

Hosted Phone Cloud Q Supervisors Users Guide

1. INTRODUCTION TO HOSTED PHONE CLOUD Q

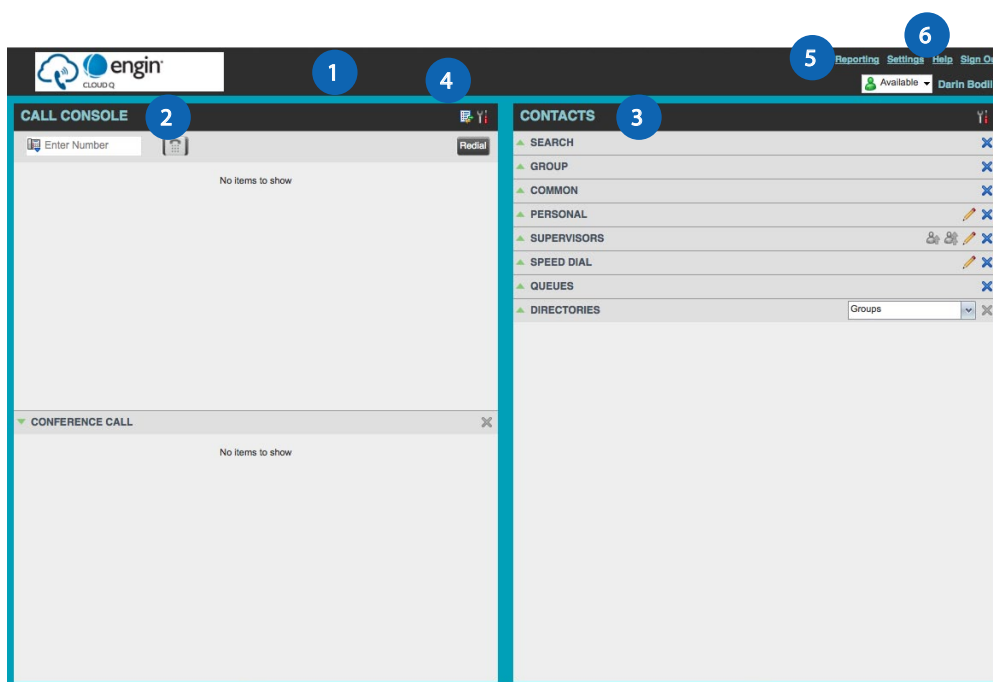
Your Hosted Phone Cloud Q Supervisor application brings call centre management capability to your engin service. Using your favorite Internet browser, you can log into your engin service and:

- Control your incoming and outgoing calls
- Monitor the call centre queue that you are a part of
- Use the engin Directory to interact with contacts in your call centre
- Perform Supervisor functions to monitor and manage agent activity in your call centre

2. CLOUD Q MAIN INTERFACE

The application has the following work areas:

1. **Logo pane** – The Logo pane displays information about you and contains links to other pages and functions.
2. **Call Console** – You use the Call Console to view and manage your current calls.
3. **Contacts pane** – The Contacts pane contains your contact directories, the list of your supervisors, and the list of the call centre queues to which you belong. It allows you to use your contacts to make and manage your calls.
4. **Call History dialog box** – You use the Call History dialog box to view your past calls and make calls from history.
5. **Report window** – You use the Report window accessed via the Reporting link, to generate reports about your activity and performance in the call centres you are staffing.
6. **Settings pages** – You use the Settings pages, accessed via the Settings link, to configure various aspects of Call Centre.



Your Cloud Q call centre states

Your Cloud Q state can be one of the following:



AVAILABLE - You are available to receive calls



UNAVAILABLE - You are not available to receive calls



WRAP-UP - You are wrapping up a call and temporarily unavailable to receive calls

Configure Your Post Sign-In Cloud Q state

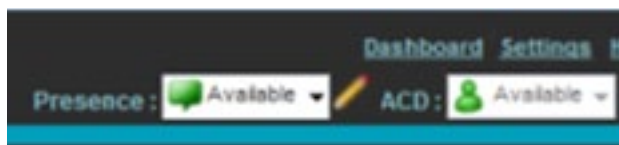
You can set your status in the Cloud Q from the moment you first 'sign-in' to the Cloud Q.

1. On the main page, click the Settings link.
2. On the Settings page, click the Application tab.
3. Set your Post Sign-In Cloud Q State and Post Call Cloud Q State.
4. If you set Post Call Cloud Q State to "Unavailable", you may have to select a code that explains the reason for your unavailability.
5. If you set your Post Call Cloud Q State to "Wrap-Up", check the Set Wrap -Up timer box and then select the length of time before your state changes to Available upon the completion of a call.

Change your Cloud Q state and set the unavailable code

You can change your status in the Cloud Q at any moment and set an unavailability code.

1. At the top right-hand side of the main window, click ACD states and then select your new state from the drop-down list.
2. If the Unavailable Codes feature is enabled and you select Unavailable as your ACD state, a list of codes to choose from appears. Select the code that best describes the reason for your unavailability.

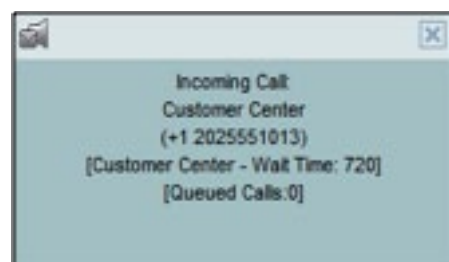


View Incoming Call Details

If the Notification feature is enabled, a notification window appears on top of the system tray when you receive a call, displaying the name and number of the caller.

For calls from your Cloud Q displays:

- Calling name and number on which the call was received
- Cloud Q or DNIS name
- Wait time of the call
- Number of calls in queue
- Diversion information, if applicable



Open a web page (URL) from the callers information

You can open a Uniform Resource Locator (URL) page in your browser to obtain more information about an incoming or any current call. This page contains information about the calling party encoded in its URL.

In the Call Notification pop-up window, that appears when you receive a call or in the Call Console for the target call, click 'Web Pop URL'.



Saving caller information into your Outlook contacts VCard

When Outlook is running on your computer, you can save the caller's phone number and personal information as a vCard in Outlook.

In the Call Notification pop-up window that appears when you receive a call, click Add vCard



Dial Ad-hoc numbers

In the Dialer, enter the number to call and click Dial



Call a Contact in the Directory

1. In the Contacts pane, click the contact to call and then click CALL for that contact.
2. To dial the contact's extension, click EXT or click MOB to dial the contact's mobile number.

Redial a Number

Up to 10 previously dialed numbers are available.

In the Dialer, click the Redial button and then select a number from the list.

Call History

1. In the Call Console, click Call History.
2. In the Call History dialog box, select Missed Calls, Received Calls, or Placed Calls.
3. Click a call log to expand it and then click Call for that log.



Answer Call

Calls can be answered automatically or manually.

To answer calls automatically:

In the Call Console, click Auto Answer.

Note that this feature works only if your handset device supports 'Advanced Call Control' (ACC). In addition, if Auto Answer is enabled on the engine server, you must not enable Auto Answer in this Cloud Q Agent application.



To answer a call manually:

Move the mouse over an incoming call and click ANS.

Blind Transfer a Call

Calls can be blind transferred while active, held, or ringing (in).

1. To transfer the call to an ad hoc number, enter the number in the Dialer and then click Transfer.
2. To transfer the call to a contact, click a contact in one of the contact's directories and then click TXR for that contact.

Transfer a Call with Consultation

Calls can be transferred while active, held, or ringing (in).

1. Dial the number or contact to whom you want to transfer the call.
2. When the call is answered, speak to the party.
3. From the Call Console, select the original call.
4. Move the mouse over the new call and click TXR.

Transfer a call back to the Cloud Q

1. From the Call Console, select the call to transfer.
2. In the Contacts pane, expand the Queues panel.
3. Click the Cloud Q name to expand it and then click TXR for that queue.

Hold Call

In the Call Console, click HOLD for an active call.

Note: This function is not available from a remote office.

Resume a Call

In the Call Console, click ANS for a held call.

Note: This function is not available from a remote office.

End a Call

In the Call Console, move the mouse over a call and click.



Generate a Call Trace

To generate a call trace for a current call:

In the Call Console, move the mouse over a call and click TRACE for that call. A call trace notification is generated, containing the name and address of the parties, the time stamp of the call, the call ID, and the system ID.

To generate a call trace for the last released call:

In the Call Console header, click Trace.



Tag a Cloud Q Call with a Disposition Code

More than one disposition code can be assigned to a call.

To assign disposition codes to a current call:

1. In the Call Console, click the call.
2. From the list that appears, select a disposition code. The code is applied to the call and logged in the engine server.

To assign disposition codes in Wrap-Up:

1. When in Wrap-Up, click Disposition Code in the Call Console header.
2. From the drop-down list that appears, select a code. The code is applied to the last released call.



Start a Three-Way Conference Call

1. In the Call Console, select one of the two calls to conference.
2. Move the mouse over the second, non-selected call and click CONF. The calls are moved to the Conference Call panel.

Add a caller to the Conference Call

In the Call Console, move the mouse over a call and click CONF.

Hold or Resume the Conference Call

1. To hold a conference, click HOLD in the Conference Call panel header. The other parties continue their conversation.
2. To resume a held conference, click ANS.

Leave the Conference Call

You can only leave a Three-Way conference.

In the Conference Call panel, click LEAVE. The other parties continue their conversation and the calls are removed from the Conference Call panel.

Drop a caller from the Conference Call

In the Conference Call panel, select a call and then click.



Hold a caller in the Conference Call

In the Conference Call panel, move the mouse over the target call and then click HOLD.

Resume a caller in the Conference Call

In the Conference Call panel, move the mouse over the target call and then click ANS.

End the Conference Call

In the Conference Call panel header, click . All calls are released.



Monitor Supervisor Phone State

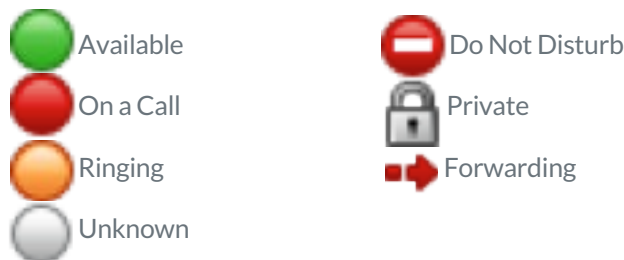
When escalating a call or making an emergency call, it is useful to know which supervisors are available to take calls.

1. In the Supervisors panel, click Edit
2. In the dialog box that appears, select the supervisors to monitor.
3. Click Save. The selected supervisors have their phone state displayed.



Phone States

The possible contact phone states are :



Make an Emergency Call to your Supervisor

While on a call, click Emergency button in the Supervisors panel to let the engine system select a supervisor, or click an available supervisor and then click EMER for that supervisor.



Blind Escalate a Call to your Supervisor

1. While on a call, click Escalate in the Supervisors panel to let the system select a supervisor, or click an available supervisor and then click ESC for that supervisor. The new call appears in the Call Console.
2. In the Call Console, select the original call.
3. Without waiting for the supervisor to answer, move the mouse over the call to the supervisor and then click TXR.



Escalate a Call with Consultation

1. While on a call, click Escalate in the Supervisors panel to let the system select a supervisor, or click an available supervisor and then click ESC for that supervisor.
2. When the call is answered, consult with the supervisor.
3. In the Call Console, select the original call.
4. Move the mouse over the new call and then click TXR.



Escalate a Call with Conference of Hand Over

1. While on a call, click Escalate in the Supervisors panel to let the system select a supervisor, or click an available supervisor and then click ESC for that supervisor.
2. When the call is answered, consult with the supervisor.
3. In the Call Console, select the original call.
4. Move the mouse over the call to the supervisor and click CONF. The call appears in the Call Console panel.
5. To hand over the call to the supervisor, click LEAVE in the Conference Call panel. The customer and the supervisor continue their conversation.



Escalate a Call with Mid-Conference hold

1. While on a call, click Escalate in the Supervisors panel to let the system select a supervisor, or click an available supervisor and then click ESC for that supervisor.
2. When the call is answered, consult with the supervisor.
3. In the Call Console, select the original call.
4. Move the mouse over the call to the supervisor and then click CONF.
5. To put the conference on hold, click HOLD in the Conference Call panel header. The other parties continue their conversation and the calls stay in the Conference Call panel.



Camp on Busy Contact

1. In the Call Console, select the call to camp on.
2. In the Agents or Supervisors directory, move the mouse over a busy or ringing contact and then click CAMP. The call is camped and removed from the Call Console.
3. If the call timer expires before the call is answered, the call is recalled to your device and reappears in the Call Console.

Send E-mail to Contact

1. Expand the Group/Enterprise or Favorites tab, click a contact with e-mail, and then click EMAIL.
2. In the message window that appears, enter the required information and then click Send.

Display Call History

Call History displays your placed, received, and missed calls.

1. In the Call Console, click Call History.
2. To view call logs in a group, select the group from the Show drop-down list.



Delete Call History

1. In the Call Console, click Call History.
2. To delete a specific call log, select the call log to delete in the Call History dialog box and then click Delete for that call.
3. To delete all call logs, click Delete ALL..



Show or Hide Contacts

1. At the top of the Contacts pane, click Options , select View, and then Directories. Then check the directories you want visible and deselect the directories to hide.
2. To show or hide directory contents, click Expand or Collapse in the directory panel for that directory.
3. To display a directory in the Directories panel, select the directory from the drop-down list. To display all directories, select Show all.
4. To display a directory below the Call Console, select Show All in the Directories panel and click the Pullout Directory button for the target directory.



Search for Contacts

1. In the Search panel, select the directories to search from the drop-down list.
2. To restrict the search to contacts that start with the text to search for, check the Begins with box.
3. In the Search text box, enter the text to search for and press ENTER. You can enter partial information, such as part of a name or number. The text is matched against all attributes and the search results are displayed in the Search panel.
4. To clear the search results, click Reset.



Manage Speed Dial and Personal Directories

1. In the Speed Dial or Personal panel, click Edit . The Edit Speed Dials/Edit Personal Contacts dialog box appears.
2. To add an entry, click Add. A new row appears. For a Speed Dial entry, select the dial code and enter the number and description of the contact. For a Personal entry, enter the name and number.
3. To delete an entry, select the entry, and click Delete.
4. To modify a Speed Dial entry, double-click the entry so that it can be edited and modify the information as required.



SUPERVISOR ACTIVITIES

Monitor Agents







You monitor agents using the Agents panel located in the Contacts pane. This shows the real-time state of the agents who you supervise and it allows you to change the state of an agent.

To select agents to monitor:

1. In the Agents panel, click the Edit button.
2. In the dialog box that appears, check the agents to monitor.
3. Click **Save**.



The selected agents have their combined phone and ACD state displayed as follows:

-  Available
-  Busy, Unavailable, or Sign-Out
-  Ringing or Wrap-Up
-  Do Not Disturb
-  Private
-  Forwarding

Agents who are not monitored have their state set to Unknown



Change the Agent's ACD State

1. In the Agents panel, click the agent and then click the ACD button for that agent.
2. From the drop-down list, select the new state.
3. If you selected Unavailable, you may also have to select an unavailability code.



View your Agent's Details

Clicking an agent expands the entry displaying all queues the agent is staffing, with the agent's join-in state in each queue and skill level in queues with skill-based routing; as well as the current calls, in order of arrival.

Make an Agent Join/Leave Queue

1. In the Agents panel, click the target agent.
2. Click the Queue button. The Agent Queue Membership dialog box appears.
3. Check or uncheck the Join box in the row of the queue you want the agent to join or leave and click **Save**.

Pick Up an Agent's Call

1. In the Agents panel, click an agent in the Ringing state.
2. Click **ANS**. The call appears in the Call Console.

Silently Monitor Agent's Current Call

The agent to monitor must have exactly one active call.

1. In the Contacts pane, expand the Agents panel.
2. Click the agent and then click **SM** for the selected agent.
A new call is created in the Conference Call panel. You are conferenced in to the call and muted.

Silently Monitor Agent's Next Call

In the Agents panel, click the target agent and then click **SMN**.

When the next call is received and answered by the agent, you are conferenced in to the call and your call is muted.

Monitor your Call Centre's Next Call (Premium Call Centre Option)

1. In the Contacts pane, expand the Queues panel and click the target call center to expand it.
2. Click the **SMN** for that call center. A monitoring call is established for the selected call center.

When the next call is received and answered by an agent, you are conferenced in to the call and your call is muted.

Unmute a Silently Monitored Call

While silently listening on a call, click **BARGE** in the Conference Call panel. You can now participate in the conversation.

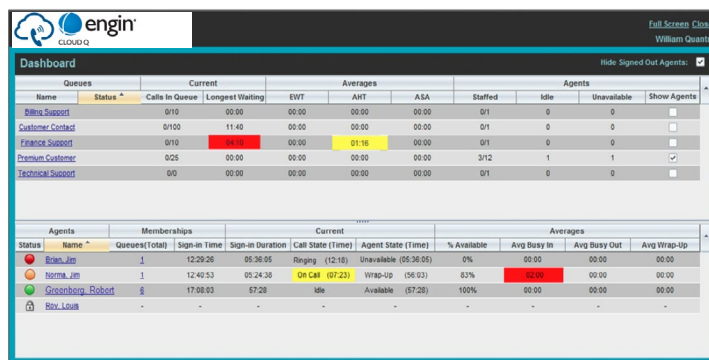
Barge In on an Agent's Call

The agent must have exactly one active call.

1. In the Contacts pane, expand the Agents panel.
2. Click the target agent and then click **BARGE** for that agent. You are conferenced in to the call.
3. To leave the conference, click **LEAVE** in the Conference Call panel.

View Agents and Queue Statistics

You can view real-time statistics for the monitored call centers and agents assigned to you, using the Dashboard window.



The screenshot shows the Engin dashboard with two main tables. The top table is the Queue Summary, and the bottom table is the Agent Summary.

Queues		Current			Averages			Agents		
Name	Status	Calls In Queue	Longest Waiting	EWT	AMT	ASA	Staffed	Idle	Unavailable	Show Agents
Alpha_Support		0/10	00:00	00:00	00:00	00:00	0/1	0	0	
Customer_Contact		0/100	11:40	00:00	00:00	00:00	0/1	0	0	
Finance_Support		0/10	00:00	00:00	01:16	00:00	0/1	0	0	
Premium_Customer		0/25	00:00	00:00	00:00	00:00	3/12	1	1	
Technical_Support		0/0	00:00	00:00	00:00	00:00	0/1	0	0	

Agents		Memberships		Current			Averages			
Status	Name	Queues (Total)	Sign-in Time	Sign-in Duration	Call State (Time)	Agent State (Time)	% Available	Avg Busy In	Avg Busy Out	Avg Wrap-Up
●	Brian_Jim	1	12:29:26	05:36:05	Ringng (12:18)	Unavailable (05:36:05)	0%	00:00	00:00	00:00
●	Norma_Jim	1	12:47:53	00:24:38	On Call (07:23)	Wrap-Up (06:03)	83%	02:00	00:00	00:00
●	Greenberg_Robert	6	17:00:03	07:28	Idle	Available (07:28)	100%	00:00	00:00	00:00
●	Box_Louis	-	-	-	-	-	-	-	-	-

- The Queue Summary shows key performance indicators for each call center you manage.
- The Agent Summary shows key performance indicators for the supervised team of agents.

Note that by default, agent statistics are not displayed.

To display agent statistics for a call center:

1. In the Queue Summary, check the Show Agents box in the row for that call center.
2. To hide signed-out agents, check the Hide Signed Out Agents box at the top-right corner of the Dashboard.

The administrator can set yellow and red thresholds for some of the measurements. When a threshold is crossed, the measurement is displayed in the color corresponding to the crossed threshold. Red thresholds have higher severity than yellow thresholds.

- Queue fields for which thresholds can be set are Calls in Queue, Longest Waiting Time, EWT, AHT, and ASA.
- Agent fields for which thresholds can be set are Call State (Time) – On Call, Call State (Time) – Idle, Agent State (Time) – Unavailable, Avg Busy In, Avg Busy Out, and Avg Wrap-Up.

Navigate from Dashboard to Agent or Queue

In the Dashboard, click the link for the agent or queue. The main window is brought to the foreground and the selected agent is displayed and expanded in the Agents panel. If you clicked a queue, the queue is displayed and expanded in the Queued Calls pane listing calls in the queue.

Monitor Queues

The Queued Calls pane shows selected call centers that you are managing. Each call center is displayed in a separate panel.

To select call centers to monitor:

1. At the top right-hand side of the Queued Calls pane, click Options and select Edit Queue Favorite Dialog from the menu.
2. In the dialog box that appears, check the call centers to display.
3. Click **Save**. The selected call centers appear in the Queued Calls pane.



The following information is displayed for each call center:





- Call center name and phone number
- Service Mode icon/button
- Message Waiting icon (if there are new messages)
- Ratio of queued calls to call center's call capacity



The Service Mode icon displays the call center mode, which can be Normal, Night Service, Night Service Override, Forced Forward, and Holiday Service.

You expand a call center panel by clicking the **Expand** button for that panel. When expanded, the calls queued on that call center appear.

For each call, the following information is displayed:


- Call Status icon, which can be:
 - Call is waiting to be answered. 
 - Message is being played to caller. 
 - Call was reordered. 
 - Call was bounced. 
- Name/number of the call center (or DNIS, if applicable) that was called
- Total call time, and in parentheses, the time in the current queue (when applicable)

Clicking a call expands the call to show additional data:

- Call priority bucket (Premium call center)
- Call position in queue
- Name

Enable Night Service Override or Forced Forwarding



1. In the Queued Calls pane, click the **Service Mode**  a Call Center panel.
2. In the Edit Queue Favorites dialog box that appears, check Night Service Override or Forced Forwarding for each call center for which you want to enable the service(s).
3. For Forced Forwarding, enter the forwarding destination.

Note that Forced Forwarding has precedence over Night Service Override.

Promote Call in Queue (Premium Call Center)

1. In the Queued Calls pane, expand a Call Center panel.
2. Click the call to promote and then click **PROMOTE**.

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

Position Call in Queue

1. In the Queued Calls pane, expand a Call Center panel.
2. Click the target call and then click **REORDER** for that call.
3. From the drop-down list that appears, select a new position.

The call is placed at the new position in the queue.

Note that you cannot place a call ahead of a bounced call.

Transfer Call to Top of Queue

1. In the Queued Calls pane, expand a Call Center panel.
2. Click the target call and then click **REORDER** for that call.
3. From the drop-down list that appears, select **Send to Front**.

Retrieve Call from Queue

1. In the Queued Calls pane, expand a Call Center panel.
2. Click the target call and then click **RETRIEVE**.

The call appears in the Call Console and you treat it as any other call.

Transfer Call from Queue to Agent

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

Transfer Call from Queue to Ad-Hoc Number

1. In the Queued Calls pane, select the call to transfer.
2. In the Dialer, enter the number and click **Transfer**.

Transfer Call between Queues

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

REPORTING

The Call Center service provides a set of reports about call centers and agents' performance. Your engin system administrator may define additional reports. Since reports are configurable, the reports available to you depend on your system configuration. For information, consult your engin administrator.

Note that agents can only request reports about themselves.

Run Report

1. On the Call Center main page, click the Reporting link.
2. In the Report window, select the report type you want.
3. In the dialog box that appears, enter the required information.
4. Click **Run Report**. The report appears in the Report window.

Schedule Report

1. On the Call Center main page, click the Reporting link.
2. In the Report window, select the report type you want.
3. In the dialog box that appears, enter required information:
 - a. For Type, select **Scheduled**.
 - b. Provide the name and the description of the report.
 - c. Specify the recurrence pattern of the report and the report time frame.
 - d. Enter the e-mail addresses of the recipients of the report.
 - e. Enter the remaining parameters.
4. Click **Schedule Report**. The report is scheduled.

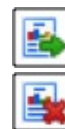
It will run at the specified times and will be sent to the recipients configured in the report schedule.

Manage Scheduled Reports

1. On the Call Center main page, click the Reporting link.
2. From the drop-down list, select **Scheduled Reports**.

A Scheduled Reports dialog box appears, listing the reports that you have scheduled.

3. To edit a report, click **Load** in the row for the report, and modify the report as required.
4. To delete a report, click **Delete** in the row for the report.



Keyboard Shortcuts

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

Key	Equivalent Mouse Action
ESC	Click the Close button in a dialog box.
ESC	Cancel the changes.
/	Click the Dialer text box.
?	Click the Search text box.
ARROW DOWN	Click the scroll bar or the next item on a list.
ARROW UP	Click the scroll bar or the previous item on a list.
PAGE DOWN	Scroll down one page.
PAGE UP	Scroll up one page.
1...9	Select a call in the Call Console.
SPACEBAR	Click Answer on the selected incoming call in the Call Console.
<PERIOD>	Click End on the selected call in the Call Console.
ENTER	Click Dial.
ENTER	Click Search.
+	Click Transfer in the Dialer.
SHIFT+1..9	Select a ringing call and click Answer.
SHIFT+1..9	Select an active call and click Hold.
SHIFT+1..9	Select a held call and click Retrieve.
S or s	Click the Settings link.
B or b	Click the Back to Application link.
R or r	Click the Call History button.
H or h	Click the Help link.
D or d	Click the Dashboard link (Supervisor)
SHIFT+L or SHIFT+l	Click the Sign Out link.
SHIFT+A	Select Available (Agent).
SHIFT+U	Select Unavailable (Agent).
SHIFT+W	Select Wrap-Up (Agent).