



# **Call Center Suite Version 3.0**

## *Overview of New Features*

**January 2002**

## Overview

All of the Call Center Suite modules have been further developed in Version 3.0. The most significant enhancements are in the area of reporting, including the introduction of a new reporting module, Auto Reporter, which extends powerful historical and real-time reporting capabilities beyond current network boundaries plus a number of time saving benefits. The module enhancements are detailed below.

### Server

#### Native TCP/IP Support

Call Center Suite now supports native TCP/IP from the modules into the Server, which simplifies configuration on end user sites. Call Center Suite can now be readily deployed in call center scenarios that are increasingly popular: Call center agents are no longer having to work in central locations. Using Call Center Suite v3.0 means that remote agent setup is easy, as are multi-site applications using industry standard WAN connectivity.

#### Over 1,000 Concurrent User Connections

As a result of the TCP/IP support described above, the previous limit of 255 simultaneous connections for associated modules of CallViewer, RealViewer and Reporter has been increased to well above 1,000. This enables the product to be scaled into significantly larger configurations.

#### 2,000,000 Record Import Support

There are new regulations that impact call centers regarding blocking unsolicited calls to individual parties. Call center companies that ignore the regulations could be faced with financial penalties. Call Center Suite previously addressed this issue by giving users the ability to enter the parties who do not want to receive unsolicited calls into the Server database. With the new release, Call Center Suite has been increased from 1,000,000 to 2,000,000 records that can now be imported into the Server. For more information on these regulations, reference the Direct Marketing Association's Web site at [www.the-dma.org](http://www.the-dma.org).

#### Serial Connection Speeds Increased Above 38,400 Baud

In order to better support intensive, large sites, the baud rate has been increased to 38,400 for serial connection speeds, which reduces the delay in statistical updates during busy hour periods.

#### Call Summary Screen Now Includes ACD Agent Information

The Call Summary Screen view has been modified to include real-time statistics that display global ACD Agent information:

- Agents currently logged in
- Agents currently in "Free" status
- Agents currently in "Busy" status
- Agents currently in "Wrap-Up" status
- Agents currently in "Busy N/A" status



### RealViewer

#### TCP/IP Support Added

Via TCP/IP, RealViewer can now display information at remote locations rather than just being geographically confined to direct LAN connections.

#### New Statistics Added

The following new statistics have been added to the RealViewer selection menu, which eliminates the need to create special filters to view this information:

Avg Ring (In) Time Now	Total Call (Out) Time Now	Avg Talk (In) Time	Max Ring (Out) Time
Avg Ring (Out) Time Now	Total Call (In) Time	Avg Talk (Out) Time	Max Talk Time
Total Talk (In) Time Now	Total Call (Out) Time	Avg Call Time	Max Call Time
Total Talk (Out) Time Now	Total Talk (In) Time	Avg Call (In) Time	Agents Idle
Total Call (In) Time Now	Total Talk (Out) Time	Avg Call (Out) Time	

#### Filter Enhancements

A new filter tab called "Transferred Calls" is available to enable measuring call traffic in relation to call transfers.

Users can now select a Windows drop down list to filter by the device (hunt group or extension) that calls were either diverted/transferred/recalled/overflowed to or from.

## ***Intelligent Router***

### TCP/IP Support Added

As discussed above in the Server enhancements, TCP/IP support has been added.

### Placeholders for E-mail Addresses

Previously, the e-mail address field would only accept fixed data entered during creation of the Intelligent Router action. Now, placeholders can be specified in the e-mail address field for increased flexibility. E-mail can be sent to a recipient based upon an import database field value relating to the call that triggered the Intelligent Router action. For example, e-mail could be sent to the agent of a specific customer every time he/she calls in, or even when that customer abandons prior to answer.

### New Statistics Added & Filter Enhancements

As discussed above in the RealViewer section, new statistics and filter enhancements have been added.

## ***Reporter Modules (Historical Reporting)***

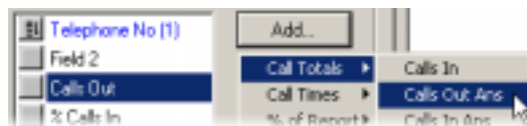
The historical reporting modules have undergone dramatic enhancements. The historical and real-time elements of the Reporter modules have come closer together and several features previously supported by real-time are now included in the historical application.

### TCP/IP Support Added

As discussed above in the Server enhancements, TCP/IP support has been added to the reporting modules.

### Reporter Basic – Report and Report Grouping Customization

Reporter Basic users can now customize their reports by selecting the statistics they want to include. This provides increased flexibility and a more powerful reporting package, similar to the capabilities already in the real-time reporting.



The new release also allows users to configure a “custom report” from scratch, where they may specifically control the field grouping on the report (e.g. by ½ hour, by three minutes, by four minutes talk time, by device, by agent, by trunk, etc.).

### Reporter Basic - Report Field Sorting Customization

Users can now specify the sorting of a report, which can be done by a single field in ascending/descending order, or by using multiple field values. The most important reporting parameters can actually be prioritized in report generation.

### Reporter Pro – Forecasting Stats

Several new statistics have been added that provide call center managers with information necessary for resource planning. This enables users to add columns to reports that show:

- Trunks required
- Agents required
- Percentage trunk usage
- Trunk busy minutes

### Global Filter Availability

Filters created in either the historical and or real-time elements of the Reporter are now shared across both applications.

### Multiple Tariff Support With Enhanced Tariff Structure

Tariff structures can now be set up to accommodate rates that change across times in the week. Due to the ever increasing number of carriers, Version 3.0 now supports any number of additional carrier Tariffs for inclusion in reports.

### Inbound Call Costing

Inbound charges for special services – One or more of the multiple call tariffs can be assigned as “Inbound” to facilitate charges applied against designated numbers or associated trunk lines. This allows call center managers to verify inbound call costs against network provider invoices, facilitate effective bill production for client cost allocation in outsource environments and/or reconcile revenue generated on applicable inbound lines.

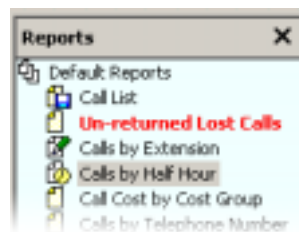
Measuring customer and remotely located site call costs – Custom or standard tariff can be used in collaboration with caller ID to ascertain the accurate cost to the caller of a received call.

### Dialing Code De-Coder

Beyond the ability to match telephone numbers with callers’ name details stored in databases, new fields have been added that match telephone dialing codes against the “Area” and “Charge Group”. Potential abuse can be pinpointed and further traffic analysis can be performed.

### Easier Report Management

The new browser-style interface makes it easier for users to select, modify and group saved report configurations.



### Improved Print Previews Options

With the print preview options now available, users can click on options to size to fit length, width, zoom, auto size and scale the font. Users can also drag it around on the screen, making it easier to get from the end of the page to another, when zoomed up. In addition, “print preview” actually just becomes a different viewing mode of a report, so a report’s configuration can be modified directly from “print preview mode”.

### Multiple Report Views

Version 3.0 enables users to select several reports for onscreen viewing.

07:00:00 - 07:30:00	14	28	00:34:25	00:01:00	1.4%	2.3
07:30:00 - 08:00:00	4	13	00:33:53	00:03:04	0.4%	1.1
Total	972	1202	28:58:18	00:01:24	100.0%	100.0

Navigation buttons: Calls by Extension, Calls by Half Hour, Call Cost by Cost Gro..., Calls by Telephone

### Faster Report Calculations

Reporting capabilities have been further optimized to significantly reduce delays previously encountered. Reports can also be run simultaneously, so users no longer need to wait for one report to finish before requesting the next.

### Summary Reports Subtotals

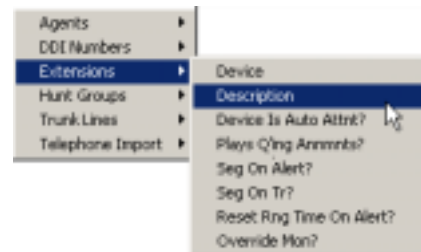
Grouped reports now show subtotals against each column.

### Improved User Interface

The new user interface closely resembles a browser and shares many similarities, including folder creation and simplified navigation via the toolbar.

### Friendlier Configuration

The construction of reports is now more consistent with List Tile configuration in the real-time reporting. For example, field-choosing uses the all-familiar statistics sub menus, and the filtering user interface across both products is almost identical. Also included are report configuration improvements, such as the ability to right-click to run a report (even in print preview mode) and immediately change its parameters.



### View All Data Across All Server Databases

Previous versions have only permitted the running of reports based upon the call and agent status database files. In Version 3.0, users can now choose to run reports on all configuration related data, the call data, the agent status and even the telephone import database.

### User Configurable Time Segments

Report time segments were previously fixed at half hourly intervals, such as inbound calls by half hour report. With v3.0, the interval period can now be set by users between "1 Second" to "Per Month". Per Month can include any number of months, so if there is sufficient historical data, users could actually group by quarter, or even by year.



### Configurable Report Templates

In addition to default reports, this new version includes the ability to customize report templates with any statistic, in any report, and in any order.

### Concurrent User Licensing via Server

Security key implementation has been simplified in this new release. The quantity of user licenses is now concurrently controlled across the network by the Server dongle and Reporter users no longer require dedicated security keys.

## ***Reporter and Reporter Pro (Real-Time Reporting)***

### TCP/IP Support Added

As discussed above in the Server enhancements, TCP/IP support has been added.

### New Statistics Added

The following new statistics have been added to the real-time reporting, which eliminates the need to create special filters:

Avg Ring (In) Time Now	Total Call (Out) Time Now	Avg Talk (In) Time	Max Ring (Out) Time
Avg Ring (Out) Time Now	Total Call (In) Time	Avg Talk (Out) Time	Max Talk Time
Total Talk (In) Time Now	Total Call (Out) Time	Avg Call Time	Max Call Time
Total Talk (Out) Time Now	Total Talk (In) Time	Avg Call (In) Time	Agents Idle
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### Filter Enhancements

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## ***Auto Reporter – New Module***

This new module provides the current Reporter modules with degrees of automation and extends the way information is displayed and viewed. Auto Reporter is supplied on a system wide basis. However, in order to take advantage of the real-time statistical reporting to cell phones, readerboards, Web, etc., the customer must have Reporter or Reporter Pro in conjunction with Auto Reporter.

### Scheduled Report Production

A schedule can be set in time increments of seconds, minutes, daily, weekly, or monthly for each individual real-time statistic or report. Real-time can schedule as low as every five seconds and historical reports can be scheduled to refresh every 15 minutes at a minimum.

Reports can be scheduled to print, uploaded to a Web site, e-mailed, or even exported to Excel, Word or CSV (comma separated value) file. This saves considerable time and effort for users by eliminating the need to manually produce metrics.

### Exporting to HTML, WML, Excel, Word

The report exporting capabilities have been extended to go beyond traditional CSV and TXT (text) methods. Auto Reporter can directly export reports to HTML (Hyper Text Mark Up Language) for Web page use, WML (WAP Mark

Up Language) for access via cellular phones, Excel and Word. The exporting can be either automatically scheduled or on demand.

#### Auto Publishing to Web & WAP

Auto Reporter allows reports and real-time tiles to be published directly to a Web or WAP site, using FTP (File Transfer Protocol). Call Center Suite users could use this functionality to publish reports and statistics for instant availability throughout the organization. And, in the case where call center services are being outsourced to a company that has deployed Call Center Suite, regular performance reports on service levels could be automatically updated and accessible. Historical reports have a minimum refresh period of 15 minutes and real-time statistics have a minimum refresh period for HTML and WML of five seconds.

By publishing to WML, users can have access to reporting information and real-time statistics. This enables call center management to access the status of agents and/or groups via their cellular phones – a unique and useable management tool.

The WAP and HTML capabilities can be further extended by utilizing alternative display formats, which are supported by Personal Digital Assistants (PDAs) and handheld PCs.

#### E-mail Reports

Reports can be quickly e-mailed to recipients either on demand or automatically by use of a schedule.

#### Text Output for Readerboard Support

To interface with Readerboards, Auto Reporter uses a real-time schedule to produce a simple text file, which is locally stored on the machine running real-time reporting and can be refreshed every second. The text file contains details including text describing the statistic on the same line as the statistic. Up to 10 statistics can be published by each Reporter user license.

#### Workforce Management Support

Auto Reporter provides the link that enables products, such as Blue Pumpkin Software's Director Essential/Enterprise, to be able to analyze the comprehensive information available within Call Center Suite Reporter Pro to optimize staff resource usage in the call center.

#### Palm™ report format support

With the widespread use of PDAs, information portability is being demanded on an ever-increasing basis. Auto Reporter can schedule reports to be formatted in PalmOS™ friendly formats, so that when combined with popular handheld synchronization applications, such as "AvantGo™" and "Handbase™", offline analysis of reports can be performed.

## ***CallViewer***

#### TCP/IP Support Added

As discussed above in the Server enhancements, TCP/IP support has been added to CallViewer.

#### Enhanced Dialing Rules

Version 3.0 now handles complicated dialing rules for locations where there are local toll calls and/or where there are local call rates to adjacent area codes. This is achieved through the use of a configurable option allowing CallViewer to either calculate its dialing rules via the Server, or where the user/installer specifies the dialing rules locally, including such information as the outbound dialing prefix (trunk access code), local toll codes, international dialing code, etc.