can serve as targets for Incoming Call Routing, Auto Attendants, Forwarding, and Coverage.

In the other direction, all working OfficeSuite extensions can be used as ACD targets. *Only Agents can serve queued calls*, but any valid OfficeSuite User, Location, Auto Attendant, or Group can be made into the target for a Voice Queue Timeout Redirect.

⁴ ACD Applications cannot be made members of OfficeSuite Call Groups.



With the exception of members of Queues, which must be Agents (valid User/Location extensions), the ACD system can also send calls to external numbers (e.g. as Queue Timeout Redirect targets.) An ACD application that needs to send a call externally needs permission to make that call. Like other OfficeSuite extensions, ACD Applications are given call Permission Profiles. This is done on the "ACD Applications" page on the OfficeSuite portal.

ACD Services Extension

When the ACD service is first turned up, Broadview sets up a single extension within the Tenant as the "ACD Services" extension. Today, a call to this extension will always be prompted to create a custom audio file for the Audio Library. This extension self-identifies on the "Audio Library" page and "Adding and Editing Audio Files" pages. In the future, the ACD Services extension may provide a menu of useful options.

If it is necessary to record custom audio files remotely, (i.e. not using OfficeSuite extension dialing), route a corporate phone number or an Auto Attendant option to the ACD Services extension.

Busy Phones

The ACD system is aware of busy Mitel® phones. Any current activity on an OfficeSuite Mitel® phone is recognized by the ACD system as a "Busy" condition. The ACD System will not offer queued calls to busy phones.

However, if an ACD timeout routes a call directly to an OfficeSuite extension, neither the Signed In, Ready, Busy, or Logged In state of that extension is relevant. The call will be sent to that extension regardless. If the user isn't able to take that call, regular OfficeSuite capabilities will handle the call, invoking other line appearances, coverage, monitor groups, forwarding and/or mobile twinning as configured.

Codec Interoperability

The ACD system answers calls using a full rate codec. If an Agent is in a site where low bit rate codecs are required, the ACD connection to that Agent will make use of that lower bit rate codec. Transcoding between the two bit rates will take place inside the ACD system. Recordings will be made at the full bit rate. When those recordings are downloaded to a PC they will have been transcoded to become GSM inside a .wav wrapper. Most PC media players can play GSM files from a .wav wrapper.

See the section on Audio Library for a discussion of the codecs that are supported when a PC audio file is uploaded into the Audio Library.

Glossary of Terms & Acronyms

Abandoned Call	<p>A call that arrived at a Queue but was not answered by an Agent. There are two reasons this might occur:</p> <ul style="list-style-type: none"> • The caller hung up before an Agent could answer. • The queue timed out because no Agent answered. <p>If a UI dashboard or Report includes both a Queue and the Queue that is its Timeout Redirect Extension, and if a call timed out of the first queue but was answered in the second, this call will not show in this display/report as Abandoned because it was indeed answered by the combination of queues in the display/report.</p>
ACD	Automatic Call Distribution. A generic term for call center queuing and distribution systems. OfficeSuite eQueues is a hosted ACD service offered by Broadview Networks.
ACD Services extension	An extension created by Broadview Networks personnel when the ACD service was first turned up. This is the extension where custom audio files can be recorded for Hold Treatments and Whisper Announcements.
ANI	Automatic Number Identification. The calling number on a call received from the PSTN (when the PSTN makes it available.)
Available	An Agent whose ACD Sign In key is lit. The phone busy state is not relevant to whether the Agent is Available.
CLID	Calling Line ID. The calling number on a call received from the PSTN (if the PSTN makes it available.)
CNAM	Calling Name. A string of letters and digits that the PSTN has associated with this calling number (if the PSTN makes it available.) The particular CNAM associated with an inbound call is not controlled by Broadview Networks.
Datamart	A background process that compiles data so that it can be used in creating ACD Reports. Currently Datamart runs every four hours every day.
Handled	Handled calls are calls that came into a queue and were answered by an Agent.
Member	An Agent who is assigned to take calls from a particular Queue.
Offered	An offered call is a call that enters a Queue to wait for an Agent.
PSTN	Public Switch Telephone Network. The telephone network that delivers calls to and from Broadview Networks and its OfficeSuite hosted service.
Ready	An Agent whose ACD Sign In key is lit. The phone busy state is not relevant to whether the Agent is Ready.
Signed In	An Agent whose ACD Sign In key is lit. The phone busy state is not relevant to whether the Agent is Signed In.



Tenant	A business making use of Broadview Networks' OfficeSuite functionality. A tenant has a single unified extension dialing plan.
UI	User Interface
Unavailable	An Agent is unavailable for ACD calls if they are not signed in. The phone busy state is not relevant to whether the Agent is Unavailable.

Frequently Asked Questions (FAQs)

Q: How frequently are data for reports updated?

A: Reports are based on information that is currently compiled every four hours. The process that compiles that data is called Datamart. The current expectation is that Datamart will run at approximately midnight, 4 a.m., 8 a.m., noon, 4 p.m. and 8 p.m. Eastern Time. Sometimes Datamart will run on a different schedule, but 4 hours will be the maximum time between updates to reports.

Q: How long are call detail records, “CDRs”, kept in History?

A: The default duration for call detail records is 365 days.

Q: When the optional Call Recording function is purchased, how long are recorded calls archived?

A: The default duration for recordings is 30 days. The customer may request a longer period, but additional storage fees will apply as more recordings are archived. Calls can be stored in the Recording Library and will remain available there until deleted. Recordings can also be downloaded and saved to the PC's hard drive.

Q: Why is there a “Broadview ACD Support” extension listed among my Agents? I also see this extension as a User in the OfficeSuite portal. Will I be charged for this?

A: This extra extension gives Broadview a way to access your ACD configuration and support your use of the product. You will not be charged for this extension or for the extra ACD Tenant Admin. A future release of the ACD software will make this extension/Administrator unnecessary.

Q: What is the maximum number of calls that can be processed in my ACD system?

A: The total number of ACD calls answered and in queue can be as many as three times the number of Agents purchased. If this is insufficient, please contact OfficeSuite Support.