



MaxSupervisor™

Manual

MAX Communication Server
Release 8.6.1

May 11, 2020

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Overview

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

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

Session Licensing and License Upgrade Procedures

MaxSupervisor requires that a MaxSupervisor seat license or session license be installed at the MAXCS ACM system.

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

CDR Records Note

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

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

Installation

The client system must meet the following minimum requirements.

Operating systems supported:

- Windows 10
- Windows 8.1 (64-bit)
- Windows 7 (32-bit or 64-bit)

System requirements:

- IBM/PC AT compatible system
- Microsoft .NET 4.5 or higher
- 2 GHz CPU or faster
- 1 GB available hard drive disk space
- 1 GB RAM
- SVGA monitor (1024 x 768) with 256 color display or better
- Keyboard and mouse
- A sound card in the computer, if using IPTalk
- MAXCS 8.6.1 must be running on a server accessible to this client

Pre-Installation Checklist

Before installing MaxSupervisor, make sure the following is done:

- MAXCS ACM 8.6.1 has been installed on the system server.
- TCP/IP is enabled on both machines.
- The client is able to connect to the server on the network.
- The person installing MaxSupervisor has local administrator rights on the client computer.
- The MaxSupervisor License Key has been installed and activated on the system server.

Installing MaxSupervisor on a Client System

After you have completed all of the pre-installation steps listed in the previous section, follow these steps on the client machine to install MaxSupervisor:

1. Close all Windows applications.
2. From the MAXCS installation media, open the **MaxSupervisor** folder and run the **Setup** program. Follow the instructions on the screen.
3. Alternatively, if your system administrator has loaded MaxSupervisor on a shared network server, you can copy the files in the MaxSupervisor folder to your desktop computer and run the MaxSupervisor **Setup** program.

Uninstalling MaxSupervisor

To uninstall MaxSupervisor,

1. From the Windows **Start** menu, select **Control Panel > Add/Remove Programs**. Choose **MaxSupervisor 8.6.1**.
2. Click **Remove**, and respond to any additional prompts.

Automatic Upgrade

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

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

Downgrade Procedure

1. Go to **Control Panel > Add/Remove Programs** and remove MaxSupervisor 8.6.1 program and ALL OTHER 8.6.1 client

applications (including MaxAgent, MaxCommunicator, MaxOutlook, AltiConsole and CDR Search).

2. Reboot your system.
3. Go to "<local drive>:**Program Files\AltiGen\Shared Files**" and remove **AlpInterface.dll**.

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

4. Install the earlier software, as appropriate.

Getting Started

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

Logging In

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



The image shows the MaxSupervisor login dialog box. It features a stylized logo on the left and the 'ALTIGEN COMMUNICATIONS' logo in the top right corner. The main title 'MAXSUPERVISOR' is centered. Below the title are three input fields: 'Server Name' with a dropdown menu showing '10.10.13.80', 'Extension' with the text '3501', and 'Password' with four dots. At the bottom, there is a progress bar, a checked checkbox labeled 'Always save password', and two buttons: 'Sign in' and 'Cancel'.

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

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

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

3. Click **Sign in**.
4. In the dialog box, select the workgroup(s) you want to monitor, and enter a password for each workgroup.



In this dialog box, you can:

- Sort the **Workgroup** column in ascending or descending order by clicking the column heading (it's a toggle).
- Resize a column by dragging a column edge to make the column wider or narrower.
- Choose to hide specific rows. If **Show All Rows** is checked, the **Hide Row** column is available. Check the **Hide Row** check box of each workgroup you don't want to see listed in this sign-in dialog box, and then uncheck the **Show All Rows** option. The workgroups you want to hide are now hidden. If the **Monitor** column check box of any of those workgroups had been checked, they are automatically unchecked when they are hidden.
- Choose to see all rows. To see all workgroups listed again, check the **Show All Rows** option. MaxSupervisor remembers the **Hide Row** check boxes you checked and retains those checks.

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

Version Mismatch

If your version of MaxSupervisor is significantly different from the version of MAXCS on the system server, you are prompted for upgrade permission when you try to log in. If you allow upgrade at this time, the MaxSupervisor startup is terminated and a software upgrade session is started. Restart MaxSupervisor to run the newer version. (See "Automatic Upgrade" on page 4 for more details.)

If you lose connection with the server

When a connection with the phone server is broken, a message asks if you want to connect again. Click **Yes** to restore the connection without you having to go through the log-in process again.

Overview of the Main Window

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

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

See general workgroup queue and staffing information here

Click Agent View tab to see detailed information on agents' current calls and login history

WG	Name	CIO	LGT	CIO > SL%	VM	Config	Logout	Login	Idle	Busy	Wrap-Up	N-Ready	DND/FwD	Error	Not Available
1111	TS Product 1	0	00.00.00	0	0	9	8	0	0	0	0	0	0	0	0
2222	TS Product 2	0	00.00.00	0	0	9	8	0	0	0	0	0	0	0	0
3333	TS Product 3	0	00.00.00	0	0	9	8	0	0	0	0	0	0	0	0
4444	Cust Supp Product 1	0	00.00.00	0	0	9	8	0	0	0	0	0	0	0	0
5555	Cust Supp Product 2	0	00.00.00	0	0	9	8	0	0	0	0	0	0	0	0

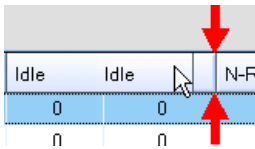
Login/Out	Ext	Name	Agent State	Skill Level	Rec	Talk Time	CallerID	Caller Name	Login/Out Duration	Logout Reason
● Out	2001	Joe Schmo	Available (04:28:55)	1					04:29:15	[0]
● Out	3501	Penny Nickel	Available (04:27:58)	1					04:29:15	[0]
● Out	3502	Flace Street	Available (04:27:58)	1					04:29:15	[0]
● Out	5000	Remote One	Unstaffed (04:29:14)	1					04:29:15	[0]
● Out	5001	Remote Two	Available (04:27:58)	1					04:29:15	[0]
● Out	2002	Tweedle Dee	Available (04:16:56)	1					04:29:15	[0]
● Out	2003	Tweedle Dum	Available (04:16:56)	1					04:29:15	[0]
● Out	2004	Boris Karloff	Available (04:28:54)	1					04:29:14	[0]
● Out	2005	Lon Cheney	Available (04:28:54)	1					04:29:13	[0]

Tabbed pages contain various types of information related to the selected workgroup

Customizing the Display

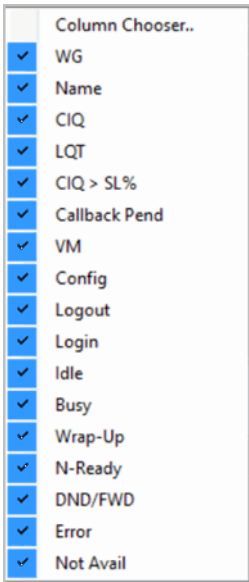
You can customize the MaxSupervisor display to meet your needs in the following ways. MaxSupervisor remembers your preferences the next time you log on.

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



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

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



Columns available on the Workgroup View tab.

Uncheck columns you don't want to see.

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

WG
1111
2222
3333
4444

Ascending order

WG
5555
4444
3333
2222

Descending order

You can sort on multiple columns in Agent View and in these Workgroup View tabs: Calls in Queue, Group Voicemail, and Agent State. To sort on multiple columns:

1. Click a column heading for the initial sort, and click the arrow to set the sort up or down. This will be your primary sort. The order in which you select columns determines the sort hierarchy.
 2. Shift-Click the next column that you want to sort by, and then click the sort arrow to set the sort order for that column. This will be the secondary sort.
 3. Repeat step 2 for any additional columns that you want to sub-sort on.
- **Resize MaxSupervisor** windows by using the standard Windows method: place the cursor at a window edge or corner, then drag the window to the size you want.
 - **Make a tabbed page an independent view** by dragging the tab away from its position on the screen (applies to the tabs in the lower part of the window only). For example, here the **Agent State** tab has been dragged out to make a separate resizable view:

The screenshot displays the MaxSupervisor interface. At the top, there are tabs for 'Workgroup View' and 'Agent View'. Below these is a table with columns: WG, Name, CIQ, LQT, CIQ > SL%, VM, Config, Logout, Login, Idle, Busy, Wrap-Up, N-Ready, and DND/FWD. The table contains data for various workgroups like 'TS Product 1', 'TS Product 2', 'TS Product 3', 'Cust Supp Product 1', and 'Cust Supp Product 2'. Below the table are tabs for 'Calls in Queue', 'Group Statistics', 'Group Voicemail', and 'Agent Statistics'. The 'Agent Statistics' section shows performance summaries for three agents: 2001-Joe Schmo, 3501-Penny Nickel, and 3502-Race Street. To the right, the 'Agent State' tab is dragged out, showing a list of agents with their status (Out), extension, name, and agent ID.

WG	Name	CIQ	LQT	CIQ > SL%	VM	Config	Logout	Login	Idle	Busy	Wrap-Up	N-Ready	DND/FWD
1111	TS Product 1	0	00:00:00	0	0	9	8	0	0	0	0	0	0
2222	TS Product 2	0	00:00:00	0	0	9	8	0	0	0	0	0	0
3333	TS Product 3	0	00:00:00	0	0	9	8	0	0	0	0	0	0
4444	Cust Supp Product 1	0	00:00:00	0	0	9	8	0	0	0	0	0	0
5555	Cust Supp Product 2	0	00:00:00	0	0	9	8	0	0	0	0	0	0

Agent State	Login/Out	Ext	Name	Ag
● Out	2001	Joe Schmo	Av	
● Out	3501	Penny Nickel	Av	
● Out	3502	Race Street	Av	
● Out	5000	Remote One	Ur	
● Out	5001	Remote Two	Av	
● Out	2002	Tweedle Dee	Av	
● Out	2003	Tweedle Dum	Av	
● Out	2004	Boris Karloff	Av	
● Out	2005	Lon Cheney	Av	

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

WG	Name	CIQ	LQT	CIQ > SL%	VM	Config	Logout
1111	TS Product 1	0	00:00:00	0	0	9	8
2222	TS Product 2	0	00:00:00	0	0	9	8
3333	TS Product 3	0	00:00:00	0	0	9	8
4444	Cust Supp Product 1	0	00:00:00	0	0	9	8
5555	Cust Supp Product 2	0	00:00:00	0	0	9	8

Login/Out	Ext	Name	Agent State	Skill Level	Rec	T
Out	2001	Joe Schmo	Available (04:45:06)	1		
Out	3501	Penny Nickel	Available (04:44:09)	1		
Out	3502	Race Street	Available (04:44:09)	1		

Agent's Performance Summary since Midnight		2001-Joe Schmo	3501-Penny Nickel	3
Agent Daily First Login Time		-	-	-
Last Logged In Time		-	-	-
Last Logged Out Time		02/17/2009 08:58:07	02/17/2009 08:58:07	0
Total Logged In Time		00:00:00	00:00:00	0
Total Nnt-Ready Time (Annlv In all WG)		00:00:00	00:00:00	0

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

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

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

Restoring Defaults

To restore columns, column and tab order, windows, and so on, to their defaults, or to hide logged-out or unstaffed agents, open the Configuration panel.

1. Click the **Configuration** button.
2. Click the **Restore Defaults** tab.
3. Make your changes in this panel and then click **OK**.
4. Restart MaxSupervisor.

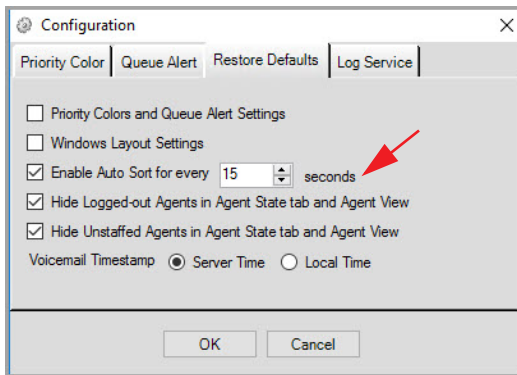
Setting the Re-Sort Interval

MaxSupervisor includes an automatic sort interval for Agent View and Agent Status. The application will refresh the display based upon the interval you've chosen and the column you've used to sort the data.

The default interval is 15 seconds.

To change this interval from the default setting,

1. Click the **Configuration** button.
2. Click the **Restore Defaults** tab.



3. Check the **Enable Auto Sort for every xx seconds** check box.
4. Specify how often to sort, in seconds. Click **OK**.

Auto-sort Notes

- Older systems, and systems with less memory or a slower processor, may exhibit screen flashes while the view is being sorted. For this reason, we recommend that such systems use a relatively large auto-sort interval value.
- If your combined total of "unique" agents in all workgroups exceeds 200 (where an agent having membership across multiple work groups is considered 1 unique agent), then you may experience slight performance degradation.

Minimizing and Exiting MaxSupervisor

Minimize - To minimize MaxSupervisor, click the **Minimize** button in the top right corner of the screen. MaxSupervisor shrinks to an icon in the Windows task bar and the Windows system tray.

Exit - If you are shutting down Microsoft Windows, MaxSupervisor will close automatically. Otherwise, to exit MaxSupervisor, right-click the icon in the Windows Task bar and choose **Close Window** or click the X in upper right corner of the MaxAgent window.

Error Messages

The following messages may appear as login or connectivity errors.

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

Error Message	Description	Solution
The version of Max-Supervisor on your desktop is out of date.	The installed version of MaxSupervisor does not match the version of MAXCS on the system server.	Upgrade MaxSupervisor to match the current running version of MAXCS.

Using MaxSupervisor

Using MaxSupervisor, you can do the following:

- Monitor multiple workgroups in a single view that displays queue and staffing information for all the workgroups
- View details of a selected workgroup: calls in queue, group statistics (including graph format), group voice mail, agent statistics, and agent state
- Pick up and redirect queued calls
- Listen to an agent's phone call
- Barge in on an agent's phone call
- Coach an agent without the caller hearing you
- Record an agent's phone call
- Log in and log out agents from workgroups
- Manually set an agent to *Ready* or *Not Ready* state
- Listen to and handle workgroup voice mail
- Save and print workgroup and agent statistical data

Monitoring Workgroups

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

WG	Name	CIQ	LQT	CIQ > SL%	Callback Pend	VM	Config	Logout	Login	Idle	Busy	Wrap-Up	N-Ready	DND/FWD	Error	Not Avail
171	Product Service	0	00:00	0	0	1	1	0	1	1	0	0	0	0	0	0

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

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

The columns display the following information:

- **WG** — Workgroup number

- **Name** — Workgroup name
- **CIQ** — Number of calls in queue. The background color changes to red when the limits specified in the configuration are exceeded.
- **LQT** — The length of time that the oldest call has been waiting in the queue. The background color changes to red when the limits specified in the configuration are exceeded.
- **CIQ > SL%** — The percentage of calls in the queue that has been waiting longer than the MAXCS-defined service level
- **Callback Pend** – Number of callbacks that are scheduled and have not been completed yet.
- **VM** — Number of unheard workgroup voice mails
- **Config** — Number of agents set up for this workgroup
- **Logout** — Number of agents logged out of this workgroup
- **Login** — Number of agents logged in to this workgroup
- **Idle** — Number of agents who are available for a call

Note: Beginning with Release 7.5, when a Polycom user places a call on hold, the agent is considered Busy in Workgroup calculations. This is different from the calculations in previous releases, where an agent with a call on hold would be calculated as Idle.

- **Busy** — Number of agents who are in the busy state (offhook, forward all calls, do not disturb)
- **Wrap-Up** — Number of agents who are in the wrap-up state (performing duties related to finishing a call)
- **N-Ready** — Number of agents who are in the not ready state
- **DND/FWD** — Number of agents who have DND turned on or are having their calls forwarded
- **Error** — Number of agents who are in the error state (offhook but not on a call)
- **Not Avail** — Number of agents who are logged in but not able to receive calls for any of a number of reasons (checking voice mail, in wrap-up, in not-ready state, in busy state, etc.) This value will increment only when agent is Unstaff (virtual extension).

Viewing the Queues

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

ID	WG	Caller ID	Caller Name	DNIS	Queue Time	Priority	PQT	SKLR	Type
1	515	8313354605	Tyler B		00:00:10	5	00:00:10	0	Voice C

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

Callback Calls

Following is a description of the data for Callback calls:

Queue Time — The queue time for the current call

LQT — The length of time in the current queue

Caller ID — The caller ID for the current call

Caller Name — The caller name for the current call

DNIS — The DNIS for the original call

Priority — The priority of the original call

SKLR — The SKLR for the original call

For workgroups handling Callback calls, the following additional columns will be available:

Original Number — the original phone number

Original Name — the original name

Original Group — the original workgroup where the caller chose the Callback option

To pick up a call from queue

To pick up a call from queue, select the call and click the **Pickup** button at the bottom of the tab. This will ring the supervisor extension when the phone is in idle state. If it is not in idle state, the supervisor's current call is put on hold and the queued call is connected.

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

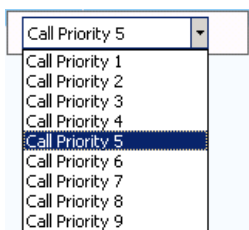
To redirect a call from queue

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

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

To reassign call priority

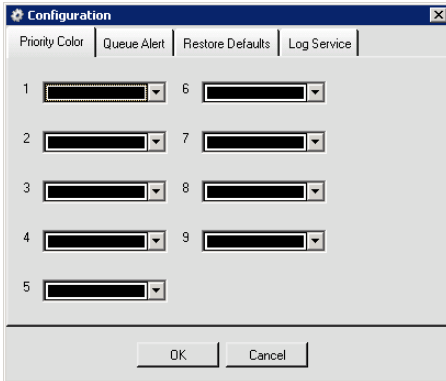
To reassign call priority to a queued call, right-click on the call and select a priority level from **1 - 9**.



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

Using Color-Coding and Alerts

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

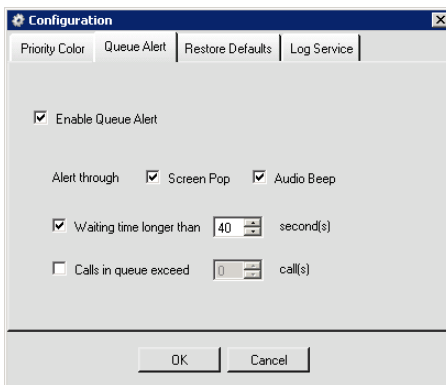


To assign a color to each call priority

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

To set up queue alerts,

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



2. Check **Enable Queue Alert** to enable the alert.

3. Choose to be alerted through a screen pop and/or an audio beep.
4. Choose to be alerted when the queue time exceeds the number of seconds you specify and/or the number of calls exceeds the number you specify.
5. Click **OK**.

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

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

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

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

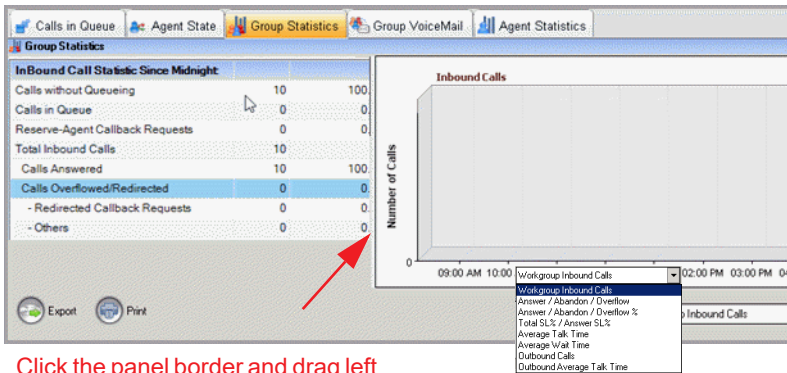
To restore alerts to the default settings

To restore alerts to the default settings,

1. Click the **Configuration** button to open the Configuration dialog box, then click the **Restore Defaults** tab.
2. Check the **Priority Colors and Queue Alert Settings** check box. Click **OK**.
3. Restart MaxSupervisor.

Viewing Group Statistics

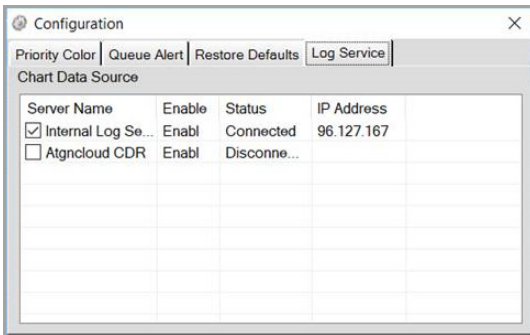
The **Group Statistics** tab displays (in both tabular and graph formats) real time workgroup activity and performance since midnight, and a summary of agent data. The statistics displayed are for workgroup calls only.



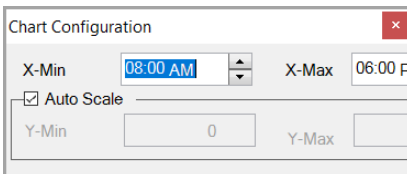
Click the panel border and drag left or right to resize the panels

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

Note: if MaxSupervisor is running behind NAT, the graph may not display. To resolve this, go to **Configuration** -> **Log Service** and enter the AW Server public IP Address in the IP Address field..



To adjust the time of day for the graph, right-click the graph and adjust the settings.



Workgroup statistics are reset every night at midnight.

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

Inbound Call Statistics Since Midnight	
Calls without Queuing	Total of calls with queue duration of zero.
Calls in Queue	Total number of calls in queue.
Total Inbound Calls	Total calls that arrived.
Calls Answered	Total inbound calls that were answered.
Calls Overflowed/ Redirected	<p>Count of calls that overflowed from the WG queue or were redirected to other destinations.</p> <p>These statistics will appear if the workgroup has been enabled for Callback calls:</p> <ul style="list-style-type: none"> • Callback Requests — The number of Callback request calls • Others — The number of calls other than callback request calls
Calls Abandoned	Total of all types of abandoned calls in the following subcategories.
- Abandoned in Queue	Count of callers who hung up while in queue listening to music or queue greeting.
- Abandoned during Ring	Count of caller hang ups while ringing a WG agent.
- Abandoned to Voice Mail	Total of all calls abandoned to VM.
*Leave Voice Mail	Count of calls abandoned to voice mail by caller pressing a digit or by the system automatically redirecting caller to voice mail where caller leaves a message.
*Without Voice Mail	Count of calls abandoned to voice mail by caller pressing a digit or by system automatically redirecting caller to voice mail and where the caller did not leave a message.
- Abandoned to App or Others	Total calls redirected to a target (including to an application) other than voice mail, when caller in queue presses a digit.

Service Level	
SLT - Service Level Threshold (seconds)	WG calls taken out of queue are either taken before or after this administrator set time. It is used as a measure for other statistics.
Calls Answered within SLT	Total calls answered with queue duration less than or equal to the Service Level Threshold configured in Workgroup Configuration window of MAXCS.
Service Level %	Percentage of calls in queue answered before SLT time is reached.
All Calls with Wait Time less than SLT	Number of calls with queue duration with wait time less than SLT, whether answered, abandoned, or otherwise terminated.
Wait Time and Talk Time	
Average Wait Time for Answered Calls	Total Wait Time for Answered Calls divided by Total Calls Answered.
Average Wait Time for Abandoned Calls	Total Wait Time (Queue Duration + Ring Duration) for Abandoned Calls divided by Total Calls Abandoned.
Average Talk Time	Total In Talk Time divided by Total Inbound Calls Answered.
Maximum Calls in Queue	Peak number of calls that were in the queue.
Longest Queue Time	Longest time any one call was in the queue.
Outbound Call Statistics Since Midnight	
Total Connected Outbound Calls	Total of outgoing calls successfully connected.
Avg Talk Time	Total Outbound Talk Time divided by Total Connected Outbound Calls.

Total Callback Calls Since Midnight – These statistics will appear if the workgroup has been enabled for Callback calls	
Callback Connected	Total of Callback calls that connected with the target workgroup. These calls can either be put in the queue when no agents are available or ring agents without putting into the queue. After the callback call is re-connected, it will then be included in the existing call statistics, such as answered, abandoned or overflowed/redirected calls, depending upon the call's exit state.
Callback Failed	Total Callback calls that did not connect back to the target workgroup. The reason that these attempts failed could be that the calls did not go through or that the answering party rejected the call.

Viewing Agent Statistics

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

The table also displays the login and logout times.

Calls in Queue Agent State Group Statistics Group VoiceMail Agent Statistics				
Agent Statistics				
Agent's Performance Summary since Midnight	2001-Joe Schmo	3501-Penny Nickel	3502-Race Street	5000-R
Agent Daily First Login Time	-	-	-	-
Last Logged In Time	-	-	-	-
Last Logged Out Time	02/17/2009 13:48:46	02/17/2009 13:48:47	02/17/2009 13:48:47	02/17/20
Total Logged In Time	00:00:00	00:00:00	00:00:00	00:00:00
Total Not-Ready Time (Apply to all WG)	00:00:00	00:00:00	00:00:00	00:00:00
Total DND/FWD Time (Apply to all WG)	00:00:00	00:00:00	00:00:00	00:00:00
Agent's WG Call Activities:				
Total WG In Calls Answered	0	0	0	0
Total Talk Time	00:00:00	00:00:00	00:00:00	00:00:00
Average Talk Time	00:00:00	00:00:00	00:00:00	00:00:00
Total WG Out Calls Connected	0	0	0	0
Export Print				

You can sort the agents in ascending or descending order by type of statistic. To do so, click a statistics category on the left. The agents get rearranged according to your selection. For example, if you click "Total WG In Calls Answered", you would see something like the following:

Agent's WG Call Activities:				
Total WG In Calls Answered	7	18	13	7
Total Talk Time	02:44:29	05:02:11	01:17:34	01:19:15

Notice that the chosen category above displays a descending arrow. So the first agent displayed here answered the most calls, and the last agent displayed answered the least. If you click the category again, the arrow and the sort order becomes ascending, from least to most.

Saving and Printing Statistics

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

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

Viewing Agent State

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

WG	Name	CIQ	LQT	CIQ > SL%	Callback Pend	VM
57	TS Operations	0	00:00:00	0	0	0

Login/Out	Ext	Name	Agent State	Not Ready Reason	Sl
In	235	Agent Name	Available (00:19:31)	-	1
Out	520	Agent Name	Available (00:26:39)	-	1
In	210	Agent Name	Not Ready (02:04:31)	[5] Deployment	1
Out	212	Agent Name	Not Ready (00:25:31)	[1] Lunch	1
In	221	Agent Name	Busy (00:26:23)	-	1
In	202	Agent Name	Not Ready (00:37:54)	[5] Deployment	1

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

If your organization is using Not Ready reason codes, they can appear on the Agent State tab.



You can hide logged-out agents or unstaffed agents from the view. This option is found in the Configuration panel on the *Restore Defaults* tab.

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

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

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

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

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

Column: Time in Not Ready Reason

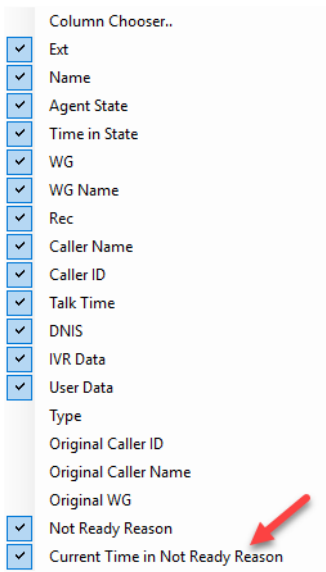
NEW

Beginning in Release 8.6.1, Agent View and the Agent State tab have a new column available: *Time in Not Ready Reason*.

This column displays the amount of time that the agent has been in the current Not Ready reason code.

The duration will continue to increment as long as the agent remains not ready, even if the agent is in a personal call.

Note that if the agent changes to a different Not Ready reason code, then the duration in this column will reset.



Listening in, Barging In, Coaching

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

Note: These features require the appropriate extension permissions. For hardware deployments, they also require that a Triton Resource Board be installed in the MaxCS system. If you try to make use of these features when there is no board present, you'll get a fast busy signal.

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

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

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

During call recording, any communication from a barge-in or coach supervisor's extension becomes part of that call recording.

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

Listening In

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

To listen in to a call,

1. On the **Agent State** tab, click to select an agent connected to an incoming workgroup call.
2. Click the **Listen** button to ring your extension, then listen in by phone or headset.

Alternatively, using the handset, press **# 59 + <agent extension> + <workgroup password> + 1**.

3. When you are finished monitoring, click the **Stop** button at the bottom of the tab.

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

Barging In

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

To barge in to a call,

1. On the **Agent State** tab, click to select an agent connected to an incoming workgroup call.
2. Click the **Barge In** button to ring your extension, then speak to the agent and caller through the handset.

Alternatively, using the handset, press **# 59 + <agent extension> + <workgroup password> + 2**.

3. To exit the call, click the **Stop** button at the bottom of the tab.

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

Coaching on a call

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

To coach an agent,

1. On the **Agent State** tab, click to select an agent connected to an incoming workgroup call.
2. Click the **Coach** button to ring your extension, then speak to the agent through the handset. The agent hears a tone, alerting the agent that coaching has been initiated.

Alternatively, using the handset, press **# 59 + <agent extension> + <workgroup password> + 3**.

3. To exit the call, click the **Stop** button at the bottom of the tab. The **Stop** button becomes available on the tab after you click **Coach**.

Recording Calls

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

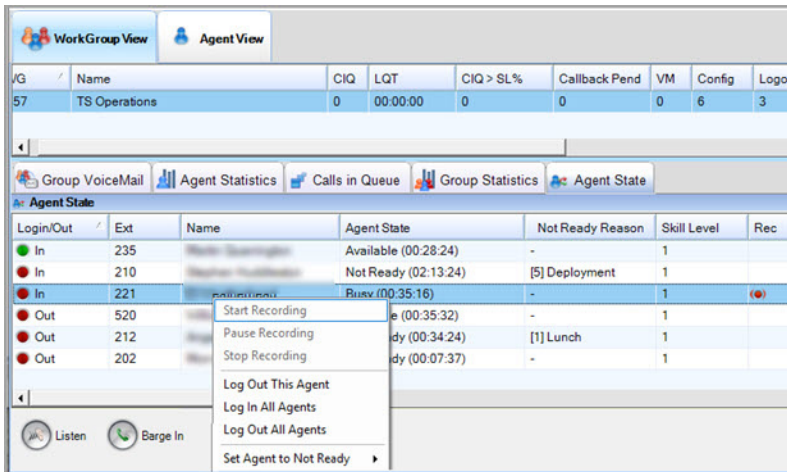
Note: The system administrator must have enabled the **Non-Workgroup Call** recording option for your extension.

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

During call recording, any communication from a barge-in or coach supervisor's extension becomes part of that call recording.

To record a call,

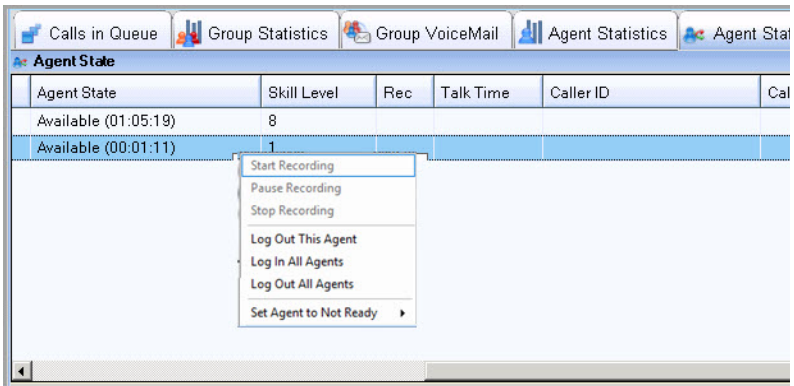
1. On the **Agent State** tab, right-click on the agent call to open a context menu.



2. Choose **Start Recording**. If the **Insert Recording Tone** option is set, both parties will hear a beep when the recording begins.
Note: After a supervisor clicks on the **Start Recording** command to record an agent's conversation, a recording icon appears in the **Record** column. It remains until the call is finished or when the supervisor stops recording the call.
3. To pause recording, right-click on the conversation and choose **Pause Recording**.
4. To end recording, right-click on the conversation and choose **Stop Recording**. If your system records to a centralized location, contact your administrator for access. If the system is set to save the recording to your voice mail, you can listen to the recording through the Altigen Voice Mail System.

Forced Agent Login/Logout

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



- To log an agent out of a workgroup, right-click on a workgroup row and choose **Log Out This Agent**.
- To log out all agents, right-click on a workgroup row and choose **Log Out All Agents**.
- To log all agents in to a workgroup, right-click on a workgroup row and choose **Log In All Agents**. You must wait a few moments for all of the agents to be logged in before you switch to a different workgroup. If you do not wait, some agents in the first workgroup may not be logged in properly.

Setting Agents to Ready or Not Ready State

You can set agents to Ready or Not Ready state as needed. Just right-click the agent's name and choose the appropriate action from the properties menu.

NEW

If MaxCS has been configured to require reason codes when an agent state changes to Not Ready, then you will need to choose a reason code for this change. A new reason code has been added for your convenience: *97 - Supervisor Override*. You can choose that code or any other code that is more appropriate.

Viewing Group Voice Mail

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

Type	Caller Name	Number	Date/Time	Duration	F
Heard	O	5102526353	11/18/2008 3:23:12 PM	00:00:07	
Heard	SANTA CRUZ CA	8318188219	11/18/2008 4:09:55 PM	00:00:04	
Saved	O	5102526353	11/20/2008 12:01:33 PM	00:00:04	
New	SANTA CRUZ CA	8318188219	1/6/2009 1:13:39 PM	00:00:07	
New	SANTA CRUZ CA	8318188219	1/6/2009 1:26:31 PM	00:00:02	
New	Tyler B	8313354605	1/6/2009 1:34:45 PM	00:00:04	
Heard	SANTA CRUZ CA	8318188219	1/6/2009 8:43:19 PM	00:00:06	
Urgent	SANTA CRUZ CA	8318188219	1/20/2009 5:56:10 PM	00:00:04	
New	SANTA CRUZ CA	8318188219	1/20/2009 9:59:54 PM	00:00:04	

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

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

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

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

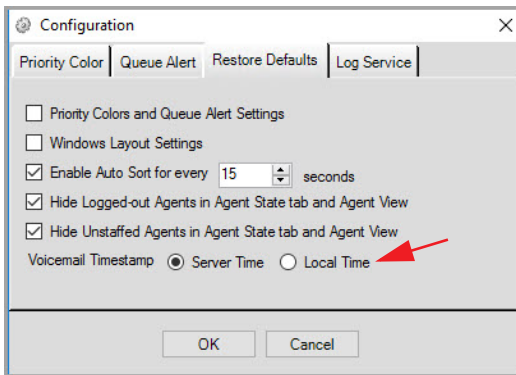
The **Note** column gives you a place to type a note about the voice mail. Just click in the column and type your note.

Displaying Local or Server Time for Messages

If you are located in a different time zone from the MaxCS server, you can adjust the display of the Date/Time column to reflect either the local time or the server time.

To adjust the voicemail time display,

1. Click the **Configuration** button to open the Configuration dialog box, then click the **Restore Defaults** tab.
2. For the *Voicemail Timestamp* options, click either **Server Time** or **Local Time**. Click **OK**.



Dealing with Voicemail messages

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

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

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

ID	Name

Number	Name
<input type="checkbox"/> 1234	1234
<input type="checkbox"/> 1300	John Boyd
<input type="checkbox"/> 1301	Richard Hatfield
<input checked="" type="checkbox"/> 1302	Eric Tran
<input type="checkbox"/> 2300	Wendy Sanders
<input type="checkbox"/> 2301	Kim Franklin
<input type="checkbox"/> 2302	seven ten
<input type="checkbox"/> 2700	2700
<input type="checkbox"/> 2701	2701
<input type="checkbox"/> 2702	2702
<input type="checkbox"/> 2703	2703
<input type="checkbox"/> 2704	2704
<input type="checkbox"/> 2705	2705
<input type="checkbox"/> 2706	2706

Record introductory message

Voice mail groups are listed here

Extensions are listed here

2. Check the check box next to the group(s) and/or extension(s) to which you want to forward the message.
3. Optionally, you can leave an introductory message. Select the **Record Introductory Message** check box and follow the steps below.
4. Click **OK** to complete the forwarding.

Recording an Introductory Message

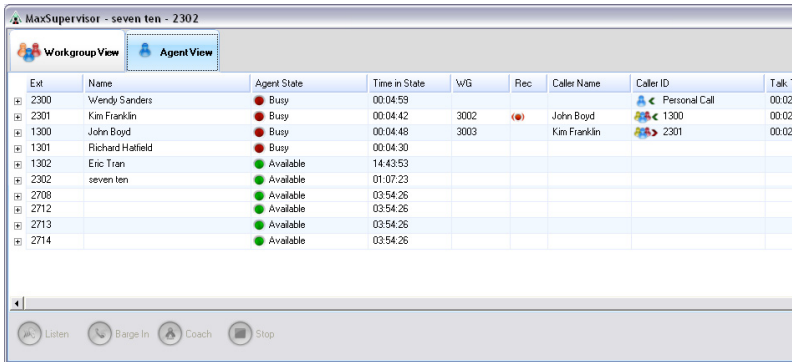
1. If you select the **Record Introductory Message** check box, then when you click **OK** to complete the forward, pick up the phone hand set and you'll hear a prompt to record the message.
2. Record the message and press the pound key (**#**). A confirmation appears on screen.
3. Click **OK** to confirm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

To attach a note:

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

Agent View

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



The screenshot shows the MaxSupervisor interface with the 'Agent View' tab selected. The table below represents the data shown in the interface:

Ext	Name	Agent State	Time in State	WG	Rec	Caller Name	Caller ID	Talk
2300	Wendy Sanders	Busy	00:04:59				Personal Call	00:02
2301	Kim Franklin	Busy	00:04:42	3002		John Boyd	1300	00:02
1300	John Boyd	Busy	00:04:48	3003		Kim Franklin	2301	00:02
1301	Richard Hatfield	Busy	00:04:30					
1302	Eric Tran	Available	14:43:53					
2302	seven ten	Available	01:07:23					
2708		Available	03:54:26					
2712		Available	03:54:26					
2713		Available	03:54:26					
2714		Available	03:54:26					

At the bottom of the window, there are four buttons: Listen, Barge In, Coach, and Stop.

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

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



Beginning in Release 8.6.1, you can also display the workgroup name beside the workgroup number column.

If an agent is handling a Callback call, you will see data in the following fields:

Original Number — the original phone number

Original Name — the original name

Original Group — the original workgroup where the caller chose the Callback option

See the section, “Callback Calls” on page 19 for descriptions of data for Callback calls.

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

The screenshot shows the MaxSupervisor interface for agent Wendy Sanders (Ext: 2300). The 'Agent View' tab is active, displaying a table with columns: Ext, Name, Agent State, Time in State, WG, Rec, Caller Name, and Caller ID. Below this, a detailed table shows login/logout history for workgroups 3002 and 3003. A second table lists other agents: Kim Franklin (Ext: 2301), John Boyd (Ext: 1300), Richard Hatfield (Ext: 1301), and Eric Tran (Ext: 1302).

Ext	Name	Agent State	Time in State	WG	Rec	Caller Name	Caller ID
2300	Wendy Sanders	Busy	00:06:21				Personal Call

WG	Login/Out	Last Login Time	Login Duration	Last Logout Time	Logout Duration	Logout Reason	Skill Level
3002	In	01/23/2009 13:48:21	25:04:24:46				5
3003	Out			02/17/2009 17:16:16	00:56:51	[86]	3

Ext	Name	Agent State	Time in State	WG	Rec	Caller Name	Caller ID
2301	Kim Franklin	Busy	00:06:05	3002		John Boyd	1300
1300	John Boyd	Busy	00:06:10	3003		Kim Franklin	2301
1301	Richard Hatfield	Busy	00:05:52			Sales Region 4	3002
1302	Eric Tran	Available	14:45:15				

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

You can expand the information for multiple agents.

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

This screenshot is identical to the previous one, but with a context menu open over the row for workgroup 3003. The menu options are: 'Log Out From This Workgroup', 'Log In To All Workgroups', and 'Log Out From All Workgroups'.

On this tab, you can hide logged-out agents or unstaffed agents from the view. This option is found in the Configuration panel on the *Restore Defaults* tab.

You can set agents to *Ready* or *Not Ready* state as needed. Just right-click the agent's name and choose the appropriate action from the properties menu.



Beginning in Release 8.6.1, Agent View and the Agent State tab have a new column available: *Time in Not Ready Reason*. For details, see "Column: Time in Not Ready Reason" on page 29.

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