ALTIGEN COMMUNICATIONS

MaxSupervisor™

Manual

MAX Communication Server
Release 6.0
Update2

2/2009 4504-0013-6.0 Update2

WARNING!

Toll fraud is committed when individuals unlawfully gain access to customer telecommunication systems. This is a criminal offense. Currently, we do not know of any telecommunications system that is immune to this type of criminal activity. AltiGen Communications, Inc., will not accept liability for any damages, including long distance charges, which result from unauthorized and/or unlawful use. Although AltiGen Communications, Inc., has designed security features into its products, it is your sole responsibility to use the security features and to establish security practices within your company, including training, security awareness, and call auditing.

NOTICE

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This documentation may be used only in accordance with the terms of the AltiGen Communications, Inc., License Agreement.

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TRADEMARKS

Part Number 4504-0013-6.0 Update2

Contents

Warranty

What The Warranty Covers

AltiGen Communications warrants its hardware products to be free from defects in material and workmanship during the warranty period. If a product proves to be defective in material or workmanship during the warranty period, AltiGen Communications will, at its sole option, repair, refund or replace the product with a like product.

How Long the Warranty Is Effective

All AltiGen Communications products are warranted for one year for all parts from the date of the first end user purchase.

Whom the Warranty Protects

This warranty is valid only for the first end user purchaser.

What the Warranty Does Not Cover

1. Any product on which the serial number has been defaced, modified or removed.
2. Damage, deterioration or malfunction resulting from:
   a) Accident, misuse, neglect, fire, water, lightning, or other acts of nature, unauthorized product modification, or failure to follow instructions supplied with the product.
   b) Repair or attempted repair by anyone not authorized by AltiGen Communications.
   c) Any damage of the product due to shipment.
   d) Removal or installation of the product.
   e) Causes external to the product, such as electric power fluctuations or failure.
   f) Use of supplies or parts not meeting AltiGen Communications' specifications.
   g) Normal wear and tear.
   h) Any other cause which does not relate to a product defect.
3. Shipping, installation, set-up and removal service charges.

How to Obtain Service

End user customers should contact your Authorized AltiGen Dealer for service.

Authorized AltiGen Dealers must follow the steps below for service:

1. Take or ship the product (shipment prepaid) to your AltiGen distributor or to AltiGen Communications, Inc.

   All materials being returned to AltiGen must have an associated RMA number. RMA numbers are issued by AltiGen Customer Service and can be obtained by calling 1-888-ALTIGEN (258-4436) or faxing an RMA form to 510-252-9738, to the attention of Customer Service. AltiGen reserves the right to refuse return of any material that does not have an RMA number. The RMA number should be clearly marked on the outside of the box in which the material is being returned. For example:

Attn.: RMA # 123
AltiGen Communications, Inc.
4555 Cushing Pkwy.
Fremont, CA 94538

Upon authorization of return, AltiGen will decide whether the malfunctioning product will be repaired or replaced.

2. To obtain warranty service, you will be required to provide:

   a) the date and proof of purchase

   b) serial number of the product

   c) your name and company name

   d) your shipping address

   e) a description of the problem.

3. For additional information contact your AltiGen Dealer or AltiGen Communications, Inc., at 510-252-9712.

Effect of State Law

This warranty gives you specific legal rights, and you may also have other rights which vary from state to state. Some states do not allow limitations on implied warranties and/or do not allow the exclusion of incidental or consequential damages, so the above limitations and exclusions may not apply to you.

Sales Outside the U.S.A.

For AltiGen Communications products sold outside of the U.S.A., contact your AltiGen Communications dealer for warranty information and services.

About MaxSupervisor

MaxSupervisor is PC desktop software that runs with the MAX Communication Server (MAXCS) ACC and MAXCS ACM systems. Using MaxSupervisor, supervisors of workgroup agents can monitor the real time status and performance of a workgroup, including calls, workgroup statistics, and agent state. This information can be stored in an internal or external CDR database for future review and analysis.

The supervisor has the ability to listen to calls and to barge in or coach calls if assistance is needed. The supervisor can also re-route a call in queue, if necessary.

New in Release 6.0 Update2

- All workgroups a supervisor is monitoring are displayed in a single view, making it easier to see what's happening in all groups at once.
- A graphical view (trend lines) displays workgroup statistics to help make better staffing decisions.
- Supervisors can check workgroup voice mails without needing a separate license or needing to log in as an agent.
- A Microsoft .NET-based graphical user interface, gives the ability to:
    - Customize tabbed pages
    - Separate a tabbed page from the main view
    - Move a tabbed page within the main view
    - Rearrange and hide columns
    - Use the keyboard arrow and tab buttons to move from option to option, as well as select by a click

Session Licensing and License Upgrade Procedures

MaxSupervisor requires a MaxSupervisor seat license to be installed at the MAXCS ACC/ACM system.

The system administrator can verify MaxSupervisor seat licenses in MaxAdministrator by selecting **License > Client License Management**.

CDR Records Note

For CDR records, there are two **Service Level** displays for MaxSupervisor:

- **Service Level** =
  (number of calls in WG Queue – number of calls in Q over SL threshold) **/** number of calls in Q
- **Service Level since midnight** =
  (number of answered calls – number of answered calls over SL threshold) **/** number of answered calls

Installation

The client system must meet the following minimum requirements.

- IBM/PC AT compatible system
- 1GHz CPU or above (Dual Core 2GHz CPU recommended)
- Windows XP Professional SP2 or Windows Vista Business Edition
- 250 MB available hard drive disk space
- 256 MB RAM minimum (1GB recommended)
- SVGA monitor (1024 x 768) with 256 color display, or better
- Keyboard and mouse
- MAXCS ACC/ACM 6.0 Update2 or above running on a server accessible to this client.

Pre-Installation Checklist

Before installing MaxSupervisor, make sure the following is done:

- MAXCS ACC 6.0 Update2 or MAXCS ACM 6.0 Update2 has been installed on the system server.
- TCP/IP is enabled on both machines.
- The client is able to connect to the server on the network.
- The person installing MaxSupervisor has local administrator rights on the client PC.
- The MaxSupervisor License Key has been installed and activated on the system server.

Installing MaxSupervisor on a Client System

When the above items are done, follow these steps on the client machine:

1. Exit all Windows applications.
2. Insert the MAX Communication Server Clients CD into the CD ROM drive.

3. Open the **MaxSupervisor** folder, and run the **Setup** program in that folder, following the step-by-step installation instructions as they appear on the screen.
4. Alternatively, if your system administrator has loaded MaxSupervisor on a shared network server, you can copy the files in the MaxSupervisor folder to your desktop PC, and run the MaxSupervisor **Setup** program.

Uninstalling MaxSupervisor

1. From the Windows **Start** menu, select **Control Panel > Add/Remove Programs** to uninstall MaxSupervisor.
2. Click **Remove**, and respond to any additional prompts.

Automatic Upgrade

Each time you start up MaxSupervisor, a comparison is made with the version of MAXCS ACC/ACM that is running on the server. If updates were made on the server, and your version of MaxSupervisor is out-of-date, you are prompted for upgrade permission. If you automatically upgrade, the MaxSupervisor startup is terminated and a software upgrade session is started. Restart MaxSupervisor to run the newer version.

Note: For remote MaxSupervisor users outside the firewall, TCP port 10050 is required to be open to allow auto upgrade. Also, automatic upgrade over the Internet requires the sending of 15 MB files over the WAN, which may take some time, to perform the automatic update.

Downgrade Procedure

1. Go to **Control Panel** > **Add/Remove Programs** and remove the MaxSupervisor 6.0 Update2 program and ALL OTHER 6.0 Update2 client applications (including MaxAgent, MaxCommunicator, AltiConsole and CDR Search).
2. Reboot your system.
3. Go to “<local drive>:**Program Files\AltiGen\Shared Files**” and remove **AlpInterface.dll**.

Note: The **AlpInterface** might be located under "\WinNT\System32\", "\Windows\System32\" or some other location. Use the **Search for Files and Folders** feature to locate and remove all **AlpInterface.dll** files from the system.

4. Install the earlier software, as appropriate.

CHAPTER 3

Getting Started

Start MaxSupervisor from the Microsoft Windows **Start** menu, by choosing **Start** > **All Programs** > **MaxSupervisor** > **MaxSupervisor**.

Note: For users running Windows XP SP3, a firewall protection Security Alert may pop up when opening the login window. If this happens, click **Yes** to allow MaxSupervisor to run.

If you are connecting to the Internet through a modem connection, before you log in, establish a session connection from your PC to your local internet service provider. If you're using a low-speed connection, the login may take some time, since a large amount of data is transferred to your desktop.

Logging In

1. If this is the first login to this MAXCS ACC/ACM system, enter the system server's IP address or name of the system server you will be using. To obtain the server name or IP address, ask your IT administrator. (Subsequently, when you log in, you'll see the IP address in the **Server Name** field.)

2. Enter your **Extension** number and the **Password** assigned to your phone.

   If you want to store your login password and have it entered automatically the next time you log in to MaxSupervisor, check the **Always save password** check box.

   Note: Up to 8 login attempts are allowed, after which login will be disabled from 1 to 24 hours (depending on the duration set by your system administrator).

3. Click **Sign in**. A progress bar shows you the progress of the sign-in.

4. In the dialog box that appears next, select the workgroup(s) you want to monitor, and enter a password for each workgroup.

In this dialog box, you can:

- Sort the **Workgroup** column in ascending or descending order by clicking the column heading (it’s a toggle).
- Resize a column by dragging a column edge to make the column wider or narrower.

- Choose to hide specific rows. If **Show All Rows** is checked, the **Hide Row** column is available. Check the **Hide Row** check box of each workgroup you don't want to see listed in this sign-in dialog box, and then uncheck the **Show All Rows** option. The workgroups you want to hide are now hidden. If the **Monitor** column check box of any of those workgroups had been checked, they are automatically unchecked when they are hidden.
- Choose to see all rows. To see all workgroups listed again, check the **Show All Rows** option. MaxSupervisor remembers the **Hide Row** check boxes you checked and retains those checks.

5. Check the **Save workgroup password** check box, if you want to store the passwords so you don't have to type them the next time you log in.
6. Click **Sign in**. A progress bar shows you the progress of the sign-in. It takes some time to populate the call information in the agent state when MaxSupervisor first starts up.

Version Mismatch Dialog Box

If your version of MaxSupervisor doesn't match the version of MAXCS on the system server, you are prompted for upgrade permission when you try to log in. If you allow upgrade at this time, the MaxSupervisor startup is terminated and a software upgrade session is started. Restart MaxSupervisor to run the newer version. (See "Automatic Upgrade" on page 4 for more details.)

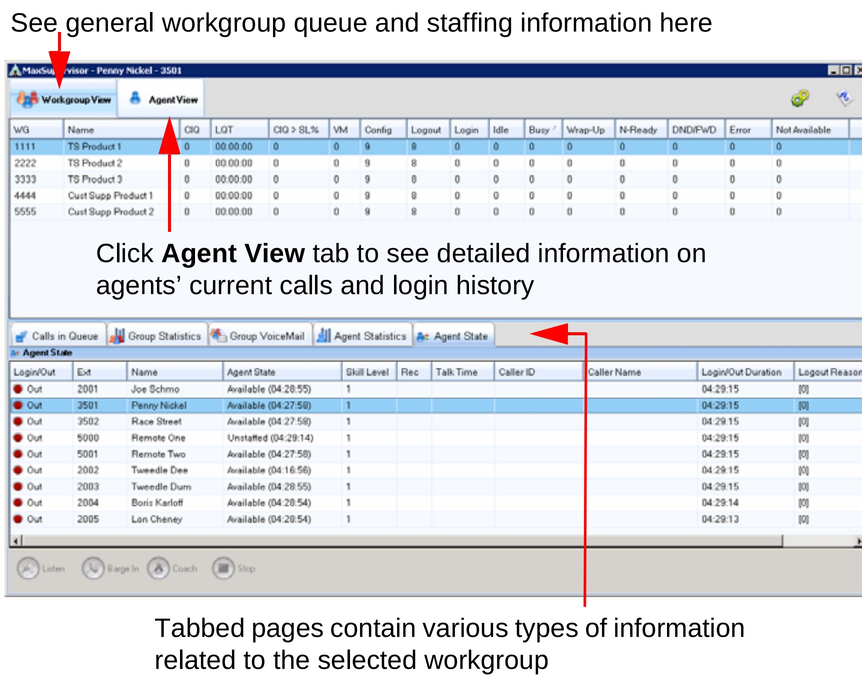
When Connection Is Broken

When a connection with the phone server is broken, a message box pops up asking if you want to connect again. Clicking **Yes** will restore the connection without you having to go through the log-in process again.

Overview of the Main Window

Once you log in to MaxSupervisor, the main window appears. This window provides views to monitor all the workgroups you selected.

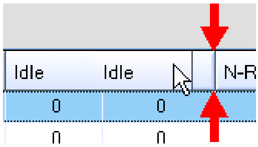
You can customize the MaxSupervisor display: select only the columns you need, rearrange the columns and tabs to suit your needs, and sort in ascending and descending order.



Customizing the Display

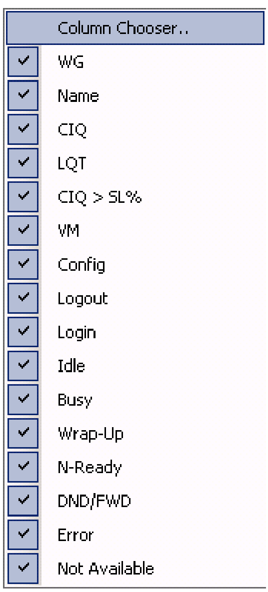
You can customize the MaxSupervisor display to meet your needs in the following ways. MaxSupervisor remembers your preferences the next time you log on.

- **Resize panels** by moving the cursor between panels until you see up and down arrows. Then click and drag up or down to resize the panels.
- **Resize columns** by placing the cursor on a column divider in the header area until you see left and right arrows. Then click and drag left or right to resize the columns.
- **Rearrange columns** by clicking and dragging a column name to the location you want.



Dragging the Idle column to the right. Red arrows show where to release it.

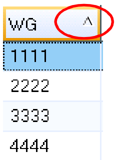
- **Specify the columns** you want to see by right-clicking a column heading and checking or unchecking columns in the pop-up list. Checked columns will be displayed.



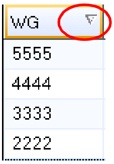
Columns available on the **Workgroup View** tab.

Uncheck columns you don't want to see.

- **Sort columns** in ascending or descending order by clicking the column heading. An ascending (first to last) or descending (last to first) arrow appears. Click the column heading again to sort in the reverse order. If you click a column heading, and all the data in that column is the same, MaxSupervisor keeps the sort order of the previously clicked column.

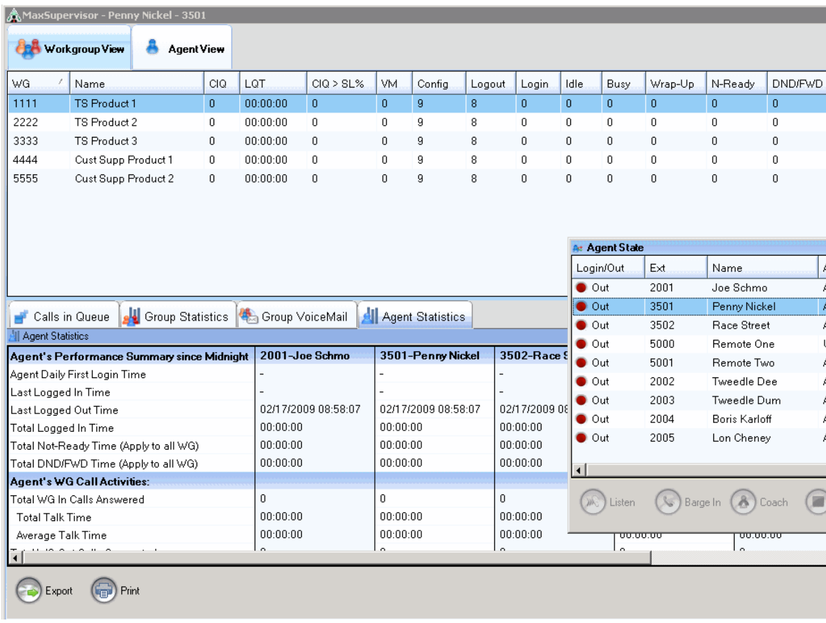


Ascending order

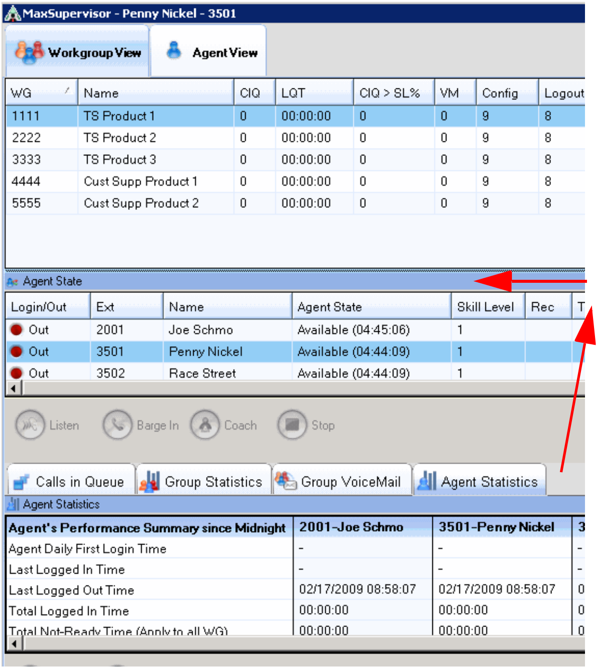


Descending order

- **Resize MaxSupervisor** windows by using the standard Windows method: place the cursor at a window edge or corner, then drag the window to the size you want.
- **Make a tabbed page an independent view** by dragging the tab away from its position on the screen (applies to the tabs in the lower part of the window only). For example, here the **Agent State** tab has been dragged out to make a separate resizable view:



You can also make an independent tab a separate panel in MaxSupervisor. For example, you might want this view:



Agent State tab has been dragged from its place in the bottom panel and moved up to be displayed in an independent panel.

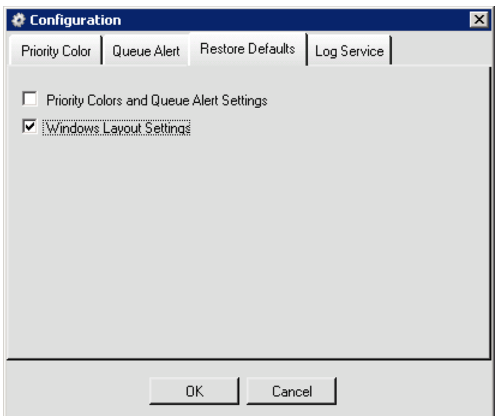
To get the tabbed page to be an independent panel, drag it slightly above the remaining tabs until you see a rectangle across the width of MaxSupervisor, then release it.

To return an independent page to its place, drag its title bar to the tabs part of the tabs area and release.

Restoring Layout Defaults

To restore columns, column and tab order, windows, and so on, to their defaults,

1. Click the **Configuration** button . The Configuration dialog box opens:



2. Click the **Restore Defaults** tab, and check the **Windows Layout Settings** check box.
3. Click **OK**.
4. Restart MaxSupervisor.

Minimizing and Exiting MaxSupervisor

Minimize - To minimize MaxSupervisor, click the **Minimize** button in the top right corner of the screen. MaxSupervisor shrinks to an icon in the Windows tray: 1:58 PM . To open the MaxSupervisor window again, double-click the MaxSupervisor icon (or right-click it and choose **MaxSupervisor**.)

Exit - If you are shutting down Microsoft Windows, MaxSupervisor will exit automatically. Otherwise, to exit MaxSupervisor, click the button at the top right of the MaxSupervisor window.

Error Messages

The following errors may be displayed as login or connectivity errors.

Error Message	Description	Solution
MAXCS connection limit has been exceeded.	No MaxSupervisor was found OR more than allowed number of MaxSupervisor users have attempted to log on.	Administrator must maintain the number of MaxSupervisor license keys or add additional seat licensing.
Cannot connect to AltiLink. Please check server name or network connection.	You are not connected to MAXCS.	Check the server field (IP address or DNS name) by: 1. Pinging the network server address OR 2. Try using the IP address of MAXCS (if using the DNS name in the server field).
Please register AlpInterface.dll (regsver32 AlpInterface.dll).	MaxSupervisor uses this dll to communicate with MAXCS. It should be registered in the user's system.	Re-register this file. Type in DOS command window, **regsver32 AlpInterface.dll** Change directory to MaxSupervisor directory, type **regsver32 AlpInterface.dll**
You have entered an invalid password. Please try again.	The password is incorrect.	Enter your extension password.
The version of MaxSupervisor on your desktop is out of date.	The installed version of MaxSupervisor does not match the version of MAXCS on the system server.	Upgrade MaxSupervisor to match the current running version of MAXCS.

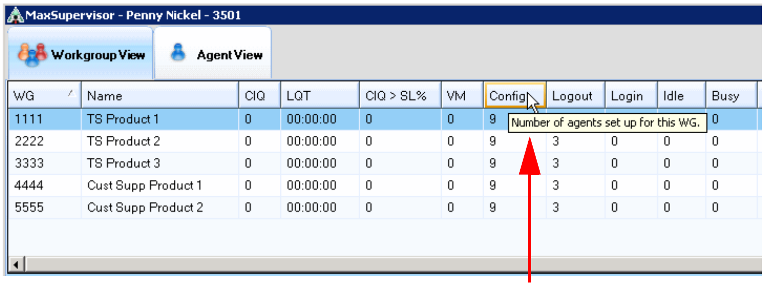
Using MaxSupervisor

Using MaxSupervisor, you can do the following:

- Monitor multiple workgroups in a single view that displays queue and staffing information for all the workgroups
- View details of a selected workgroup: calls in queue, group statistics (including graph format), group voice mail, agent statistics, and agent state
- Pick up and redirect queued calls
- Listen to an agent's phone call
- Barge in on an agent's phone call
- Coach an agent without the caller hearing you
- Record an agent's phone call
- Log in and log out agents from workgroups
- Listen to and handle workgroup voice mail
- Save and print workgroup and agent statistical data

Monitoring Workgroups

For all the workgroups you chose to monitor when you logged in, calls-in-queue and workgroup staffing information are summarized in real time on one **Workgroup View** tab. Additional tabs in the bottom pane of the Workgroup View show detailed information on individual workgroups.



If necessary, use the scroll bar to see all the fields.

Hover the mouse pointer over a column name to see a full explanation

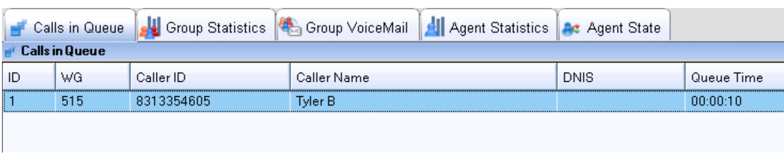
The columns display the following:

- **WG**—Workgroup number
- **Name**—Workgroup name
- **CIQ**—Number of calls in queue. The background color changes to red when the limits specified in the configuration are exceeded.
- **LQT**—The length of time that the oldest call has been waiting in the queue. The background color changes to red when the limits specified in the configuration are exceeded.
- **CIQ > SL%**—The percentage of calls in the queue that has been waiting longer than the MAXCS-defined service level
- **VM**—Number of unheard workgroup voice mails
- **Config**—Number of agents set up for this workgroup
- **Logout**—Number of agents logged out of this workgroup
- **Login**—Number of agents logged in to this workgroup
- **Idle**—Number of agents who are available for a call
- **Busy**—Number of agents who are in the busy state (offhook, forward all calls, do not disturb)
- **Wrap-Up**—Number of agents who are in the wrap-up state (performing duties related to finishing a call)
- **N-Ready**—Number of agents who are in the not ready state
- **DND/FWD**—Number of agents who have DND turned on or are having their calls forwarded

- **Error**—Number of agents who are in the error state (offhook but not on a call)
- **Not Available**—Number of agents who are logged in but not able to receive calls for any of a number of reasons (checking voice mail, in wrap-up, in not-ready state, in busy state, etc.) **Not Available** will increment only when agent is Unstaff (virtual extension).

Viewing the Queues

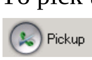
Select a workgroup in the **Workgroup** tab, then click the **Calls in Queue** tab to view queue information for the selected workgroup.



ID	WG	Caller ID	Caller Name	DNIS	Queue Time
1	515	8313354605	Tyler B		00:00:10

For each call in queue, the **Queue** tab displays the call ID (this is the queue position if call priority queuing is not enabled; if calls are distributed based on priority rules, ID identifies the order in which the call entered the workgroup but not necessarily the order in which it will be answered), workgroup number, caller ID, caller name if available, the number dialed by the caller (DNIS), queue time, servicing priority, length of time the caller has been waiting in the queue since the last priority change, the skill level required by the caller (SKLR), and the type of call.

To pick up a call from queue

To pick up a call from queue, select the call and click the **Pickup** button 

at the bottom of the tab. This will ring the supervisor extension when the phone is in idle state. If it is not in idle state, the supervisor's current call is put on hold and the queued call is connected.

Note: The **Allow Pickup Call from Workgroup Queue** setting in MaxAdministrator (Extension Configuration, **Group** tab) must be checked for your extension before you can pick up calls from queue.

To redirect a call from queue

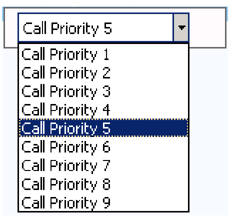
To redirect a call from queue, select a queued call from the list, then click the **Redirect** button 

at the bottom of the tab. MaxSupervisor pops up a window that lists extensions and speed dial numbers. Click a number and click **OK** to redirect the call to that number. You may also type the extension or speed dial number in the **Number to Forward** box.

Note: The **Allow Redirect Call / Change Priority** setting in MaxAdministrator (Workgroup Configuration, **Queue Management** tab) must be checked for your extension before you can redirect calls from queue.

To reassign call priority

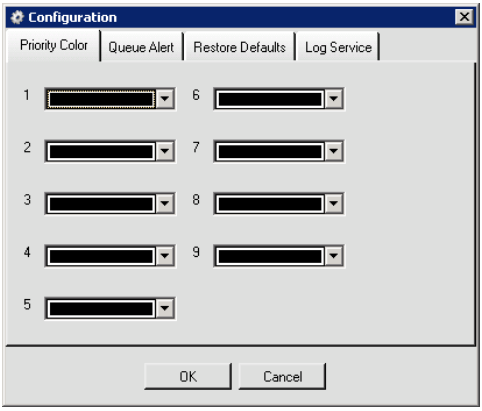
To reassign call priority to a queued call, right-click on the call and select a priority level from **1** - **9**.



Note: The **Allow Redirect Call / Change Priority** setting in MaxAdministrator (Workgroup Configuration, **Queue Management** tab) must be checked for your extension before you can change call priority.

Configuring the Queue with Color-Coding and Alerts

You can assign different colors to different call priorities and be alerted when the queue reaches specified limits. To do so, click the **Configuration** button  at the top right of MaxSupervisor.



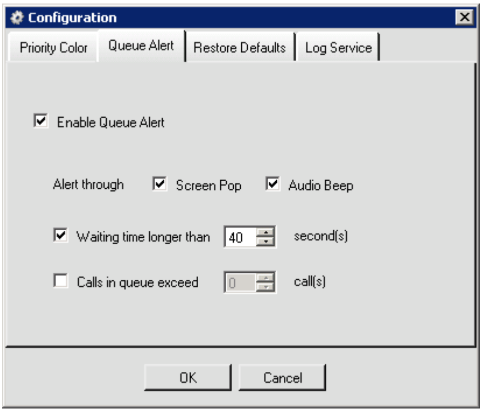
To assign a color to each call priority

Choose a color from the drop-down list beside each call priority you want to color-code, and click **OK**. The configuration is stored locally.

To set up queue alerts

To set up queue alerts,

1. Click the **Queue Alert** tab in the Configuration dialog box:



2. Check **Enable Queue Alert** to enable the alert.
3. Choose to be alerted through a screen pop and/or an audio beep.

4. Choose to be alerted when the queue time exceeds the number of seconds you specify and/or the number of calls exceeds the number you specify.
5. Click **OK**.

When a specified condition is met, a screen pop displays messages like the following:

- "*Date Time*: Number of queued call(s) in Workgroup *xxx* exceeds *y* call(s)"
- "*Date Time*: Waiting time in Workgroup *xxx* longer than *x* seconds(s)."

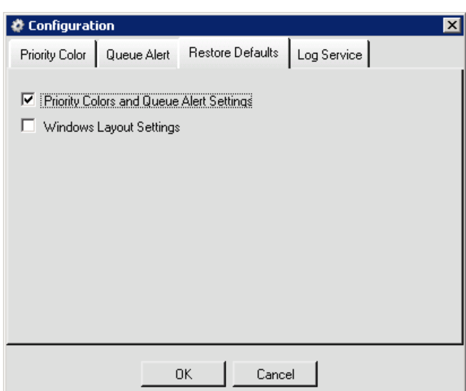
Click **OK** to dismiss the pop up. If you leave the pop up displayed, it will be updated when the specified threshold is crossed again.

You don't have to be part of a workgroup to use the Queue Alert feature.

To restore alerts to the default settings

To restore alerts to the default settings,

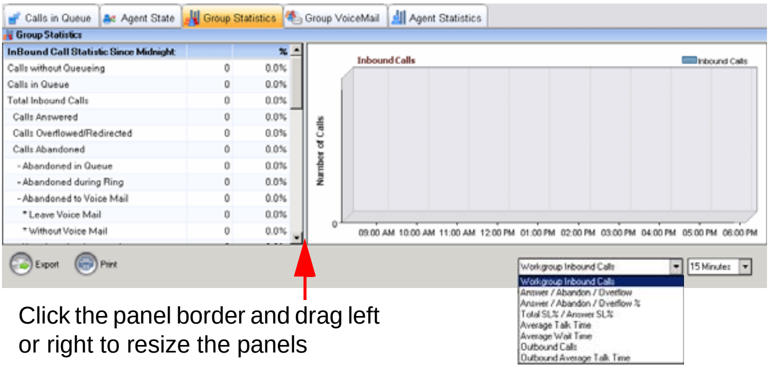
1. Click the **Configuration** button  to open the Configuration dialog box, then click the **Restore Defaults** tab.



2. Check the **Priority Colors and Queue Alert Settings** check box.
3. Click **OK**.
4. Restart MaxSupervisor.

Viewing Group Statistics

The **Group Statistics** tab displays (in both tabular and graph formats) real time workgroup activity and performance since midnight, and a summary of agent data. The statistics displayed are for workgroup calls only.



You can select the data you want to see graphed from the drop-down list below the graph. You can select a time interval for the graph also: 15 minutes, 30 minutes, 1 hour.

Workgroup statistics are reset every night at midnight.

Most of the statistics are self-explanatory. The following table details each one:

Inbound Call Statistics Since Midnight	
Calls without Queuing	Total of calls with queue duration of zero.
Calls in Queue	Total number of calls in queue.
Total Inbound Calls	Total calls that arrived.
Calls Answered	Total inbound calls that were answered.
Calls Overflowed/ Redirected	Count of calls that overflowed from the WG queue or were redirected to other destinations.
Calls Abandoned	Total of all types of abandoned calls in the following subcategories.
- Abandoned in Queue	Count of callers who hung up while in queue listening to music or queue greeting.
- Abandoned during Ring	Count of caller hang ups while ringing a WG agent.
- Abandoned to Voice Mail	Total of all calls abandoned to VM.
*Leave Voice Mail	Count of calls abandoned to voice mail by caller pressing a digit or by the system automatically redirecting caller to voice mail where caller leaves a message.
*Without Voice Mail	Count of calls abandoned to voice mail by caller pressing a digit or by system automatically redirecting caller to voice mail and where the caller did not leave a message.
- Abandoned to App or Others	Total calls redirected to a target (including to an application) other than voice mail, when caller in queue presses a digit.
Service Level	
SLT - Service Level Threshold (seconds)	WG calls taken out of queue are either taken before or after this administrator set time. It is used as a measure for other statistics.
Calls Answered within SLT	Total calls answered with queue duration less than or equal to the Service Level Threshold configured in Workgroup Configuration window of MAXCS.
Service Level %	Percentage of calls in queue answered before SLT time is reached.
All Calls with Wait Time less than SLT	Number of calls with queue duration with wait time less than SLT, whether answered, abandoned, or otherwise terminated.

Wait Time and Talk Time	
Average Wait Time for Answered Calls	Total Wait Time for Answered Calls divided by Total Calls Answered.
Average Wait Time for Abandoned Calls	Total Wait Time (Queue Duration + Ring Duration) for Abandoned Calls divided by Total Calls Abandoned.
Average Talk Time	Total In Talk Time divided by Total Inbound Calls Answered.
Maximum Calls in Queue	Peak number of calls that were in the queue.
Longest Queue Time	Longest time any one call was in the queue.
Outbound Call Statistics Since Midnight	
Total Connected Outbound Calls	Total of outgoing calls successfully connected.
Avg Talk Time	Total Outbound Talk Time divided by Total Connected Outbound Calls.

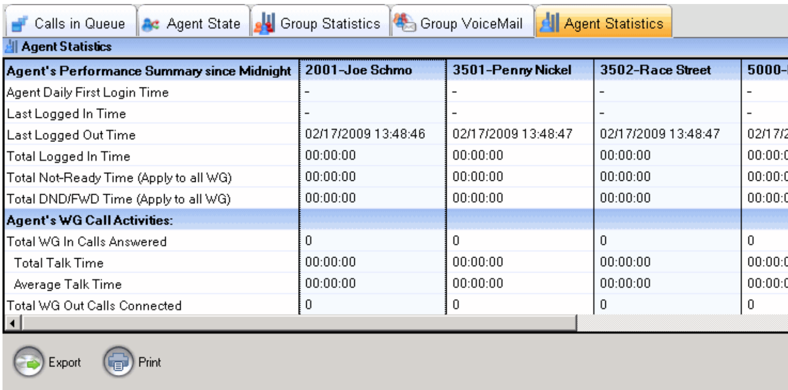
In Talk Time is defined as: Sum of talk duration of incoming answered workgroup calls. Talk duration lasts from the time an agent answers the call until the time the call is disconnected, parked or transferred. (Hold time is not included in talk time.)

Outbound Talk Time is defined as: Sum of talk duration of connected outbound workgroup calls. Talk duration lasts from the time the call is connected until the time the call is disconnected, parked or transferred. (Hold time is not included in talk time.)

Viewing Agent Statistics

The **Agent Statistics** tab displays performance statistics for the individual agents of the workgroup selected in the **Workgroup View** tab, including the number of calls answered, the average talk time (average amount of time spent on the phone per call), and the average time spent in wrap up.

The table also displays the login and logout times.



Saving and Printing Statistics

To save agent or group statistics to a CSV (comma-separated values) file, click the **Export** button Export at the bottom of the tab and then specify a directory and file name. To print the data, click the **Print** button Print. If you are printing group statistics, the tabular data and the graph both print out.

Important: Workgroup statistics are reset every night at midnight. If you do not export or print records before the reset, you cannot recover the data.

Viewing Agent State

Click the **Agent State** tab to view the current state of the agents for the selected workgroup and to have access to the **Listen**, **Barge In** and **Coach** buttons.

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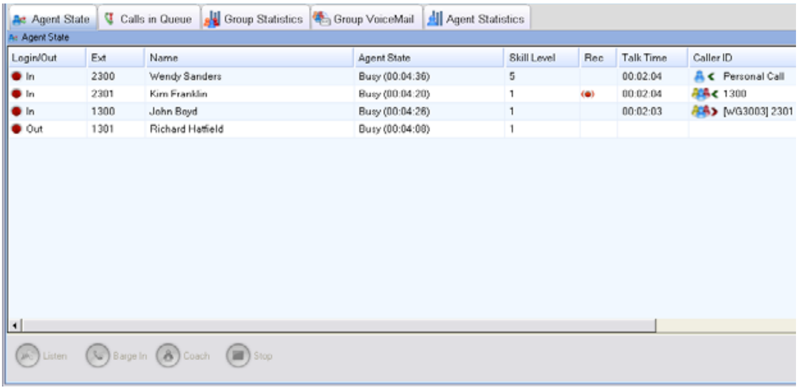


This tab shows if the agent is logged in or out and whether the agent is available for a call (a green dot means available, a red dot means not available). It displays the agent's extension and name, the agent's state (such as *busy*, *available*, *wrap-up*), and the skill level assigned to the agent.

If the agent is connected to a call, then the following is displayed: a red circle icon in the **Rec** column if the call is being recorded, talk time, the ID of the person at the other end of the call, and the name of that person (if available).

The **Caller ID** column also shows whether the call is incoming or outgoing, a workgroup or non-workgroup call.

- An icon showing three people in the **Caller ID** column is a workgroup call. An icon showing one person is a non-workgroup call.
- A left-pointing green arrow in the **Caller ID** column indicates an incoming call, and a right-pointing red arrow indicates an outgoing call.

Additional columns show how long the agent has been logged in or out and, if logged out, the reason for logging out. Your company's logout reason codes are configured by your system administrator. In addition, the following codes are system codes:

- [00] – Appears in the **Logout Reason** column in one of two situations: either agents in this workgroup are not required to provide a logout reason, or “00” is used to indicate a logout reason of “other.”
- [96] – The agent’s IP extension was logged out by the system due to a network error.
- [97] – The agent’s physical or IP extension changed to a virtual extension, and the system logged out the extension from the workgroup.
- [98] – The supervisor logged out the agent.
- [99] – The system logged out the agent from the workgroup based on the system configuration for “Agent ring no answer.”

Listening in, Barging In, Coaching

You can listen to (silently monitor) an agent’s calls and, if necessary, intervene and enter the conversation in progress, sometimes called barging into the call. Essentially, barging in is to create a conference call with the agent, the caller, and yourself. You can also choose to coach the agent – tell the agent what to say without the caller hearing you.

Note: These features require the appropriate extension permissions. They also require that a Triton Resource Board be installed in the MAXCS ACC/ACM system. If you try to make use of these features when there is no board present, you’ll get a fast busy signal.

You can monitor an agent’s incoming/outgoing calls for the workgroup that belongs to you, regardless of the agent’s login/logout status.

You can monitor, barge-in on, and coach an agent's non-workgroup call through MaxSupervisor or from the phone interface (using **#59**).

You cannot listen, barge in on, or coach parked calls, calls on hold, or calls in conference.

WARNING: Listening in to or recording a conversation without the consent of one or both parties may be a violation of local, state and federal privacy laws. It is the responsibility of the users of this feature to assure they are in compliance with all applicable laws.

Listening In

When you listen in to a call, you cannot be heard.

To listen in to a call

1. On the **Agent State** tab, click to select an agent connected to an incoming workgroup call.
2. Click the **Listen** button 

to ring your extension, then listen in by phone or headset.

   Alternatively, using the handset, press **# 59** + **<agent extension> + <workgroup password> + 1**.
3. When you are finished monitoring, click the **Stop** button at the bottom of the tab.

   The **Stop** button becomes available on the tab after you click **Listen**.

Barging In

You can barge into a workgroup agent call and enter the conversation in progress.

To barge in to a call

1. On the **Agent State** tab, click to select an agent connected to an incoming workgroup call.
2. Click the **Barge In** button 

to ring your extension, then speak to the agent and caller through the handset.

   Alternatively, using the handset, press **# 59** + **<agent extension> + <workgroup password> + 2.**
3. To exit the call, click the **Stop** button at the bottom of the tab.

   The **Stop** button becomes available on the tab after you click **Barge In**.

Coaching

You can coach a workgroup agent, telling the agent what to say, without the caller hearing you.

To coach an agent

1. On the **Agent State** tab, click to select an agent connected to an incoming workgroup call.
2. Click the **Coach** button 

to ring your extension, then speak to the agent through the handset. The agent hears a tone, alerting the agent that coaching has been initiated.

   Alternatively, using the handset, press **# 59** + **<agent extension>** + **<workgroup password> + 3.**
3. To exit the call, click the **Stop** button at the bottom of the tab.

   The **Stop** button becomes available on the tab after you click **Coach**.

Recording Calls

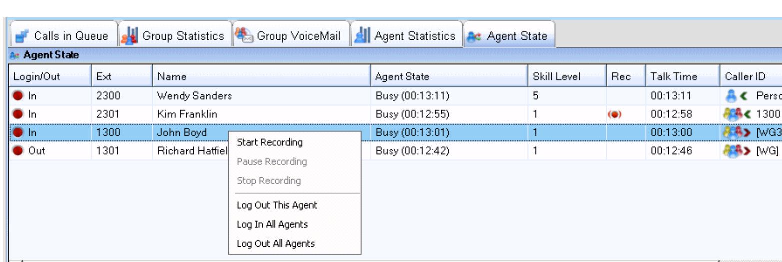
A supervisor can record conversations between a workgroup agent and a customer. Recorded conversations can then be played back through voice mail or accessed at a centralized location, depending on how your system is set up.

Note: The system administrator must have enabled the **Non-Workgroup Call** recording option for your extension.

WARNING: Listening in to or recording a conversation without the consent of one or both parties may be a violation of local, state and federal privacy laws. It is the responsibility of the users of this feature to assure they are in compliance with all applicable laws.

To record a call

1. On the **Agent State** tab, right-click on the agent call to open a context menu.



2. Choose **Start Recording**. If the **Insert Recording Tone** option is set, both parties will hear a beep when the recording begins.

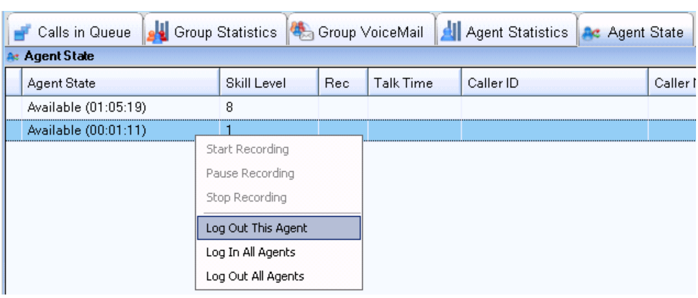
   Note: After a supervisor clicks on the **Start Recording** command to record an agent's conversation, a recording icon is displayed in the **Record** column. The display remains until the call is finished or when the supervisor stops recording the call.

3. To pause recording, right-click on the conversation and choose **Pause Recording**.

4. To end recording, right-click on the conversation and choose **Stop Recording**. If your system records to a centralized location, contact your administrator for access. If the system is set to save the recording to your voice mail, you can listen to the recording through the AltiGen Voice Mail System.

Forced Agent Login/Logout

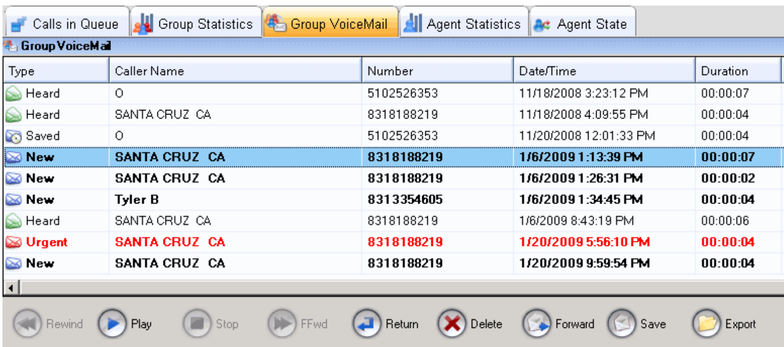
The supervisor can log in or log out one or all agents from a workgroup from the **Agent State** tab in MaxSupervisor.



- To log an agent out of a workgroup, right-click on a workgroup row and choose **Log Out This Agent**.
- To log out all agents, right-click on a workgroup row and choose **Log Out All Agents**.
- To log all agents in to a workgroup, right-click on a workgroup row and choose **Log In All Agents**.

Viewing Group Voice Mail

To view and handle workgroup voice mails for a workgroup, select the workgroup and click the **Group VM** tab.



The **Type** column shows the state of a message:

- **New**—Not heard yet and not marked urgent.
- **Urgent**—Not heard yet and marked urgent. The row appears in red type. After the voice mail is listened to, the row appears in black type, and the type column displays **Heard**.
- **Heard**—Listened to.
- **Saved**—Saved as a .wav file to a preconfigured location.

The caller’s name is shown, if available, and the caller’s phone number, the date and time the message was left, and the length (duration) of the message.

The **Progress** column shows your progress through the message when you listen to it. (The progress column does not reflect fast forwarding or rewinding.)

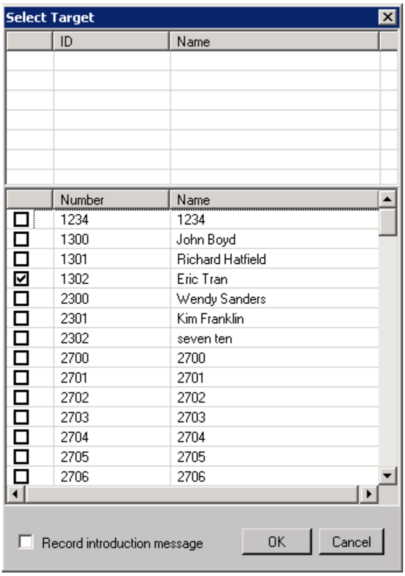
The **Note** column gives you a place to type a note about the voice mail. Just click in the column and type your note.

Dealing with Voice Mail

Select the message and use the voice mail command buttons at the bottom of the **GroupVM** tab.

- To listen to the voice mail, click the **Play** button. To stop it, click the **Stop** button. To rewind it, click the **Rewind** button. To fast forward, click the **FFwd** button.
- To call the caller back, click the **Return** button.
- To delete a selected message, click the **Delete** button. You are asked for confirmation.
- **Save**—To save a selected message as a .wav file on a remote server in a location designated by the system administrator, click the **Save** button. No file saving dialog box opens, but the message is saved in the specified location.
- **Export**—To save a selected message as a .wav file in a directory that you specify and with a name that you specify, click the **Export** button. A file saving dialog box opens. Choose a directory, name the .wav file, and click **OK**.
- **Forward**— To forward a voice mail to an extension or a VM Group

1. Select the voice mail and click the **Forward** button. The Select Target dialog box opens:



Voice mail groups are listed here

Extensions are listed here

2. Check the check box next to the group(s) and/or extension(s) to which you want to forward the message.

3. Optionally, you can leave an introductory message. Select the **Record Introductory Message** check box and follow the steps below.
4. Click **OK** to complete the forwarding.

To record an introductory message:

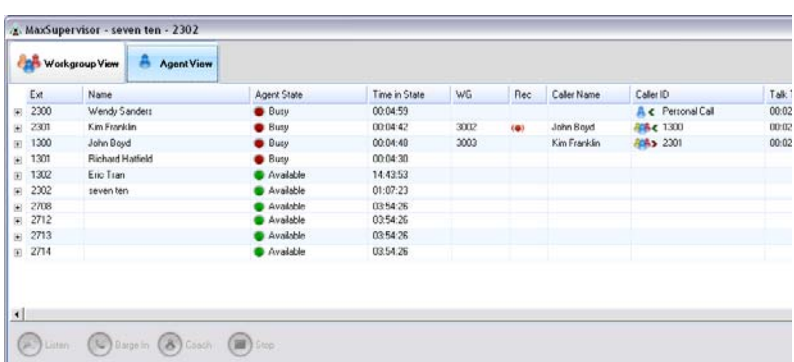
1. If you select the **Record Introductory Message** check box, then when you click **OK** to complete the forward, pick up the phone hand set and you’ll hear a prompt to record the message.
2. Record the message and press the pound key (#). A confirmation appears on screen.
3. Click **OK** to confirm and complete the action.

To attach a note:

To add a note to accompany a voice mail, click in the **Note** field and type your note.

Agent View

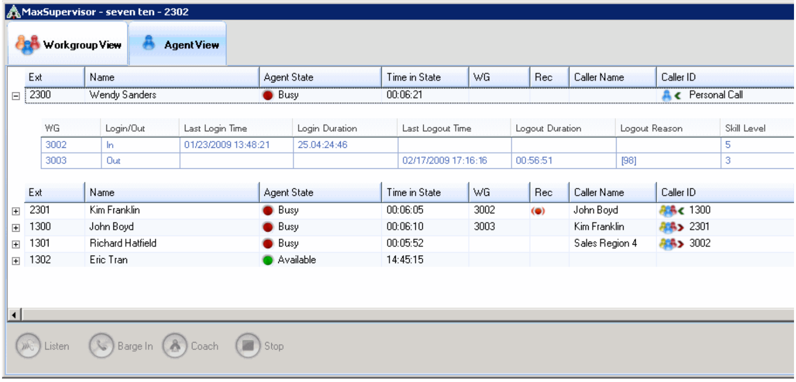
The **Agent View** tab shows all agents that belong to at least one of the workgroups you’re monitoring. If the agent is on more than one call, only the active call's information is shown.



You can click a call and use the **Listen**, **Barge In**, and **Coach** buttons at the bottom of the **Agent View** tab. You can right-click a call to access the Recording pop-up menu. When a call is being recorded, a recording icon  appears in the **Rec** column.

The **Agent View** tab displays an agent's extension; name; readiness state (green=idle, red=busy, orange=wrap-up, grey=unstaffed, red x=error); the duration of time in that state; the workgroup an agent is on a call for, if any; caller name if available; caller ID; talk time; DNIS; IVR data (if the user navigated through the interactive voice response system, or auto-attendant, menu resulting in either collected digits and/or data mapped by the IVR using the collected digits); and user data (notes that an agent attached to the call).

Click the plus sign on an agent row to see the agent's workgroups and the agent's login/logout information for each workgroup, plus the agent's assigned skill level. In the figure below, the row for agent Wendy Sanders has been expanded. You can see that see is logged into workgroup 3002 and is logged out of workgroup 3003. You can see when she logged out of workgroup 3003, how long she has been logged out, and the reason for logging out.

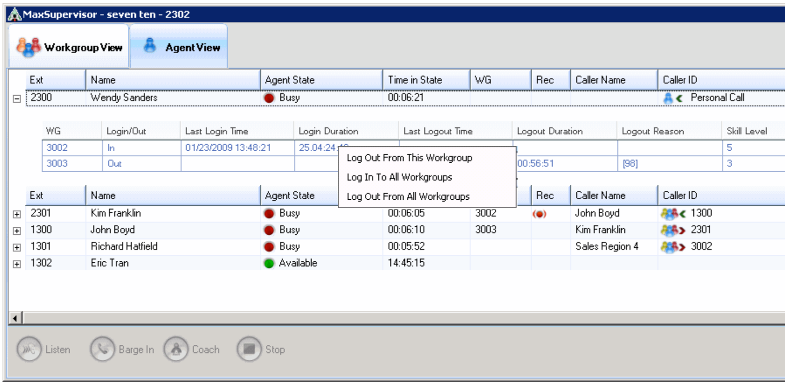


If an agent belongs to a workgroup that you're not monitoring in the current session, that workgroup is not shown here.

You can expand the information for multiple agents.

Within the expanded login/logout display you can right-click a row to log the agent in to or out of that one workgroup or all the agent's workgroups. See the next figure.

Using MaxSupervisor


MaxSupervisor - seven ten - 2302
Workgroup View
Agent View
Ext
Name
Agent State
Time in State
WG
Rec
Caller Name
Caller ID
2300
Wendy Sanders
Busy
00:06:21
Personal Call
WG
Login/Out
Last Login Time
Login Duration
Last Logout Time
Logout Duration
Logout Reason
Skill Level
3002
In
01/23/2009 13:48:21
5
3003
Out
00:56:51
[98]
3
Log Out From This Workgroup
Log In To All Workgroups
Log Out From All Workgroups
2301
Kim Franklin
Busy
00:06:05
3002
John Boyd
1300
1300
John Boyd
Busy
00:06:10
3003
Kim Franklin
2301
1301
Richard Hatfield
Busy
00:05:52
Sales Region 4
3002
1302
Eric Tran
Available
14:45:15
Listen
Barge In
Coach
Stop

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