

POPP Hosted Microsoft VoIP Phone System

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1 Introduction

Before you begin

You must be able to access the Administrator Portal interface: https://portal.popp.com/bg

The Administrator Portal is supported on the latest versions of all major browsers and operating systems, including IE8, Firefox, Google Chrome and Safari. Your computer should be running either Windows 2000 or later, or Mac OS X 10.6 (Snow Leopard) or later.

Note:

- Hosted Call Center (HCC) is also known as "ACD" (Automatic Call Distribution)
- Multi Line Hunt Groups (MLHGs) are also referred to as "Queues"
- MLHG members are also referred to as "Agents"

Hosted Call Center for Administrators

Hosted Call Center (HCC) allows Administrators to see detailed statistical information on the activity of the Multi Line Hunt Group(s) in their Business Group or Department using the Administrator Portal. If an Administrator manages any MLHGs which are using the Premium HCC service level, it can also be used to access a number of advanced supervisory features for monitoring MLHG members, including the ability to listen in on or participate in calls.

How Hosted Call Center works

Hosted Call Center uses the Multi Line Hunt Group (MLHG) feature within a Business Group to provide detailed information about MLHG activity through the Administrator Portal, both for Administrators and the MLHG members.

This information is particularly useful if you are operating a small call center and want to monitor the performance of your call center staff.

MLHGs

Your Business Group will include one or more MLHGs. You can view the configuration of these MLHGs using the Administrator Portal. On this page, you can view, edit, move and remove MLHGs, add and remove member lines, and access the configuration options for the member lines.

Hosted Call Center

Once calls are coming in to the MLHG, you can use the Administrator Portal to launch a Supervisor Dashboard with range of pages that provide real-time and historical statistics on how each of your MLHGs is performing.

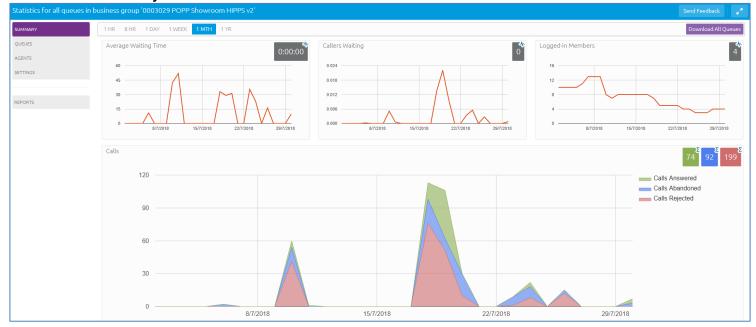
Note:

In the Hosted Call Center interface, the term 'Queue' refers to the MLHG(s) acting as a Call Center and 'Agent' to its members.



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Administrator Summary Screen:



On this screen you can see summary information about all the MLHGs together (if you have more than one in your Business Group):

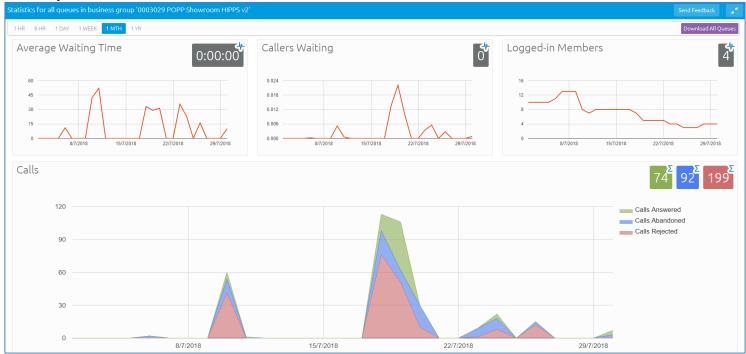
- The graphs show historical data for the time period selected. The white numbers in the gray or colored boxes on the top right of each graph are either the cumulative total of a graph or a snapshot at the current time, as indicated by an icon and tooltip at the top right of each box.
- You can hover over the data lines on the graphs to see tooltips giving information for a specific time within the time period of the graph
- You can click on a time period at the top of the screen to show historical data for a different time period, for example 1 Day or 1 Week
- You can download a .csv file that has more detailed statistics of all your queues for a selected time period

There are separate screens that display more detailed information on the activity of queues and agents, for example allowing you to view statistics for an individual agent. This information can be displayed in two different views: the detailed graphical view shown above or a Wallboard view illustrated below that removes the navigation, enlarges the graphs and shows data for the time period that is currently selected. You can also use the options at the top of the screen to change the time period being displayed.



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Summary Wallboard:



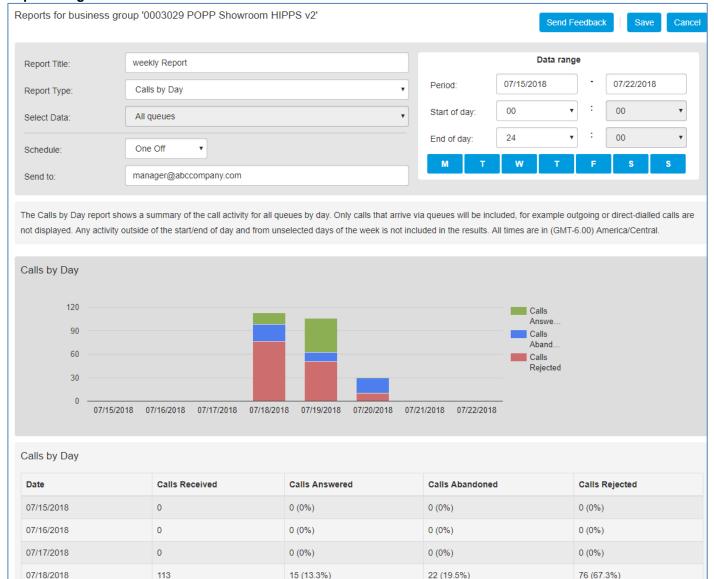
You can also launch the Reports page that allows you to:

- Instantaneously create detailed reports on different areas of your Call Center's past performance during a specific time period
- Schedule one-off or recurring reports to be generated in the future and sent as a PDF file to one or more e-mail addresses



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Reports Page:



Premium Hosted Call Center

Premium HCC is a service level that offers a number of additional supervisory features to aid you in the day to day management of your Business Group, including the ability to listen in on or participate in your Agents' calls.

If you are managing one or more MLHGs that are using the Premium HCC service level, you will be able to use and manage these features using the Settings option in the HCC interface.

You will also see a number of additional statistics which provide further information on the activity of queues and agents.



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2 Administer MLHGs

Administrators can use the Administrator Portal to make changes to the configuration of the MLHGs within their Business Group or Department, including adding and removing MLHG lines and amending the configuration options on those lines.

Before you begin

You must be able to access the Administrator Portal: https://portal.popp.com/bg

About this task

This task describes some of the typical actions you may need to carry out to administer your Multi Line Hunt Groups and MLHG members.

These include:

- Finding MLHGs in the Administrator Portal
- Moving MLHGs between departments in a Business Group
- Viewing and modifying an MLHG, including configuring the settings on any MLHG Pilot Numbers and enabling or disabling call recording for a line
- · Adding lines to an MLHG
- · Removing lines from an MLHG
- · Changing positions of lines within the MLHG
- Setting up Unavailable Call Forwarding on an MLHG Pilot Number
- · Renaming an MLHG

You must ensure that you adhere to the following capacity guidelines when administering MLHGs:

- You can configure up to 10 MLHGs for use with HCC in a single Business Group
- Each MLHG configured for use with HCC can have up to 64 MLHG members (32 if ring-all)
- Each MLHG member can be a member of up to 10 MLHGs that are configured for use with HCC
- Each Business Group can have a maximum of 100 HCC Agents and 2 Supervisors
- Each Agent can belong to up to 20 Queues
- You will have a limited number of HCC licenses available for either the Basic HCC or Premium HCC service. You will
 not be able to configure additional MLHG lines that use the HCC service if you do not have enough licenses. The
 Administrator Portal displays how many Premium and Basic HCC licenses are currently in use in this MLHG.
- You will see an error message if you attempt to make a change to your MLHG configuration but do not have enough licenses available for that change

2.1 Find MLHGs

This task describes how to find your MLHGs in Administrator Portal

Detailed procedure

- 1. Log in to the Administrator Portal.
- 2. Click on Hunt Groups (MLHGs) in the navigation panel on the left-hand side of this page.
- 3. You will now see the MLHG page.
- **4.** If your MLHG is in a sub-department of the Business Group and is not currently being displayed, use the drop-down list at the top of the page to select the Department.
- 5. You will now see all the MLHGs in this Business Group or Department.
- **6.** For each MLHG, you will see the following information:
 - The number of lines in the MLHG
 - The Service Level currently in use. This will be one of Premium ACD or Basic ACD (if Hosted Call Center is enabled) or MLHG (if the line is not subscribed to the Hosted Call Center service).



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2.2 Move MLHGs

This task describes how to move an MLHG between departments within your Business Group.

Detailed procedure

- 1. Check the box to the left of the MLHG that you want to move.
- 2. Use the drop-down at the top of the screen to select the department that you want to move the MLHG to.
- 3. Click Move.

Result: The MLHG will now be moved to the new department.

Viewing and modifying MLHGs

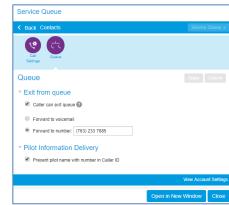
This task describes how to view the details of an MLHG and modify its settings, including carrying out additional configuration on any MLHG Pilot Numbers.

Detailed procedure

- 1. Click on the name of the MLHG.
- 2. Hunt Group Pilots tab:
 - a. A pilot number is a phone number that routes callers into the MLHG. This screen displays each pilot Telephone Number, Extension and Name. The pilot number Name is useful if you have Agents who are members of several Queues as this enables them to see at a glance which MLHG is forwarding a call without having to remember the DN (when "Present pilot name with number in Caller ID" and "Pilot's information delivered as Caller ID" options are configured see Queue and Hunt Setting sections below). If you require additional Pilot Numbers, you should contact POPP.



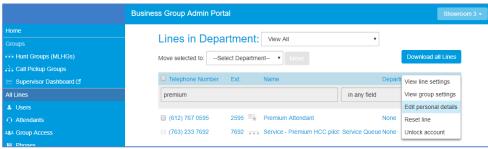
- **b.** To view and/or modify the configuration of a Pilot Number, click on the Pilot Number. You will now see the User Portal page for this MLHG Pilot and can make configuration changes as for an individual line. Click on **Queue** to:
 - i. Choose whether to enable the Caller can exit queue feature, where a caller can press 0 to leave a queue if their call is not being answered and have their call redirected to voicemail or forwarded to a defined phone number. Check the box to enable this feature. Click Apply to save.
 - ii. Choose whether or not to present the name(s) of the MLHG Pilot Number(s) when the Pilot Line is distributing calls to MLHG members. You must have already configured a name for the MLHG Pilot Number. Check the Present pilot name with number in Caller ID checkbox to enable this feature. Click Apply to save.



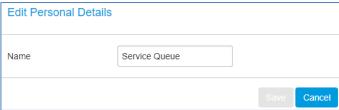


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- **c.** To add/modify the pilot number Name:
 - i. Click All Lines on the left side of the screen
 - ii. Click on the Actions drop-down to the right of the pilot number and select Edit personal details



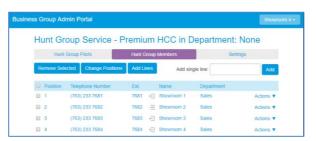
iii. Name: Enter the pilot number name and click **Save**

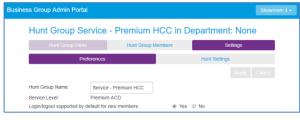


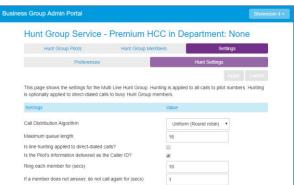
- Hunt Group Members tab: View and modify the lines configured in the MLHG. See details of all the lines which are members of this MLHG, including whether each member is currently logged in.
- **4. Settings tab:** View and modify the settings for the MLHG. From this screen you can view/modify:
 - a. Preferences:
 - i. Hunt Group Name
 - ii. Login/logout is supported by default for new members (Yes/No)

b. Hunt Settings:

- i. View the call distribution algorithm that is currently in use for this MLHG and other detailed MLHG settings. If you want to change any of these settings, you should contact POPP.
- ii. "Is the Pilot's information delivered as the Caller ID": check this box to deliver the pilot number as the Caller ID number on incoming calls to the MLHG. This is helpful for Agents who are members of several Queues as this enables them to see at a glance which MLHG is forwarding a call.









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Add Lines

Add single line:

Add

2.3 Add New MLHG Member/Line

This task describes how to add a new MLHG member line to an MLHG. Note that there should be no more than 64 MLHG member lines in each MLHG.

These steps assume that you have already accessed the **Hunt Group Members** tab as described in the previous section. There are two different ways to add a line:

- If you know the telephone number, you can enter it directly.
- If you do not know the telephone number of the line, or want to add a number of lines, you can select them from a list of available lines.

Detailed procedure

1. To add a single line for which you know the telephone number, type the number in the **Add single**

line field at the foot of the **Hunt Group Members** screen.

- 2. Click Add.
- 3. To pick one or more lines from a list of available lines, click the **Add Lines** button at the top of the **Hunt Group Members** screen.
- 4. A new screen appears showing all the available lines.
- 5. Check the box to the left of the line(s) that you want to add.
- 6. Click Add Selected.

Result: You have now added one or more new MLHG members to this MLHG.

2.4 Remove MLHG Member/Line

This task describes how to remove an MLHG member line from an MLHG. This will not delete the line from the Business Group or Department: it will just no longer be a member of the MLHG. These steps assume that you have already accessed the **Hunt Group Members** tab.

Detailed procedure

- 1. On the Hunt Group Members tab, check the box alongside the line(s) you want to remove from the MLHG.
- 2. Click the Remove Selected button at the top of the Hunt Group Members screen.

Result: The lines that you selected will now be removed from the MLHG.

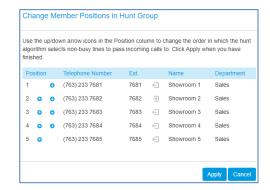
2.5 Change Position of MLHG Member/Line

This task describes how to change the position of an MLHG member line in an MLHG. When a call is received in the MLHG, it may be routed to MLHG members in the order in which they are listed in the MLHG.

These steps assume that you have already accessed the **Hunt Group Members** tab.

Detailed procedure

- **1.** On the **Hunt Group Members** tab, click the **Change Positions** button at the top of the screen.
- **2.** You will now see a new screen that lists all the lines and their current positions.
- **3.** Use the up and down arrow icons to move the lines to their new positions.
- **4.** Once all the lines are in the correct positions, click **Apply** to save your new configuration.





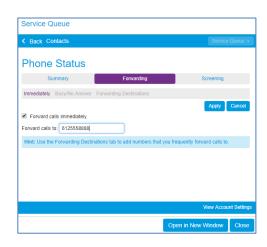
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2.6 Unavailable Call Forward Settings on MLHG Pilot

If you have one or more MLHG Pilots configured in your MLHG, you may be able to configure Unavailable Call Forwarding on the MLHG Pilot number so that callers can still reach your business even if all the lines in the MLHG are unavailable (e.g., in the event of a power outage).

Detailed procedure

- 1. Open the **Hunt Group Pilots** tab for this MLHG.
- **2.** Click on the Hunt Group Pilot Telephone Number that you want to configure.
- 4. Click Go to Call Manager.
- **5.** Click the **Forwarding** tab and make your changes. For example, you might want to enable or disable the Unavailable Call Forwarding service or configure the forwarding number that would be used if all your lines were unavailable.
- 6. Click Apply to save your changes.



2.7 Rename MLHG

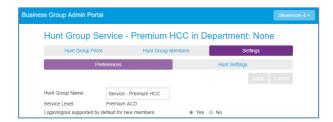
This task describes how to rename an MLHG.

Detailed procedure

- **1.** Select the MLHG that you want to rename from the list of MLHGs on the main MLHG page in the Administrator Portal.
- 2. Click on the Settings tab.
- 3. Click on the Preferences tab.
- **4.** Type the new name in the text box.
- 5. Click Apply to save your new name.

Results

You should now be able to make any required changes to your MLHG(s).





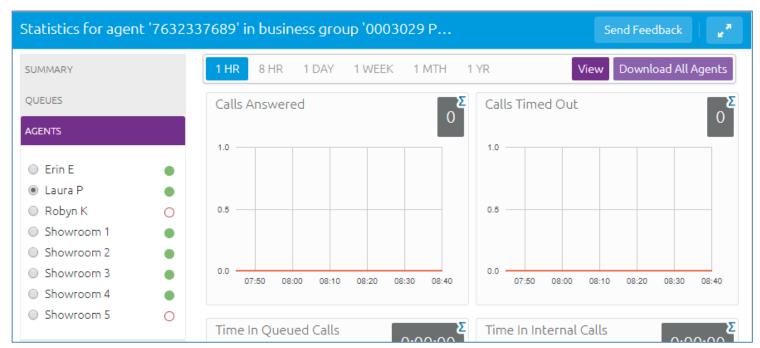
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2.8 View Agent Status

The Agent Status page is used by MLHG members to view information on the current activity of the Queues (MLHGs) that they belong to and, if they are a member of a Premium HCC Queue, manage their Agent State. You can access the Agent Status page of a particular Agent if necessary. For example, you may need to mark an Agent as unavailable if they are not currently available to take calls but have failed to update their Agent State.

To access the Agent Status page for a particular Agent using the Agents screen of the Supervisor Dashboard:

- From the Administrator Portal home screen, click on Supervisor Dashboard
- Click **AGENTS** on the left side of the screen
- On the Agents panel on the left-hand side of the screen, select the radio button that corresponds to your chosen Agent
- Click the View button located in the top right-hand corner of the screen



View button

The Agent Status page for your chosen Agent will then open.

Note: Note that Administrators cannot view incoming call details for an Agent.



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3 Premium HCC Features

Premium HCC provides several additional features that aid Administrators in day to day management of their Business Group, including the ability to listen in on or participate in their Agents' calls.

The following sections provide information on each of the additional features that are available to Administrators who are managing a Business Group using the Premium HCC service level.

Note:

If you have one MLHG nested inside another MLHG, the Pilot number of the nested MLHG will also be a member of the other MLHG. If a call coming in to the 'main' MLHG is hunted to the Pilot Number of the nested MLHG, it will use the service level of the nested MLHG. So, if your main MLHG has the Premium HCC service level but the nested MLHG only uses the Basic HCC service level, you will not be able to use Premium HCC features on this call.

3.1 Agent States

Premium HCC provides Administrators with the ability to configure a number of Agent States that your Agents can use to indicate their current availability. Alongside this, there are a number of Agent States that are set automatically, for example if an Agent is in a call. This allows Administrators to see how many of the Agents in the Queues that they manage are able to take calls and view detailed statistics for Agent availability.

Agent State Types

When Agent States are enabled in a Business Group with the Premium HCC service, Agents can explicitly set their Agent state using a drop-down on the Agent Status page and HCC Supervisors can view who is available to take calls. In addition, there are a number of Unavailable Agent States that are set automatically when the telephone system detects that an Agent is not available to answer a call.

The Current State drop-down on the Agent Status page enables the Agent to set their status to one of the following:

- Available Agents in the Available state can answer calls arriving from a Queue
- **Unavailable** Agents in an Unavailable state cannot answer calls arriving from a Queue. However, they are still able to answer direct-dial calls.

As Agents may be unavailable for a number of reasons, Premium HCC allows you to configure up to 30 unavailability reasons that Agents can choose from when moving to an Unavailable state. Each of these gives a different reason as to why an Agent is not currently able to take calls. For example, you can configure unavailability reasons that indicate an Agent is at lunch or in a meeting.

However, in certain circumstances, the Agent State will be set automatically to one of the following values, which are listed here in decreasing order of precedence.

- Wrap-up state If wrap-up is enabled in the Queue, the Agent is automatically moved into wrap-up state when they finish a call that arrived via a Queue.
- Logged Out This Agent State is displayed when an Agent is logged out of all the Queues of which they are a member but is not in wrap-up or a custom unavailable state.
- Line Not Ready This Agent State is displayed when an Agent is logged in to a Queue but their telephone line is not ready to receive calls (for example, it is an unregistered SIP line), and the Agent is not in wrap-up or a custom unavailable state.
- **DND** This Agent State is displayed when an Agent is logged in to a Queue but has turned on their MetaSphere CFS Do Not Disturb (DND) call service, and is not in wrap-up or a custom unavailable state.

You should note that an Agent would not be moved into the **DND** state if they use phone-side DND (if integrated DND is not enabled for the Agent) or turn on DND through Incoming Call Manager.

• In a call. This Agent State is displayed when an Agent is in a call but would otherwise be available.

This can be any type of incoming or outgoing call, and not just calls received through a Queue. The Agent will be moved into the In a call state as soon as their phone starts ringing. However, if you are using the Monitor / Whisper / Barge-in (MWB) feature of Premium HCC, the Agent only becomes eligible for MWB once the call is connected. The icons used on the Agent dashboard will distinguish between an Agent who is In a call because their phone is ringing and an Agent who is actively handling a call and therefore eligible for MWB.



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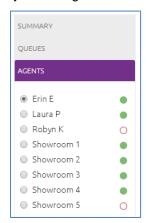
If an agent in state **Available** has enabled phone-side DND without integrated DND then MetaSphere CFS will continue to offer calls to them, which the phone will reject. Each time this happens, the agent will be shown as **In a Call** (note - not **DND**) for 30 seconds following the failed call attempt, during which time they will not be offered any further calls. At the end of the 30 seconds, their state will return to **Available** and the agent will become eligible to be offered new calls again.

Agents in these states cannot receive calls arriving from a Queue. While Agents cannot set these automatic Agent States using the drop-down on the Agent Status page, they will be able to see when they have been moved into one of these states and can then choose to select a custom unavailable state instead should they wish. An Agent will not be able to select the Available state if they are logged out, are in a call or have turned on DND. They will automatically move from one of these Agent states to the Available state when their status changes, for example they log back in to a Queue, turn off DND or hang up a call.

You can enable or disable Agent States for your Business Group using the Settings screen.

Viewing Agent States

The Agents page allows you to see a real-time indication of the state of each Agent in the Queues that you manage



Agents page

The icons to the right of the Agent's name are used to indicate each Agent's current state. The tooltip provides more information about the Agent's state, for example it will display the custom unavailability reason selected by an Agent who is unavailable for calls.

The following icons are used:

This icon indicates that this Agent is in an **Available** state and can receive calls.

This icon indicates that this Agent is in an Unavailable state and cannot currently take calls arriving from a Queue. However, they may still be able to answer incoming direct-dial calls. This icon will pulse if the Agent is currently in the wrap-up state.

The tooltip will display **In a Call** if the Agent's phone is currently ringing but they have not yet answered the call.

This icon indicates that this agent is in a connected call. This icon will pulse if the Agent is unavailable because they are in the wrap-up state.

The Agent may not be in a call that arrived via one of their Queues. For example, this icon will be used and the tooltip will show that this Agent is **Logged Out** if the Agent has logged out of all their Queues but is on a direct-dial call.

You can also see an Agent's current state in the top right hand corner of the **Agent State** statistic graph, as shown below. This graph displays the time spent in each of the Agent States, including the automatic unavailability states, for the specified time period.



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3.2 Wrap-up and Disposition Codes

Premium HCC allows Administrators to enable the wrap-up state and disposition codes for the Queues that they manage. The wrap-up state marks Agents as unavailable while they carry out any clerical work related to a completed call, while disposition codes are used by Agents to indicate how a call was resolved.

Wrap-up state

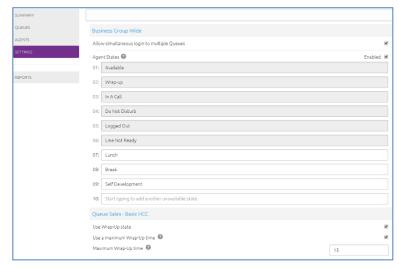
Wrap-up state is an Agent State that your Agents will enter immediately after completing a customer call. While in wrap-up state, Agents should carry out any work related to the completed call. If wrap-up has been enabled for a Queue, Agents are automatically put into wrap-up state after ending a call that has arrived through that Queue. Agents are unavailable for further calls from the Queue while in this state, allowing them time to resolve any issues coming out of the call. You can choose to allow Agents to exit wrap-up state manually or require them to choose a disposition code to indicate how the call was resolved.

You can configure a wrap-up timer so that Agents can only spend a limited amount of time in wrap-up state. The Agent will see the timer counting down on the Agent Status page. When the wrap-up time expires, the Agent will automatically exit wrap-up state. If you have configured your Call Center to use mandatory disposition codes, a "wrap-up timed out" disposition code will automatically be entered. The Agent's state will normally then be shown as Available and they will be able to receive calls, unless they have carried out another action that would automatically set their Agent state to Unavailable, for example, if they have logged out of the Queue, have set Do Not Disturb on their line, or are now in a call. You can enable wrap-up for a Queue and set the wrap-up timer using the **Settings** page.

Disposition Codes

Premium HCC allows you to configure up to 30 disposition codes that each correspond to a possible resolution to a customer call. Agents can assign one of these codes to each call that they complete, allowing you to easily see whether calls are being dealt with satisfactorily and identify any recurring problems.

You can choose to enable or disable the use of disposition codes for each Queue that you manage. Additionally, you can decide whether Agents must assign a disposition code to a completed call before being able to handle any more calls. You can enable or disable disposition codes for your Queues and configure new codes using the **Settings** page.



Settings page

Statistics

Premium HCC generates statistics to show the average time that Agents have been spending in the wrap-up state, giving you a clear indication of how much time is being taken carrying out clerical duties after a call has been completed. You can view the average wrap-up time for each Agent or for all Agents in a Queue.

Additionally, you can see how many calls are being assigned each disposition code, giving you useful information on how your Agents are dealing with calls and helping you identify patterns that may indicate an issue with your service. Again, you can view this statistic for an individual Agent or for all Agents in a Queue.



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3.3 Monitor / Whisper / Barge-In

Premium HCC allows Administrators to listen in on their Agents' calls undetected, talk to an Agent during a call without the customer hearing, or fully participate in an ongoing call and speak to all parties. This applies to all calls made or received by the agent's line, such as those made by the agent to call back a previous caller, and not only those received by a caller coming through the HCC queue.

A list of the Agents that are logged in to the Queues that you manage is shown on the left hand side of the Agents screen.

The phone icon Swill be displayed for any Agents that are currently in an active call and therefore eligible for Monitor / Whisper / Barge-In. The agent's current availability state is displayed in the tooltip.

If you select the radio button next to an Agent that is currently in an active call, three buttons will appear at the top of the screen, giving you the choice of three possible actions.

- Monitor listen in on the existing call between the selected Agent and the customer.
- Whisper speak to or advise the selected Agent during the call, without the customer hearing.
- Barge-In fully join the call, speaking to both the selected Agent and the customer.



Monitor Whisper View Barge-in

Agents

Once you click any of these buttons, your phone will ring and you will be connected to the Agent's call on answering.

You can only use the Monitor, Whisper and Barge-In actions to participate in an Agent's call if:

- Agent is a member of the Business Group and department that you manage or any of its sub-departments
- Agent is a member of at least one Premium HCC Queue

Note: It is possible to use Monitor, Whisper, Barge-in between Supervisors and Agents even on direct dialed inbound/outbound calls.

Using the Monitor, Whisper and Barge-In actions directly from your phone

It is possible to invoke the Monitor, Whisper or Barge-In actions directly from your phone, without the need to use the HCC interface. To do this, you must dial the access code of the action that you want to use, followed by the intercom code of the Agent whose call you want to participate in (or these can also be configured using programmable buttons on the phone).

Access codes:

Monitor - *381

Whisper - *382

Barge-in - *383

Usage example: If you would like to use the whisper function on the agent at extension 4502; when this agent is on a call, the Supervisor can pick up their phone and dial *3824502 in one long string of digits.



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4 Premium HCC Settings

The Premium HCC service level provides several advanced supervisory features for Business Groups and Queues, including Agent States and Disposition Codes. Administrators can manage settings for these additional features using the Settings screen.

Before you begin

You must be managing at least one Queue that is using the Premium HCC service level.

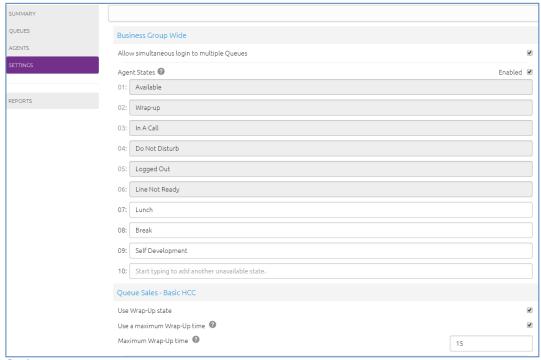
About this task

This task describes some of the typical actions you may need to carry out when managing the advanced features available in Business Groups and Queues using the Premium HCC service level.

- Enabling or disabling simultaneous login to multiple MLHGs that require explicit login
- Enabling the use of agent states for a business group
- Adding or removing custom unavailability agent states. Note that you should not remove any custom unavailability
 agent states which are currently being used by your agents.
- Enabling or disabling the use of the 'wrap-up' state and disposition codes for a specific Queue, including configuring a wrap-up timer if you want to limit the amount of time an Agent can spend in the Wrap-Up state.
- Mandating the use of disposition codes by agents in a specific Queue
- · Adding or removing disposition codes

Opening the Settings page

You can access the Settings page by clicking on the Settings box on the left of the Summary screen.



Settings screen



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4.1 Simultaneous Login to Multiple Queues

You can choose to allow Agents in this Business Group to be logged in to more than one Queue that requires explicit login. If this setting is disabled, Agents will be automatically logged out of a Queue that requires explicit login if they try to log in to another. Note that this setting does not affect Queues which do not require explicit login. Agents are always allowed to be logged in to more than one of these Queues simultaneously.

Detailed procedure

- 1. To enable or disable simultaneous login to multiple Queues, check or uncheck the box marked **Allow simultaneous login to multiple MLHGs** as appropriate.
- 2. Click the Save button in the top right-hand corner of the Settings page to confirm your changes.



4.2 Agent States

You can enable or disable the use of agent states for all Queues in this Business Group.

Detailed procedure

- 1. To enable or disable agent states, check or uncheck the box marked Agent States Enabled as appropriate.
- 2. Click the Save button in the top right-hand corner of the Settings page to confirm your changes.



4.3 Unavailability Reasons

You can add up to 30 additional unavailability states/reasons (up to 30 characters each) that can be used by Agents to indicate why they are currently unable to take calls arriving via any of their queues. You can also amend or remove any existing unavailability states. However, you should be aware of the following impacts of doing this.

- The statistics that are generated for agent states are tracked by the number that they hold in the list, rather than the name given to them. If you move an unavailability state to another position in the list, the historical statistics will stay associated with the number and will be assigned to any unavailability state that you put in its place. If possible, you should avoid changing the position of unavailability states in the list to prevent states becoming associated with the wrong historical statistics.
- You must be very careful not to remove any unavailability states which are currently being used by your Agents. If you
 do this, your Agents will be shown as Available because the Agent Dashboard cannot display the appropriate
 unavailable state. Additionally, the graph displaying the usage of the Agent States will have a set of Agent States with
 no associated name. You can see whether an unavailability state is in use by viewing the Agent State graph on the
 Supervisor Dashboard.

Note that Agent States must be enabled before you can add or remove any unavailability states.

Detailed procedure

- 1. To add a new unavailability state, type its name into the field labeled **Start typing to add another unavailable state** at the end of the list.
- **2.** To remove an unavailability state, delete the text and leave the field blank. As stated above, you must be confident that no Agents are using this unavailability reason.
- **3.** Once you have finished adding and removing unavailability reasons, click the **Save** button in the top right-hand corner of the Settings page.



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4.4 Wrap-up State

The wrap-up state is an Agent State that your Agents will enter immediately after completing a customer call. While in the wrap-up state, Agents should carry out any work related to the completed call.

Note that Agent States must be enabled before you can enable the Wrap-Up state for a Queue.

You should decide if you want to configure a wrap-up timer to limit the amount of time an Agent can spend in wrap-up state. Once this time limit expires, the Agent will automatically be moved into the Available Agent State, unless they have logged out of all their Queues, are set to Do not Disturb (DND), or are already in another call.

You should decide whether you want to configure any disposition codes for Agents to use to indicate how a call was resolved. If you want to configure disposition codes, you should also decide whether Agents must assign a disposition code to a call before they are able to leave the wrap-up state.

If you configure mandatory disposition codes and a wrap-up timer, a "Wrap-up timed out" disposition code will automatically be applied if the wrap-up timer expires before an Agent has assigned a disposition code.

Detailed procedure

- 1. To enable the use of the wrap-up state for a Queue, find your chosen Queue on the **Settings** page and check or uncheck the box marked **Use 'Wrap-Up' state** as appropriate.
- 2. If you have enabled the use of wrap-up state, you will see the following additional fields where you can set a



maximum time that an Agent can spend in the wrap-up state before they are automatically moved back to an Available state. To configure a maximum time:

- a. Check the **Use a maximum Wrap-Up time** checkbox.
- b. Enter the length of time, in seconds, in the input box.



- **3.** If you decided that you wanted to add disposition codes, type one of your chosen codes into the empty field underneath the **Disposition Codes** heading (up to 30 characters each). Once you begin typing in the empty field, another field will appear underneath. Enter your second chosen code into this new field, and so on until you have entered all of your chosen codes.
- **4.** If you decided that Agents must assign a disposition code to a call before leaving wrap-up state, ensure that the **Required** checkbox above the list of disposition codes is checked.
- 5. Click the Save button in the top right-hand corner of the Settings page to confirm your changes.





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4.5 Disposition Codes

You can add up to 30 additional disposition codes that can be used by Agents to indicate how a call was resolved. You can also remove any existing disposition codes.

Note that Agent States and the wrap-up state must be enabled before you can configure disposition codes. Note also that if you have configured a wrap-up timer, a Wrap-up timeout disposition code will automatically be created. This disposition code will be used when an Agent is automatically returned to the available state because the wrap-up timer expires before the Agent has entered a disposition code. This disposition code cannot be deleted.

Detailed procedure

- 1. To add a new disposition code, type its name into the empty field at the end of the list.
- 2. To remove a disposition code, delete the text and leave the field blank.
- 3. Click the Save button in the top right-hand corner of the Settings page to confirm your changes.

04:

Start typing to add another code.

Note:

The statistics that are generated for disposition codes are tracked by the number that they hold in the list, rather than the name given to them. If you move a code name to another position in the list, the historical statistics will stay associated with the number and will be assigned to any code name that you put in its place. If possible, you should avoid changing the position of disposition codes in the list to prevent codes becoming associated with the wrong historical statistics.

Results

You have made and confirmed any changes to the settings for Premium HCC features.



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5 HCC Statistics

How to access HCC statistics

You will use the MLHGs page within the Administrator Portal interface to access and download the various statistics generated by the HCC component.

This section describes how to access the HCC statistics from within the Administrator Portal MLHG page and provides a description of the various statistics available.

Before you begin

You must be able to access the Administrator Portal: https://portal.popp.com/bg

The Administrator Portal is supported on the latest versions of all major browsers and operating systems, including IE8, Firefox, Google Chrome and Safari. Your computer should be running either Windows 2000 or later, or Mac OS X 10.6 (Snow Leopard) or later.

Tip:

In the HCC interface, a Multi-Line Hunt Group is referred to as a Queue and the MLHG members as Agents.

Accessing the HCC statistics

The HCC statistics are accessed using the MLHGs page in the Administrator Portal.

- Log in to the Administrator Portal
- From the Home screen, click on Supervisor Dashboard
- This launches the HCC Summary screen in a new browser window, from where you can also access screens displaying statistics for your Queues and Agents

Using the HCC statistics screens

The Summary, Queues and Agents screens allow you to access and display a variety of information, including downloading the statistics for further analysis in your own database.

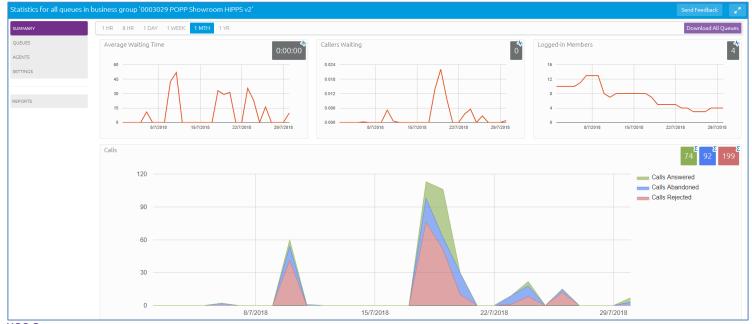
- Hover over the data lines on the graphs to see tool tips giving information for a specific time within the time period of the graph
- Click on a time period at the top of the screen to show historical data for a different time period, for example 1 Day or 1
 Week
- Click the **Download All Queues** button at the top right of the screen to download a .csv file that has more detailed statistics of all your queues for the selected time period. On the Agents page, this is a **Download All Agents** button that provides statistics for all the Agents.

Interpreting HCC statistics (below) describes in more detail how these statistics are calculated.

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5.1 HCC Summary

The HCC Summary screen displays a range of statistics for all the queues (MLHGs) in the Business Group or Department that you previously selected.



HCC Summary screen

The graphs show historical data for the time period selected. The numbers in the colored boxes on the top right of each graph are either the cumulative total of a graph or a snapshot at the current time, as indicated by an icon and tooltip at the top right of each box. You can use the bar at the top of the screen to change to a different time period.

Some of these statistics are displayed either as absolute numbers or as a rate per hour:

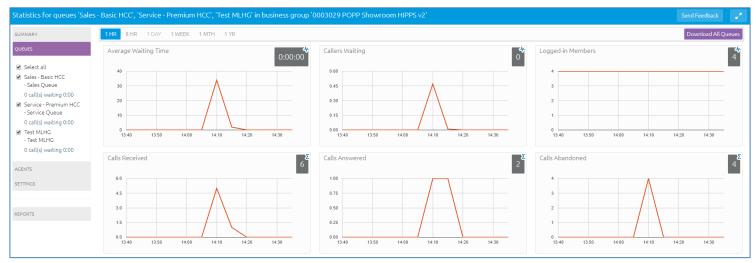
- Average waiting time for a call to be answered (the number in the box is the cumulative total for the time period selected)
- Number of callers waiting in the Queue(s) managed by this Administrator
- Number of Agents who are logged in
- Number of calls (showing values for received, answered, abandoned and rejected calls)

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5.2 Queue Statistics

On the Summary screen, you can change the browser window to one that shows detailed information on the Queues that you administer.

• Click on the Queues box on the left of the Summary screen



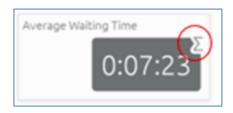
Queues statistics screen

The default view shows a range of statistics for all the Queues that you administer over an 8-hr period:

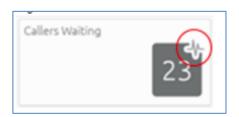
- Use the bar at the top of the screen to select a different time period
- Use the checkboxes on the left-hand side of the screen to display statistics for a single Queue or for a combination of Queues
- This panel shows the MLHG Pilot Number and the number of calls that are currently waiting, to help you identify the Queue that might be of the most interest to you, for example because there are a large number of callers waiting
- The numbers in the boxes are either current values or the cumulative total in the graphs for the time period selected

Each box has one of the following images, with a tool tip, in the top right corner of the box to indicate how the number has been calculated:

Cumulative total icon - This indicates that the number in the box is the cumulative total for the time period displayed in the graph.



Current value icon - This indicates that the number in the box is the current value for this statistic.





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The following statistics are displayed on the Queues screen. As indicated, some of these numbers will be displayed either as absolute numbers or as a rate per hour.

- Average Waiting Time (duration)

 This is the sum of queuing and alerting (when a call has been hunted to a particular agent and that agent's line is ringing) times

- Callers Waiting (calls)

- o This is the number of callers waiting in the queue. Calls arriving in the MLHG may be put in a queue if all the lines are busy and your MLHG is configured to hold callers in a queue. When an agent becomes available, the first call in the queue will be hunted to that agent and it will not be counted in this statistic even if the agent has not yet answered the call.
- o You will not see this statistic if your MLHG is configured to only accept a call when an agent is available

- Logged in Members (agents)

o The number of agents who are currently logged in

- Calls Received (number of calls or the rate of calls/hr.)

- o This is the rate at which incoming calls arrive
- The number in the box is the cumulative total for the time period selected

- Calls Answered

- The number in the box is the cumulative total for the time period selected
- For the historical statistics in the graphs, this is either the percentage or absolute number of received calls that were answered

- Calls Abandoned

- o These are received calls where the caller hung up before it was answered
- o The number in the box is the cumulative total for the time period selected
- For the historical statistics in the graphs, this is either the percentage or absolute number of received calls that were abandoned

- Calls Rejected

- o This is either calls that were rejected as busy (if you have disabled queuing) or the received calls that were rejected when the queue was full
- o The number in the box is the cumulative total for the time period selected
- For the historical statistics in the graphs, this is either the percentage or absolute number of received calls that were rejected

- Abandon Time (duration)

o The average time a caller waits in a queue before hanging up without their call being answered



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o The number in the box is the cumulative total for the time period selected

- Call Duration (duration)

- o The average duration of answered calls
- o The number in the box is the cumulative total for the time period selected

- Wrap-up Time (duration) - Premium HCC only

- o The average time spent by agents completing any work associated with a call after the call itself has ended
- o The number in the box is the cumulative total for the time period selected

- Pilot Calls Received (number of calls or calls/hr.)

- Calls may arrive in a queue either via the pilot number(s) or by calling one of the agents directly. You can
 configure your queue so that, if that agent is busy when the call arrives, the call is then queued as if it
 arrived via the pilot number(s).
- o The number in the box is the cumulative total for the time period selected
- o For the historical statistics in the graphs, this is either the number of calls or the rate of calls per hour

- Alerting Time (duration)

- This is the average time between the call being hunted to an agent and the agent answering their phone.
 This statistic, along with Hunt attempts not answered, provides a useful metric of how responsive your call center agents are.
- o The number in the box is the cumulative total for the time period selected

- Logged-in Agent States - Premium HCC only

 This is the total amount of time in seconds that agents logged in to the selected queues spent in each agent state in the period. Agents are only included on this graph for times when they were logged into at least one of the selected queues.

- Current States (%) - Premium HCC only

This is the percentage of agents who are currently in each state. This statistic only includes agents who are logged in to at least one of the selected Queues and only states that are currently being used by agents are shown. This statistic does include agents whose state is set automatically to unavailable, for example because they are in a call or have turned on MetaSphere CFS DND. Agents who are logged out of all of the selected Queues are not shown.

- Disposition Codes (%) - Premium HCC only

- o The percentage of calls that have been assigned each disposition code by agents in the selected queues
- If a Queue has a wrap-up timer configured, where Agents are only permitted to spend a specified amount
 of time in wrap-up state, the pie chart includes calls that were assigned the automatic 'wrap-up timed out'
 disposition code that is entered automatically if the wrap-up time expires before an Agent has entered a
 disposition code.



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- Calls Queued

- o The number in the box is the cumulative total for the time period selected
- o For the historical statistics, this is either the percentage or rate of calls per hour
- o If all agents are busy in other calls, an incoming call will be queued until an agent is available
- o If you have disabled queuing so a call is only accepted if an agent is available, this statistic will be hidden

- Queued Calls Timed Out

- You can configure your queue to timeout calls that have been queued for longer than a specified time.
 However, we would recommend implementing a different behavior in this scenario, for example by forwarding the caller to voicemail. If you see a lot of calls being timed out, then you probably need to add more agents to the queue.
- o If queuing has been disabled, a call will only be accepted if an agent is available, and this statistic will be hidden
- o The number in the box is the cumulative total for the time period selected
- o For the historical statistics, this is either the percentage of calls or the rate of calls per hour

- Exit from Queue Attempts

- This is the number of callers who pressed zero on their phone keypad to exit a MLHG queue and forward their call either to voicemail or a configured telephone number
- o The number in the box is the cumulative total for the time period selected

- Time Before Exit From Queue

- This is the time that callers remain in a MLHG queue for, before pressing zero on their phone keypad to exit the queue and forward their call either to voicemail or a configured telephone number
- o The number in the box is the cumulative total for the time period selected

- Hunt Attempts Timed Out (number of calls or calls/hr.)

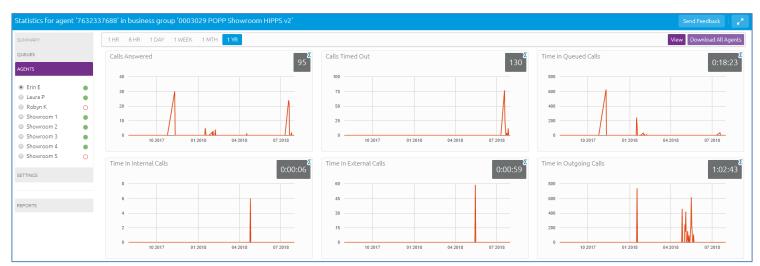
- This is the number of calls that were hunted to a particular agent but the call timed out before the agent answered, and the call was then hunted to another agent. If the caller simply hung up before the agent answered, this is not counted in this statistic. This statistic is only shown if hunt on no answer is configured for this MLHG.
- This statistic, along with Alerting time, provides a useful metric of how responsive your call center agents are
- o The number in the box is the cumulative total for the time period selected
- o For the historical statistics in the graphs, this is either the number of calls or the rate of calls per hour

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5.3 Agent Statistics

On the Summary screen, you can change the browser window to one that shows detailed information on the Agents in the Queues that you administer.

- Click on the Agents box on the left of the Summary screen



Agent statistics screen

The default view shows 1-hour historical data (on the graphs) for the first Agent in the Queues that you administer. The numbers in the box on the top right of each graph are either cumulative total for the graph or the near real-time current value, as identified by the icon in the top right of the box. Some of these numbers will be displayed either as absolute numbers or as a rate per hour, as indicated below.

- Use the radio button to select the statistics for a different agent
- Use the red Download All Agents button to download information about all your Agents. The download will include statistics per agent for each Queue that they belong to.

The following statistics are available on this screen. Note that some of these statistics will only be shown if you are managing at least one Queue that is using the Premium HCC service level:

- Calls answered (number of calls or calls/hr.)

- o The rate at which this agent answered incoming calls
- o The number in the box is the cumulative total for the time period selected
- o For historical statistics in the graphs, this is either the number of calls or calls/hr.

- Calls timed out (number of calls or calls/hr.)

- The rate at which this agent failed to answer calls (the calls may therefore have been hunted to another agent). This statistic tracks calls that were unanswered because the call was timed out when ringing this agent. If the caller simply hung up, then that is not counted here.
- o The number in the box is the cumulative total for the time period selected
- o For the historical statistics in the graphs, this is either the number of calls or calls/hr.



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Time in queued calls (% or duration in seconds)

- o The time this agent spent in calls that arrived via a queue
- o The number in the box is the cumulative total for the time period selected
- o For the historical statistics in the graphs, this is either a percentage or the duration in seconds

- Time in internal calls (% or duration in seconds)

- o The time this agent spent in calls from other members of their Business Group
- o The number in the box is the cumulative total for the time period selected
- o For the historical statistics in the graphs, this is either a percentage or the duration in seconds

- Time in external calls (% or duration in seconds)

- o The time this agent spent in calls dialed directly to the agent from outside the Business Group
- o The number in the box is the cumulative total for the time period selected
- o For the historical statistics in the graphs, this is either a percentage or the duration in seconds

- Time in outgoing calls (% or duration in seconds)

- o The time this agent spent in outgoing calls
- o The number in the box is the cumulative total for the time period selected
- o For the historical statistics in the graphs, this is either a percentage or the duration in seconds

- Time otherwise unavailable (% or duration in seconds)

- The time that this agent was unavailable to answer calls without already being in a call, for example because they enabled Do Not Disturb on their line
- o The number in the box is the cumulative total for the time period selected
- o For the historical statistics in the graphs, this is either a percentage or the duration in seconds

- Time logged in (% or duration in seconds)

- The time this agent was logged in to a queue. This number may exceed 100% if the agent is a member of more than one queue.
- \circ The number in the box is the cumulative total for the time period selected
- o For the historical statistics in the graphs, this is either a percentage or the duration in seconds

- Wrap-up Time - Premium HCC only

- The average time spent by this agent completing any work associated with a call after the call itself has ended
- o The number in the box is the cumulative total for the time period selected

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- Agent States - Premium HCC only

- This is the percentage of time that this agent spent in each agent state, including agent states that are set automatically, for example when they were unavailable because they had logged out of all their Queues, turned on DND or were in a call.
- o The state that this agent is currently in is shown in the top right-hand corner

- Disposition Codes (calls/hr.) - Premium HCC only

- o The total number of calls that this agent has assigned to each disposition code
- o If the Agent is a member of a Queue that has a wrap-up timer configured, where Agents are only permitted to spend a specified amount of time in wrap-up state, the pie chart includes calls that were assigned the automatic 'wrap-up timed out' disposition code that is entered automatically if the wrap-up time expires before an Agent has entered a disposition code.

5.4 Wallboard Views

The Summary, Queues and Agents pages can also be displayed as a Wallboard view. The Wallboard view removes the navigation and shows data for the time period that is currently selected. To use the Wallboard view:

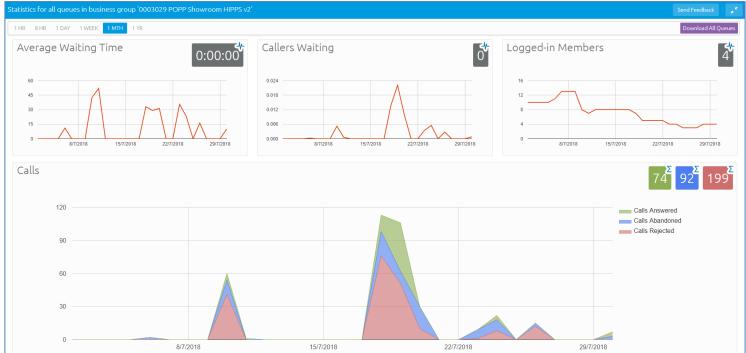
- Ensure that you have selected the appropriate time period that you want to display on the Wallboard view
- Click on the button at the top right of the screen to display the Wallboard view. This icon toggles between the Wallboard view and the standard view.



Wallboard view toggle buttons

The Summary screen Wallboard view

The Summary Wallboard view retains but enlarges the graphs.



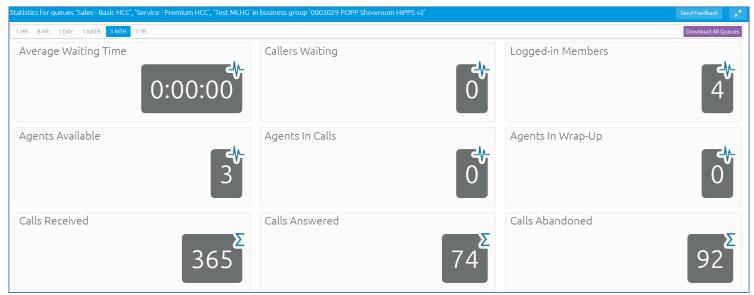
Summary Wallboard view



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The Queues and Agents Wallboard views

The Queues and Agents Wallboard views simply display the name of the statistic and the current real-time value.



Queues Wallboard view

This view could be useful if you want to see at a glance how your Queues or Agents are currently performing.

5.5 Integrated HCC Statistics

How to access HCC statistics

The Summary, Queues and Agents statistics displayed by HCC are calculated in a number of different ways. This section provides more advanced information to help you interpret these statistics.

On each screen, the graphs show historical data for the time period selected. The numbers in the boxes on the top right of each graph or on the Wallboard views are either the cumulative total shown in the graphs, or a snapshot at the current time. Each box has an icon and tool tip to indicate which type of value is being shown.

- Where the gray boxes display the current view, the values in the gray boxes use an hourly rate that is a running average.
- For the 1 day and 1 week granularities this hourly rate will be the same as the number in the period. For other granularities it will be 12x higher or 24x lower than the numbers in the graphs for the same call rate.
- The graphs either use the hourly rate, or display the absolute numbers for calls received, calls answered, calls abandoned and calls rejected in the selected time period and use these as the axis of the graph. These numbers are also shown in the tooltip that appears when you mouse over a specific time period on the graph. The tooltip also displays the percentage of total calls for calls that were answered, abandoned or rejected.
- The statistics auto-refresh to keep the data current. This happens without the page reloading.
 - o Where the boxes display the current view, the statistics auto-refresh every 30 seconds.
 - o For historical data, the statistics auto-refresh:



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- Every 5 minutes when the 1 or 8 hour views are selected
- Every hour when the 1 day or 1 week views are selected
- Every day when the 1 month or 1 year views are selected
- The list of queues and agents currently configured auto-refreshes every hour.
- The statistics shown on the Integrated HCC screens are calculated using different metrics.
- The statistics always use the mean when combining multiple queues, or combining 12 x 5 min stats into 1 hour and 24 x 1 hour stats into 1 day. The running average is used for the current value of calculating event based statistics (that is, all statistics except Callers waiting, Logged in members). This is therefore effectively a weighted mean of the last ~5 events.
- Some statistics are calculated as a percentage that will be a proportion of the time period selected spent on that particular activity. For example, if the 1 Hour time period is selected, statistics are shown in 5 minute segments, and the current 5 minute period would therefore be 300 seconds.
- The number of calls per hour statistic is updated as calls arrive, and is calculated as 1 divided by the gap between the two most recent calls. There is a running average of the most recent values (for example the last 5 calls), but weighted so that the most recent changes count for more. If the rate of calls suddenly changes, the value will still partly reflect the old rate until several new calls have arrived.
- This means that during low call volumes the current view statistic may at first seem too high because it now takes a long time for a call to arrive at the new rate.
- For historical values, if this statistic is displaying a rate per hour rather than the absolute number of calls, the statistic takes the number of calls and divides by the granularity (for example, if you have 2 calls in 5 minutes, you will have 24 calls per hour). This allows for simple comparison of the current value shown for a statistic when switching between different time periods. For example, if the call center is receiving calls at a steady rate of approximately 5 calls every 5 minutes, a current rate of 60 calls per hour will be shown for both the 1 hour and 1 day views.

Note that this may cause unexpected statistics if you are testing the system by carrying out individual calls on an otherwise idle system. For example, a single call will result in a rate of 12 calls per hour being shown for both the 1 hour and 1 day views.

- For the **Average waiting time** statistic, the current view values are updated as new data becomes available. If there are no calls currently waiting or currently active then the average waiting time will be reported as zero.
- The following statistics are tracked as numbers.
 - o Callers waiting
 - Logged in members

The current view value is the actual number at that refresh point, whereas the graph is the mean over that time period. If an agent logs out during the period of the graph, they will be shown as logged in for less than 100% of the time. For example, an agent logging out for 1 minute in a 5 minute period will be shown as logged in for 80% of the time. Callers waiting may show as a fraction when calculating historical values.



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- On the Queues tab, the graphs may show the absolute number rather than the rate for the following statistics:
 - o Calls received / Calls answered / Calls rejected / Calls abandoned
 - o Pilot calls received
 - o Calls queued / Queued calls timed out / Hunt attempts timed out
 - Exit from queue attempts
 - Time before exit from queue
- On the Agents tab, the graphs may show the absolute number rather than the rate for the following statistics.
 - o Calls answered / Calls timed out
 - o Time in queued / internal / external / outgoing calls
 - o Time otherwise unavailable / time logged in



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6 HCC (aka ACD) Reports

To Access Reports:

- Log in to the Administrator Portal
- From the Home screen, click on the Call Analytics menu option on the left side of the screen
- Click on the Reports tab to manage or add reports

HCC Supervisors can create a wide range of reports that provide crucial information on call and Agent activity to assist with day-to-day management tasks, such as planning for busy periods during the working week and monitoring the general performance of your call center Agents.



types for analyzing call activity from different angles.

Reports may be viewed directly or may be saved so that they can be automatically generated in the future and emailed to specified recipients.

Call Analytics Reports screen

Available Reports

The following report types are available for Hosted Call Center:

- Abandoned Calls Detail
- Abandoned calls Summary
- Agent Status Summary
- Agent Summary
- All Agents Status Summaries
- Calls by Day
- Calls by Queue
- Call Detail by Agent
- Call Duration Summary
- Call Log
- Daily Traffic
- Frequent Caller Summary
- Hourly Usage
- Inbound Summary
- Queue Summary
- Short Calls by Agent
- User Statistics



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For the following reports, you'll need to know the **name or number of the Agent** that you want to create the report for:

- Agent Status Summary
- Call Detail by Agent report

For the following report types, you'll need to know the **name of the Queue** that you want to create a report for:

- Abandoned Calls Summary
- Abandoned Calls Detail
- Calls by Queue
- Call Duration Summary
- Frequent Callers Summary
- Hourly Usage

You must decide whether you want to only generate the report once or generate it on a regular basis.

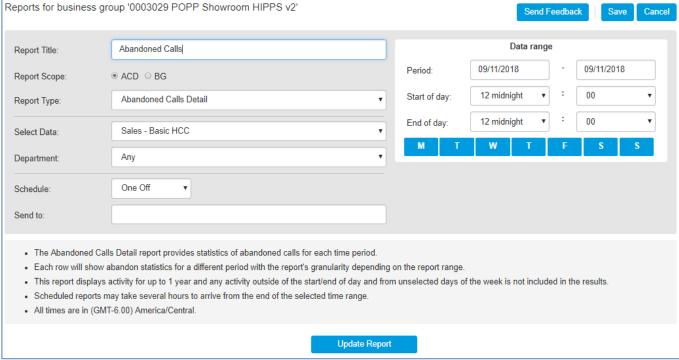
- If you only want to schedule a one-off report, you must know the date range that you want the report to cover
 - o For all of the following report types, this date range must be within the last year:
 - Abandoned Calls Detail
 - Abandoned Calls Summary
 - Agent Status Summary
 - All Agents Status Summaries
 - Calls by Day
 - Calls by Queue
 - Queue Summary
 - o For all of the following report types, this date range must be within the last 60 days:
 - Agent Summary
 - Call Detail by Agent
 - Call Duration Summary
 - Call Log
 - Frequent Caller Summary
 - Inbound Summary
 - Short Calls by Agent
 - User Statistics
 - o For all of the following report types, this date range must be within the last 32 days:
 - Daily Traffic
 - Hourly Usage



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6.1 Create New Report

- To create a report, click on New Report to launch a new window to create the report
- Supervisors can only view information for the business group/departments they manage (and any of their subdepartments)
- You can schedule a report to be automatically generated at a point in the future. This can be a one-off report covering a
 pre-defined time period, or a recurring report that is generated on a daily, weekly, monthly or yearly basis. HCC will
 send the generated reports as PDF files to one or more e-mail addresses of your choosing.
- Only Supervisors with the proper permissions can generate reports. However, these reports can be e-mailed to any recipients entered by the Supervisor when creating the report



New Reports screen

- Enter report details:
 - o Report Title enter a title for this report
 - o If you are also a Hosted Call Center (HCC) Supervisor, you will see **ACD** (HCC) and **BG** (Business Group) radio buttons below the Report Title box. Select **ACD** to generate a Hosted Call Center report.
 - o Report Type select the type of report from the drop-down. See ACD Report Types section below for details.
 - o Department select the department for which you want to generate the report
- Enter Data range to set the dates and times (working hours) the report should include:
 - o Period enter/select start and end date
 - o Start of day use the drop-down to select the required time period (e.g., 8 am)
 - \circ End of day use the drop-down to select the required time period (e.g., 5 pm)
 - **Note**: If you choose a start time that is later in the day than the end time, the report will display statistics for activity between 0.00 (midnight) and your chosen end time <u>and</u> for activity between your chosen start time and 24.00 (midnight the next day).
 - o Days of the week click on the icons for the days of the week to include/exclude those days from the report
- Click **Update Report** to display the report on the screen
- Schedule select one:
 - o One Off generate report one time
 - Daily generate report once daily
 - Weekly generate report once per week on the specified date selected in the "Due" field
- Send to enter the e-mail address(es) of people who should receive a copy of the report via e-mail each time it's generated
- Click Save to save this report and launch the Report Schedule Manager in a new window or click Cancel to cancel



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6.2 Manage Scheduled Reports

• To manage scheduled reports, click on **Manage Reports** to launch the **Report Schedule Manager** in a new window. This screen displays details of the reports you currently have scheduled.



Report Schedule Manager screen

- Click Edit alongside a report to make any changes to report details
- Click **Delete** to delete a report
- Click **Clone** to create another report of this type using the same parameters as this one. The report will be created with the appropriate fields already filled in.
- You can also add a new report from this screen by clicking on Add a new report at the top of the screen

Note:

There is a maximum of 50 scheduled reports per business group. If this limit has been reached, the option to add a scheduled report will be grayed out and you will need to delete one or more existing scheduled reports before you can add a new one.



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6.3 Report Types

- You can select from the following report types in the Report Type drop-down list when creating a new report
- Some reports are only available if you have Hosted Call Center Premium Queue(s)

Abandoned Calls Detail

The Abandoned Calls Detail report allows you to see the abandon statistics for different time periods. You may want to use this report to identify if there are particular times of day when there's a high percentage of abandoned calls. This information is presented in a table only.

Abandoned Calls Detail						
Date	Calls Abandoned	Calls Rejected	Average Abandon Time			
07/02/2018	0 (0%)	0 (0%)	0:00			
07/03/2018	0 (0%)	0 (0%)	0:00			
07/04/2018	0 (0%)	0 (0%)	0:00			

Abandoned Calls Detail report

Each row in the table shows the abandon statistics for a different time period. The granularity of this time period will depend on the total report length:

- If the report spans less than 28 hours, each row will cover a 5 minute period
- If the report spans more than 28 hours but less than 32 days, each row will cover a 1 hour period
- If the report spans more than 32 days, each row will cover 1 day

The table presents the following information for the specified time period:

- **Date** The time period covered by the report
- **Calls Abandoned** The number of calls received through this Queue that were abandoned by the caller before they were answered. This statistic is also presented as a percentage of the total number of calls received through the Queue.
- Calls Rejected The number of calls received through this Queue that were rejected because there were no
 Agents available to take the call and the caller could not be put on hold. This could be because the maximum limit
 on the number of callers on hold had already been reached or because the relevant Queue does not support
 keeping callers on hold. This statistic is also presented as a percentage of the total number of calls received
 through the Queue.
- Average Abandon Time The average time callers waited in a Queue before hanging up without their call being answered



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Abandoned Calls Summary

The Abandoned Calls Summary report allows you to see how many calls are abandoned across all of your Queues. This report includes both inbound calls and internal calls. You may want to use this report to identify unexpected rates of call abandonment in particular Queues which might indicate that you need more Agents in that Queue.

The report provides statistics on the call abandonment rate for all your Queues within your chosen time period. The entirety of this time period must be within the last year.

This information is presented in a table only.

Abandoned Calls Summary							
Queue	Calls Abandoned	Calls Rejected	Average Abandon Time				
Service - Premium HCC	31 (77.5%)	0 (0%)	0:17				
Sales - Basic HCC	33 (47.8%)	0 (0%)	0:29				

Abandoned Calls Summary report

The table presents the following information for the specified time period.

- Queue The name of the Queue
- **Calls Abandoned** The number of calls received through this Queue that were abandoned by the caller before they were answered
- Calls Rejected The number of calls received through the Queue that were rejected because there were no Agents available to take the call and the caller could not be put on hold. This could be because the maximum limit on the number of callers on hold had already been reached or because the relevant Queue does not support keeping callers on hold. This statistic is also presented as a percentage of the total number of calls received through the Queue.
- Average Abandon Time The average time callers waited in a Queue before hanging up without their call being answered

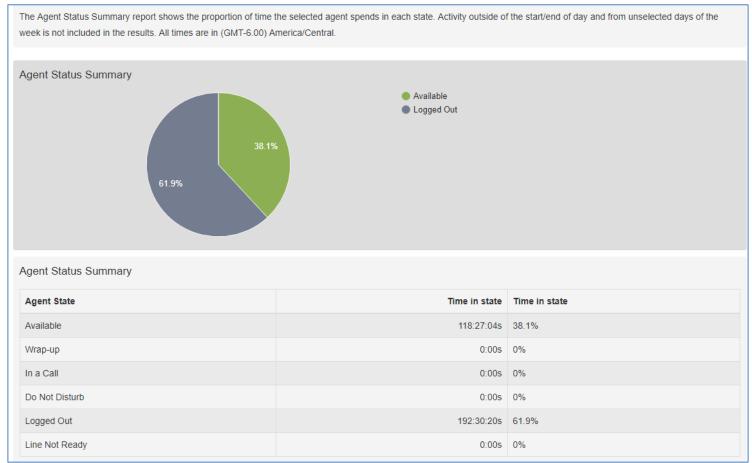


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Agent Status Summary

Note: This report is only available for Agents that are members of a Premium HCC Queue.

The Agent Status Summary report allows you to see how long an Agent has been spending in each Agent State during your chosen time period, which must be within the last year. The information is presented in a pie chart and table.



Agent Status Summary report

The pie chart displays the percentage of your chosen time period that the Agent spent in each Agent State. The table displays the total time that the Agent has spent in each Agent State. This is also presented as a percentage of your chosen time period.



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Agent Summary

The Agent Summary report gives an overview of the performance of all of the Agents in your call center, allowing you to spot any issues that may require further investigation.

It includes general performance information for all Agents in the Business Group or Departments that you manage (and any of their sub-departments) during your chosen time period. The entirety of this time period must be within the last 60 days. This information is presented in a table. Note that this table does not include information on incoming calls that were not received via a Queue or outgoing calls.

Agent Summary									
Agent	Queue	Min Call Duration	Average Call Duration	Max Call Duration	Average Alerting Time	Total Calls Offered	Total Calls Answered		
Showroom 1	Service - Premium HCC	0:12	0:30	0:48	0:11	8	2 (25%)		
Showroom 1	Sales - Basic HCC	0:00	0:00	0:00	0:07	5	0 (0%)		
Showroom 2	Service - Premium HCC	0:04	1:29	6:59	0:10	20	5 (25%)		

Agent Summary report

Each row in the table gives information on an Agent's activity when handling calls from a particular Queue, as indicated in the **Agent** and **Queue** columns. Note that an Agent who is a member of multiple Queues will have a row in the table for every Queue that they are a member of. The following information is provided:

- Min Call Duration The duration of the shortest call answered by the Agent that was received from this Queue during the specified time period
- Average Call Duration The average length of a call answered by this Agent from this Queue during the time period specified
- Max Call Duration The duration of the longest call that this Agent handled from this Queue during the time period specified
- Average Alerting Time The average time before a call was answered
- Total Calls Offered The number of calls offered to this Agent from this Queue during the chosen time period
- Total Calls Answered The number of calls answered by this Agent from this Queue



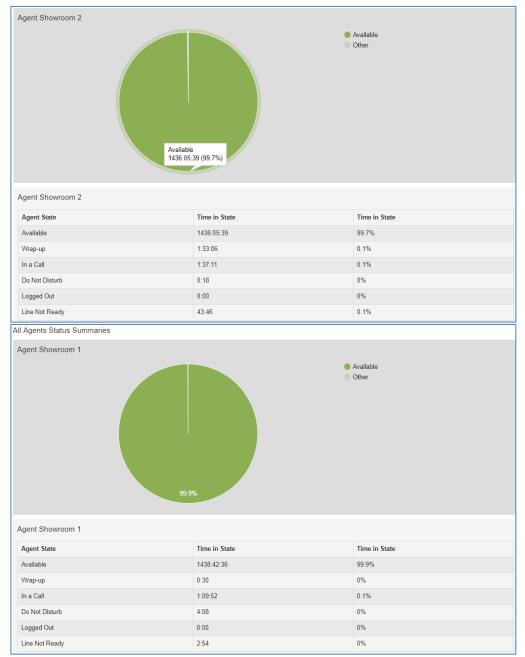
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All Agents Status Summaries

Note: This report is only available for Agents that are members of a Premium HCC Queue.

The All Agents Status Summaries report allows you to see how long each Agent has been spending in each Agent State during your chosen time period, which must be within the last year.

The information is presented as a pie chart and table for each agent and allows you to view summaries for all your agents from a single report.



All Agents Status Summaries report

The pie chart for each agent displays the percentage of your chosen time period that this Agent spent in each Agent State. The table for each agent displays the total time that this Agent has spent in each Agent State. This is also presented as a percentage of your chosen time period.



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Calls by Day

The Calls by Day report allows you to see the number of calls per day that are being received by your call center and how they are being handled. You may want to use this report to identify patterns in call volume so that you can anticipate busy periods in future, or you may use the output to identify unexpected rates of call abandonment or rejection.

The report provides statistics on call activity for the Business Group or Departments that you manage (and any of their subdepartments) on each day that falls within your chosen time period. The entirety of this time period must be within the last year. Note that if you use the **Start of day** and **End of day** fields to specify the hours of a working day, any activity outside of these hours will be excluded from the report.

This information is presented in a bar chart and table.



Calls by Day report

The bar chart displays the number of answered, abandoned and rejected calls for each day in the specified time period. The table presents the following information for each day in the specified time period.

- Date The date that the call was initiated
- Calls Received The number of calls received
- **Calls Answered** The number of calls received that were answered by an Agent. This is also presented as a percentage of the total number of calls received.
- **Calls Abandoned** The number of calls received that were abandoned by the caller before they were answered by an Agent. This is also presented as a percentage of the total number of calls received.
- Calls Rejected The number of calls received that were rejected because there were no Agents available to take
 the call and the caller could not be put on hold. This could be because the maximum limit on the number of callers
 on hold had already been reached or because the relevant

Queue does not support keeping callers on hold.



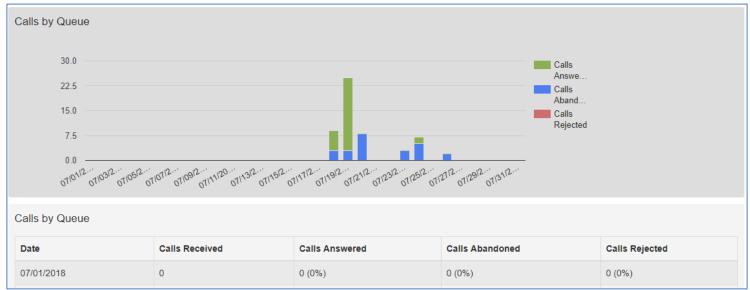
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Calls by Queue

The Calls by Queue report allows you to see the number of calls that are being received through a particular Queue and how they are being handled. You may want to use this report to identify patterns in call volume so that you can anticipate busy periods in future, or you may use the output to identify unexpected rates of call abandonment or rejection.

The report provides statistics on call activity for a particular Queue on each day that falls within your chosen time period. The entirety of this time period must be within the last year. Note that if you use the **Start of day** and **End of day** fields to specify the hours of a working day, any activity outside of these hours will be excluded from the report.

This information is presented in a bar chart and table.



Calls by Queue report

The bar chart displays the number of answered, abandoned and rejected calls for each day in the specified time period. The table presents the following information for each day in the specified time period.

- Date The date that the call was initiated
- Calls Received The number of calls received through the Queue
- **Calls Answered** The number of calls received through the Queue that were answered by an Agent. This is also presented as a percentage of the total number of calls received through the Queue.
- Calls Abandoned The number of calls received through the Queue that were abandoned by the caller before
 they were answered by an Agent. This is also presented as a percentage of the total number of calls received
 through the Queue.
- Calls Rejected The number of calls received through the Queue that were rejected because there were no
 Agents available to take the call and the caller could not be put on hold. This could be because the maximum limit
 on the number of callers on hold had already been reached or because the relevant Queue does not support
 keeping callers on hold. This statistic is also presented as a percentage of the total number of calls received
 through the Queue.



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Call Detail by Agent

The Call Detail by Agent report offers a detailed view of call activity for a particular Agent, allowing you to easily assess their level of performance.

It provides information on all incoming and outgoing calls involving an Agent during your chosen time period. The entirety of this time period must be within the last 60 days.

This information is presented as a table with a row for each call.

Call Detail by Agent							
Date	Direction	Source	Intermediate Destinations	Destination	Duration		
07/20/2018 07:58:46	outbound	Erin E		6123383376	0:56		

Call Detail by Agent report

The following information is provided for each call.

- Date The date and time at which the call was initiated
- Direction Whether this was an incoming, outgoing or internal call
- Source The number of the calling party
- Intermediate Destinations Any numbers that this call was routed to before reaching its destination. This may include an MLHG Pilot Number or the names or numbers of any other Agents that this call was hunted to before it was answered or abandoned.
- Destination The number of the party that received the call
- Duration The duration of the call

Note: Calls that used any of the following services may be listed more than once, with each listing representing a leg of the call:

- MADNs
- Call Waiting
- Call Pickup
- Call Hold
- 3-Way Calling



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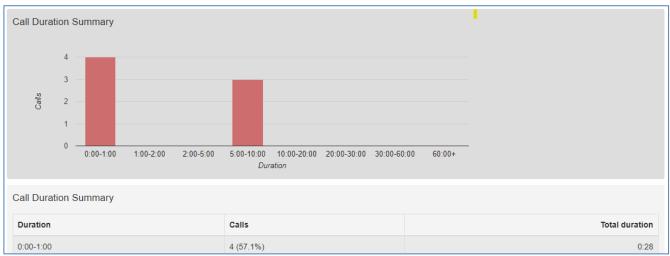
Call Duration Summary

This Call Duration Summary report gives a clear indication of how quickly your Agents are dealing with customer calls. It provides information on the length of calls answered by Agents for a particular Queue during your chosen time period. The entirety of this period must be within the last 60 days.

Note that calls will only be included if they started in the specified time period. A call does not have to finish within the specified time period to be included. If a call is passed from one Queue to another, it will be included in the Call Duration Summary report for both Queues.

For ease of use, calls are divided into a number of duration ranges, starting with calls less than 1 minute long and going up to calls over an hour long.

This information is presented in both a histogram and a table.



Call Duration Summary report

The histogram shows how many answered calls fell into each duration range during the specified time period. The table presents the same information, along with the total duration of all calls in each duration range.



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Call Log

The Call Log report gives a detailed overview of call activity for your call center, providing information on all calls made to or from the Business Group or Departments that you manage (and any of their sub-departments) during your chosen time period. The entirety of this time period must be within the last 60 days.

This information is presented as a table with a row for each call.

Call Log	Call Log								
Date	Direction	Source	Intermediate Destinations	Destination	Alerting Time	Duration	Account Code		
07/17/2018 7:29:04 am	internal	7632337690		Showroom 1	0:13	unconnected			
07/17/2018 7:30:20 am	internal	7632337690		Showroom 1	0:13	0:42			
07/17/2018 7:30:51 am	internal	7632337690		Showroom 2	0:04	0:25			
07/17/2018 8:01:43 am	internal	Showroom 1		Showroom 2	0:02	0:45			

Call Log report

The following information is provided for each call:

- Date The date and time at which the call was initiated
- Direction Whether this was an incoming, outgoing or internal call
- Source The number of the calling party
- **Intermediate Destinations** Any numbers that this call was routed to before reaching its destination. This may include an MLHG Pilot Number or the names or numbers of any other Agents that this call was hunted to before it was answered or abandoned.
- **Destination** The number of the party that received the call
- **Alerting Time** Amount of time between a call from this Queue being hunted to the Agent and the Agent answering their phone
- Duration The duration of the call
- Account Code Account Code (if used)

Note: Calls that used any of the following services may be listed more than once, with each listing representing a leg of the call:

- Call Waiting
- Call Pickup
- Call Hold
- 3-Way Calling
- Some types of call transfer, for example if a call is transferred by a Business Group line into a MLHG, the initial leg of the call will be reported separately

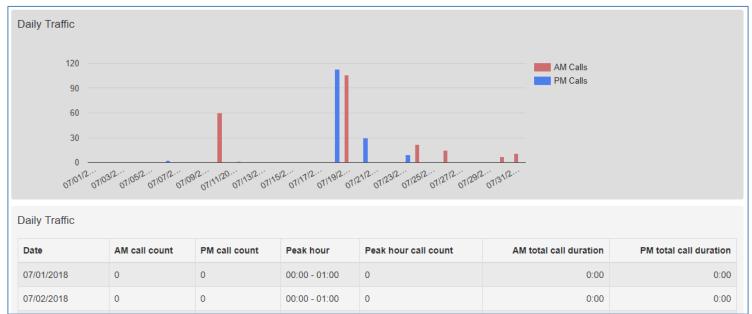


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Daily Traffic

The Daily Traffic report provides a useful indication of when your call center is at its busiest, allowing you to identify peak hours of activity and whether your Agents are handling more calls in the morning or afternoon.

It provides information on the volume of incoming calls to the Business Group or Departments that you manage (and any of their sub-departments) during your chosen time period. This time period must be within the last 32 days. The information is presented in a bar chart and table.



Daily Traffic report

The bar chart displays the number of calls received each day from 0.00am to 12.00 and from 12.00 to 24.00. If the hours of a working day have been specified using the **Start of day** and **End of day** fields, calls started outside of the hours of a working day will be excluded from this count.

The table presents the following information for each day that is included in the specified time period:

- Date The date that the call was initiated.
- AM call count the number of calls received from 0.00 to 12.00. If the hours of a working day have been specified
 using the Start of day and End of day fields, calls started outside of the hours of a working day will be excluded
 from this count
- PM call count the number of calls received from 12.00 to 24.00. If the hours of a working day have been
 specified using the Start of day and End of day fields, calls started outside of the hours of a working day will be
 excluded from this count
- **Peak hour** the hour of day during which the most calls were received. Note that the peak hour can only be calculated for data that is less than 32 days old
- **Peak hour call count** the number of calls received during the peak hour. Note that the peak hour call count can only be calculated for data that is less than 32 days old.
- AM total call duration the total duration of all calls received from 0.00 to 12.00. If the hours of a working day
 have been specified using the Start of day and End of day fields, the duration of calls that were started outside of
 the hours of a working day will be excluded from this count
- **PM total call duration** the total duration of all calls received from 12.00 to 24.00. If the hours of a working day have been specified using the **Start of day** and **End of day** fields, the duration of calls that were started outside of the hours of a working day will be excluded from this count.



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Frequent Caller Summary

The Frequent Caller Summary report allows you to see the 50 most active callers, in order, for the selected Queue. You may want to use this report to identify callers whose repeat calls might indicate their call was not dealt with satisfactorily, for example because they called multiple times but hung up before their call was answered each time, or who are particularly good customers who might be suitable targets for a marketing campaign.

The report provides statistics for the 50 most active callers to a selected Queue within your chosen time period. The entirety of this time period must be within the last 60 days.

The information is presented in a table only.

Frequent Caller Summary								
Caller ranking Source Calls Received Calls Abandoned Total queuing time Total duration								
1	7637977900	36	3	28:57	16:19			
2	Number withheld	9	1	3:48	2:44			
3	7639570964	5	0	2:14	3:23			
4	7634421059	4	0	2:48	0:23			

Frequent Callers Summary report

The table presents the following information for the selected Queue for the specified time period.

- Caller ranking The ranking for this caller, based on the number of calls received from them during the specified time period
- Source The number of the calling party
- Calls Received The number of calls received from this caller
- Calls Abandoned The number of calls that were abandoned by this caller before they were answered by an Agent
- Total queuing time The total amount of time this caller had to wait before their call was answered by an Agent
- Total duration The total duration of all incoming calls received from this caller



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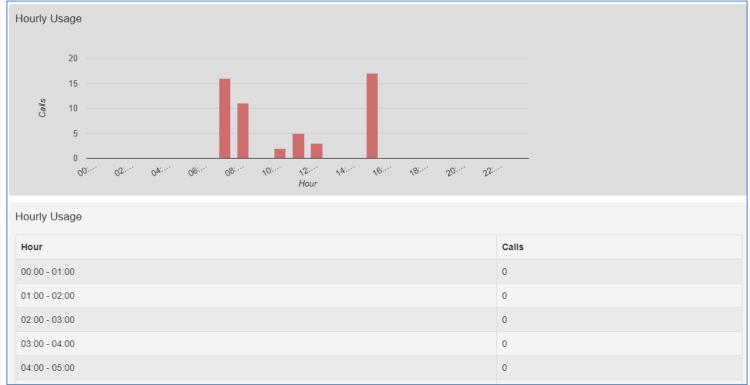
Hourly Usage

The Hourly Usage report allows you to see which hours of the day a Queue is at its busiest, helping you to plan when extra Agents may be required to answer calls.

It provides information on the volume of calls handled per hour by a particular Queue during a specified time period. The entirety of this time period must be within the last 32 days.

- If the time period that you specify is longer than one day, the totals shown for each hour will be the number of calls made during this hour on all selected days
- If you use the **Start of day** and **End of day** fields to specify the hours of a working day, any activity outside of these hours will be excluded from the report

This information is presented in a histogram and table, which both display the number of calls per hour that were received through your chosen Queue and answered by an Agent.



Hourly Usage report



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Inbound Summary

The Inbound Summary report allows you to see a summary of the activity for each Pilot Number in your Queue(s). You may want to use this report to assess the success of marketing campaigns which use a Pilot Number as the first point of contact for your organization.

The report provides statistics on the inbound calls received by all Pilot Numbers in all your queues within your chosen time period. The entirety of this time period must be within the last 60 days.

This information is presented in a table only.

Inbound Summary									
Pilot Number	Calls Received	Calls Connected	Total Duration	Average Call Duration	Average Wait Time	Calls Abandoned	Average Abandon Time		
7632337692	0	0	0:00	0:00	0:00	0	0:00		
7632337693	3	1	0:01	0:01	0:16	2	0:06		
7632315748	14	0	0:00	0:00	0:00	14	0:10		

Inbound Summary report

The table presents the following information for the specified time period:

- Pilot Number The DN of each Pilot Number in your Queue(s)
- Calls Received The number of calls received through the Pilot Number(s) in your Queue(s)
- Calls Connected The number of calls handled by the Pilot Number(s) in your Queue(s)
- Total Duration The total duration of all incoming calls received by the Pilot Number(s) in your
- Queue(s)
- **Average Call Duration** The average length of a call answered by the Pilot Number(s) in your Queue(s) during the time period specified
- Average Wait Time The average time a caller had to wait before the Pilot Number(s) handled the call
- Calls Abandoned The total number of calls received by the Pilot Number(s) in your Queue(s) that were abandoned by the caller before they were answered
- Average Abandon Time The average time callers waited in a Queue before hanging up without their call being answered by the Pilot Number



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Queue Summary

The Queue Summary report allows you to see the activity in all your Queues on a single report.

This report includes both inbound calls and internal calls. You may want to use this report to identify patterns in call volume across your Queues so that you can anticipate busy periods in future, or you may use the output to identify unexpected rates of call abandonment or rejection.

The report provides statistics on the activity of all your Queues within your chosen time period. The entirety of this time period must be within the last 60 days. This information is presented in a table only.

Queue Summary							
Queue	Calls Received	Calls Answered	Calls Abandoned	Calls Rejected	Average Waiting Time	Average Call Duration	Average Abandon Time
Service - Premium HCC	1	0 (0%)	1 (100%)	0 (0%)	0:05	0:00	0:05
Sales - Basic HCC	9	2 (22.2%)	7 (77.8%)	0 (0%)	0:07	0:02	0:07

Queue Summary report

The table presents the following information for the specified time period.

- Queue The name of the Queue
- **Calls Received** The number of calls received through this Queue. This is also presented as a percentage of the total number of calls received through the Queue.
- **Calls Answered** The number of calls received through this Queue which were answered by an Agent. This is also presented as a percentage of the total number of calls received through the Queue.
- Calls Abandoned The number of calls received through this Queue that were abandoned by the caller before
 they were answered by an Agent. This is also presented as a percentage of the total number of calls received
 through the Queue.
- Calls Rejected The number of calls received through this Queue that were rejected because there were no Agents available to take the call and the caller could not be put on hold. This could be because the maximum limit on the number of callers on hold had already been reached or because the relevant Queue does not support keeping callers on hold. This statistic is also presented as a percentage of the total number of calls received through the Queue.
- Average Waiting Time The average time callers had to wait before the call was answered by this Queue
- Average Call Duration The average length of a call answered by this Queue during the time period specified
- Average Abandon Time The average time callers waited in a Queue before hanging up without their call being answered



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Short Calls by Agent

The Short Calls by Agent report allows you to see the number of calls of less than 5 seconds handled by your Agents. You may want to use this report to identify Agents with an abnormally high number of short calls which might suggest that they are not handling callers correctly.

The report provides statistics for the number of short calls handled by all your Agents within your chosen time period. The entirety of this time period must be within the last 60 days.

This information is presented in a table only.

Short Calls by Agent	Short Calls by Agent						
Agent	Short calls						
Test MLHG	8						
Showroom 1	8						
Showroom 2	4						
Showroom 3	3						
Showroom 4	4						
Showroom 5	7						
Robyn K	4						
Erin E	28						
Laura P	3						

Short Calls by Agent report

The table presents the following information for all your Agents over the specified time period.

- Agent The name of the Agent
- Short calls The number of calls lasting less than 5 seconds handled by the Agent



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User Statistics

The User Statistics report provides an overview of the performance of each of the Agents in your call center, allowing you to quickly view key metrics such as how many calls Agents are failing to answer and how long on average they are taking to deal with customer calls.

It provides call statistics for each Agent in the Business Group or Departments that you manage (and any of their sub-departments) during your chosen time period. The entirety of this time period must be within the last 60 days. This information is presented in a table, with each Agent having one row for incoming call statistics and one row for outgoing call statistics, as indicated in the **Direction** column.

User Statistics								
Line	Direction	Total Calls	Answered Calls	Unanswered Calls	Average Alerting Time	Total Call Duration	Average Call Duration	
Showroom 1	inbound	85	63 (74.1%)	22 (25.9%)	0:05	30:35	0:29	
Showroom 1	outbound	36	19 (52.8%)	17 (47.2%)	0:05	6:13	0:19	
Showroom 2	inbound	44	20 (45.5%)	24 (54.5%)	0:05	6:06	0:18	
Showroom 2	outbound	42	33 (78.6%)	9 (21.4%)	0:05	55:14	1:40	
Showroom 3	inbound	24	11 (45.8%)	13 (54.2%)	0:07	7:49	0:42	

User Statistics report

The table presents the following information on an Agent's incoming and outgoing calls during the specified time period.

- Line Agent
- **Direction** Whether this was an incoming, outgoing or internal call
- Total Calls The number of incoming/outgoing calls involving this Agent
- **Answered Calls** The number of incoming/outgoing calls involving this Agent that were answered by the called party. This is also shown as a percentage of the total outgoing calls made.
- **Unanswered Calls** The number of incoming/outgoing calls involving this Agent that were not answered by the called party. This is also shown as a percentage of the total outgoing calls made.
- Average Alerting Time The average time before a call was answered
- Total Call Duration The total duration of all incoming/outgoing calls involving this Agent
- Average Call Duration The average duration of an incoming/outgoing call involving this Agent

For Additional Training and Support

• Visit www.popp.com or call POPP Communications at 763-797-7900