

Contact Center Suite

User Guide



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Overview

This section provides a broad overview on the Contact Center Suite application.

About This Guide

This guide contains instructions for agents and supervisors using Contact Center Suite client applications, including Connection Assistant.

NOTE

The features described in this guide may not be available in the license level you have purchased. Refer to the online help for feature capabilities for your license.

To help you find information more quickly, this guide is divided into six sections:

- **Overview:** This section gives a brief description of the Contact Center Suite client applications and the features in version 4.0 and later. It also contains information on other sources of help for using Contact Center Suite.
- **CallViewer:** This module contains information on starting CallViewer, using the Startup Wizard and the new “look and feel” options. It also covers basic CallViewer tasks, such as call control functionality and using Button Manager. Advanced tasks include using hot keys, screen popping, Rule Manager, and handling e-mails routed with Media Blending. If you are using Connection Assistant, this information applies, however, refer to the Options License topic in the online help for details on CallViewer and Connection Assistant feature differences.
- **Tiles, Filters, and Statistics:** This section covers general concepts for tiles, filters, and statistics, which are common to several client applications.
- **RealViewer:** This module contains information on starting RealViewer and using Startup Wizard. It also covers basic RealViewer tasks, such as creating a Deskboard tile and applying filters to tiles. Advanced topics include setting tile alarms and rearranging the RealViewer window.
- **Reporter:** This module contains information on starting Reporter and using Startup Wizard. It also covers basic Reporter tasks, such as running reports, saving and reusing reports, changing report options, and exporting data. Advanced topics include printing and previewing reports, using Auto Reporter and integrating with the Mercom Audiolog™ Server.
- **Reporter Real-Time:** This module contains information on starting Reporter Real-Time and using Startup Wizard. It also covers basic tasks such as adding tiles, customizing the tile's appearance, changing the statistics on a tile, and applying filters. Advanced topics include creating DSS tiles for extensions and agents, using call control, and using Auto Reporter.

Online Help

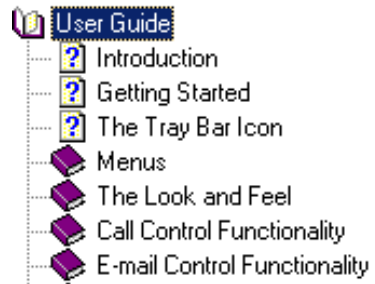
There are several ways to access the online help from within the client applications, although not all options may be available in every window:

- Press **F1** on your keyboard.
- Click the **Help** button.
- Select **Help** from the application menu or tray bar menu.

Navigating Help Topics

In most cases, the right pane of the help window displays information about the current screen. You can navigate to other topics using the table of contents in the left pane of the help window.

The contents are organized into “books” of related information. Double-click a book to open it and reveal the topics and/or books it contains, as shown in the example on the right.



You can also use the drop-down menu to select help topics. Click the **Previous** and **Next** icons to navigate through the related topics in the chosen book.

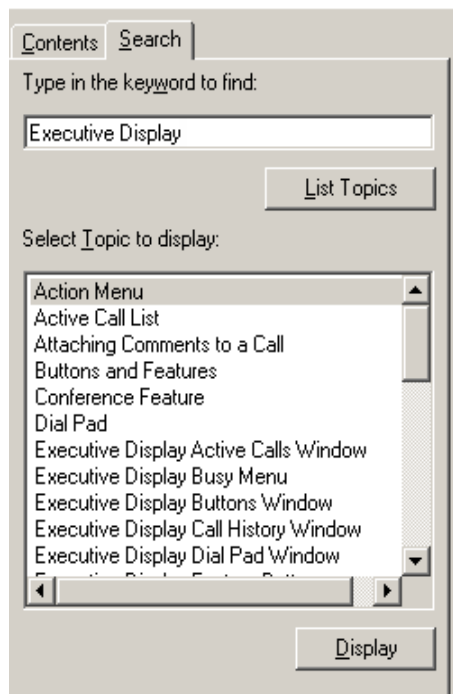


Searching Help

Sometimes the fastest way to find the information you need is to use the help search feature.

To search help:

1. Click the **Search** tab.
2. Type the keyword you want to find in the text box, and then click **List Topics**.
3. Select the topic from the list in the lower portion of the panel, and then click **Display**.



Printing a Help Topic

To print a help topic, navigate to the information you want to print, and then click the **Print** icon at the top of the window.

Where to Find Additional Information

You can find additional information in the *Contact Center Suite Installation Manual* (part no. 835.2208) or in the online Help for each of the individual clients. This User Guide does not include information on the Server, Data Manager, and Intelligent Router.

About Contact Center Suite

Contact Center Suite is a Computer Telephony Integration (CTI) application. It links the telephone system and the computer, providing a seamless and automated technological partnership. Contact Center Suite can be used with the following communications systems:

- Inter-Tel® Axxess® Converged Communications Platform (Single and Multiple Nodes)
- Inter-Tel 5000 Network Communications Solutions (Single and Multiple Nodes)

Contact Center Suite is ideal for businesses, such as an order entry center, help desk (customer support), telemarketing firm, etc., that experience high call volumes and use a computerized database and/or an automatic call distribution system, although it is also suited to low-volume environments.

As more customers turn to the Internet for sales, support, and service, call centers receive e-mails and faxes, in addition to traditional phone calls. Contact Center Server v4.0 or later supports full Media Blending, effectively modeling all three forms of contact.

NOTE

A third-party fax to e-mail gateway is required to support modeling of faxes. Refer to the *Advanced Applications Design Guide for Contact Center Suite* (part no. 835.3053) for details.

Software Applications

The Contact Center Suite software package contains the following modules:

- **Server:** Stores all call data and provides real-time information for the other components of the system. The Server is the heart of the Contact Center system. Refer to the *Contact Center Suite Installation Manual* for information on Server.
- **Data Manager:** Used to configure the Server. It connects over the network to the Server, and allows the administrator to configure various settings, such as lists of devices, or how to connect to the telephone system. The Data Manager can also be executed on the same computer as the Server. Refer to the *Contact Center Suite Installation Manual* for information on Data Manager.
- **CallViewer:** Allows individual users to screen pop information from the company database and manage calls and e-mail messages. CallViewer includes several “look and feel” choices to help you customize the application to suit your need.
- **RealViewer:** Allows users to see statistics, at their own computer, based on the activity of the user or their group.
- **Reporter (Reporter Basic, Reporter, and Reporter Pro):** Allows you to analyze the call log historically in a variety of ways to make better business decisions. Note that licensing varies for Reporter Basic, Reporter, and Reporter Pro.
- **Reporter Real-Time (Reporter and Reporter Pro):** Allows you to analyze the call log in real-time in a variety of ways to make better business decisions. Note that licensing varies for Reporter and Reporter Pro.
- **Intelligent Router:** Allows you to program routing schemes (and numerous other actions) for calls and other media types based on call information and other statistics. Intelligent Router is required if the optional media blending feature is desired. Refer to the *Contact Center Suite Installation Manual* for information on Intelligent Router.
- **Verint (formerly Mercom) Audiolog® Server:** Contact Center Suite supports the Verint Audiolog voice recorder, which enables the recording of your calls and subsequent playback from Reporter.
- **Auto Reporter:** Provides Web publishing capabilities for Reporter and Reporter Real-Time. With Auto Reporter, you can schedule reports to automatically publish them to a Web site (Internet or intranet), send them to a printer, or e-mail them with attachments in .doc or .xls format. Wireless Application Protocol (WAP) reports can be published to a Web site for viewing on a WAP-compliant device. Finally, **Auto Reporter** allows you to schedule exports for reports. Refer to [pages 61](#) and [81](#) for more information.

Licenses

The features available in each Contact Center Suite module are controlled by the license level you have purchased. Refer to the Server chapter of the *Contact Center Suite Installation Manual* or the online help for details on checking your licensing information.

Support Services

NOTE Technical support personnel may need to view the installation, setup, etc. of the Server using Inter-Tel Remote Support.

If you have questions about any of the Contact Center Suite products, refer to this manual or the online help. If you need additional support, please contact the designated on-site System Manager. If this does not resolve the problem, contact your authorized Inter-Tel provider for technical assistance.

Features of Contact Center Suite v4.0 and Later

Contact Center Suite v4.0 or later contains many features including the following:

- **Internal Call Modeling:** Allows new activity reporting and intelligent routing capabilities for internal calls, enabling managers to monitor the performance of internal departments, both historically and in real-time, and automatically manage their call traffic. See the Intelligent Router chapter of the *Contact Center Suite Installation Manual* for more details.
- **Enhanced CallViewer:** Provides enhanced user functionality and customization including changeable Looks, DSS buttons, integrated call logger and personal call router. See the “CallViewer” section, beginning on [page 17](#), for more details.
- **Media Blending:** Allows e-mails sent to contact centers to be routed and handled like calls. See the “CallViewer” section for more details.
- **Multi-Media Reporting:** With the addition of real-time and historical reporting, enables managers to monitor and report on routed e-mails and normal telephone traffic. See the “Reporter” and “Reporter Real-Time” sections for more details.
- **Agent Help Support:** New agent-help functionality allows managers to monitor and react to the support needs of their staff in real time when faced with a difficult call that requires the assistance of a manager. See [page 39](#) for more details.

Tiles, Filters, and Statistics

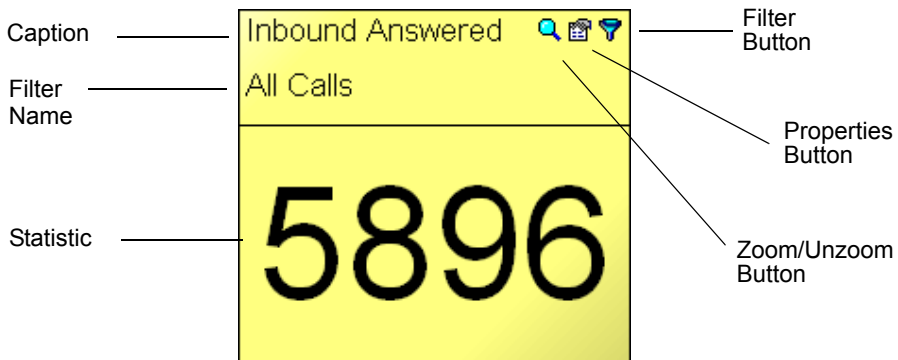
This chapter provides details on the tiles, filters and statistics available in Contact Center Suite.

Introduction

There are three elements of Contact Center Suite that are common to multiple client applications: tiles, filters, and statistics. This section provides general concepts for each of these. See the remaining sections of this User Guide for specific details of each application's usage.





Tiles

Tiles are the building blocks of RealViewer and Reporter Real-Time.



Each tile consists of a caption, which describes the display, and the associated statistic. Tiles display a single call summary statistic, which can be filtered to include only a particular group of agents, or other information, such as the date and time. (Call Summary does not support custom filters.) The statistic can also have an associated alarm that will notify you when the statistic falls within a certain range (see "Using Tile Alarms" on [page 53](#)).

Each tile also includes the following buttons:


- **Zoom/Unzoom:** When displayed as , click this button to enlarge the tile to fill the whole RealViewer display area. When displayed as , click to reduce the tile to the original, unzoomed size.
- **Properties:** Click the  button to change the content, description, color, or alarm settings for the tile.
- **Filter:** Click the  button to choose an existing filter to apply to the particular tile or create a new one.

Tiles can display many types of statistics, as described in “Types of Statistics” on [page 14](#).

Adding a Tile

Even though the types of tiles vary from one client application to another, the method used to create them is the same. Reporter also provides a new tile wizard to help you create tiles. See the online help for details on using the new tile wizard.

To create a tile:

Click the Add Tile button () on the toolbar, or click **Add Tile** from the shortcut (right-click) menu. The new tile is created, and the property sheet for that tile opens. See the “RealViewer” and “Reporter Real-Time” sections of this User Guide for examples of various types of tiles.

Editing a Tile

After you have created a tile, you can change the properties, such as the statistics associated with that tile or add an alarm.

To edit a tile:

1. Double-click on that tile’s statistics, or right-click on the tile and select **Properties**. The property sheet is displayed with the tile’s current settings.
2. Change the settings as desired.
3. Click **OK** when finished, or click **Cancel** to exit without saving changes.

NOTE

See the online help for details on the property sheets associated with tile properties.

Removing a Tile

To remove a single tile, right-click on the tile to remove and click **Remove**. At the prompt, click **Yes** to remove the tile or **No** to cancel the action.

NOTE

Removing a tile cannot be undone.

You can also remove all tiles by using the **Tiles** property page of the Options property sheet (see the online help).

Filters

Filtering is a feature provided in Reporter, Reporter Pro, RealViewer, and Intelligent Router. This allows you to select information that you want to see, based on different parameters, such as how long a call was active, what ACD hunt group the call rang, what DID number the call used to access the switch, etc. You can choose to filter calls by trunk or by device.

Filtering calls by device considers each individual device with which a call is handled, whereas filtering by trunk only considers each call once, regardless of how many devices handled it. Filtering by device is often used to measure individual agents or extensions, while filtering by trunk is used to measure statistics against DID numbers or trunk lines, e.g., to measure the effectiveness of a marketing campaign. Further information on filtering by device and by trunk can be found in the online help.


Every report or tile is filtered by the All Calls filter by default. The All Calls filter does not exclude any calls when filtering, and cannot be edited or deleted.

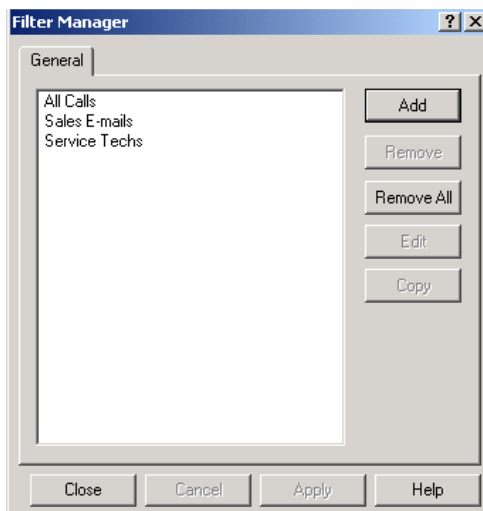
In Reporter Real-Time and RealViewer, a filter can be applied to each tile, and the same filter can be applied to multiple tiles. In Reporter, a filter is applied to a report, and the same filter can be applied to multiple reports.

NOTE

In Reporter Real-Time and RealViewer, the greater the number of different filters that you apply to tiles increases the time it takes for the application to start.

Using Filter Manager

The Filter Manager lists the currently available filters and provides access to programming options. To display the Filter Manager, click the Filter Manager button () on the toolbar or press **CTRL + F**. Or, select **Filter Manager** from the main menu.



You can also add, remove, edit, and copy filters, using the buttons described below.

NOTE You must have Administrator permission to add, edit, or remove a filter.

- **Add:** Displays the Add Filter dialog box so you can create a new filter. You can also add a filter by clicking the Filter button on a tile or report, and choosing **Add Filter**.
- **Remove:** Removes the currently selected filter. You are prompted for a confirmation before the filter is removed. If you remove a filter, any tiles or reports using that filter will default to the All Calls filter.
- **Remove All:** Deletes all filters listed except the All Calls filter. You are prompted for a confirmation before the filters are removed. If you remove all of the filters, any tiles or reports using those filters will default to the All Calls filter.
- **Edit:** Displays the Edit Filter dialog box so you can edit the selected filter. (You can also access the Edit Filter dialog box by double-clicking on the filter you want to edit).
- **Copy:** Copies the current filter and immediately includes it in the filter list. The name of the copied filter is the same as the original filter except it includes "(1)" after the name. For example, a copy of the Sales filter would result in Sales (1).


Each of these options is described in detail in the online help.

Adding a Filter

You can create as many filters as you need, limited only by the available memory of your computer. You can also edit a filter after creating it, to immediately see the effects of the changes you make.

NOTE When running in Call Summary mode, where you do not use a RealViewer license, you cannot create or apply filters to tiles.

To add a new filter:

1. Open the Filter Manager, and click **Add**. Or, you can click the Filter button () in a tile or report caption and click **Add Filter**. The Add New Filter screen is displayed.
2. Select the tab corresponding to the information you want to use as the filtering parameters. Your options are as follows:
 - General
 - Call Route
 - ACD Hunt Groups
 - Direction & DID
 - Duration
 - Call Status
 - Information
 - Transferred Calls
 - Miscellaneous

3. Program the information for the selected tabs, as described in the online help.

NOTE

Any of the text-based fields can accept wild cards (e.g., “*@acme.com”) or comma separated lists (e.g., “200-204,207,209”) to define the extensions, groups, or agents you want to include in the filter. The list you enter can include ranges or individual extension items wherever you can specify a device. For example, if you entered “200-204,207,209,” the filter would include extensions 200, 201, 202, 203, 204, 207, and 209. You may not enter “abc-def” for a device field range because letters are not valid in that context. You can also select extensions or agents from the appropriate list, which are intelligently added to or removed from the list.

4. Click **OK** when finished, or click **Cancel** to exit without saving changes. If you added a filter through the Filter Manager, you are returned to the Filter Manager screen. If you added a filter using the tile or report buttons, you are returned to the main application window.

Example: Creating an Extension Filter

In the following example, you will create a filter to monitor a single extension.

1. Open Filter Manager as described on [page 10](#), and then click **Add**.
2. On the General tab, type a unique description of the filter name. This will be displayed in the Filter Manager and on any tile’s caption that uses the filter. The description should provide enough information so you can easily identify what the filter displays, for example, **Ext. 1234**.
3. In the Devices section, select the extension number from the drop-down list to include in the filter, for example, **1234**.
4. Click **OK**. The Ext. 1234 filter is ready to be applied to a tile.

Example: Creating a Filter for an Agent ID for a Single Agent

In the following example, you will create a filter to monitor a single agent ID.

1. Open Filter Manager as described on [page 10](#), and then click **Add**.
2. On the General tab, type a unique description of the filter name, for example, **Agt. 6234**.
3. In the Devices section, select the agent ID number from the drop-down list to include in the filter, for example, **6234**.
4. Click **OK**. The Agt. 1234 filter is ready to be applied to a tile.

Example: Creating a Filter for an Extension or Agent ID in a Hunt Group

In the following example, you will create a filter to monitor an agent or extension in a hunt group.

1. Open Filter Manager as described on [page 10](#), and then click **Add**.
2. On the General tab, type a unique description of the filter name, for example, **Ext. 1234 in HG 2000**.
3. In the Devices section, select the extension number from the drop-down list to include in the filter, for example, **1234**.
4. On the Call Route tab, in the **Call First Rang At Extension / Group** field, select the hunt group number to include in the filter, for example, **2000**.

NOTE Do *not* select the hunt group on the ACD Hunt Group tab.

5. Click **OK**. The Ext. 1234 in HG 2000 filter is ready to be applied to a tile.

Example: Creating a Call Statistics Filter for a Hunt Group

In the following example, you will create a filter to monitor call statistics for a single hunt group.

1. Open Filter Manager as described on [page 10](#), and then click **Add**.
2. On the General tab, type a unique description of the filter name, for example, **Call Stats-HG2000**.
3. On the Call Route tab, in the **Call First Rang At Extension / Group** field, select the hunt group number to include in the filter, for example, **2000**.
4. Click **OK**. The Call Stats-HG2000 filter is ready to be applied to a tile.

Other Filter Suggestions


The following filter suggestions are a few of the many types you can create to analyze activities in Contact Center Suite:

- Filters on Direction
- Routing Filters
- Transferred Calls
- First Rung Information
- Call Durations

Editing a Filter

You can edit a filter to change any of the options that affect what is included in a tile or report.

To edit a filter:

1. Open the Filter Manager by clicking the Filter Manager button () or selecting **Filter Manager** from the main menu.
2. Select the filter that you want to edit, and click **Edit**. Or, double-click on the filter that you want to edit.
3. Make any necessary changes to the information on the tabs as described in “Adding a Filter” on [page 10](#) and then click **OK**.


After you have completed editing a filter, any tiles that are using the filter are automatically updated.

NOTE You cannot edit the All Calls filter.

Removing a Filter

You can remove any filter except the All Calls filter using the Filter Manager.

To remove a filter:

1. Open the Filter Manager by clicking the Filter Manager button () or selecting **Filter Manager** from the main menu.
2. Select the filter that you want to remove, and click **Remove**.

NOTE After a filter is removed, it cannot be retrieved.

3. At the prompt, click **Yes** to delete the filter or **No** to cancel the action.
If you click **Yes**, the filter will be removed, and any tiles using the filter will revert to the default All Calls filter, which cannot be removed.

Statistics

Every piece of data that can be displayed in Contact Center Suite is a statistic. Some of these relate to information about a particular call, but the majority of statistics are calculated values. How you choose to create your tiles and filters affects how the statistics are calculated. Call segmentation settings also affect how the statistics are calculated. Refer to the *Contact Center Suite Installation Manual* or the online help for information on call segmentation.

Some statistics are available in all client applications (RealViewer, Reporter, Reporter Real-Time, and Intelligent Router), however, some appear in only specific applications. All statistics are described in the online help, along with information about which application uses the statistic and which license levels are needed.

Types of Statistics

Call Summary Statistics are usually a single number or piece of information that summarizes the calls for a particular group or filter. Such statistics can be displayed on Dashboard or multi stat tiles or graphed on the graph tiles. Examples include Total Inbound Calls, Calls Refused, and Agents Logged In.

Call Summary statistics include the following categories:

- **Call Totals** – Call statistics that increment after call termination, for example, Calls In Completed.
- **Active Call Statistics** – Real-time call statistics, for example, Calls Queuing.
- **% Call Totals** – Percentages of call statistics that increment after call termination, for example, % Answered <= 5, 15, 30, 60, 90, or 120s. Service level statistics are included in this category.
- **Call Times** – Various times of call and e-mail statistics, for example, Avg Ans Time (E-mail).
- **Agent Statistics** – All agent statuses, for example, Logged In, Idle, and Busy (Call).
- **Network Statistics** – Tools for testing traffic over the network between the client application and the Contact Center Server, for example, Packets Sent / Minute.
- **Miscellaneous** – Time and date options.

Using Statistics

You will select which statistics you want to see on tiles in RealViewer and in reports in Reporter. Anywhere you select an option or choose a field, you are using Contact Center Suite's statistics.

Example: Agent Status in a Hunt Group

In this example, you will create a filter to monitor agent status in a hunt group.

1. Open Filter Manager as described on [page 10](#) and then click **Add**.
2. On the General tab, type a unique description of the filter name, for example, **Agt . Status for HG 2000**.
3. On the ACD Hunt Group tab, select the hunt group number to include in the filter, for example, **2000**.
4. Click **OK**. The Agent Status for HG 2000 filter is ready to be applied to a tile.

CallViewer

This section provides details for the Callviewer module in Contact Center Suite.

Introduction

CallViewer (or Connection Assistant) is a software product that provides telephony call control, screen popping, and desktop automation on a Windows-based computer. This application makes extensive use of Caller ID and Dialed Number Identification Service (DNIS).

A CallViewer user will have a networked PC connected to the Server, and a telephone connected to the company telephone system. When the user makes outbound calls or receives inbound calls, the dialed number or the Caller ID of the caller, along with other pertinent customer information, appears in the CallViewer user interface. This enables the user to see information about the caller before answering. CallViewer can also be used to screen pop the customer information in the company database, saving you time locating the relevant information.

CallViewer provides Media Blending functionality. When an agent is routed an e-mail by Intelligent Router, the e-mail message appears in Contact Center Suite just like a received call.

If you are using Connection Assistant, the information in this section applies, however, refer to the Options License topic in the online help for details on CallViewer and Connection Assistant feature differences.

Starting CallViewer



From the Start menu, choose Programs – Inter-Tel Contact Center Suite, and then select **CallViewer (or Connection Assistant)**.

NOTE

In the remainder of this section, “CallViewer” is referenced, although the information may also apply to Connection Assistant.

When CallViewer starts, the Startup Wizard begins, as described on the next page.

The features of CallViewer can be limited by specifying passwords on the Server. If the Server has all password levels set, you will need to enter a password to access CallViewer.

Using Startup Wizard

When you launch CallViewer for the first time, the Startup Wizard helps you configure various common options step-by-step. Each set of options is shown on its own page and includes **Next/Previous** buttons for navigating through the wizard.

NOTE

If you want to run the startup wizard at a later time, right-click the CallViewer tray bar icon () and select **Startup Wizard**.

The following screens display during setup:

- **Welcome Page:** This page begins a sequence of Startup Wizard pages that is used to collect some configuration defaults for the software.
- **Devices Page:** Enter the extension number and the voice mail number used for this installation of CallViewer. The devices can be changed later using the Options dialog, on the Devices tab.
- **Search for Contact Center Server:** Choose one server option from the following choices:
 - *Run in simulation mode:* When enabled, no connection is made to a CTI Server and the software runs in simulation mode. Enable this option when you need to simulate calls to test macros that you have written.

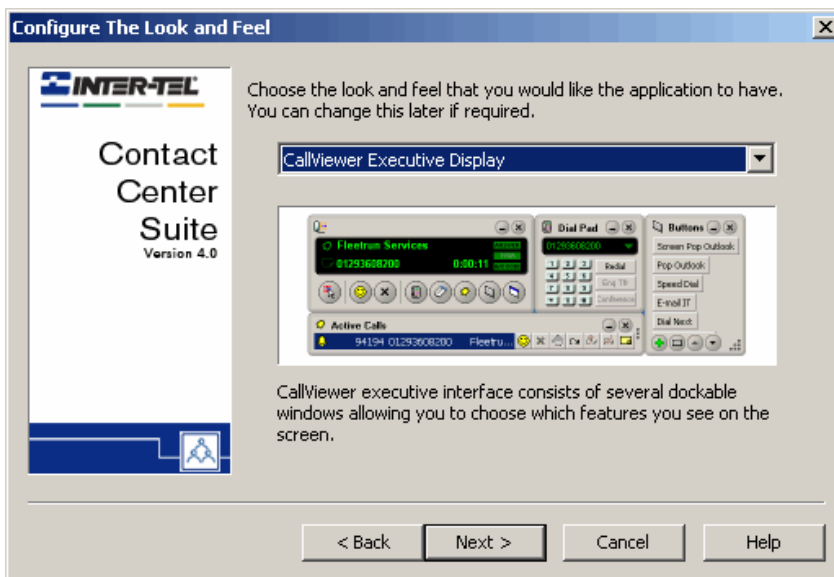
NOTE

Simulation mode is only used with the Contact Center Suite Developer SDK when creating user-defined actions. **If you are not using the dongle provided with the Developer SDK and running in Simulation mode, CallViewer will not function.**

- *Search network for a CTI Server:* When enabled, the Startup Wizard searches the network for available CTI servers when you proceed to the next page of the Startup Wizard. This is the default option when no information is available for the server connection.
- *Connect to this CTI Server:* When enabled, CallViewer uses the server that you specify in the text box below this option. This is the default option when information is available for the server connection.

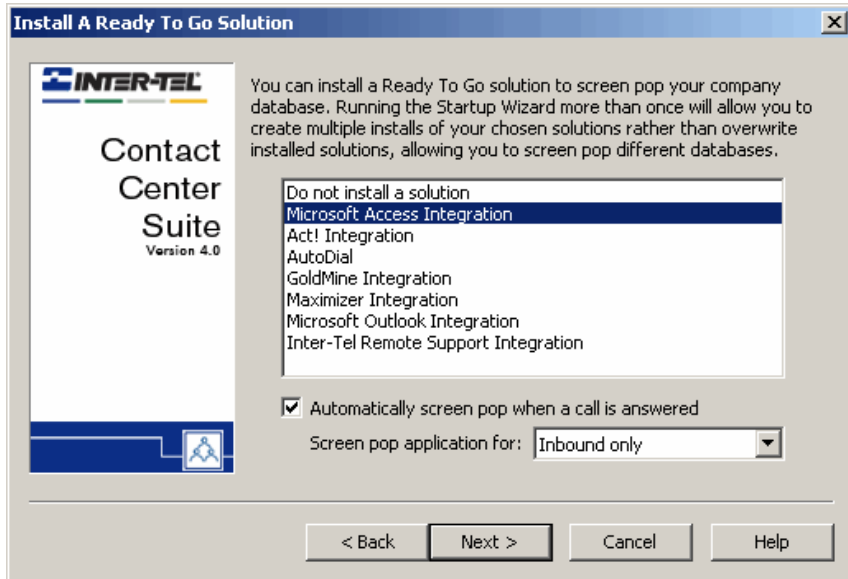
The server option can be changed later using the Network Settings dialog (see the online help for details).

- **Auto Configure Page:** This page is displayed only if you selected the option to search the network for a CTI Server in the previous page. The Auto Configure page searches the local area network for CTI servers and after the search is complete, a list of available server names is displayed. Select a server name to proceed.
 - *If you are using NETBIOS,* auto-configure searches for servers named CTISERVER1 through CTISERVER9, on any valid LANA numbers between 0 and 20.
 - *If you are using TCP/IP,* auto-configure searches the port number specified in network settings (default 3986) for computers in the same class C subnet as this computer. For example, if your IP address is 10.1.2.10, auto-configure will look for servers on addresses 10.1.2.1 to 10.1.2.254.
- **Look and Feel Page:** Choose which look you prefer for CallViewer from the drop-down list. For each selection, you see a sample picture and a description of the features included. The example below shows the Executive Display.

**NOTE**

You can change to another “Look and Feel” selection at a later time if you choose. See [page 24](#) for details.

- **Ready To Go Page:** Select and configure a Ready To Go solution so that you can quickly access another application from within CallViewer. The Ready To Go Solutions choices are shown in the following example.



If you choose to install a solution, you can determine when CallViewer screen pops the database, using the following options:

- *Automatically screen pop when call is answered:* When enabled, the chosen database screen pops when a call is answered at the CallViewer extension. When disabled, the chosen database screen pops when a call starts to alert.

NOTE

The application you intend to use for screen popping must be open while you are using screen popping from CallViewer. For example, to screen pop Outlook, it must be running on the PC where CallViewer is being used.

- *Screen pop application for:* Choose inbound calls, outbound calls, or both inbound and outbound calls. Inbound calls will also screen pop routed e-mails.

You do not need to set up the RTG options using the Startup Wizard. You can also create a Ready To Go action when defining a new rule or button. You can also edit the settings of a Ready To Go solution created using the Startup Wizard using the Action Manager. See the online help for details on configuring Ready To Go solutions.

- **Dial Rules Page:** The dial rules affect how a number is altered before being passed to the CTI Server to be dialed. Choose one of the following options:
 - *Calculate dial rules via CallViewer Contact Center Server:* When enabled, all dial rules are calculated at the CTI Server using previously configured options. This is the default setting.
 - *Specify dial rules for this installation:* When enabled, all dial rules are calculated by CallViewer using rules configured here or from the Options feature. To support canonical format dialing (i.e., the format that Outlook uses to store numbers), you need to use local rules that are correctly configured. Then you can dial numbers in the form “+country (area) number,” for example, “+44 1293 608200.”

The dial rules configuration includes tabs for General, Local, Long Distance, and International settings. Each tab contains a “test” section (described on [page 22](#)) so you can try out the settings before finishing the configuration. To set the dial rules, complete the following steps.

- 1) On the General tab, program the *Outbound Dial Prefix*, which is the number you need to dial to reach an outside line, for example, 8 or 9. This information is critical for external outbound dialing.
- 2) On the Local tab, program the following:
 - *Local area code:* Enter your area code (for example, 480).
 - *Local toll calls:* Enter any prefixes, within your area code, that may require the long distance code. You can enter partial prefixes to indicate a range (e.g., 8 would indicate 800-899).
 - *Always dial the local area code on local calls:* When enabled, the local area code is always prefixed to the number being dialed, when dialing a local number.
 - *The local area code is prefixed with ‘0’ for non-international calls:* When enabled, this setting will prefix the local area code being dialed with a “0” for non-international calls entered using canonical format. For example, a UK number such as 01293 608200 would be entered in canonical form as +44 1293 608200, and would be dialed as such from a non-UK country, but in the UK the “0” needs to be prefixed to the local area code, and so this setting would need to be enabled. This setting only takes effect when dialing numbers in canonical form.
- 3) On the Long Distance tab, program the following:
 - *Long distance code:* Enter the code required to dial outside your area code (e.g., 1 for the US).
 - *Don’t dial long distance code:* Enter a comma-separated list of area codes that do not require the long distance code.

- 4) On the International tab, program the following:
- *International dial code*: Enter your international dial code (e.g., 011 for the US).
 - *Country code*: Enter the country code where you are calling from, e.g., “44” for UK, “1” for US.
 - *Replace ‘+’ with international dialing code*: When enabled, a “+” in the number to be dialed is changed to the international dialing code the caller enters.

The Test section appears on each tab, and contains a **Sample telephone number** text box where you can type digits to test. As you type the number to test, the **Actual number dialed** field updates as you type, to reflect the number that would be dialed by CallViewer.

Click **Test** to apply the dial rules to the sample telephone number and produce a result in the Actual number dialed display. The type of call (internal, local, long distance, or international) is also displayed to help you determine which rule you may need to adjust for correct dialing.

NOTE

The Actual Number Dialed area is for display only; you cannot edit the contents.

- **Import Your Previous Configurations Page**: This page appears only if you are upgrading from an earlier release of CallViewer (version 3.x or before), if legacy macro files or hot key settings are detected, and there are no current actions or hot keys defined for the current installation.

If you have existing Ready To Go (RTG) macros in use in CallViewer, you should **NOT** upgrade your old macros and buttons, but instead recreate them with the new Ready To Go integrations. In v4.0 and later, the Ready To Go options are more advanced and provide tighter integration with v4.0 and later (i.e., they can be more fully customized, have multiple instances, etc.). This also applies to automatic macros, which are now defined by rules. If you have existing RTGs in use, but also have other macros, you may want to perform the upgrade, but then delete the RTGs and recreate them using the new versions.

Many simple macros from v3.x are replaced by built-in actions in v4.0 and later, such as those that opened a file or placed a call. For example, the “Set Call Note” macro from v3.x has been entirely replaced by a built-in feature, so you can delete that button or associated macros.

The import page contains the following options:





- *Import existing button macros*: This option is enabled if existing macro files from an earlier release are installed on this computer. When enabled, upon successful completion of the Wizard, the Wizard imports the existing button macros as new actions bound to new buttons.
- *Import existing automatic macros*: This option is enabled if the previous option is enabled. When enabled, upon successful completion of the Wizard, the Wizard imports the existing automatic macros as new actions bound to new rules.
- *Import existing hot keys*: This option is enabled if existing hot keys from an earlier release are configured and enabled on this computer. When enabled, upon successful completion of the Wizard, the Wizard imports the existing hot keys as new hot keys in this installation.
- **Finished Page**: To complete the CallViewer configuration, click **Finish** in the Startup Wizard.

Using the CallViewer Tray Bar Icon


When CallViewer is launched, an icon appears on the Windows tray bar, as shown below. The tray bar icon provides access to the CallViewer options and indicates the current connectivity status, as described below.



While CallViewer is loading, move the mouse pointer over the tray bar icon to see a tooltip message on the progress. The tooltip shows the following states.

-  **Offline/Disconnected**: CallViewer is not connected to a CTI Server, and not running in simulation mode. During this state, you can only use CallViewer to configure network settings.
-  **Connecting**: CallViewer is trying to connect to a CTI Server. During this state you cannot use CallViewer's telephony functionality because the connection to the CTI Server is not fully established.
-  **CallViewer**: CallViewer is connected and functioning normally.
-  **Telephone system offline**: CallViewer is connected to the CTI Server, but the CTI Server has lost the connection to the telephone system.

The CallViewer tray bar icon has menus that you can access using left and right mouse buttons.

To access the call control menu, click the CallViewer tray bar icon (). Some of the options may be unavailable when there are no active calls at the extension. See “Controlling Calls with CallViewer” on [page 33](#) for details on using the menu options.

Right-click the tray bar icon to display the Main Menu; refer to the online help for descriptions of the menu options.

Using the Look and Feel Options

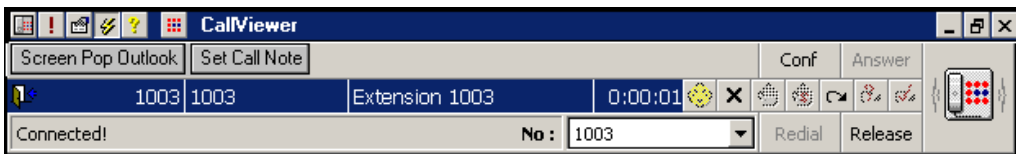
CallViewer uses several “look and feel” options to define the appearance and functionality of the main windows. Some options are typically used by a call center agent for screen popping, while others may be used by other non-call center users as a computer-based interface to their desktop phone. The options are described in greater detail in later areas of this section.

Items such as network settings dialogs and button creation dialogs are not defined by the look and feel, and are common across all choices.

Selecting a Look and Feel Option

Use the following descriptions to help you choose the look and feel option that suits your need best. Refer to [page 26](#) for descriptions of the components.

- **CallViewer Legacy:** Provides a familiar interface for existing users with its similarity in appearance to previous versions of CallViewer. The buttons that were included on the caption bar on previous versions to launch Personal Navigator and user-defined feature buttons are no longer available.



The Legacy option has a compact design that requires little desktop space, which makes it ideal for call center agents use, however, it contains the fewest features. It also offers a smaller “mini mode” version with only control buttons.

- **CallViewer Executive Display:** Provides a small main window with options to open additional windows for the dial pad, active calls, call history, and user-defined buttons. This option may be preferred by call center agents and managers or non-call center users because of its flexibility.

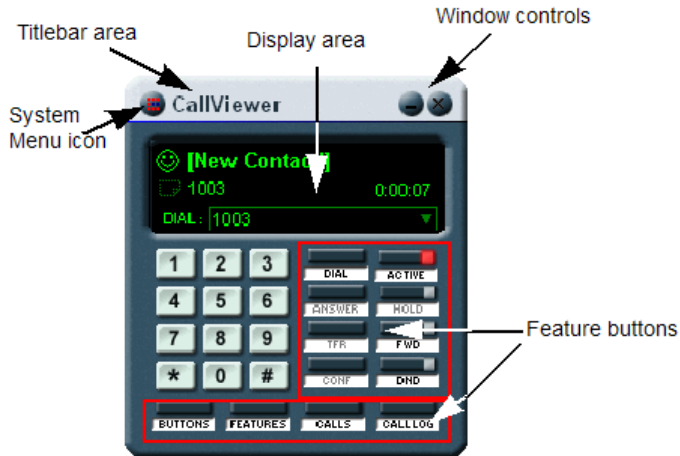


- CallViewer Quick Connect:** Provides call controls in the smallest interface option. This option may be preferred by a call center agent who need basic call control functionality without sacrificing space on the desktop.



NOTE The CallViewer Quick Connect look and feel option is not the same as the Show Quick Connect feature available in all the choices. When you enable Show Quick Connect in the CallViewer Legacy, Executive Display, or Handset, you see a small icon, either or , that you can position anywhere on your screen.

- CallViewer Handset:** Provides basic call control through an interface that resembles a telephone display, with additional windows for call history and user-defined buttons.



Each look and feel choice contains its own set of options and features, such as an active call list, call history, and dial pad, which are described in the following sections.

Exploring Look and Feel Components

Each “look and feel” consists of one or more windows. Each look has a main window, and any number of other windows, the availability of which depends on the look being used. The main window is often the most different among each “look,” as this window is often central to the functionality of the “look.” The other windows have a more common interface. The basic elements of the main window are described below. Refer to the online help for specific look information.

The following types of windows are available:

- Main window (see below)
- Active Call List (see [page 27](#))
- Dial List (see [page 29](#))
- Call History (see [page 29](#))
- User Button area (see [page 31](#))
- Feature sets (see [page 31](#))
- Quick Connect (see [page 31](#))

Main Window

The main window is the central window for each “look and feel” and provides access to other components of the look. The functionality of each individual look will vary in the main window. This section describes some common elements of the windows.

The main window cannot be resized, but can be moved using the window titlebar like any normal Windows application. The titlebar is at the top of each window.

NOTE

For specific information about the main window of a particular look, refer to the online help.

Docking Windows

Many “looks” allow you to dock (join together) windows to the main window, or to other windows in the “look.”

To dock windows together: Drag the window using its titlebar to the side of the window that it is to dock with. When the window gets close to the other window, the two will snap together. You can dock windows to any corner of a window, as long as both windows support docking.

To undock a window: Use the titlebar of the window to drag it away from the window it is docked with. The window will not undock immediately, but after it has been moved a short distance, it will undock, and then be positioned on the screen as normal.

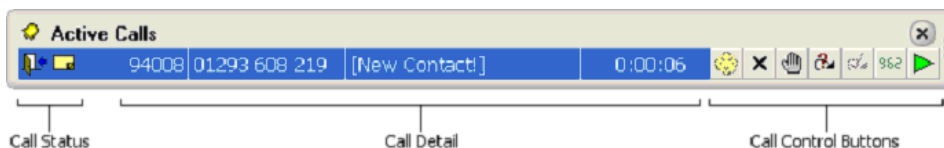
You can move all the docked windows as one by dragging the titlebar of the main window (or if two other windows are docked together, dragging the titlebar of the window that has been docked to).

Status Bar







Many “looks” indicate textual status information on the main window. This information includes the current connection state with the Server. See the online help for details on the status messages.


Active Call List

The active call list displays a list of calls and routed e-mails that are active at your extension right now. In some “looks” the active call list is in a separate window, while in others it is part of another window. Each call in the call list consists of the call status, call detail, and call control buttons, as shown in the example below:



- Call Status:** The call status consists of two icons. The left-most icon indicates the current call status, such as whether it is inbound or outbound, answered or alerting. The available icons are described below.

| Button | Description |
|---|---|
|  | An unanswered outbound call is ringing. |
|  | An unanswered inbound call is ringing. |
|  | The call has been answered. |
|  | The call is on hold. |
|  | The call was answered and is now on hold. |
|  | The item is a routed e-mail. |

The right-most icon () indicates whether a call annotation is present for this call or e-mail. If the icon is present, then the call or e-mail has an annotation. Hover the mouse cursor over the icon to display the current call note.

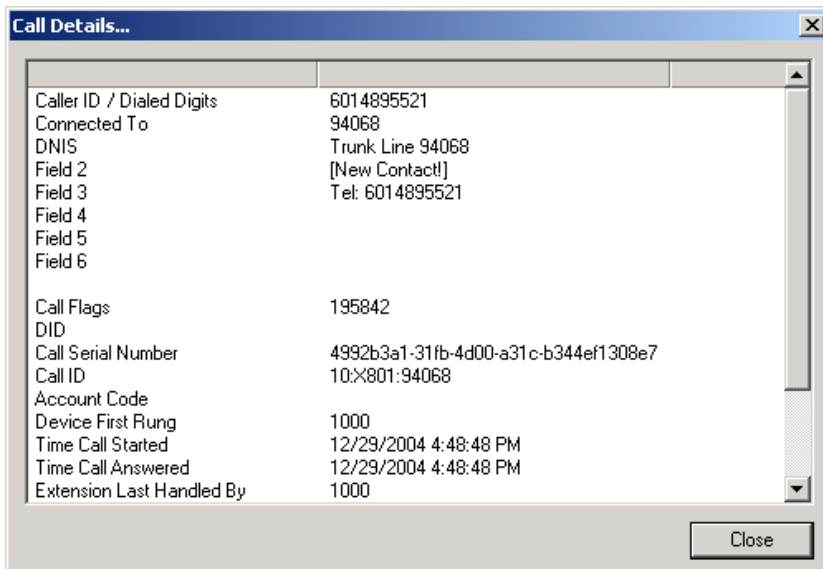
- **Call Detail:** The call detail area displays one or more fields of information about each active call. You can also double-click an item in the call list to display all information known about the call. (See “Examining Call Details” on [page 28](#).)

You can choose which fields are displayed in the call list using the Call List Fields page of the Options dialog (see the online help, where you will also find a list of available fields and their descriptions). The color of the text in the call detail section denotes the type of call:

- Red text – unanswered call
 - Green text – answered call or e-mail
 - Yellow background – inbound external call
 - Green background – outbound external call
 - White background – internal call
- **Call Control Buttons:** The right side of the call list contains one or more call control buttons for each call in the list. You can configure which buttons appear in the list from the Call List Buttons page of the Options dialog. Some buttons may be disabled; this will depend on the status of the calls at your extension, whether you are licensed to use such a call control feature, and whether the telephone system supports the call control feature. See the online help for descriptions of the available call control buttons.

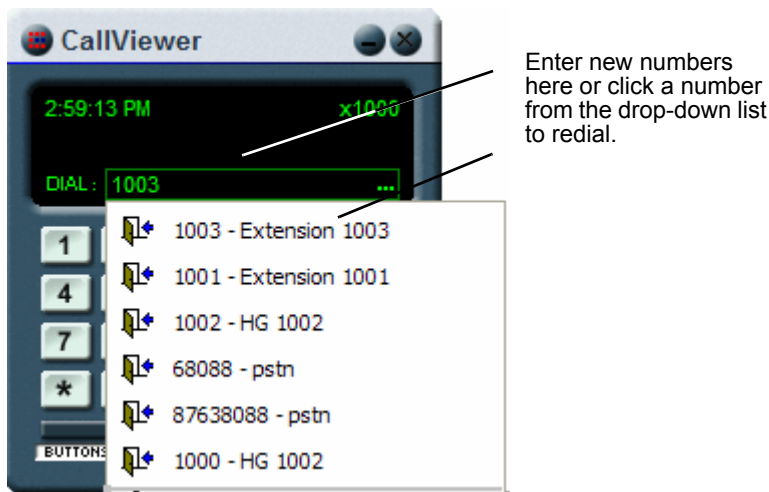
Examining Call Details


To obtain a summary of information on the current call you are handling, double-click a call in the active call list. The Call Details screen is displayed, as shown below.



Dial List

CallViewer stores a list of the last 20 dialed or received telephone numbers, allowing you to quickly re-use numbers that you have recently called or received calls from. When more than 20 entries exist in the list, the bottom-most entry is removed. Click a dial list button on a window to display a menu containing all the numbers in your recent dial list. Click a number in the list to immediately place a call to that caller from your extension.



- **To dial a new number**, click in the dial entry area shown at the right and enter the number to dial. Press **Enter** to dial the number. 
- **To redial a recent incoming or outgoing number**, click the drop-down arrow and then select a number from the list. CallViewer automatically dials the number as it is selected from the list.





Call History

The call history window displays a list of all calls and e-mails that have been active at your extension. While CallViewer is running, it stores information about each call or e-mail at your extension. Up to 5000 items can be stored when you are using the full CallViewer license or up to 1000 items for Connection Assistant. When the maximum number of items have been reached, the oldest item in the list is removed to make space for the next new item. Items are updated in the list only when CallViewer is connected to the CTI Server. See [page 38](#) for information on using call history.

Viewing Call History

The Call History window can display several pieces of information about each call. The information being displayed can be configured using the Call Log Fields tab of the Options dialog. See the online help for further details, including a list of available fields that can be displayed in the list.

The Call History window uses icons to depict information about the status of each call, as described below.

| Status Icon | Description |
|---|--|
|  | Unanswered outbound call |
|  | Unanswered inbound call or e-mail. |
|  | Answered inbound or outbound call or e-mail. |
|  | Answered e-mail. |

In addition to the status icons described above, the call history window uses the color of the text to denote information about each call: red text denotes an alerting call, while black text denotes an answered call. A green background denotes an outbound external call, a yellow background an inbound external call. Internal calls and e-mails are highlighted in purple.

The top of the call history contains the header, which displays the names of the fields in the call history. You can click a field header to sort on that field. Click the same field header again, and the sort order toggles between ascending and descending.

You can resize the individual fields by dragging the right edge of a field in the header.

Filtering Call History

You can also filter a contact list to make it easier to locate calls. Click the **Options** button on the Call History window to display the Call History Options dialog box. Refer to the online help for details on using this feature.

Buttons

There are three types of buttons available in CallViewer windows:

- **Fixed Buttons:** These buttons are part of the look. They perform a specific action, such as opening another window, and cannot be changed or removed from the window.
- **User Buttons:** These buttons can be created by the user. When they are created they appear in the “User Button area.” You can choose the action that the button performs when it is clicked. You can also choose whether to display a picture on the button, and/or a label.
- **Feature Buttons:** These buttons are similar to both Fixed Buttons and User Buttons. A feature button already exists in a specific location in a look, and often has some default functionality, such as changing the ACD Agent state of the associated CallViewer extension. However, the user can edit a feature button to change its assigned action, as well as change the picture or text displayed on the button. If a feature button is edited, it can also be reset to its default functionality.

User Button Area

The user button area contains buttons you create. Some user button areas are resizable, allowing you to expand the area to fit the buttons. The location and size of the User Button area depends on the look being used.

You can use the User Button area to create, edit, and remove buttons. See “Using Button Manager” on [page 35](#) for more information.

Feature Sets

Some looks have Feature Set windows available (called Feature Set 1 and Feature Set 2). Feature Sets consist of several blank Feature Buttons to which you can assign actions, as an alternative to simply creating User Buttons in the User Button area. For example, you could use the User Button area for screen popping and application integration buttons, Feature Set 1 for some common speed dial buttons (a button which makes a call to a specific number), and Feature Set 2 for DSS buttons.

Quick Connect Button

Several of the looks include a separate Quick Connect button that can be positioned anywhere on the desktop, regardless of whether the main window is minimized or not.

Accessing the Quick Connect is look-specific; see the look sections of the online help for details. Refer to [page 34](#) for instructions on using Go Dial and Quick Connect.


Action Menu

When you are active on a call you can access the Action Menu (see the look sections of the online help for locations and contents). The Action Menu allows you to perform various call control actions on the active call, much like clicking call control icons described in “Using the Active Call List” on [page 32](#).

Changing the Look

When the Startup Wizard runs, you select the look and feel, however, you can change the look at any time using the steps below.

To change the CallViewer appearance:


1. From the Windows tray bar menu, right-click the CallViewer icon (), and select **Look And Feel**.
2. Select a look from the list available. When you have clicked on your selection, the current look closes, and the new look is opened. This may take a few seconds to complete.

NOTE

Future releases of CallViewer may contain additional “look and feel” options that are not described in this User Guide.

Using the Active Call List

The Active Call List displays calls that are currently active at your extension, including those alerting, answered (i.e., in progress), and holding. You can easily answer, end, hold, and transfer the calls that appear in the list using the call control buttons described in the online help.

To use a control button, select the item in the call list and then click the desired control button. In addition to the call controls, there may be options for user-defined actions, which are represented with a  icon. See the online help for descriptions of the call control buttons and user-defined actions.


Controlling Calls with CallViewer

There are many ways to make, receive, and control calls from your computer screen. For example, you can use buttons, hot keys, shortcut menus, or create user buttons. The following sections describe some of the possible methods.

Making a Call

You can make a call using CallViewer in a number of ways, which are described below.

Using Go Dial

1. Highlight a telephone number in another application.
2. Click the Go Dial  button.

Using the Dial List

Click the Dial List button in the Dial Area (see [page 29](#)) to select one of the last 20 recently placed calls. The number is dialed as soon as you make a selection.

OR, type a new number in the Dial Area's text box, and press **Enter** to dial the number.


Using the Dial Command

1. From the Action menu (see [page 31](#)), select **Dial**. The Make Call dialog box is displayed.
2. Type the telephone number in the text box and then click **OK** to dial the number, or click **Cancel** to close the dialog box without dialing.

Transferring / Redirecting a Call

A Direct (or Blind) transfer does not place the transferring call on hold while ringing the destination number, but immediately completes the transfer (i.e., the person at the distant end will hear the call ringing at the destination number).

To transfer or redirect a call:

1. Choose one of the methods described below.
 - Click the  button on the Active Call List for the call that you want to transfer or redirect.
 - Select **Blind Transfer** or **Redirect** from the Action menu.
 - If you are using the default hot keys, press **CTRL + F10** to transfer or redirect a call.



The Transfer Call dialog box is displayed.



2. In the text box, type the extension or number of the destination where you want to transfer or redirect the call.
3. Click **OK** to transfer or redirect the call, or click **Cancel** to return to the active call without transferring it.

Using Go Dial and Quick Connect

Using Go Dial and Quick Connect are similar operations. Both are used to quickly dial a number from CallViewer. Use **Go Dial** when you want to dial a number that is highlighted in the last active Windows application. For example, you can highlight a telephone number in an e-mail message and dial it using the steps below.

To use Go Dial or Quick Connect:

1. Highlight a telephone number in a Windows application.
2. Choose one of the methods described below.
 - Click the **Go Dial** option from the Action menu or the icon () in the Executive look or  in the Legacy and Quick Connect looks).
 - Click the Quick Connect window.

You can also use Quick Connect to dial a number from the list of recent inbound and outbound calls. Right-click the Quick Connect icon ( or ) and select a number to dial.

Understanding Agent States


As a member of a hunt group, your agent state changes to allow Intelligent Router to route calls and e-mail messages. The following states are used to determine your availability for calls and/or e-mails.

| Agent State | Description |
|-----------------|--|
| Logged Out | You are not logged into the hunt group, and therefore, are not available for calls or e-mails. |
| Free | You are available for calls or e-mails. |
| Busy (Call) | You are busy on a call. |
| Busy (E-mail) | You are busy on an e-mail. |
| Wrapup (Call) | You are in wrapup following a call. |
| Busy N/A (DND) | You are logged into the hunt group, however, you are not available for calls or e-mails. |
| Free (E-mail) | You are available for e-mails. |
| Wrapup (E-mail) | You are in wrapup following an e-mail. |

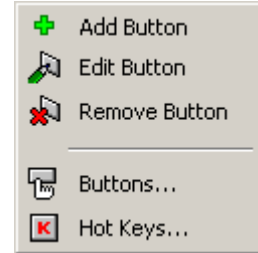
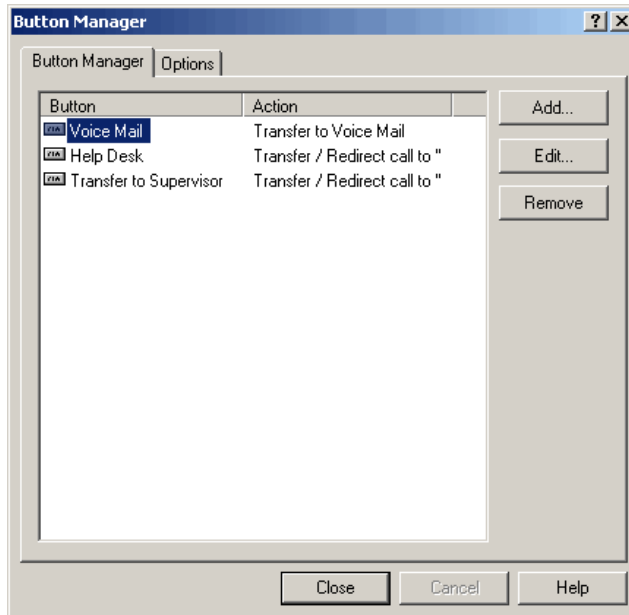
Using Button Manager

You can create, edit, and delete user-defined buttons (see “User Button Area” on [page 31](#)) that will be displayed in the “button area” of a CallViewer window using the Button Manager. Buttons can be customized with labels and/or pictures, for example, the picture of the person you call using a speed dial button.

To open **Button Manager**, do one of the following.

- Right-click the CallViewer tray bar icon () and select **Buttons**.
- Open the Buttons window on any of the CallViewer looks, right-click to access the Button Manger shortcut menu, as shown at right, and then click **Buttons**.

The Button Manager dialog box opens, as shown below.



NOTE

See the “Sizing Buttons” topic in the online help for details on using Button Manager’s Options tab.

Adding a Button

Using CallViewer's built-in actions, you can create buttons to perform a variety of tasks, such as making, answering, and transferring calls, and setting states. Buttons can display images or text, so you can easily identify a button's function.

Example: Adding a Speed Dial Button

In this example, you will add a button to dial a number with a single click of the mouse.

1. From the Button Manager, click **Add**.

NOTE

You can also begin from the Buttons window, by right-clicking and then selecting **Add Button**.

2. On the General tab, select the **Button Text** check box and then type a label in the text box.
3. *If you do not want to add a picture to the button*, skip this step.
If you do want to add a picture to the button:
 - a. Select the **Display this picture on the button** check box. A dialog box opens for you to select the picture, which can be in .ico, .bmp, .gif, or .jpg format.
 - b. Navigate to where the picture file is stored and then select the file name. A small preview of the image appears on the dialog box. See the online help for details on image sizes and transparency settings.
 - c. Click **Open**.
4. On the Action tab, click the drop-down list and select **Make Call**.
5. Type the number that your button will dial in the **Make a call to this telephone number** text box.
6. Click **OK**. For this example, you will not assign the speed dial to a hot key, however, see the online help if you want to do so.

Example: Adding a DSS Button

You can create Direct Station Selection (DSS) buttons to quickly see the call status of colleagues to determine whether they are on a call, unavailable or idle. Call control operations for the extension being monitored, such as transferring or picking up calls, can be done using DSS buttons.

In the following example, you will create a DSS button for a selected extension.

To create a DSS button:

1. From the Button Manager, click **Add**.
You can also begin from the Buttons window, by right-clicking and then selecting **Add Button**.
2. On the General tab, select the **Button Text** check box and then type a name in the text box.
3. On the Action tab, click the drop-down list and select **DSS Button**.
4. Type the extension number you want to monitor or use the drop-down list to select one.
5. Click **OK**.

Refer to the online help for details on using DSS buttons to monitor and control extensions.

Example: Setting an Account Code

You can set an account code for a call using a button that you create in the User Button or a Feature Sets, if they are available in the look you are using. First, follow these steps to create an account code button.

To create a button to set an account code for a call:

1. Open the user button or feature set window.

NOTE

The user button area on the Legacy look is integrated into the main window. The Legacy look does not support user-defined feature buttons.

2. Right-click on the button area and select **Add Button**.
3. On the General tab, select the option **Display this text on the button** and then type a label for your button in the text box. You will need to create a button for each code you may want to use, so include the code in the label, for example, **Code 9999**.
4. On the Action tab, click **Add** and then select **Set Account Code** from the drop-down list.
5. Click **OK**.

To set an account code for a call, click the account code button while the call is active.

NOTE

You can add the Account Code field to the Call List Fields (for the Active Call List) and/or the Call Log Fields (for the Call History). See the Options topics in the online help for details.

Editing or Removing Buttons

When you want to change the label, picture, action, or hot key associated with an existing button, right-click the button, select **Edit**, and then make the changes to the options on the General, Action, and/or the Hot Key tabs as needed. To remove a button, right-click the button, and then select **Remove Button**.

Controlling DND States

The Handset look includes a built-in button to quickly enable or disable a DND state. In all the looks, you can create a button to automate setting a state using the steps below. You may want to create separate buttons for each state that you frequently use, in addition to a button to disable any state.

Example: Creating a DND Busy N/A (DND) State Button

In the following example, you will create a button to change to the **UNAVAILABLE** state.

1. From the Button Manager, click **Add**.
2. On the General tab, select the **Button Text** check box and then type **UNAVAILABLE** in the text box.
3. On the Action tab, click the action list and select **Set DND State**.
4. Select the option **Enable DND at your extension**.
5. Select **UNAVAILABLE** from the parameters list.
6. Click **OK**.

Using Call History

The call history window contains details of the calls, and possibly routed e-mails (if Media Blending is enabled on your system) that you have received. Icons and colors associated with each item indicate whether the call was inbound or outbound, answered, unanswered, etc. Refer to the online help for a complete description of colors and icons used in the call history.

To place a call immediately to a number in the call list, double-click the entry. If you double-click a routed e-mail in the list, your default e-mail application creates a blank e-mail addressed to that recipient.

You can filter the contact list to make it easier to locate calls, using the **Options** button in the call history window. You can also customize the fields that are displayed using the Call Log Fields tab of the CallViewer Options dialog box.

Advanced CallViewer Topics

The following sections are intended for experienced users who want to further customize CallViewer.


Creating Hot Keys

Hot keys are sequences (e.g., **CTRL + ALT + F1**) that perform a specified action or run a CallViewer button action. This key sequence that you define also works globally across the Windows environment, even when the CallViewer window is not the active application, however, CallViewer must be running at the time. When a key sequence is assigned as a hot key, the specified key combination is invisible to other Windows programs.

There are some key combinations, however, that cannot be assigned as a hot key because Windows uses the combination for a special purpose or operation. Examples include **CTRL + ALT + DELETE**, **PRINT SCREEN**, **ENTER**, **ALT + F4**, etc.

Example: Defining a Hot Key for an Agent Help Request

Use the following procedure to first create a button to request agent help, and then assign a hot key sequence to the button.

1. From the Windows tray bar menu, right-click the CallViewer icon (), and select **Button Manager**. The Button Manager opens.
2. Click **Add**.
3. On the General tab, select the **Button Text** check box and then type **Agent Help** in the text box.
4. On the Action tab, select the option **Display Status LED** and then select **Agent Help?** from the settings drop-down list.
5. On the Hot Key tab, check the box for **Enable the hot key associated with this button** and then click inside the key assignment text box.
6. Press the keyboard keys that you want to assign to the hot key, for example, **CTRL + H**.
7. Click **OK**.

The Agent Help button appears in your user button area. To request agent help, you can either click the button or press **CTRL + H**. The LED on the button illuminates to indicate that you have requested help. Supervisors can enable the agent list tile in Reporter Real-Time to show which agents have requested help.



Screen Popping Calls and E-mails

CallViewer can be used to “screen pop” customer information in the company database, however, a Ready To Go (RTG) solution must be configured or a custom macro have been written for the feature. For example, if you have configured the Screen Pop from GoldMine® RTG, when you answer a call that is identified (i.e., has Caller ID), information about the caller can be displayed for you if it is found in your GoldMine database.


Screen popping is most effective if it is triggered when the call is answered, rather than when a call is alerting. Screen popping can be implemented using an RTG button, which you click after answering a call, or using CallViewer rules, which automatically displays information for identified contacts. The next section includes an example to create a screen popping rule.

Defining and Using Rules

Rules enable you to automatically perform a specific action when a specific event occurs, based on various criteria being met. For example, you could create a rule to send a call to voice mail if it was received without Caller ID. The rules dictate the initial event, or trigger event, that must occur before conditions are evaluated and an action is executed.

NOTE

Rules are evaluated in the order that they appear in the Rules Manager screen. When you create a rule, it is automatically added to the bottom of the list. Therefore, if you want actions to fire in a specific order, you must add the rules in the order in which you want them evaluated.

To open the Rules Manager, right-click the CallViewer tray bar icon () and select **Rules**. The rule list displays a list of all rules that have been created and the following information for each rule:

- **Rule:** Displays the user-defined name and indicates whether the rule is currently enabled (● – green icon) or disabled (● – gray icon). It does not reflect the global rule enable state.
- **Fire Count:** Displays the number of times that the rule has fired since it was created.
- **Last Fired At:** Displays the last date/time that the rule fired or “N/A” if the rule has never fired.
- **Fire Rate / Day:** Displays the average number of times that this rule has fired since it was created, or “N/A” if the rule has never fired. If the average is less than one, “< 1” is displayed to indicate that the rule has fired, but not enough times to be able to accurately represent its average fire count.
- **Action:** Displays the action that this rule executes when the rule fires.

Example: Adding a Rule for Screen Popping

In the following example you will create a rule that screen pops a GoldMine database when you answer inbound calls with Caller ID, whether or not the contact is contained in the database.

1. From the Rule Manager, click **Add**. The Add Rule screen is displayed.
2. On the General tab, type **Pop GoldMine** in the rule name text box.
3. From the drop-down list, select **Fire when call / e-mail answered** for the rule type.
4. Select the following parameters:
 - **Direction:** Inbound
 - **Call Type:** All calls
 - **Caller ID:** Caller ID received
 - **Caller Identified:** Identity ignored
5. On the Action tab, click **Add** and then select **Screen pop GoldMine** from the drop-down list.
6. On the configuration dialog box, leave the default name that CallViewer automatically inserts.
7. Click the [...] button next to the Database Path field, navigate to the database file location, select it and then click **Open**.
8. If you need a username and password to open the GoldMine database, type them in the text boxes provided. You can leave these fields blank if you do not need them for GoldMine.
9. From the search extent drop-down, select **Search everything** to search all phone fields using all number formats.
10. Click **OK** to finish the Ready To Go configuration.
11. Click **OK** to finish the rule.

Enabling and Disabling Rules

You can disable rules so that they are not evaluated the next time the trigger event occurs. This means that you can have multiple rules but have CallViewer evaluate only certain rules.

To enable/disable individual rules:

1. Open Rules Manager (see “Defining and Using Rules” on [page 40](#)).
2. Highlight the rule and click **Enable** or **Disable**.

To temporarily disable all rules from firing:

From the Rule Manager, clear **Enable rule firing** and click **OK**. No rules will be evaluated until you enable the setting again.

NOTE

This setting controls whether rules are evaluated at all. It does not affect each rule's enabled / disabled state – rules in the list are still displayed as either enabled or disabled regardless of this setting. This means that if a rule is disabled when you select **Enable rules firing**, it will not become enabled unless you specifically enable that rule.

Media Blending

Media Blending is a feature in Contact Center Suite v4.0 and later that allows Intelligent Router to route other forms of media, such as e-mail messages, among available agents just like it routes calls. If Media Blending has been enabled on your Contact Center Suite system, you may receive e-mail messages that Intelligent Router has routed to you via the hunt group you are logged into.

The e-mail messages appear along with calls in your Active Call List. When you receive the e-mail, you are placed in the Busy (E-mail) agent state so that you will not receive any telephone calls while you are working on the message.

Responding to a Routed E-mail Message

The process for answering a routed e-mail is the same as non-routed messages, as follows.

1. Open the message in your e-mail client.
2. Read the message.
3. Click **Reply**.
4. Type your response.
5. Click **Send**.

After you have responded to the message you are taken out of the Busy (E-mail) state so that you can take further calls.

Using Outlook with Routed E-mails

If you are using Outlook as your e-mail client and you have installed the Contact Center Suite Outlook Extensions support, the integrated toolbar allows you to easily send agent requests and perform common functions on routed e-mails. Refer to the online help for Outlook integration information, a list of the toolbar's buttons, and a description of the corresponding action.

Using the Alternate Response Method (#ARM#) Command

In some instances it may be more appropriate to use some other method of communication, such as a telephone call or a written letter, rather than responding by e-mail. In this case, you do not want to send an e-mail response too, however, you need to inform Intelligent Router of the status so the process can be closed. This is done with the Alternate Response Method response.

To send an ARM response:

1. Respond to the message using an alternative to e-mail, such as with a telephone call, fax, or letter.
2. From your e-mail application, initiate a reply to the original e-mail message. For example, in Outlook, select the message and then click **Reply**.
3. Add the text # [ARM] # somewhere in the subject field of the message. You do not need to add anything to the body of the message.
4. Click **Send**.

After you have responded to the message you are taken out of the Busy (E-mail) state so that you can take further calls.

Using the No Reply Necessary (#[NRN]#) Command

There may be some instances when you receive a message which requires no reply, for example, a follow-up response from a customer containing a "Thank you." In this situation, you can send Intelligent Router a No Reply Necessary response so that the message can be removed from the hunt group queue.

To send a NRN response:

1. From your e-mail application, initiate a reply to the original e-mail message. For example, in Outlook, select the message and then click **Reply**.
2. Add the text # [NRN] # somewhere in the subject field of the message. You do not need to add anything to the body of the message.
3. Click **Send**.

Using the Refuse ([REFUSE]) Command

If you do not want to respond to a routed e-mail message, you can refuse the message so that Intelligent Router will distribute it to another agent.

To send a REFUSE response:

1. From your e-mail application, initiate a reply to the original e-mail message. For example, in Outlook, select the message and then click **Reply**.
2. Add the text `# [REFUSE] #` somewhere in the subject field of the message. You do not need to add anything to the body of the message.
3. Click **Send**.

Changing Agent Status with E-mail Commands

You can also change your agent status at any time by sending commands to Intelligent Router in an e-mail message. See also “Understanding Agent States” on [page 34](#).

To send an Agent Status change command:

1. From your e-mail application, begin a new e-mail message.
2. In the **To** field, type the address of the ACD hunt group that routes e-mail messages to you.
3. In the subject field of the message, type `# [<command>] #`, where *<command>* is replaced with the keyword (see table below) for the agent state to which you are changing. For example, to change to the Wrapup state, you would type `# [WRAPUP] #` in the e-mail subject field.

NOTE You do not need to type anything in the body of the message.

4. Click **Send**.

| Keyword | Abbreviation | Agent State |
|-----------------|--------------|---|
| #[FREE]# | #[FR]# | Sets the agent into the Free ACD status. |
| #[FREEEMAIL]# | #[FRE]# | Sets the agent into the Free (E-mail) ACD status. |
| #[BUSYEMAIL]# | #[BE]# | Sets the agent into the Busy (E-mail) ACD status. |
| #[WRAPUP]# | #[WU]# | Sets the agent into the Wrapup ACD status. |
| #[WRAPUPEMAIL]# | #[WUE]# | Sets the agent into the Wrapup (E-mail) ACD status. |
| #[BUSYNA]# | #[BNA]# | Sets the agent into the Busy N/A ACD status. |

RealViewer

This chapter provides detailed information on how to use Realviewer.

Introduction

RealViewer is an application that shows real-time call statistics, enabling you to see current details against all or selected call criteria on the telephone system.

Using RealViewer, you can view statistics, such as the **Longest Waiting Inbound Call Today**, either across the telephone system, for a group of extensions, or for a particular event. You can also view the number of agents currently in the busy state, for example, or the number of inbound calls currently waiting to be answered. In addition, you can filter information based on group, DID number, telephone number, etc.

RealViewer v4.0 and later supports internal call modeling and media blending. With media blending, e-mail messages can be routed, handled, and filtered just like calls.

RealViewer requires an available license on the Server dongle. If a RealViewer license is not available, Call Summary, which does not support custom filters and certain statistics, is invoked. Refer to the *Contact Center Suite Installation Manual* or the online help for details on features available with different license levels.

Starting RealViewer



From the Start Menu, choose Programs, Inter-Tel Contact Center Suite – RealViewer – **RealViewer**. If a RealViewer license is available, RealViewer is started. If there is no license available, Call Summary is started.

When RealViewer starts, if the Network Settings have not been configured yet or have not been configured correctly, Startup Wizard attempts to automatically find a CTI Server (Server) on your LAN using a self-configuration mode.

Using Startup Wizard

If this is the first time RealViewer has been run after installation, the RealViewer Startup Wizard will run.

NOTE The Startup Wizard is not run for Call Summary installations.

The wizard will help you locate a CTI Server (Server) if one cannot be found, and it will ask you some simple questions to help create a default RealViewer screen.

When using the RealViewer Wizard, you can navigate by using the following buttons:

- **Next:** Advances you to the next screen.
- **Back:** Returns you to the previous screen.
- **Cancel:** Stops the Wizard and returns you to the main screen.

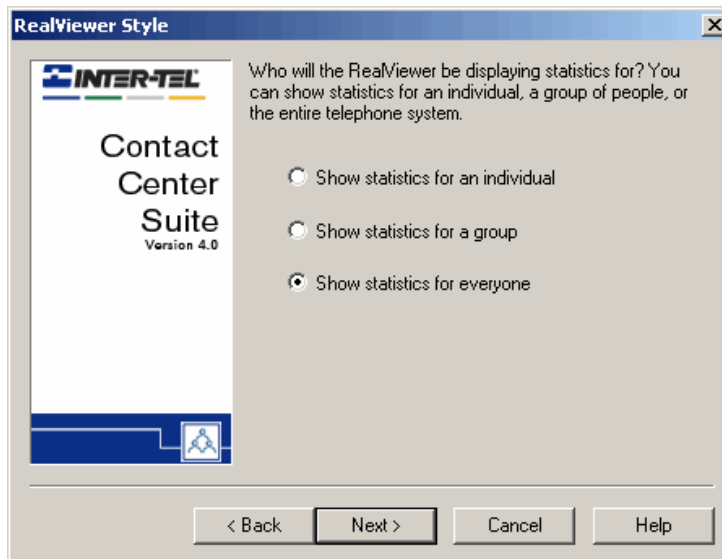
NOTE

If the Wizard was started due to missing settings, clicking **Cancel** will close RealViewer completely.

- **Help:** Displays the online Help information for that screen.

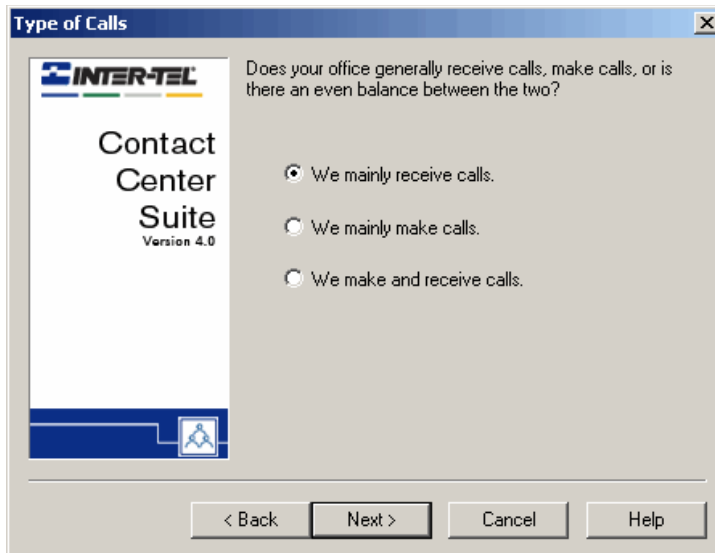
The following screens are displayed during setup:

- **Welcome Page:** This page begins a sequence of Startup Wizard pages that is used to collect some configuration defaults for the software. Click **Next** to continue.
- **Search for Contact Center Server:** Choose one server option from the following choices and then click **Next**:
 - *Keep existing settings:* This option is visible and is the default choice if RealViewer finds existing settings in the registry for a server to which to connect. Select this option if you want the existing settings to be left unchanged.
 - *Search network for a CTI Server:* Select this option to search the network for available CTI servers.
 - *Connect to this CTI Server:* Select this option to use the server that you specify in the text box below this option.
- **RealViewer Style:** This page, shown below, allows you to choose the style of RealViewer screen that you would like to create.



Select one of the following options and then click **Next**:

- *Show statistics for an individual*: Select this option to create a screen that will show statistics for one extension or agent.
- *Show statistics for a group*: Select this option to create a screen that will show statistics for a group of extensions or agents.
- *Show statistics for everyone*: Select this option to create a screen that will show statistics for the entire telephone system.
- **Type of Calls**: This page, shown below, allows you to select the type of calls that your call center normally handles. This will affect the different statistics that your default RealViewer screen displays.



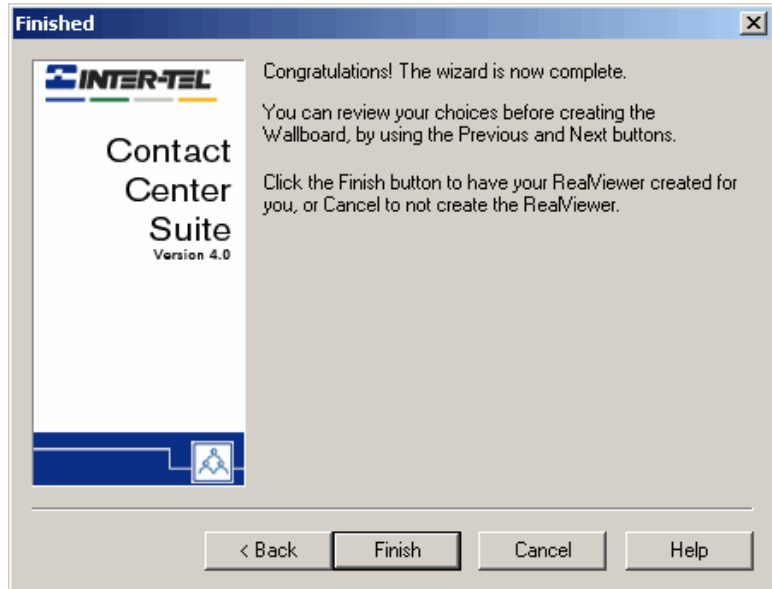
Select one of the following options and then click **Next**:

- *We mainly receive inbound calls*: Select this option to create a screen that will predominantly show statistics for inbound calls.
- *We mainly make calls*: Select this option to create a screen that will predominantly show statistics for outbound calls.
- *We make and receive calls*: Select this option to create a screen that will show statistics for both inbound and outbound calls.
- **Filtering the Data**: If you selected "Shows statistics for an individual" or "Show statistics for a group" in the RealViewer Style screen (see [page 46](#)), the Filtering the Data page allows you to specify the extension(s) that you want to include.

To do this, complete the following fields:

- *Your extension*: Enter the extension that you use to make and receive calls.
- *Your group*: Enter the list of extensions in your group, including your own extension. Each entry should be separated by a comma (,).


- **Finished:** If you want to review your choices, use the **Next** and **Back** buttons. When you are satisfied with your selections, click **Finish** to create the default RealViewer screen or **Cancel** to close RealViewer.

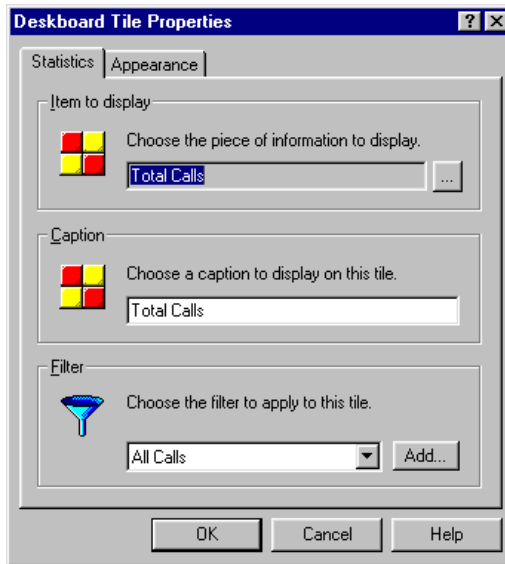


Adding a Deskboard Tile

Tiles are the building blocks of RealViewer. See “Tiles, Filters, and Statistics” beginning on [page 7](#) for basic tile concepts.

To add a Deskboard tile:

1. Click the Add Tile button () on the toolbar, or click **Add Tile** from the shortcut (right-click) menu. The new tile is created, and the property sheet for that tile opens, as shown below.



2. Complete the following fields in the Statistics tab:
 - **Item to display:** Shows the currently selected statistic that the tile will display (see the online help for details on statistics). To change the statistic, click the ellipsis (...) button, and then choose the new statistic from the available menu. If you change the statistic without changing the caption, you will be asked if the caption should be changed when you click **OK**. If you click **Yes**, the caption will change to match the new statistic. If you click **No**, the name will not change.

NOTE

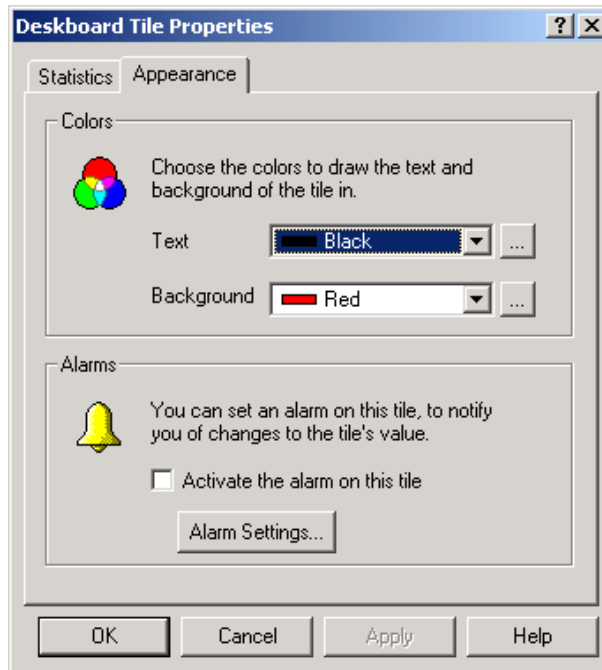
The number of statistics that Call Summary supports is limited. If Call Summary is running, any statistics that are not supported are disabled.

If you change a statistic for a tile, also change the caption to match the statistic. If you do not change the caption, it may become confusing.

- **Caption:** Allows you to edit the caption displayed above the tile. If you do not change the caption but change the statistic, you will be asked if the caption should be changed when you click **OK**.
- **Filter:** Use the drop-down list to select a filter to apply to the tile. This filter is automatically applied when you click **OK**. If needed, you can click **Add** to display the Add Filter dialog box, which will allow you to create a new filter. If you create a new filter, it is automatically selected as your preferred filter for this tile. See [pages 9 and 52](#) for details on filters.

NOTE | The Filter options are disabled if running Call Summary.

3. Select the Appearance tab.



Complete the following fields:

- **Text Color:** Use the drop-down list to choose the text color for the tile or click the ellipsis button (...) to select a custom color.
- **Background Color:** Use the drop-down list to choose the background color for the tile or click the ellipsis button (...) to select a custom color.


When selecting a custom color, move the sliders for the R, G, and B options to change the colors in the sample areas.

- *To lighten the shade of the Sample*, click the color sample(s) to the left of the center box.
 - *To darken the shade of the Sample*, click the color sample(s) to the right of the center box.
- **Activate the alarm on this tile:** Select this option to apply an alarm to the tile. If an alarm is currently firing when you clear this box, the alarm will stop signaling when you click **OK**.
 - **Alarm Settings:** Click this button to configure the alarm using the Alarms dialog box. Configure the alarm as described on [page 53](#).
4. Click **OK** when finished, or **Cancel** to exit without saving changes. If you click **OK**, the new tile will appear in the Tile Area.


Example: Creating a Tile for Calls Waiting

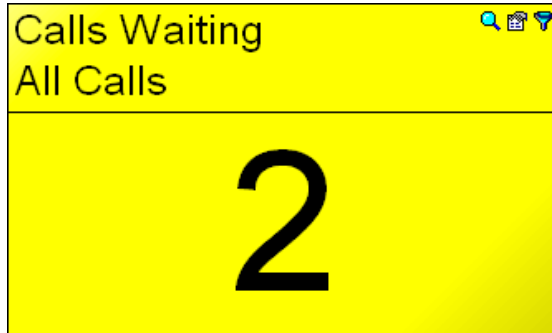
In this example, you will create a tile to monitor the number of internal and external inbound calls that are currently ringing.

To create a tile for calls waiting:

1. Click the Add Tile button () on the toolbar, or click **Add Tile** from the shortcut (right-click) menu.
2. On the Statistics tab in the Item to display area, click the ellipsis button (...), select Active Call Statistics, and then **Calls Waiting**.

The **Calls Waiting** caption is automatically added. For this example, leave the label as it appears, however, you may customize others you create that you want to distinguish from tiles with similar content.

3. On the Appearance tab, from the Background drop-down list, select  Yellow.
4. Click **OK**. The new tile appears in the RealViewer window. The All Calls filter is applied to the new tile automatically until a different filter is selected.




Applying Filters to Tiles

Applying a filter to a tile allows you to select information that you want to see, based on different parameters. Beginning on [page 9](#), the Filters section covers filters and some examples of commonly used filters. In this section, you will see how to apply a filter to an existing tile.

Example: Changing Tile Properties to a Different Filter

In a previous example (on [page 12](#)) you created a filter for call statistics for a hunt group. In this example, you will apply the call statistics filter to the Calls Waiting tile that was created in the previous example.

To change tile properties to a different filter:

1. Click the filter button () on the top, right corner of a tile to display a shortcut menu of available filters with the currently selected filter checked.
2. Select the **Call Stats-HG2000** filter to apply to the Calls Waiting tile. There may be a slight delay while the filter change is processed. When a filter is selected, the statistics on all tiles are recalculated.

Notice that the name of the current filter appears under the caption on the tile.



Advanced RealViewer Topics

The following sections are intended for experienced users who want to further customize RealViewer.

Using Tile Alarms

Tile alarms immediately notify you when a statistic is within a certain parameter. For example, you may want to know when the number of overflowed calls reaches 15. With RealViewer alarm options, you can set the tile to flash, play a wave file, or activate when this occurs.

Example: Adding an Alarm to a Tile

In this example, you will add an alarm to the Calls Waiting tile to notify you when the number of calls waiting equals or exceeds 25.

To add an alarm to a tile:

1. Double-click on the Calls Waiting tile's statistics, or right-click on the tile and select **Properties**.
2. On the Appearance tab, click **Alarm Settings**.
3. In the **Alarm fires when** area, use the first drop-down list to select **>=** (greater than or equal to), and then in the second drop-down list select **25**. This setting causes the alarm to fire when the number of calls waiting reaches 25 or more.
4. Select only the **Flash the tile** option and **30s** from the drop-down list to select how long the tile will flash. Refer to the online help for information on the other alarm action options.

NOTE


You can select more than one notification option when setting the alarm (e.g., you can have the tile flash and play a sound file at the same time).

5. Click **OK**.

To deactivate an alarm, clear the **Activate the alarm on this tile** option in the Appearance property sheet for the tile.

Rearranging Tiles in the RealViewer Window

There are two ways you can rearrange the RealViewer window:

- Using the drag-and-drop feature, click and drag the tile you want to move. Then position it over the tile that you want it to precede. The border of the stationary tile thickens or becomes highlighted. Release the tile you are moving. It is automatically placed in the area **BEFORE** the highlighted tile.
- Using the toolbar icon , you can arrange the tiles in a grid, columns, rows, or by best fit. Refer to the online help for details.

Reporter

This chapter provides detailed information on the Reporter module in Contact Center Suite.

Introduction

Reporter Basic, Reporter, and Reporter Pro are used to run historical reports on call, e-mail, and agent activity information, which is stored within a database on the CTI Server. These reports can be run by specifying various criteria (e.g., reports can be filtered by Caller ID, DID number, trunk line, extension or agent groups, time, date, call cost, etc.).

Reporter can include 70+ report templates, depending on the license level you have purchased. Each license level (*Reporter Basic*, *Reporter*, or *Reporter Pro*) contains specific report templates. Reporter and Reporter Real-Time have several different variants which are either enabled or disabled based upon the software license, as described in the *Contact Center Suite Installation Manual* and the online help.

Starting Reporter



From the Start Menu, choose Programs, then Inter-Tel Contact Center Suite, and then Reporter. Then click on the **Reporter** menu item.

When Reporter starts, if the network settings have not been configured yet or have not been configured correctly, a self-configuration mode will be invoked to attempt to automatically find a CTI Server on your LAN.

Using Startup Wizard

If this is the first time Reporter is run after installation, Reporter prompts for the following options to be configured:

- **Welcome:** Click **Next** to begin the installation.
- **Search for Contact Center Server:** Choose one server option from the following choices and then click **Next**:
 - *Keep existing settings:* This option is visible and is the default choice if Reporter finds existing settings in the registry for a server to which to connect. Select this option if you want the existing settings to be left unchanged.
 - *Search network for a CTI Server:* Select this option to search the network for available CTI servers.
 - *Connect to this CTI Server:* Select this option to use the server that you specify in the text box below this option. This is the default option when information is available for the server connection.

- **Auto Configure Page:** This page is displayed only if you selected the option to search the network for a CTI Server in the previous page. The Auto Configure page searches the local area network for CTI servers and after the search is complete, a list of available server names is displayed. Select a server name to proceed.
- **Call Costing Page:** Enter all the local dial codes for your area, separating each with a comma. Click **Next**.

NOTE

The call costing functionality provided by Reporter is based on limited information provided by telcos. Additionally, carriers can update their tariffs at any time. For this reason, changes in tariffs or network carrier discounts cannot always be reflected.

- **Report Upgrade Page:** Select one of the following options:
 - *Upgrade reports to process external and internal calls:* Select this option to use the report filter option “Only process calls (external and internal)” for all existing reports from an earlier Reporter installation. Choosing this option excludes e-mails from the upgraded reports, however, you can create additional reports that include e-mails.
 - *Upgrade reports to process external calls only:* Select this option to use the report filter option “Only process external (trunk) calls” for all existing reports from an earlier Reporter installation. Choosing this option effectively maintains the functionality of the previous version reports, because version 3.x reports only considered external calls.
 - *Do not upgrade reports:* Select this option to leave the reports as they were in the previous version (i.e., do not apply any of the filtering capability that is new to v4.0). Choosing this option causes the upgraded reports to take into account e-mails and internal calls.

NOTE

This option causes reports to include all media types, however, it will not change report names, so a report such as “Calls by Extension” will also process e-mails.

- **Auto Reporter Site:** This page appears only if a default site has not already been created, you have Internet Information Server (IIS) or Personal Web Server installed on your computer and the application detects it. This allows you to create an Auto Reporter site using the default settings.
- **Finished Page:** To complete the Reporter configuration, click **Finish** in the Startup Wizard.

You can modify these configurations at any time while running Reporter. See “Network Settings” and “Options” topics in the online help for details.

Running Reports

When you start Reporter, the main window is displayed.

The report list on the left side of the main window displays all reports grouped on categories, such as *Reporter Basic Reports*, *Other Reports*, *My Reports*, etc. The report categories are based on the license in which a report works fully. For example, a Reporter Pro license is grouped into the *Reporter Pro* group in the report list.

The current status of each report is also displayed along with the report name. Refer to the online help for details on the icons used to depict the different report states.

To run a report, double-click the report name. If the report has already run and not yet changed, the saved version of the report will be displayed.

Saving and Reusing Reports

When you run a report, it is automatically saved to the report cache stored on your local computer. The next time you run that report, Reporter decides if the report data needs to be processed again or whether it can be read from the report cache.

For example, if you have a call list report configured to display today's data, the report will always run using the latest data because today is always changing. If the report was configured to display yesterday's data and you ran the report at 9 AM, the report would be processed again to reflect all of yesterday's information. If, however, you ran the report again (before midnight when the date changed), Reporter would use the information stored in the report cache.

To run an existing report, do one of the following:

- Double-click the report in the report list.
- Select the report name in the report list and press **ENTER**.
- Right-click the report name and select **Run**.

To view a previously run report:





Right-click on the report name and select **View Saved Report**.


NOTE

It takes longer to generate reports that were not previously run because Reporter must gather and analyze data from Contact Center Server.


Report Options

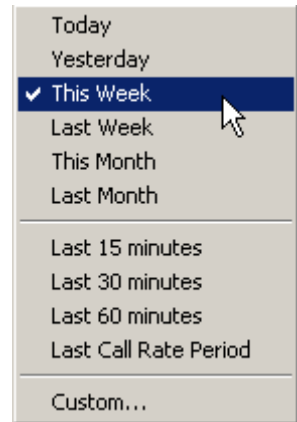
After you have run a report, you can quickly change the content or view of the current report using the following buttons on the report window:

-  Use this button to hide the header information (name of the filter used, the time frame for the report content, the date and time the report was last run, the number of items and the time it took to run the report). To display the header again, click the  button.
-  Use the Date Range button to change the time frame for the report content (see “Applying a Date Range” on [page 58](#)).
-  Use the Filter button to select an existing filter for the report or create a new filter (see “Applying a Filter” on [page 58](#)).


You can also use the Close () button to close the current report.

Applying a Date Range

To change the date range for a report, click the Date Range () button in the toolbar of the report and select the time frame (e.g., today, yesterday, this week, etc.) from the drop-down list. If you have complex date criteria to apply or if you want to define a custom time frame, use the Report Properties dialog box (see the online help).



Applying a Filter

Filters control what is included in the resulting report (e.g., date/time, DID, extension(s), group(s), etc.). To apply a filter to a report, click the Filter () button in the report’s toolbar and select an existing filter or click **Add Filter** to create a new one (see “Adding a Filter” on [page 10](#)).

Creating a Report

Reporter contains report templates, which are predefined layouts that determine which call statistics are contained within the report and how it is displayed. A report template can be customized using the report properties.

A description for all Reporter report templates is provided in the online help.

There are two ways you can create a custom report:

- You can modify the report Properties for a default report. Use this option when you want to run a temporary report and do not want to preserve the original values in the default report list.
- You can create a new report and modify the options that are predefined for the report type that you select as the starting point. Use this option when you want to define a report that you plan to use at a later time and still preserve the original values in the default report list.

Example: Modifying an Existing Report

In this example, you will modify the Call List report to remove two fields (Call Time and Call Segment) that you do not need and add a field that you do want to see (Talk Time).


To modify an existing report:

1. On the Report List panel on the left, right-click the Call List report and select **Properties**.
2. On the **Fields** tab, click the **Call Time** field to select it.
3. While pressing and holding the **CTRL** key, click the **Call Segment** field. Both fields are now selected so that you can remove them both at once.
4. Click **Remove**.
5. Click **Add** and then select **Talk Time**.
6. Click **OK**. The report is updated automatically.

Example: Creating a New Report

In the following example, you will create a new report based on the Call Cost by Cost Group showing only Calls Out for last month.

To create a new report:

1. From the toolbar, click **New Report** (.
2. On the **General** tab:
 - a. At the end of the report name, type **Last Month OUT** to distinguish it from the default report.
 - b. Select **My Reports** from the category drop-down list.
 - c. Click **Call Cost by Cost Group** report in the Report Type list.
3. On the **Date/Time** tab, select **Last Month**.
4. On the **Fields** tab, remove the **Calls In** and **% Of All Calls In** fields.
5. Click **OK**. The report is run automatically.

Exporting Data

If you are licensed for Auto Reporter, you can export reports to a variety of applications including Microsoft® Excel, Microsoft® Word, applications that accept Comma-Separated Values (CSV), applications that accept Hyper-Text Markup Language (HTML), and applications that use Wireless Markup Language (WML). You can also e-mail reports to colleagues or publish reports to the Internet.

To make things easier, Reporter includes three separate wizards, each designed to step you through the process of exporting, e-mailing, or publishing reports. It also includes an Import Wizard designed to assist you in importing data from previous versions of Reporter or from Reporter Real-Time. See the online help for details on using the wizards.


Advanced Reporter Topics

The following sections are intended for experienced users who want to further customize Reporter.

Previewing and Printing Reports

Reporter has a preview feature you can use to see what the report looks like when printed before sending it to the printer.

Do one of the following to preview the report:


- Click the Preview button () on the toolbar or press ALT + V.
- Right-click and select Print Preview from the shortcut menu in the report window or report list.

The preview is displayed in the report window, which contains its own toolbar with various buttons as described in the online help.

Do one of the following to return to list mode:


- Click the Preview button.
- Press **ALT + V** again.

Do one of the following to print the report:

- Click the Print button () on the toolbar. This option sends the report directly to the default printer.
- Press **CTRL + P**.
- Select **Print** from the shortcut (right-click) or main menu.

Playing Back Recorded Calls

You must be licensed to use the Mercom Audiolog to play back recordings using Reporter. If the call recording integration option was installed during the installation of Reporter, you will be able to play back recordings from within Call List or Call Detail reports. See the *Contact Center Suite Installation Manual* or the online help for recording server configuration details.

When a call is recorded and available for playback, a Play Recording option is displayed in the shortcut menu, and a speaker icon () is displayed in the Call Detail list for that call (or segment).

To play a recording:

- *From a Call List report*, right-click the call segment and select **Play Recording**. If the Play Recording option is disabled, there is no recording for that call segment.
- *From a Call Detail report*, click **Play**, which is displayed at the top of the report. If this option is disabled, there is no recording for that call segment.

NOTE

There is a slight delay between the voice recording server and the Contact Center Server. If you attempt to play a call that was just recorded, you may receive an error message. If this occurs, wait a few seconds and then attempt to play the call again.

Using Auto Reporter

Auto Reporter provides the following types of reporting and publishing features:

- **Scheduled Reporting:** Allows you to schedule reports to be run at intervals ranging from every 15 minutes to once a month. Reports can be automatically displayed, printed, exported, published to the Internet, or e-mailed.
- **Batch Reporting:** Allows you to batch several reports together and perform the same action on all reports at once. For example, you can print your monthly reports all at the same time or publish key reports to the Internet every day.
- **Report Publishing:** Allows you to manually or automatically publish your reports to the Internet for viewing in a Web browser or on a WAP-enabled device. Your reports can be accessible no matter where you are.
- **E-Mailing Reports:** Allows you to e-mail exported reports to your colleagues either automatically or at the touch of a button.

To successfully publish reports and statistics, you need access to a Web server. For this server, you can use a company Web server, your own PC, or even an Internet Service Provider (ISP). Refer to the online help for details on Web server configuration.

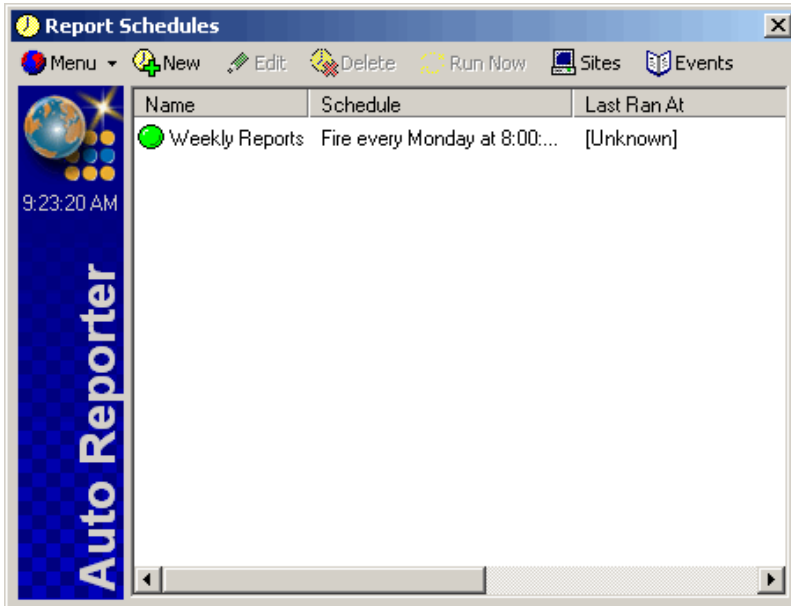
Example: Scheduling a Report

In this example, you will create a schedule to export two reports in spreadsheet format every Monday at 8 AM.

To schedule a report:

1. From the Reporter toolbar, click the Auto Reporter icon and then select **Report Schedules**.
2. From the toolbar, click **New**.
3. On the General tab:
 - a. Type **Weekly Reports** for the schedule name.
 - b. For the schedule option, select **Every** and then **Monday**.
 - c. Change the Starting at time to **8:00:00 AM**.
4. On the Reports tab, click **Add** and then select **Call Cost by Account Code**.
5. Click **Add** again and then select **Configuration: ACD Agent List**.
6. In the Action area, select **Export Reports** from the drop-down list.
7. On the Export Wizard screen, select **Microsoft Excel Spreadsheet (XLS)** and then click **Next**.
8. Check the default file names and location that Reporter shows for the two reports and then click **Finish**. If you want to change either the file name or location, click **Browse** to change the defaults before clicking **Finish**.
9. Click **OK**.


The schedule list shows the Weekly Report and the scheduled time.



Example: Manually Publishing a Report

In this example, you will e-mail a report manually (i.e., without a schedule).

To manually publish a report:

1. Open your e-mail application.
2. In Reporter, run the report you want to export, or open a previously saved version of the report.
3. From the Reporter toolbar, click the Publish icon () and then select **E-mail Report**. The E-mail Wizard opens.
4. Click **Next**.
5. Select **Microsoft Excel Spreadsheet (XLS)** for the report format. *If you want to change the default report name, type a new name in the text box. If you want to specify the location for the file, click the ellipsis button (...) and then select a location.*
6. Click **Finish**. Reporter prepares and exports the report, which may take several minutes to complete.

When the report is finished, Reporter creates a new e-mail message in your e-mail application with the report file attached, for example, Call List.xls.
7. Type the e-mail address to which you want to send the exported report.

Reporter Real-Time

This chapter provides information on using the Reporter Real-Time module.

Introduction

Reporter Real-Time is an application that shows real-time call and routed e-mail statistics, allowing you to see real-time details against all or selected call and e-mail criteria on the telephone system. Not only will it show the current extension, agent, and trunk activity, it will include detailed information such as the caller's identity, DID number used, etc. With Reporter Real-Time, you can tell who is involved in a call or e-mail (including the distant end), how long the call/e-mail took to answer, and how long the call has been in progress. You can also add a Direct Station Selection (StationViewer) tile that allows you to monitor the current call activity of extensions and/or agents.

With Reporter Real-Time, you can summarize information across the telephone system or by extensions, agents, or trunks. In addition, you can filter information, enabling you to summarize information based on group, DID number, telephone number, etc.

Reporter has several different variations that are either enabled or disabled, based upon the software license that you have purchased, as described in the *Contact Center Suite Installation Manual* and the online help.

Starting Reporter Real-Time



From the Start Menu, choose Programs – Inter-Tel Contact Center Suite, and then Reporter. Then click on the **Reporter Real-Time** menu item.

Using Startup Wizard

If this is the first time Reporter Real-Time has been run after installation, Reporter Real-Time will invoke a configuration wizard containing the following pages:

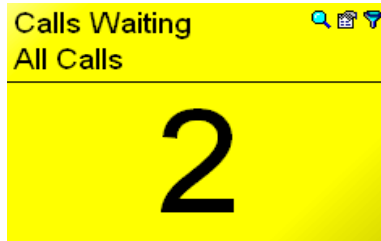
- **Welcome To Reporter Real-Time:** This displays basic information about Reporter Real-Time and the configuration wizard. Click **Next** to continue.
- **Search for Contact Center Server:** Choose one server option from the following choices and then click **Next**:
 - *Keep existing settings:* This option is visible and is the default choice if Reporter Real-Time finds existing settings in the registry for a server to which to connect. Select this option if you want the existing settings to be left unchanged.
 - *Search network for a CTI Server:* Select this option to search the network for available CTI servers. This is the default option when no information is available for the server connection.
 - *Connect to this CTI Server:* Select this option to use the server that you specify in the text box below this option. This is the default option when information is available for the server connection.
- **Auto Configure Page:** This page is displayed only if you selected the option to search the network for a CTI Server in the previous page. The Auto Configure page searches the local area network for CTI servers and after the search is complete, a list of available server names is displayed. Select a server name to proceed.
- **Extension for Call Control:** This page allows you to program the supervisor information. Enter the supervisor's **extension device number** (not agent ID) and the supervisor's Talk Voice Mailbox (if your site has a Talk Voice Mail system).
- **Finished:** This is the last page of the wizard. You can review your choices by using the **Next** and **Back** buttons. After you are satisfied with your selections, click **Finish**.

You can modify these configurations at any time while running Reporter Real-Time. See "Network Settings" and "Options" topics in the online help for details.

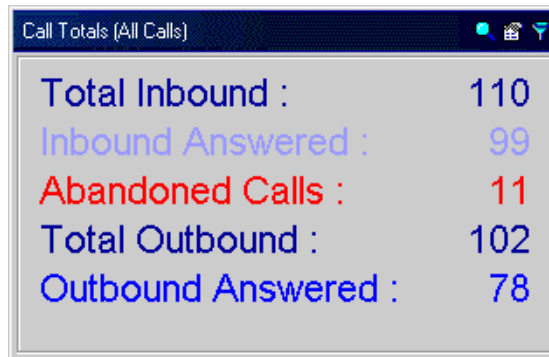
Using Reporter Real-Time Tiles

The basic building block of Reporter Real-Time is the tile. Tiles can contain three basic types of information: statistics, lists, or graphs. Reporter Real-Time provides the following types of tiles, each of which can display information in different ways:

- **Deskboard tile:** Used to display a single call summary statistic.



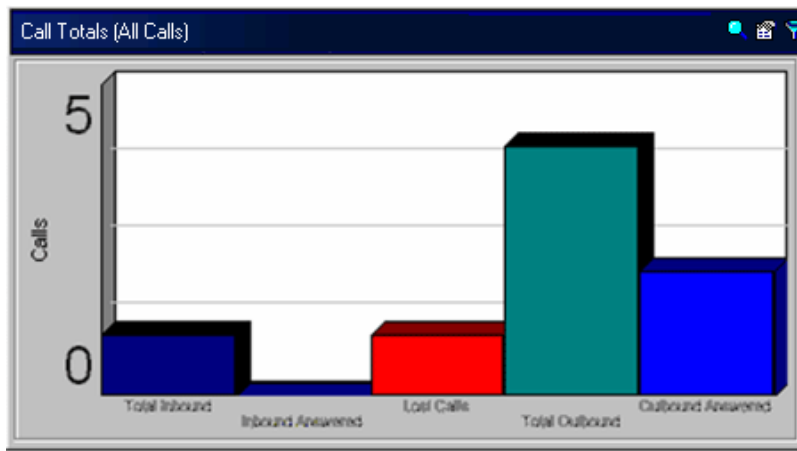
- **Multi Stat tile:** Similar to Deskboard tile, but displays several call summary statistics in a list format.



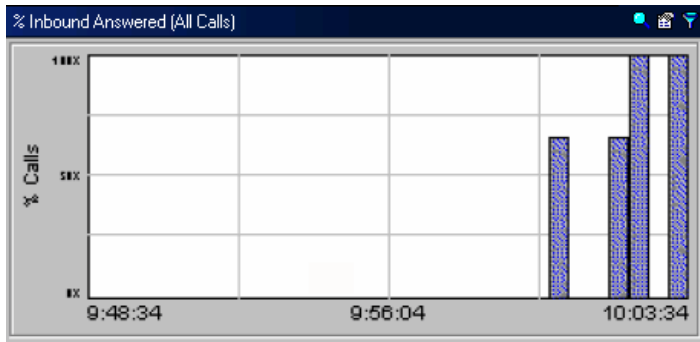
A multi-stat tile with a dark blue header containing the text 'Call Totals (All Calls)' and three small icons (a magnifying glass, a calendar, and a Wi-Fi symbol). The main body of the tile is light gray and displays a list of call statistics in a two-column format.

| | |
|---------------------|-----|
| Total Inbound : | 110 |
| Inbound Answered : | 99 |
| Abandoned Calls : | 11 |
| Total Outbound : | 102 |
| Outbound Answered : | 78 |

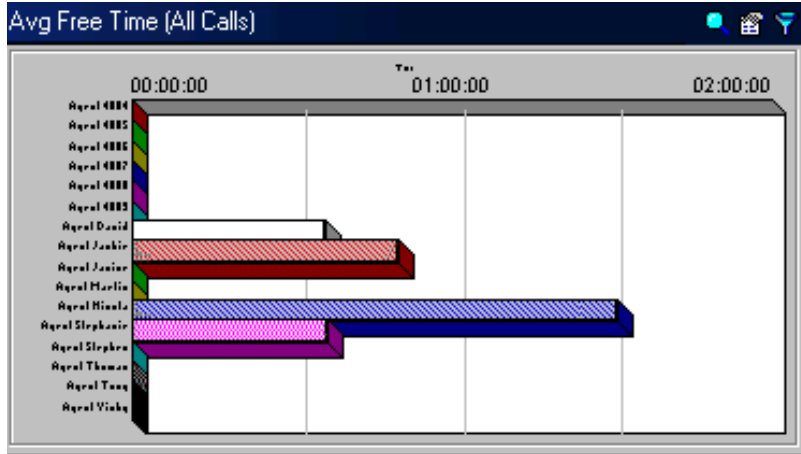
- **Graph (Multi Stat) tile:** Displays several similar statistics on one graph, graphed as a bar, column, or pie chart with various other options.



- **Graph Over Time tile:** Displays a single statistic over a period of time. The statistic can also be summarized by a particular time period (for example, every 15 minutes) to give an indication of telephone activity over time.



- **Graph By Device tile:** Displays a single statistic for every device of a particular type (e.g., agents, extensions, etc.), allowing you to visually compare a particular statistic, such as total talk time, against a group of agents.



- **StationViewer tile:** Displays buttons that indicate the current status of an extension or agent, allowing you to easily identify who is busy, idle, etc.



- **Extension List tile:** Displays various statistics per extension, such as the Caller ID of the call on the extension, with colors to indicate the status of calls. The tile can also display summary information for each extension, such as total talk time, calls handled, etc.

| Extension List (All Calls) | | | | | | | | | | |
|----------------------------|---------|-------------------|-------|--------|------|-----------|----------|----------|------------|--|
| Stz | No / Id | Description | InEnd | OutEnd | Lost | totTalkT | avgRngT | IngWT | lastEndAt | |
| | 20812 | Main Number Sta | 806 | 0 | 0 | 08:25:32 | 00:00:01 | 00:00:01 | 2:52:42 PM | |
| | 31417 | Hoggman,Chris | 74 | 13 | 0 | 06:49:00 | 00:00:50 | 00:05:31 | 2:03:36 PM | |
| | 31415 | Sunzer,Rick | 80 | 16 | 0 | 06:25:46 | 00:01:00 | 00:07:53 | 2:00:42 PM | |
| | 31418 | Schmidt,Christine | 83 | 14 | 0 | 06:21:09 | 00:00:28 | 00:03:48 | 1:58:04 PM | |
| | 31424 | Lyngar,Rick | 92 | 15 | 1 | 06:06:57 | 00:00:30 | 00:02:43 | 1:58:04 PM | |
| | 21405 | Benson,Marla | 71 | 14 | 0 | 06:00:54 | 00:00:57 | 00:05:05 | 2:50:51 PM | |
| | 31402 | Sanger,Sarah | 76 | 8 | 0 | 05:57:43 | 00:01:06 | 00:04:46 | 2:53:49 PM | |
| | 31444 | Thomas,Jeff | 98 | 16 | 0 | 05:43:39 | 00:00:40 | 00:03:11 | 2:46:46 PM | |
| | 31401 | Freeman,Isaac | 61 | 16 | 0 | 05:37:56 | 00:01:28 | 00:06:39 | 2:35:25 PM | |
| | 38367 | Tech IVR 1 | 51 | 0 | 1 | 05:37:09 | 00:00:02 | 00:00:03 | 2:38:19 PM | |
| | 31427 | Sands,Natalie | 46 | 5 | 0 | 05:29:37 | 00:00:27 | 00:03:24 | 2:47:42 PM | |
| | 31428 | Dunham,Cheryl | 92 | 16 | 0 | 05:24:38 | 00:00:27 | 00:03:20 | 2:53:04 PM | |
| | 29301 | Enterprise Confer | 23 | 0 | 0 | 05:05:08 | 00:00:01 | 00:00:02 | 1:51:30 PM | |
| | 38381 | Tech IVR 1 | 53 | 0 | 3 | 05:03:11 | 00:00:02 | 00:00:10 | 2:44:20 PM | |
| | 38377 | Tech IVR 1 | 50 | 0 | 1 | 04:59:47 | 00:00:02 | 00:00:04 | 2:45:14 PM | |
| | 31423 | Gilley,Marge | 78 | 6 | 0 | 04:56:59 | 00:00:36 | 00:02:53 | 2:52:08 PM | |
| | 31419 | Kern,Natalie | 68 | 3 | 0 | 04:43:37 | 00:00:28 | 00:02:52 | 2:48:25 PM | |
| | 31410 | Rogers,Debbie | 43 | 19 | 0 | 04:42:26 | 00:01:04 | 00:05:15 | 2:43:41 PM | |
| | 31456 | Cust Care Timeou | 1242 | 0 | 0 | 04:40:12 | 00:00:00 | 00:00:01 | 2:53:57 PM | |
| | 39304 | Enterprise Confer | 13 | 0 | 0 | 04:38:30 | 00:00:01 | 00:00:01 | 1:24:56 PM | |
| | 31404 | Dilley,Isaac | 64 | 8 | 0 | 04:33:03 | 00:01:00 | 00:04:42 | 2:52:29 PM | |
| | 31020 | Extension 31020 | 0 | 155 | 0 | 04:23:02 | 00:00:12 | 00:00:00 | 2:53:34 PM | |
| | 31409 | Crouch,Cheryl | 92 | 6 | 0 | 04:22:50 | 00:00:23 | 00:02:57 | 1:58:57 PM | |
| | 31433 | Bedera,Kathy | 46 | 6 | 0 | 04:22:47 | 00:00:29 | 00:03:23 | 2:44:34 PM | |
| | | | 12518 | 11686 | 162 | 773:09:58 | 00:00:09 | 07:25:12 | | |

- **Agent List tile:** Displays various statistics per agent, such as the Caller ID of the call at the agent extension, with colors to indicate the status of calls. The tile can also display summary information for each extension, such as total time logged in, % busy time, etc.

| o / Id | Description | Ext | Current Status | Time in Status | Tot Time on Duty | InEnd | Ref | OutEnd | Lost | totTalkT |
|--------|------------------|-------|----------------|----------------|------------------|-------|-----|--------|------|----------|
| 9866 | Phil [LCR] | 39866 | Free | 00:03:00 | 16:14:50 | 1 | 0 | 13 | 0 | 00:19:02 |
| 1406 | Angela Villicana | 31406 | Busy (Call) | 00:02:14 | 08:12:49 | 70 | 0 | 15 | 0 | 03:43:01 |
| 938 | Rebecca Gish | 31133 | Not Available | 00:01:42 | 09:12:12 | 3 | 0 | 12 | 0 | 00:31:22 |
| 015 | Michelle Viera | 31103 | Free | 00:01:40 | 08:15:58 | 18 | 1 | 3 | 0 | 03:57:54 |
| 1407 | Debbie Hall | 31407 | Busy (Call) | 00:00:40 | 08:11:33 | 13 | 0 | 22 | 0 | 01:12:47 |
| 321 | Shylee Ludt | 31109 | Wrapup (Call) | 00:00:40 | 08:20:09 | 37 | 4 | 5 | 1 | 01:19:52 |
| 626 | Barbara McNair | 31130 | Wrapup (Call) | 00:00:39 | 08:16:27 | 22 | 0 | 56 | 1 | 04:04:40 |
| 756 | Ken Fletcher | 31115 | Free | 00:00:35 | 08:23:57 | 2 | 0 | 2 | 0 | 00:03:06 |
| 1410 | Deb Randal | 31410 | Busy (Call) | 00:00:31 | 08:16:32 | 48 | 1 | 22 | 0 | 05:10:39 |
| 1403 | Chris Sheridan | 31403 | Busy (Call) | 00:00:23 | 08:15:23 | 7 | 0 | 49 | 0 | 03:05:05 |
| 016 | Rich Hancock | 31133 | Busy (Call) | 00:00:15 | 08:16:32 | 12 | 4 | 2 | 0 | 03:51:04 |
| 320 | Angela Crandall | 31353 | Busy (Call) | 00:00:11 | 07:55:40 | 10 | 0 | 82 | 0 | 02:29:51 |
| 040 | Bala Richerida | 31145 | Busy (Call) | 00:00:09 | 08:05:17 | 5 | 0 | 1 | 0 | 01:26:57 |
| 012 | Kelle Sinnott | 31075 | Free | 00:00:04 | 08:16:36 | 22 | 1 | 2 | 0 | 03:06:18 |
| 231 | Wyatt Lynn | | Logged out | 00:00:00 | 08:03:14 | 5 | 0 | 9 | 0 | 01:21:25 |
| 253 | Activations | | Logged out | 00:00:00 | 00:00:00 | 0 | 0 | 0 | 0 | 00:00:00 |

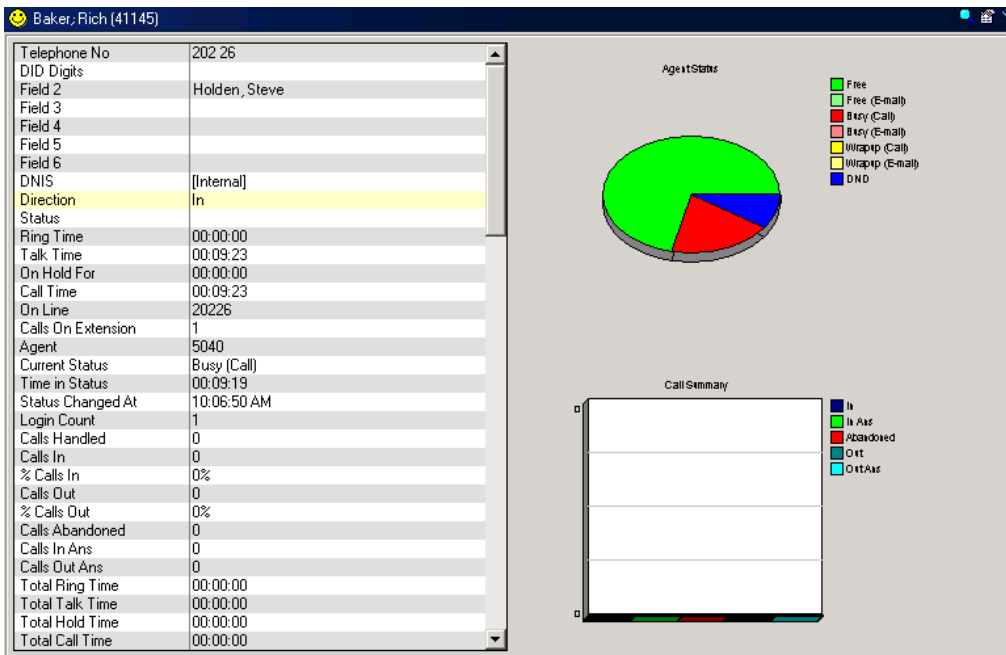
- **Trunk List tile:** Displays various statistics per trunk, such as the Caller ID of the call on the trunk, with colors to indicate the status of calls. The tile can also display summary information for each trunk, such as calls handled, average ring time, etc.

| Sta | No / Ic | Dir: | Field 2 | First Rang I | Last Rang I | Ans On | Now On | Ring Time | Talk T |
|-------|---------|------|---------------|--------------|-------------|--------|--------|-----------|--------|
| 94200 | | Out | [New Contact] | 217 | | 217 | | 00:00:03 | |

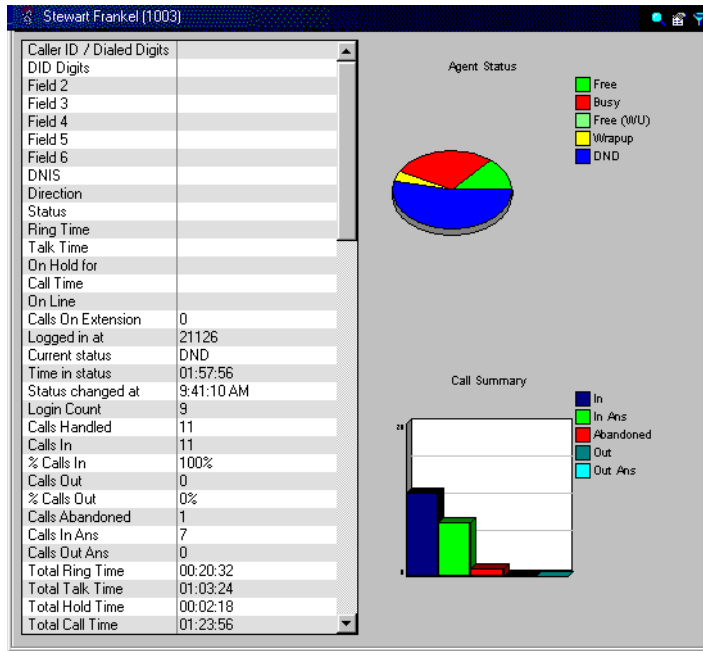
- **Contact List tile:** Displays a list of active contact traffic, i.e., external and internal calls as well as e-mails. The Contact List differs from the Trunk List in the following ways:
 - The contact list displays the Caller ID field and this field is sorted by default.
 - The contact list can only display call detail statistics and is dynamic, showing only calls that are currently active.

| Stz | Call ID / | Dir | Field 2 | Telephone No |
|-----|-----------|-----|-----------------|--------------|
| ☺ | 10:2490 | In | INTER TEL TECHN | 480 4038684 |
| 🔔 | 11:24#0 | In | Extension 1001 | 1001 |
| 🔔 | 11:24#0 | Out | Extension 1102 | 1102 |

- **Extension Detail tile:** Displays every available statistic for a given extension and graphs some of this information.



- **Agent Detail tile:** Displays every available statistic for a given agent and graphs some of this information.




See the [Tiles, Filters, and Statistics](#) section of this User Guide and the online help for more information.

Adding a Tile

The procedure for adding a tile is very similar to adding a tile in RealViewer, however, Reporter Real-Time includes a New Tile Wizard to help you set the options. The examples in this section do not use the New Tile Wizard.

You can also create the type of tile you want directly from the toolbar, not using the wizard using the steps below.


To create a tile:

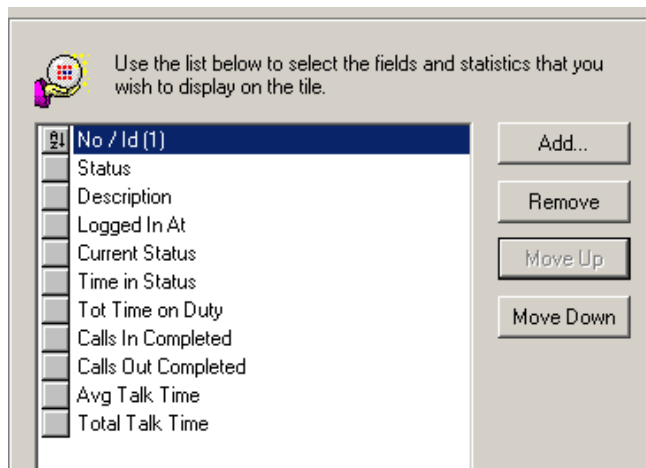
Click the Add button () on the toolbar or click **Add tile** from the shortcut (right-click) menu and then select the tile type. The new tile is created, and the property sheet for that tile opens. See the online help for details on completing the tile options.

Example: Adding a List Tile

In this example, you will create a new tile containing an agent list using the report view.

To add a list tile:

1. From the Reporter Real-Time toolbar, click the **Add** button () and then select **Agent List**.
2. On the General tab:
 - a. Select the **Use Report View** option.
 - b. Leave the other options set to the default values.
3. On the Fields tab, click the **No / Id (1)** field and then click **Move Up** so that it is the first field in the list.



4. On the Agent Help tab, select the **Enable agent help on this tile**.
5. Click **OK**. The Agent List tile is created and has the All Calls filter applied automatically.

Example: Sorting Data on an Agent List Tile

In this example, you will change the view of the agent information by sorting on different fields. Sorting a tile by different fields allows you to quickly see which agents are busy or free without having to scroll through the entire tile.

To sort data on an Agent list tile:

Using the Agent List tile you created in the previous example, click the Current Status column header. The data is now arranged with the agents who are logged in and busy at the top of the tile, followed by the agents who are free, logged out, not available, etc.

Example: Customizing a Tile's Appearance

In this example, you will change the color of a tile showing a single statistic, Calls Waiting.

To customize a tile's appearance:

1. If you do not already have a Deskboard tile to display the Calls Waiting statistic, create one using the default color for the tile. Refer to the online help if necessary to complete the fields.
2. Right-click on the Calls Waiting tile and select **Properties**.
3. On the Appearance tab, click the drop-down list for the Background and select **Yellow** from the drop-down list.
4. Click the ellipsis button next to the Background color. The custom color selector dialog box opens.
5. Drag the slider for the second color selector (**G**) from the right edge toward the left until the sample boxes show a range of orange.
6. Click **OK** to close the custom color selector and then click **OK** to close the Deskboard properties dialog box.

Changing Statistics on a List Tile

In this example, you will change the statistics that are shown on a contact list tile to remove one field and add another.

To change the statistics on a list tile:

1. If you do not already have a Contact List tile, create one using the default fields and colors for the tile. Refer to the online help if necessary to complete the fields.

There is a field on the tile to indicate the direction of the call, however, you can see from the color coding on the tile which calls are inbound and which are outbound. The direction field does not need to be included on the tile. You also decide that you want to see where the call was first answered.
2. Right-click on the Contact List tile and then select **Properties**.
3. On the Fields tab, click the Direction field and then click **Remove**.
4. Click **Add** and then select **User Ans On**.
5. Click **OK**.

The tile is automatically updated with the new field you added.

Using Tile Alarms

You can set tile alarms to fire when inbound calls have been ringing for longer than a time limit that you define. See “Using Tile Alarms” on [page 53](#) for details on setting alarms.

Applying Filters to Tiles

Applying a filter to a tile affects all statistics on the tile, allowing you to view similar statistics for a given filter, such as a group of agents. Refer to the “[Tiles, Filters, and Statistics](#)” and “[RealViewer](#)” sections for information on creating and applying filters.

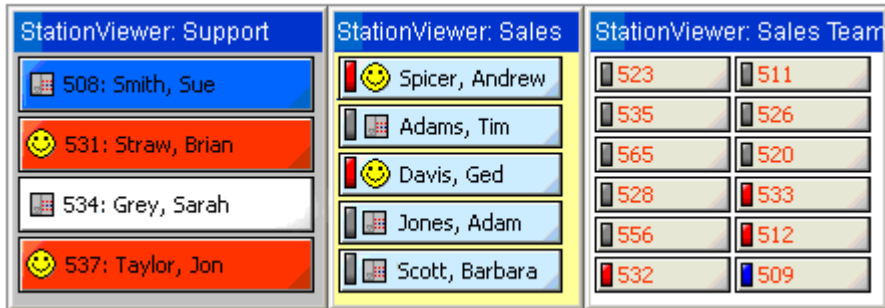
Advanced Reporter Real-Time Topics

The following sections are intended for experienced users who want to further customize Reporter Real-Time.

Creating StationViewer Tiles

StationViewer tiles allow you to monitor the current call activity of extensions and/or agents. On StationViewer tiles you can configure:

- The size of the button
- What information appears on the button
- The colors used to display the button




Each button contains a lamp (bulb) and an icon that indicates the state of the device. The device extension and description (usually the username) is also displayed, allowing you to easily identify who is busy, idle, etc. StationViewer list tiles are not filtered like other tile types.

When you add a StationViewer tile, it is empty. You must fill the tile with extensions or agents as described in the following example.

Example: Creating a StationViewer Tile for Agents

In this example, you will create a StationViewer tile showing the agents for a selected hunt group.

To create a StationViewer List Tile for agents:

1. Make sure you have Administrator access before continuing with this procedure.
2. From the Reporter Real-Time toolbar, click the **Add** button () and then select **StationViewer**.
3. On the General tab:
 - a. For the Caption, type a descriptive title to display above the tile.
 - b. For the mode, select **Agent List** to add agents to the StationViewer tile.

NOTE

The Agent List option is available only with a Reporter Pro license (see the online help for more information).

The title of the second tab changes depending on which StationViewer list mode you select. For example, if you select Agent List, the second tab changes from *Extensions* to *Agents*.

4. On the Agents tab, click **Add** to select the agents for the tile.
5. On the Appearance tab:
 - a. Use the drop-down list to select a button size. Your choices are Small, Standard, and Large.
 - b. Select the option **Use LED color for button face**. Setting this option causes the button face color to match the color that represents the associated agent's device state. For example, when the device is in the busy state and with a busy state color of red, the button face would be colored red. When the option is disabled, the button face color is static and only the LED changes color to reflect the device state.
6. Click **OK**.

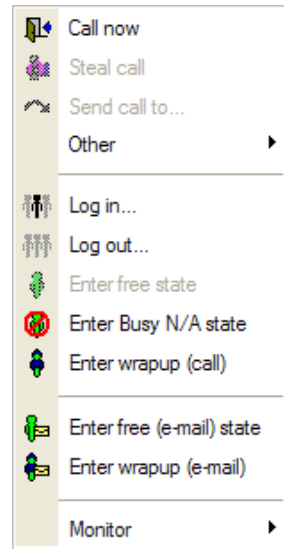
Using Call Control

You can control calls using Reporter Real-Time from the supervisor's terminal using the call control menu, which is accessed by clicking on a device in an Agent, Extension, or Trunk List tile or a StationViewer tile. The options available in the menu vary depending on the state of the device selected and the type of tile you are using. You can also handle calls at your own extension using various toolbar buttons. See the online help for details.

Before using the Call Control functionality, you must specify your extension in the Call Control page in the Configure View screen (see the Options Call Control topic in the online help). You should also identify the mailbox that will be used for recording calls.



Using Call Control with a StationViewer Tile

The call control menu for the StationViewer tiles contains many of the options available for list tiles, for example, **Call now** and **Log in**, which are described in the online help.



The following options are available only for StationViewer tiles.

- **Pickup Call:** To pickup (reverse transfer) a call that is currently ringing an extension or agent, select **Pickup Call** from the StationViewer call control menu.
- **Blind Transfer:** To transfer a call that is currently at your extension to the StationViewer extension/agent, select **Blind Transfer** from the call control menu. When selected, the call is automatically connected to the StationViewer extension/agent, regardless of its current state.
- **Enquiry Transfer:** To perform an announced transfer, select **Enquiry Transfer** from the call control menu. When selected, the call at your extension is placed on hold, and another call to the StationViewer extension/agent is initiated.

After you have connected to the StationViewer extension/agent, you can either click the Complete Transfer () button to complete the transfer or click the Hold/Retrieve () button to cancel the transfer and retrieve the call.

Example: Stealing Calls

In this example, you will transfer a call to your extension from an extension, agent, or trunk list tile.

To steal calls:

1. From an extension, agent, or trunk list tile, click on the device you want to transfer to your extension. The call control menu is displayed.
2. Select **Steal Call**. The call is transferred to your extension, but not automatically answered.

Example: Changing an Agent State

In this example, you will change an agent state from Free to Busy N/A (DND) on an Agent List tile. This operation might be useful for a supervisor who wanted to set the busy state for someone who had forgotten to do so.

To change an agent state:

1. If you do not already have an Agent List tile, create one using the defaults for the tile. Refer to the online help if necessary.
2. On the Agent List tile, click the **Current Status** column header to sort the agents by status.
3. Scroll down to find an agent whose status is Free.
4. Click on the agent record and then select **Enter busy N/A (DND)** from the call control menu.

Monitoring Calls

You can listen to and record conversations at other extensions if the features are enabled on the telephone system. The following monitoring options are available when correctly configured:

- **Silent Monitor:** To monitor an extension or agent from Reporter Real-Time, select the agent or extension that you want to monitor, and then select the **Silent Monitor** option. The agent will then be monitored from your extension until the monitoring call ends. If the telephone system has been configured accordingly, the agent or extension is not aware that they are being monitored.

NOTE

This option is unavailable if the agent or extension is not currently on a call.

- **Polite Intrude:** To politely intrude on an extension or agent from Reporter Real-Time, select the agent or extension that you want to monitor, and then select Polite intrude. The agent is informed of the intrusion by a beeping noise, and can refuse to accept the intrusion. If the agent accepts, then the Supervisor extension will intrude on the conversation, as if they had been conferenced in.

- **Forced Intrude:** To forcefully intrude on an extension or agent from Reporter Real-Time, select the agent or extension that you want to monitor, and then select Forced intrude. The agent will be briefly informed of the intrusion by a beep before the Supervisor extension intrudes on the conversation, as if they had been manually conferenced in.
- **Record This Call:** You can also record calls at an agent or extension to your mailbox. To record a call, select **Record This Call**. When the call ends, the recording will appear in your mailbox. See the *Contact Center Suite Installation Manual* or the online help for details on configuring flags and mailboxes.

NOTE

Certain or all types of call monitoring capability may be disabled on the telephone system due to local by-laws/regulations, etc.

Using Auto Reporter

Auto Reporter provides several features to Reporter Real-Time in addition to the ones available in Reporter. The added features include the following:

- **Statistic Publishing:** Allows you to publish up to 25 statistics per schedule to an HTML or WML file for publishing to the Internet or your Intranet. The files can then be viewed in a Web browser, on a WAP-enabled device, or used to drive a readerboard.
- **Alarm Publishing:** Automatically writes any alarms that you have configured within Reporter Real-Time to an alarm list. You can then publish this list to the Internet in HTML or WML format for viewing in a Web browser or on a WAP-enabled device. You can also choose to display only certain alarms or alarms over a given period of time.

To successfully publish reports and statistics, you need access to a Web server. Refer to the *Contact Center Suite Installation Manual* or the online help for configuration details.

For details on other Auto Reporter features, refer to “Using Auto Reporter” on [page 61](#).

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