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Call Center Supervisor Guide

**NORTEL
NETWORKS**

Call Center Supervisor Guide

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Call Center Supervisor Guide

Call Center is an application that handles incoming calls as efficiently and economically as possible. Call Center answers calls, then routes the calls to agents in a skillset that most closely matches the needs of the caller. If there are no agents available, the calls are placed in a skillset to wait for an appropriate agent. Waiting callers receive periodic announcements and informative messages.

This guide describes how you can use Call Center features as a supervisor or an agent. For more information about Call Center agents, refer to the *Call Center Agent Guide*. For information about Call Center administration, refer to the *Call Center Set Up and Operation Guide* and the *Call Center Reporting Set Up and Operation Guide*. For information about Multimedia Call Center, refer to the *Multimedia Call Center Set Up and Operation Guide* and Multimedia Call Center Agent Help.

Logging on to Call Center

You can log on as a supervisor to monitor or participate in calls between agents and callers. You can also log on to a skillset as an agent to have calls routed to you. Check with your Call Center Administrator to make sure you are set up as a supervisor. You must use a two-line display telephone. Your telephone must have handsfree/mute capability. To monitor calls with your voice muted, your telephone must have the handsfree/mute feature programmed.

What agents should log on to

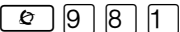


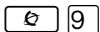




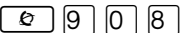



The Call Center Administrator assigns what type of calls agents can receive. The type of calls agents can receive determines whether they must log on to a telephone, Multimedia Call Center or both. This table shows what capabilities agents have depending on the call types they can receive.

Tell your agents what they must log on to, depending on the type of calls they can receive.


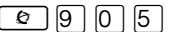


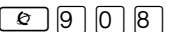
Type of calls you can receive	Are you logged onto a telephone?	Are you logged onto Multimedia Call Center?	Can you have voice calls?	Can you have phone and browser Multimedia Call Center calls?	Can you have browser only Multimedia Call Center calls?
Voice	No	Not permitted	No	-	-
	YES	Not permitted	YES	-	-
Multimedia Call Center	No	No	-	No	No
	No	YES	-	No	YES
	YES	No	-	No	No
	YES	YES	-	YES	YES
Both	No	No	No	No	No
	No	YES	No	No	No
	YES	No	No	No	No
	YES	YES	YES	YES	YES

Using Feature Codes

Call Center agents and supervisors use Feature Codes to access Call Center features. The default Feature Codes are shown below. Your Call Center Administrator can program Custom Feature Codes that you use instead. If you use Custom Feature Codes, you can record them in the space provided below. Tell the agents what the Custom Feature Codes are.



Feature	Default Feature Code	Custom Feature Code
Open mailbox		 __ __
Log on/Log off		 __ __
Monitor agent calls		 __ __
Supervisor help (ask your administrator whether this feature is available on your system)		 __ __
Not Ready		 __ __
Display Waiting Calls		 __ __

You can program these Call Center Feature Codes to memory buttons:

- Log on/Log off/Silent Monitor agent calls 
- Monitor calls 
- Supervisor help 
- Display calls waiting in a skillset 
- Take some Not Ready time 

For how to program a Feature Code to a memory button refer to [“Programming a memory button” on page 11](#).



Note: While you are using a feature, if you press the Feature  button your present feature session ends. Do not press  unless you want to end your current feature session.

Monitoring call activity

There are two ways that you can monitor call activity at your call center:

- [“Silently monitoring agent calls” on page 5](#)
- [“Monitoring skillsets” on page 9](#)

You can monitor calls by using memory buttons that you program with the Feature Codes for monitoring:

- Display calls waiting in skillsets
- Monitor agent calls .
NOTE: To use , you must program it to a memory button and press the memory button to monitor calls.

For how to program a memory button, refer to [“Programming a memory button” on page 11](#).

Silently monitoring agent calls



Note: Depending on what system your call center uses, Silent Monitor may not be available, but you can still monitor calls using . Ask your Call Center Administrator.

When you monitor calls, you are a Silent Monitor: you are not detected by the agent or callers. You monitor all of the calls on an agent's telephone, rather than on a call-by-call basis. When the current call is completed, the monitoring session of the agent continues. You do not have to reestablish the monitoring session. You must be logged on before you can monitor calls.



Note: While you monitor an agent's calls you monitor all of their calls, including their personal calls. Tell agents that if they make a call that they do not want monitored, they must first log off as an agent, then log on again when they complete the call.

You must program a memory button with , and then press the memory button to monitor calls. If the memory button you choose has an indicator, the indicator shows your log on status. You do not have Call Center calls sent to you while you use .

Using Silent Monitor with Answer DN

If you have an Answer DN programmed for your main telephone, and you are using Silent Monitor from your main telephone, the telephone that you have programmed as your Answer DN telephone rings briefly when:

- you monitor an agent who is not on a call, and the agent answers or places a call
- you start to monitor an agent who is on an active call
- you monitor an agent who puts a call on hold and answers another call or unholds the original call.

Monitoring tips

- More than one supervisor can log on to the same skillset.
- An agent can be monitored by only one supervisor at a time. Although more than one supervisor can view the same agent's information at the same time, only one supervisor can monitor the agent.
- While you are on a call, do not initiate a monitoring session.
- Use a headset rather than handsfree to monitor calls. This ensures call privacy and reduces the office noise level. Check with your Call Center Administrator to make sure you can use a headset with your telephone.







Note: You cannot monitor an agent who is:

- on a conference call
 - using an Answer DN
 - on an ISDN or Companion set
 - on any type of call if the maximum number of conference bridges are being used
-

Logging on and monitoring agent calls

You must be logged on to monitor and answer calls. You cannot log on if the maximum number of agents is logged on, if you are logged on to another telephone, or if someone else is logged on to your telephone. You can log on only to skillsets that you are assigned to.

- 1 Press  9 0 4 .
- 2 Enter your Agent ID number and press **OK** or **#** .
- 3 Enter your password and press **OK** or **#** .
The default password you enter to log on for the first time, or if your password is reset, is 0000. If you enter the default password, you must change your password. Enter a new password from four to eight digits long and press **OK**. Enter your new password again and press **OK**.
- 4 Press **IN** to log on to one or more skillsets that you want to monitor. You can monitor only the agents who are logged on to the same skillset as you. If **IN** does not appear, you are already logged on to all the skillsets or there are no skillsets available.
- 5 Press **CHNG** until the skillset you want to log on to appears on the display. The skillsets that are available are the skillsets that are assigned to you. If there is only one skillset available to log on to that you are assigned to, you are automatically logged on to that skillset.
- 6 Press **OK**. The display briefly confirms the skillsets that you are logged on to.
- 7 Press  . You are now logged on and can accept calls like an agent.
- 8 To begin monitoring agent calls press the memory button programmed with  9 0 5 .
After you press  9 0 5 Call Center does not route calls to you.
- 9 Press **OK** to accept the skillset shown or press **NEXT** or **PREV** to find the skillset you want to monitor.
- 10 Enter the Agent ID of the agent you want to monitor and press **OK**. You can press **DIR** to find the Agent ID in the Agent directory. You can monitor any agent logged into a skillset assigned to you.

- 11** Press **INFO** to display the Agent ID number, agent name, call state and the time in minutes and seconds that the call has been in this state. Call states include Idle, Not Ready, and Break (Incall, Outcall, Browse, AnsDN, Ringin).
- 12** Press **INFO** a second time to display the Agent ID number, agent name, and monitoring options again.
- 13** Press **OBSV** to monitor an agent. If another supervisor is monitoring the agent the **OBSV** button does not appear. At any time you can press the **CANCL** button to exit the monitoring session without logging off. If the agent has no active call, has a call on hold, or is on a conference call, you hear silence. You do not begin to monitor the agent until the agent takes a call, takes the call off hold, or ends the conference call.
- 14** If you want to join the call, press **JOIN**.
You can press **MUTE** to mute your voice while you monitor.
NOTE: Depending on what system you use, the Join and Mute keys may not appear and the Info key appears instead.
- 15** To end the monitoring session press **CANCL**.
If you want to monitor another agent in the skillset press **NEXT** until you see the agent you want to monitor, and then press **OBSV**.

You can program a memory button with **[e] [9] [0] [4]**. If the memory button you choose has an indicator, the indicator shows your log on status.

- If the indicator is off, you are logged off.
- If the indicator is on, you are logged on.

If an agent requests help while you are in a monitoring session

While you monitor an agent, the agent can request Supervisor Help if it is available on your system. If an agent requests help, you are automatically selected to help and assumed to have accepted the request. When you are done, the Supervisor Help session ends and your original monitoring session resumes where it left off.

About monitoring sessions

Receiving a call on your telephone	If you are monitoring an agent and you get a call on your telephone, the monitoring session ends if you answer the call. When you end your call, you can press <u>QESU</u> to reenter the monitoring session with the agent.
Making a call while monitoring	If you make a call while you are monitoring an agent, the monitoring session ends and you must begin monitoring using <input type="text" value="9"/> <input type="text" value="0"/> <input type="text" value="5"/> to reestablish a monitoring session.
Ending a session by logging off	The session ends if you or the agent are forced to log off or if the agent logs off voluntarily. If the agent is on a call at the time of log off, but you are still logged on and monitoring, the session continues until the call is disconnected or you press <u>CANCL</u> .
Conference calls	If the agent puts the a call that you are monitoring into a conference call, you do not hear the call for the duration of the conference call. When the agent goes out of conference, you are automatically monitoring the agent again. NOTE: If you want to monitor agents all the time, ask agents not to participate in conference calls.
On hold calls	If the agent puts a call that you are monitoring on hold, you do not hear the call while it is on hold. When the agent resumes the call, you are automatically monitoring the agent again. If an agent puts one call on hold and answers another call, you can monitor only the currently active call. When the agent switches back to the first call, this becomes the active call that you are monitoring.
Using VoIP telephones	How monitoring works with VoIP telephones depends on how Call Center is set up. Ask your Call Center Administrator about monitoring agents who use VoIP telephones. If you monitor an agent who uses a VoIP telephone, a it is possible that noticeable noise can be heard for several seconds when you begin to monitor a call.
Companion sets	You cannot monitor agents who are logged on to Companion sets.
ISDN sets	You cannot monitor agents who are logged on to ISDN (Integrated Services Digital Network) sets.
Maximum number of conference bridges	If the maximum number of simultaneous conference bridges are being used, when you try to start a monitoring session your display shows "No conf avail".
Transferred calls	If you are monitoring an agent and they transfer a call, you no longer hear the call.

Monitoring skillsets

Use **[☎] [9] [0] [9]** (Display Waiting Calls) to view information about skillsets and the calls waiting in skillsets. Display Waiting Calls lets you know when a skillset in your call center gets very busy. You can then ask qualified agents to log on to the busy skillset. This table describes the information in each display.

Display	Description
Skill 1: Enabled	shows the skillset number and the status of the skillset. The status can be Enabled, Disabled or Uninit (uninitialized).
1: 6 agents	shows the skillset number and how many agents are currently logged on to the skillset
1: 10 calls	shows the skillset number and the number of calls waiting in the skillset
1: wait 9:45	shows the skillset number and the time of the call waiting longest in the skillset.

Display Waiting Calls lets you know when a skillset in your call center gets very busy. You can then ask qualified agents to log on to the busy skillset.

To monitor skillsets

- 1 Press **[☎] [9] [0] [9]**.
The skillset display for skillset 1 appears.

On a one line display telephone press	On a two line display telephone press	To
[1]	[1] or GOTO	enter the number of the skillset you want to monitor
[2]	[2] or SKILL	monitor the next enabled skillset
[3] or [6]	[3] or [6] or NEXT	go to the next skillset
[4]	[4] or PREV	go to the previous menu
#	#	go to the next menu
*	*	cancel the session
[☎]	[☎]	exit

Using a memory button to monitor calls waiting in skillsets

Program a memory button with **[☎] [9] [0] [9]** to view the status of all skillsets, including the skillsets you are logged on to. If the memory button you choose has an indicator, the indicator shows information for the calls for the skillset you are logged on to.

- If the indicator is off, all of the calls are within the acceptable wait time.
- If the indicator is flashing slowly, at least one call has exceeded the first alert time.
- If the indicator is flashing quickly, at least one call in the skillset has exceeded the second alert time. The Call Center Administrator sets what the wait times are.

Taking some Not Ready time

If you use **[*] 9 0 8** (Not Ready), you do not receive Call Center calls. The Call Center Administrator can program a Break Time, which makes Call Center automatically wait a short time before it routes the next call to you. You use the Break Time to complete any tasks, such as paperwork, required by the last call. If you need some additional time, use Not Ready to prevent Call Center from routing another call to you. Do not use the Do Not Disturb feature. You can use Not Ready while a call is ringing on your telephone. The call that is ringing on your telephone goes back to the skillset. You can program a memory button with an indicator instead of pressing **[*] 9 0 8**.

For how to program a memory button, refer to [“Programming a memory button” on page 11](#).



Note: While you use Not Ready, you still receive non-Call Center, intercom and transferred calls.

Using Not Ready

- 1 Press **[*] 9 0 8**. **Make Not Ready** appears on the display.
If you press **[*] 9 0 8** and **Break canceled** appears on the display, you canceled the Break Time that the Call Center Administrator programmed for you. You must press **[*] 9 0 8** again to activate the Not Ready feature.
If you press **[*] 9 0 8** and **Agent active** appears, the Not Ready feature was on and you canceled it. Press **[*] 9 0 8** again to activate Not Ready.
- 2 When you are ready to take calls again, cancel the Not Ready feature by pressing **[*] 9 0 8**.
If **Not ready** appears, press **[*] 9 0 8** again.
Not Ready is automatically enabled if you do not answer your telephone, and if this option is configured in Call Center.

Programming Not Ready to a memory button

You can have convenient, one button access to Not Ready if you program a memory button with the Not Ready Feature Code. If the memory button you choose has an indicator, the indicator shows your busy status:

- If the indicator is off, Not Ready is off.
- If the indicator is on, Not Ready is on.
- If the indicator is flashing, the Break Time feature is on.

For how to program a memory button, refer to [“Programming a memory button” on page 11](#).






Logging off

Log off when you complete your shift or will be away from your telephone for an extended period.

- 1 From the display that shows your name on the top line, press **OUT**. The date and time display appears.
If **OUT** does not appear, you are not logged on to any skillsets.



Programming a memory button

You can program memory buttons for one-touch access to Call Center features. We recommend that you program memory buttons for:

- Log on  9 0 4
- Monitor calls  9 0 5
- Supervisor Help  9 0 6 (If it is available for your system)
- Not Ready  9 0 8
- Display Waiting Calls  9 0 9

You cannot assign features to Line, Intercom, Answer or Handsfree/Mute buttons.

Programming a feature to a memory button

- 1 Press  * 3.
- 2 Press the memory button that you want to program.
- 3 Press  and enter the feature code.



Use the paper labels that come with your telephone to identify the programmed button. To use the Feature Code, press the labeled button.

Memory button indicators

Memory button indicators are triangular icons (▶) that appear beside some memory buttons. If you program Call Center features on memory buttons with indicators, the indicators show additional information about the feature.

Changing your supervisor password

Keep your password confidential. Change your password regularly, about every 30 days.

- 1 Press  9 0 4.
- 2 Enter your Agent ID number and press OK.
- 3 Enter your password and press OK.
The default password you enter to log on for the first time, or if your password is reset, is 0000. If you use the default password you must change your password.
- 4 Press ADMIN.
- 5 Enter a new password from four to eight digits long and press OK.
Your password cannot start with a zero.
- 6 Enter your new password again and press OK.
- 7 Press .


Supervisor Help





Note: Whether you can use Supervisor Help depends on the system your Call Center uses. Ask your Call Center administrator whether you can use Supervisor Help.


With Supervisor Help an agent on a call can request help from you by pressing a programmed feature button. The agent can send an urgent request for help without interrupting the call, and without the caller being aware of the help request. Supervisor Help is for situations where an agent is on a call and urgently requires your help without alerting the caller that you are being called in.


When you receive a help request you can accept, deny, or ignore it. A request that is denied or ignored is escalated, and a larger group of supervisors is notified of the request. You can escalate a request so that it is broadcast to other supervisors who are better able to handle the request.

If you receive a request while you are not at your telephone, your  indicator flashes slowly to inform you of the missed request.

If a help request is escalated to you, your  indicator flashes quickly to inform you of the request. If the call for an escalated help request is still active, you can accept the request by pressing the  feature key. You do not have to be monitoring agents at the time, but can be answering Call Center calls.







Note: If you use Make Busy  you are still available for help requests.

To use Supervisor Help you must have a memory button programmed with the Supervisor Help feature code . The programmed key must have an LCD indicator. The memory button can have a distinct bright color so it can easily be distinguished from the other buttons. For how to program a memory button refer to [“Programming a memory button” on page 11](#).

Handling Supervisor help requests


You can program the Supervisor Help feature (F906) to a memory button of your telephone, and press the programmed memory button to use Supervisor Help. For how to program a memory button see [“Programming a memory button” on page 11](#).

- 1 Launch Supervisor Help by pressing     or the F906 memory button on your telephone.

```
Help aa?
INFO  YES  NO
```

- 2 The display shows the ID of the agent who is requesting help. Press YES to accept the agent request for help or press NO to escalate the request or press INFO to view the agent name, time and date of the request, caller ID and caller name of the agent’s call.

```
Help aa:
INFO          JOIN
```

- 3 The display shows the agent name. While you monitor the agent, you can press the INFO key to view the time and date of the request, caller ID and caller name of the agent’s call. You can press the JOIN softkey or the MUTE button on your telephone to join in the call. NOTE: Depending on what system you use, the Join and Mute softkeys may not appear.
- 4 When the help session is complete, press  to end the session.

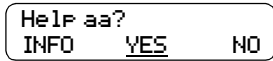
Handling escalated or missed requests

When your Supervisor Help LCD indicator is flashing, you can retrieve escalated or missed Supervisor Help requests. If there are one or more requests, Call Center shows all of the requests. Escalated requests for calls that are still active are shown first, from the oldest to most recent. After that, missed requests are shown from the oldest to the most recent.

You can accept the call by pressing the YES softkey. After you accept the request, the request no longer appears to other supervisors who are retrieving help requests. Their displays show the next escalated request, or the first missed request if there are no more escalated requests, or “No help requests” if there are no more missed requests. For a missed request, the prompt “aa:aname asked” appears, and you can retrieve information about the call by pressing the INFO softkey, or can move to the next request by pressing the NEXT softkey.

An example of retrieving an escalated request

You can program the Supervisor Help feature (☎ 9 0 6) to a memory button of your telephone, and press the programmed memory ☎ 9 0 6 button to use Supervisor Help. For how to program a memory button see [“Programming a memory button” on page 11](#).



- 1 Launch the Supervisor Help feature by pressing ☎ 9 0 6 or the F906 memory button on your telephone.
- 2 The display shows the ID and name of the agent requesting help. Press YES to accept the help request
or
press INFO to see more information about the request
or
press NO to deny the request. This escalates the request, and the display shows the next help request, if there is one.
- 3 When the help session is complete, press ☎ to end the session.

For a missed request, the prompt “aa asked help” appears”.

After a missed request is viewed by a supervisor, it is not shown to any other supervisor.




Checking skillset mailboxes for messages

Frequently check skillset mailboxes for messages. Only one person at a time can retrieve messages from each skillset mailbox. If different people access the messages in the skillset mailbox throughout the day, each person should:

- listen to the message
- write down what the message says
- erase the message
- return the caller's telephone call

If the caller is not available, the agent can try again later or give the message to another agent. If only one agent retrieving the messages at your call center, this agent does not need to transcribe and delete each message before callback. This agent handles messages and knows the status of the old messages.

Playing messages in a skillset mailbox

- 1 Press  9 8 1.
Follow the voice prompts or the display button options on your telephone to open the skillset mailbox.
- 2 Press **PLAY** or  to listen to your messages.
For other options, refer to the user card for your telephone, the *CallPilot Reference Guide*, or the *Call Center Set Up and Operation Guide*.
- 3 Press  to end the session.

Updating web page lists for Multimedia Call Center agents

Multimedia Call Center agents send web pages to callers. If the list of web pages is updated, make sure you know where the new list is and tell the agents to update their Favorites. For information on how to update and distribute web page lists, refer to the *Multimedia Call Center Set Up and Operation Guide*. For information on how agents update their Favorites, tell the agents to refer to the Multimedia Call Center Agent Help.

Important considerations about how agents use features

Call Transfer

Agents can use Transfer to transfer a call to another agent, another person such as a subject matter expert, or send the call back to a skillset.

- If the agent wants to send the call to a specific agent or another person, the agent can enter the Transfer Feature Code () and enter the extension number.
- If the agent wants to send the call to a skillset, the agent can enter the Transfer Feature Code () and enter the CDN of a skillset to send the call to a skillset.
- If you are monitoring an agent and they transfer a call, you do not continue to hear the call.

Agents who want to transfer a call to a mailbox should use .

Agents who are only Multimedia Call Center agents do not receive Call Center voice calls, but other Call Center agents can transfer voice calls to Multimedia Call Center agents.

Call Forward

Advise agents not to use Call Forward. An agent who uses Call Forward is automatically logged out or made busy, depending on their agent settings. Agents can use Call Forward to Voicemail.

Answer DN

The only way agents should use Answer DN is if they program their portable set to be the Answer DN for their main telephone. You cannot hear calls that agents answer on their Answer DN. You can only hear calls that agents answer from the set they are logged on to.

If an agent uses their Answer DN telephone to answer a call that is transferred to them, Call Center does not recognize the agent as being busy, and still sends calls to the agent's main set.

Agents who log on from a regular telephone and answer Call Center calls using an answer DN key from a portable telephone cannot use Supervisor Help.

Do Not Disturb

Instead of using Do Not Disturb, agents must use the Not Ready Feature Code (). If agents use Do Not Disturb they are automatically logged out or made not ready.

Call Forward No Answer

When an agent's phone is on Call Forward No Answer to the voicemail extension, the number of rings for Call Forward No Answer must be less than the number of rings for Transfer Callback Timeout. If a call is forwarded by CFNA to another agent and is answered by that agent, the original agent who has CFNA setting is made Not Ready or logged out instead of staying idle.

Multiple calls

Agents can handle multiple calls, but only one call at a time can be active. If an agent has multiple calls, the agent does not receive any new calls from a skillset until the agent completes the multiple held and active calls. The agent can still receive Answer DN or transfer calls.

Follow-me browsing (Multimedia Call Center agents only)

Follow-me browsing does not work with embedded Flash animations. If an agent clicks a Flash button, the image that is sent to the agent is not displayed to the caller.

Tell agents that if the page they are sending to the caller contains Flash animations, they must tell the caller to display the page by, for example, clicking the Next button, or telling them what item to click on a page to display the next page.

Automatic Answer

How Automatic Answer works depends on what type of telephones your call center uses:

- **i2002 and i2004 IP telephones:** If you connect the headset before you initialize the phone, calls are heard over the speaker. If you initialize the IP telephone before you plug in the headset, calls go to the headset as long as you have initialized the headset by pressing the headset button and then the release button. Calls always ring at the IP telephone. Every time you reconnect the headset you must initialize the headset.
- **Meridian and Norstar telephones:** If you use a headset, calls ring at the telephone and the headset, but calls go to the headset.
- **Business Series Terminals:** If you connect the headset before you connect the telephone cable to the phone jack, calls go to the handsfree speaker. If you plug in the telephone before you connect the headset, calls go to the headset as long as you have initialized the headset by pressing the headset button and then the release button. Calls always ring at the set. Every time you reconnect the headset you must initialize the headset. Calls always ring at the set.
- **T7316e:** This type of telephone supports Automatic Answer.

