

Call Center Guide

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Call Center Feature

The Call Center feature enables business groups to set up an **entry-level, informal call center** with incoming calls received by a single phone number distributed among a group of users, or agents. The following functionality is supported:

- Agent login and logout
- Uniform distribution of incoming call to the available agents
- Queuing of the incoming calls that cannot be answered immediately
- Overflow to a given destination when the group is unable to accept calls
- No Answer Policy to redirect call to next agent if not answered in a specific number of rings by previous agent
- Music on Hold

A variety of statistics are provided to monitor the performance of call centers, such as *Average Number Agents Busy* and *Average Hold Time Before Call Loss*. Statistics are also provided to track individual agent performance, such as *Average Time Agent Spends on Calls* and *Amount of Time Each Agent Logged On and Idle*. A statistics report is generated at the end of each day and sent to one or two e-mail addresses.

Be sure to read the Release Notes later in this document for known Call Center behavior and best practices.

1.1 Call Center

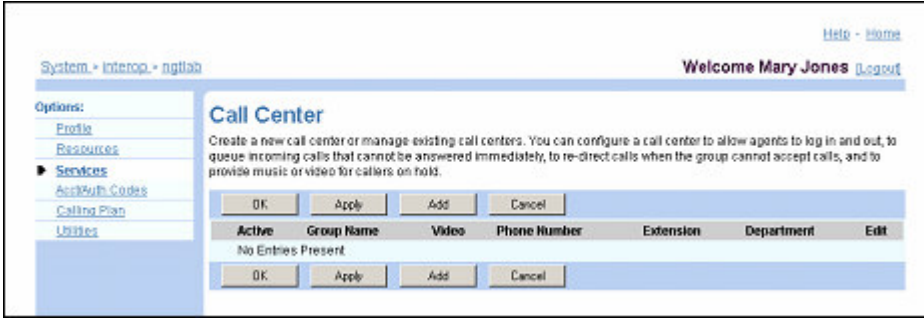
Use this item on the *Group – Services* menu page to:

- [List and Activate or Deactivate Call Centers](#)
- [Access the Profile Menu for a Call Center](#)
- [Add or Modify a Web Interface or Voice Portal Password](#)
- [Configure Statistics Reporting and View Statistics](#)
- [Select Announcements](#)
- [Configure the Voice Portal](#)
- [Configure Weighted Call Distribution](#)
- [Modify Call Center Profile](#)

The Call Center service places incoming calls in a queue if all agent lines are busy. Another feature of the service allows agents to log in or log out of their position in the queue.

1.1.1 List and Activate or Deactivate Call Centers

Use the *Group – Call Center* page to list all current Call Centers and to activate or deactivate a Call Center. From this page, you access the *Profile* menu page for an existing Call Center. Use the *Profile* menu page to add or modify attributes for a Call Center, for example, the announcements played to callers.



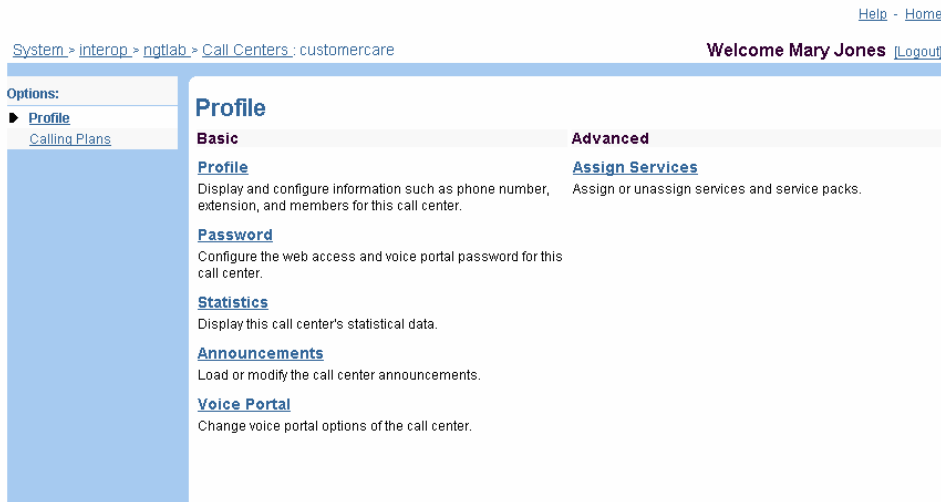
Group – Call Center

- 1) On the *Group – Services* menu page, click **Call Center**. The *Group – Call Center* page appears.
- 2) To activate or deactivate a Call Center, check or uncheck the *Active* box for the Call Center.
- 3) Save your changes. Click **Apply** or **OK**. Apply saves your changes. OK saves your changes and displays the previous page.

To exit without saving, select another page or click **Cancel** to display the previous page.

1.1.2 Access the Profile Menu for a Call Center

Use the *Call Center – Profile* menu page to display the pages to add attributes or to modify attributes for a Call Center.



Call Center – Profile Menu Page

- 1) On the *Group – Services* menu page, click **Call Center**. The *Group – Call Center* page appears.
- 2) Click **Edit** or any item on the row for a Call Center. The *Call Center – Profile* menu page appears.
- 3) To display the options for your Home page, click **Group** or **Home**.

1.1.3 Add or Modify a Web Interface or Voice Portal Password

Use the *Call Center – Passwords* page to add or change the password for the Call Center web interface and voice portal.

[Help - Home](#)

System > [interop](#) > [ngttab](#) > [Call Centers](#) - customercare Welcome **Mary Jones** [Logout](#)

Options:

- ▶ [Profile](#)
- [Calling Plans](#)

Passwords

Passwords allows you configure your passwords for the web portal and/or voice portal.

This user's password expires today

Set web access password Set voice portal password

Reset Password

* Type new password:

* Re-type new password:

Call Center – Passwords

- 1) On the *Group – Services* menu page, click **Call Center**. The *Group – Call Center* page appears.
 - 2) Click **Edit** or any item on the row for the Call Center. The *Call Center – Profile* menu appears.
 - 3) Click **Password**. The *Call Center – Passwords* page appears.
 - 4) Click “Set web access password” to define the web portal password or “Set voice portal password” to define the voice portal password.
 - 5) Type and retype the *Reset Password* text boxes.
 - 6) Save your changes. Click **Apply** or **OK**. Apply saves your changes. OK saves your changes and displays the previous page.
- To exit without saving, select another page or click **Cancel** to display the previous page.

1.1.4 Configure Statistics Reporting and View Statistics

Use the *Call Center – Call Center Statistics* page to view the statistics of activity for this Call Center for today and yesterday and, as required, clear today's statistics and configure statistics reporting.

[Help](#) - [Home](#)

System > [interop](#) > [ngtlab](#) > [Call Centers](#) : [customercare](#) Welcome **Mary Jones** [Logout](#)

Options:

- ▶ [Profile](#)
- [Calling Plans](#)

Call Center Statistics

Call Center Statistics allows you to view the statistics of this Call Center's activity and, as required, clear today's statistics, and configure e-mail statistics reporting.

OK Apply Cancel

Clear today's statistics
 Daily Report

Reporting Period: 15Minutes

E-mail Address:
(es):

Number of calls in queue now:	0	
Number of incoming calls:	<u>Yesterday</u>	<u>Today</u>
Number of calls queued:	0	0
Number of busy overflows:	0	0
Number of calls answered:	0	0
Average time spent with an agent:	0:00	0:00
Average time in queue:	0:00	0:00
Average number of agents busy:	0.0	0.0
Average number of agents logged off:	0.0	0.0
Average hold time before call loss:	0:00	0:00

Agent statistics (Today)

Agent statistics (Yesterday)

OK Apply Cancel

Call Center – Call Center Statistics

- 1) On the *Group – Services* menu page, click **Call Center**. The *Group – Call Center* page appears.
- 2) Click **Edit** or any item on the row for the Call Center. The *Call Center – Profile* menu appears.
- 3) Click **Statistics**. The *Call Center – Call Center Statistics* page appears.
- 4) Configure statistics reporting:
 - To clear or leave today's statistics, check or uncheck the *Clear today's statistics* box.
 - To enable or disable statistics reporting, check or uncheck the *Daily Report* box.
 - Select the *Reporting Period* for the collection of statistics.
 - Type one or two E-mail Addresses to receive the daily statistics report.
- 5) View group statistics:

Statistic	Description
Number of incoming calls	Number of calls that have come into this Call Center group, regardless of whether the call was answered, queued, or sent to Auto Attendant.
Number of calls queued	Number of calls held for the next available agent.

Number of busy overflows	Number of calls that came in after the queue limit was exceeded. It is likely that Auto Attendant answers such calls and the callers are directed to leave a message. (The queue length is set from the <i>Call Center Add</i> or <i>Call Center Modify</i> page.)
Number of calls answered	Number of calls that agents in this Call Center have answered.
Average time spent with an agent	An approximation of the time all agents have spent on calls. If the time is less than one hour, the time is given in the format mm:ss. If the time is more than one hour, the format is hh:mm:ss.
Average time in queue	An approximation of the time all calls have been held waiting for the next available agent. If the time is less than one hour, the time is given in the format mm:ss. If the time is more than one hour, the format is hh:mm:ss.
Average number of agents busy	An approximation of the number of agents that are busy processing calls from the Call Center, based on the duration of all calls processed by the Call Center during the day
Average number of agents logged off	An approximation of the number of agents logged off, based on the total amount of time each agent is logged off during the day.
Average hold time before call loss	An approximation of the amount of time a caller stays in the Call Center queue before deciding to hang up. If the time is less than one hour, the time is given in the format mm:ss. If the time is more than one hour, the format is hh:mm:ss.

6) View statistics for individual agents.

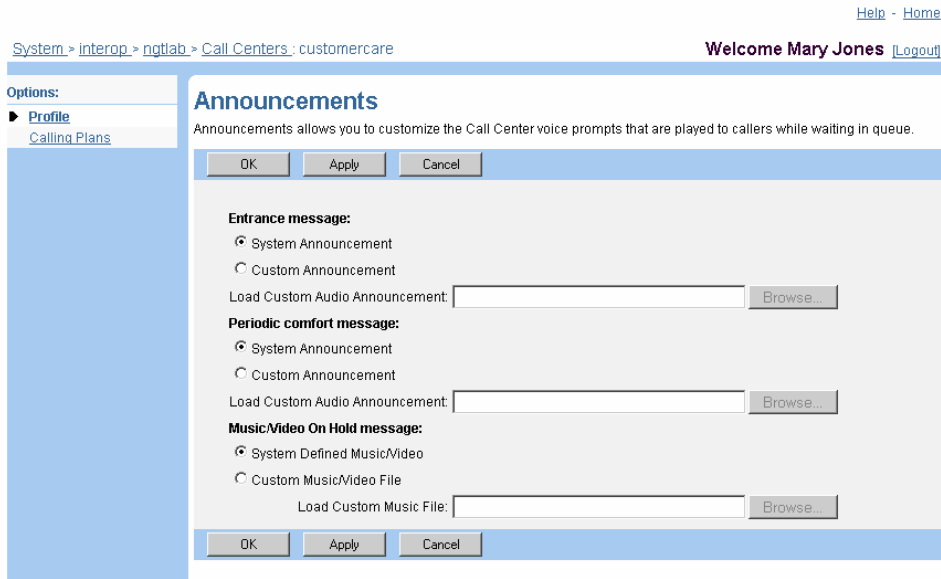
Statistic	Description
Number of calls received for each agent	Number of calls received by each agent.
Average time each agent spends with a call	Average time, in seconds, that the agent spent with a call.
Amount of time each agent is logged off	Amount of time, in minutes, that the agent was logged off.
Amount of time each agent is busy with a call	Amount of time, in minutes, that the agent was busy with a call.
Amount of time each agent is logged on and idle	Amount of time, in minutes, that the agent was logged on and idle.
Number of calls not answered by agent	The number of times an agent was presented with a call but did not answer that call.

7) Save your changes. Click **Apply** or **OK**. Apply saves your changes. OK saves your changes and displays the previous page.

To exit without saving, select another page or click **Cancel** to display the previous page.

1.1.5 Select Announcements

Use the *Call Center – Announcements* page to select the source of the announcements played to callers when their calls are answered (Entrance message) and when calls are put on hold (Periodic comfort message and Music On Hold).



Call Center – Announcements

- 1) On the *Group – Services* menu page, click **Call Center**. The *Group – Call Center* page appears.
- 2) Click **Edit** or any item on the row for the Call Center. The *Call Center – Profile* menu page appears.
- 3) Click **Announcements**. The *Call Center – Announcements* page appears.

NOTE: The *Time Between Messages* option determines how frequently these messages are played.

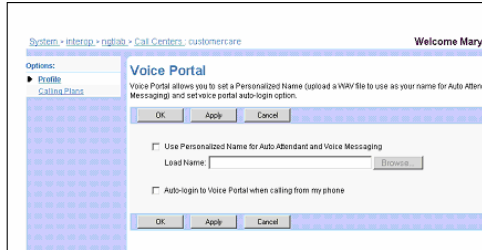
- 4) In the sections for each type of message, click the button for the announcement you want:
 - If you click “Custom Announcement” or “Custom Music File”, type the path and file name of a .WAV file with your greeting in the Load Custom Announcement text box, or click **Browse** to select a file on your computer.
 - If you click “System Announcement” or “System Defined Music”, these announcements or music sources are played:

Message	System Announcement or Audio Source
Entrance message	Your call is very important to us; please wait for the next available agent, or press zero to leave a message.
Periodic comfort message	Your call is very important to us; please wait for the next available agent.
Music On Hold	Audio source selected for the Music On Hold service. To enable Music On Hold, see section Error! Reference source not found.

- To record a personal greeting, click **Help** for this page.
- 5) Save your changes. Click **Apply** or **OK**. Apply saves your changes. OK saves your changes and displays the previous page.
To exit without saving, select another page or click **Cancel** to display the previous page.

1.1.6 Configure the Voice Portal

Use the *Call Center – Voice Portal* page to add or change the audio file that contains the personalized name for the Call Center. The Personalized Name is used in the Auto Attendant and Voice Messaging services for the Call Center. You can also enable the auto-login to the voice portal service with this page.



Call Center – Voice Portal

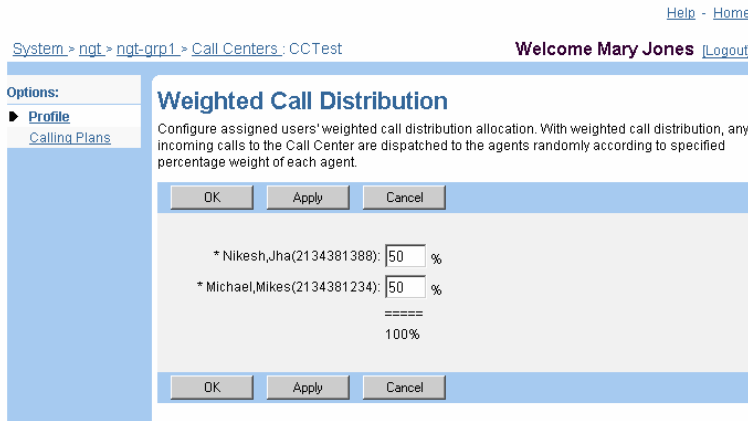
- 1) On the *Group – Services* menu page, click **Call Center**. The *Group – Call Center* page appears.
- 2) Click **Edit** or any item on the row for the Call Center. The *Call Center – Profile* menu page appears.
- 3) Click **Voice Portal**. The *Call Center – Voice Portal* page appears.
- 4) Check the *Use Personalized Name for Auto Attendant and Voice Messaging* box to use the audio file for the Personalized Name of the Call Center.
- 5) To find the audio file on your computer, click **Browse** and open the file. The path to the file appears in the *Load Name* text box.
- 6) Select *Auto-login to Voice Portal when calling from my phone* to enable the auto-login option. When this is enabled, the system recognizes the calling user and the password collection phase is skipped.
- 7) Save your changes. Click **Apply** or **OK**. Apply saves your changes. OK saves your changes and displays the previous page.

To exit without saving, select another page or click **Cancel** to display the previous page.

1.1.7 Configure Weighted Call Distribution

Use the *Call Center – Weighted Call Distribution* page to configure the call distribution policy within your Call Center. You can assign a percentage value to each agent in the Call Center. When a new call comes in, the system is more or less likely to assign that call to a given agent according to the values you set on this page. Agents already occupied with a call are not included in the random determination.

NOTE: The percentage values represent the statistical likelihood of each agent receiving the next incoming call. They are not exact guarantees or quotas.



Call Center – Weighted Call Distribution

- 1) On the *Group – Services* menu page, click **Call Center**. The *Group – Call Center* page appears.
- 2) Click **Edit** or any item on the row for the Call Center. The *Call Center – Profile* menu page appears.
- 3) Click **Weighted Call Distribution**. The *Call Center – Weighted Call Distribution* page appears. This link will only appear if you have enabled the Weighted Call Distribution policy on the profile page for this Call Center.
- 4) Assign a percentage value for each agent in your Call Center using the input boxes provided. The values must add up to exactly 100.
- 5) Save your changes. Click **Apply** or **OK**. Apply saves your changes. OK saves your changes and displays the previous page.

To exit without saving, select another page or click **Cancel** to display the previous page.

1.1.8 Modify Call Center Profile

The *Call Center – Call Center Profile* page is used to delete a Call Center or to modify the profile information for a Call Center.

[Help](#) - [Home](#)

System > [interop](#) > [ngtlab](#) > [Call Centers](#) - customercare Welcome Mary Jones [Logout](#)

Options:

- ▶ [Profile](#)
- [Calling Plans](#)

Call Center Profile

Modify the selected call center.

Call Center ID: customercare [Change User ID \(Also saves current screen data\)](#)

* Name:

Phone Number: Extension:

* Calling Line ID Last Name: * Calling Line ID First Name:

Department: Language:

Time Zone:

Aliases : sip: @

sip: @

sip: @

Group Policy: Circular Regular Simultaneous Uniform Weighted Call Distribution

Call Center Settings:

Queue Length: calls Allow agent logon/logoff

Time Between Messages: seconds Enable music or video on hold for queued calls

Play Comfort Message

Enable guard timer for seconds

No Answer Settings:

Skip to next agent after rings

Forward call after waiting seconds

Calls Forward to:

Enter search criteria below

Last Name Starts With

Available Users	Assigned Users

Call Center – Call Center Profile

- 1) On the *Group – Services* menu page, click **Call Center**. The *Group – Call Center* page appears.
- 2) Click **Edit** or any item on the row for the Call Center. The *Call Center – Profile* menu page appears.
- 3) Click **Profile**. The *Call Center – Call Center Profile* page appears.
- 4) To modify the profile information, type or select information for the Call Center. An asterisk (*) indicates required data.
 - The *Group Policy* options configure the call-distribution pattern for incoming calls. Click the button for the type of setup you want.

Policy	Description
Regular	Sends incoming calls to the next available agent.
Circular	Sends incoming calls to agents according to their position in a list. After a call has been sent to the last agent on the list, the next call is sent to the agent at the top of the list.
Simultaneous	Sends incoming calls to all agent numbers at the same time. Once the call has been answered, the remaining calls to other agents are released.
Uniform	Sends the current incoming call to the agent who has been idle the longest. After an agent has answered a call, they are moved to the bottom of the call queue.
Weighted Call Distribution	Assigns calls randomly to agents according to percentages you assign on the <i>Call Center – Weighted Call Distribution</i> page

- The *Call Center Settings* configure these attributes for calls and agents. Type or select the information you want.

Input Box	Description
Queue Length	The limit for the number of calls that can wait to be transferred to the next agent.
Time Between Messages	The time, in seconds, after which a comfort message is played to callers whose calls are on hold.
Allow agent logon/logoff	Allows agents to log on to or log off from the Call Center. A check mark indicates that the feature is on.
Enable music on hold for queued calls	Plays an audio file while a customer is on hold. NOTE: To specify the audio file for Music On Hold, see section 1.1.5 Select Announcements .
Play Comfort Message.	Plays a comfort message while a customer is on hold.
Enable guard timer for X seconds	Determines how long the system will wait before routing a call to a free agent. When a caller hangs up before an agent, the system may attempt to route another incoming call to that agent before he or she has replaced the handset, causing the call to return to the queue unanswered. When this box is checked, the system waits the specified number of seconds each time an agent's phone indicates that it is ready to receive calls before routing a new call to that agent.

- The *No Answer Settings* configure how the service behaves if an agent does not answer a call. Type or select the data or check or uncheck a box. A checked box indicates a feature is enabled.

Input Box	Description
Skip to next agent after X rings	Check this box to have the system pass incoming unanswered calls to the next agent determined by the current group policy after the specified number of rings.
Forward call after waiting X seconds	Check this box to forward calls that have not been answered by any agent after the specified number of seconds to the phone number specified in the Calls Forward to text box. This box accepts values from 0 to 7200 seconds (2 hours).
Calls Forward to	Calls not answered within the time specified by the <i>Forward call after waiting X seconds</i> control are transferred to the specified number. If this number is not one assigned to the group, type the complete number: + <country code> <national number>.

- 5) Assign users as agents for the Call Center.
 - To find a desired user, enter search criteria in the fields provided and click **Search**.
 - Assign users: In the *Available Users* column, select the users. You can select some or all of the items in a column. Item names are listed in alphabetical order. To select several items in sequential order, click the first name, hold down the SHIFT key on the keyboard, and click the last name. To select several items, but not in a particular order, click the names while holding down the CTRL key on the keyboard.

- To assign the selected users, click **Add >**. To assign all users (unselected) at once, click **Add All >>**.

NOTE: If your Call Center uses the Weighted Call Distribution policy, your new agent will be assigned a percentage value of 0, and therefore will receive no calls until you alter this value on the *Call Center – Weighted Call Distribution* page.

- 6) Unassign users from the Call Center:
 - In the *Assigned Users* column, select the users and click **Remove <**. To unassign all users (unselected) at once, click **Remove All <<**.
- 7) Save your changes. Click **Apply** or **OK**. Apply saves your changes. OK saves your changes and displays the previous page.

To exit without saving, select another page or click **Cancel** to display the previous page.

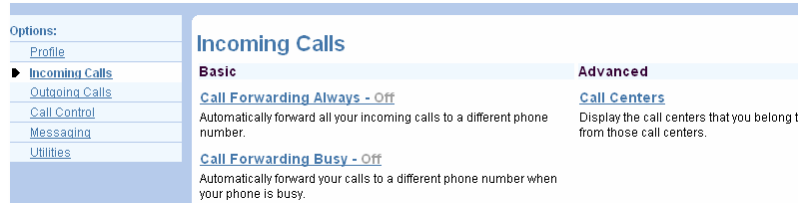
2 Agent Login / Logout

To participate in taking calls from a Call Center, agents must first be assigned to a Call Center and be logged into the Call Center.

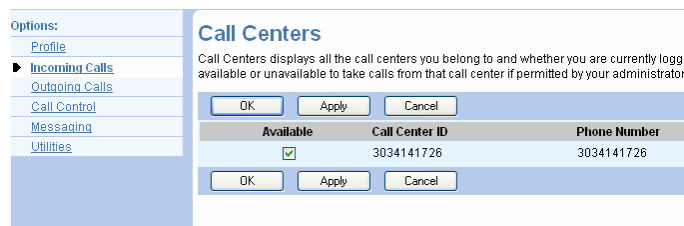
- 1) To log or out of the Call Center, the agent will first log into the Voice Web Portal.



- 2) Go to the **Incoming Calls** section and select “*Call Centers.*”



- 3) To log into the Call Center, check the “**Available**” box and press the **OK** or **Apply** button. To log out of the Call Center, uncheck the “**Available**” box and press the **OK** or **Apply** button.



When an incoming call is coming from the Call Center, the agent will see the name of the Calling Line ID (name of the Call Center) of the Call Center and the inbound caller’s ID.

If an agent does not answer an incoming call, that call will roll to the next available agent. If no agents answer the incoming call, then the caller will be sent to the no answer treatment (Call Center mailbox, or forwarded to another number as defined in the Call Center profile).

If all agents are busy handling Call Center calls, new inbound callers will be held in the queue until an agent becomes available.

If an agent hangs up on a current call, and does not answer a call held in queue, then the next available agent will be tried. If no agents answer the queued call, that call will go to the no answer treatment.

An agent can place his phone on **Do Not Disturb (DND)** (using the Web portal or feature access code) to make his extension appear busy in the queue. This will cause incoming Call Center calls to rollover to the next agent in the hunt sequence since it appears the agent is busy with another call.

Enabling DND at the phone (i.e. using the phone's DND button or call preference settings) will cause the agent's phone not to ring and make the call go to the next agent in the hunt sequence. However, if no other agent in the hunt sequence answers the call, that call will go to the no answer treatment and not be held in queue.

Note: If no agents logout of the Call Center, and all agents put their phone on **DND** then incoming Call Center calls will be queued. These calls will be held in the queue until the caller hangs up or presses **0** to opt-out of the queue and to leave a message.

To avoid calls being held in the queue when there are no agents to accept the calls, all agents should log out of the queue when finished, or at least one agent must not place his phone on DND so that calls will go to the Call Center voice mailbox.

If there are agents available to handle inbound Call Center calls, **to avoid calls currently held in queue or new inbound Call Center calls from going to the no answer treatment (i.e. voice mailbox), agents must log out of the Call Center or place their phone on Do Not Disturb.**

3 Release Notes

3.1 General Call Center Operation

These release notes outline certain known behavior for Call Centers and best practices when using the Call Center function.

- 1) For calls to be queued, all active agents (agents logged into the Call Center) must currently be busy with a Call Center call. If any available agent does not answer an incoming Call Center call, the call will roll to the next agent in the hunt sequence. If all other agents are busy, or do not answer the call, that call will not be queued and will be handled by the no answer treatment (agents are not automatically logged out of the queue when they do not answer a call).
- 2) Agents should be allowed to log out of the Call Center (in other words, the **Allow agent logon/logoff** in the Call Center profile should be checked). Otherwise calls coming into the Call Center will be handled by a no answer treatment (i.e. Contact Center voice mailbox) if the last agent in the hunt order is away from the phone and does not answer the incoming call, and other agents are currently busy with current calls or did not answer the inbound call.
- 3) An agent should log out of the Call Center when possible before hanging up on the current call if he does not wish to answer any calls waiting in queue and to avoid queued calls from being handled by a no answer treatment. If the agent hangs up on an existing call and queued calls ring the agent's phone and that agent does not answer—other agents will be tried. However, if the other agents are busy on a call or do not answer, the queued calls will all start going to the no answer treatment.
- 4) Incoming Call Center calls will go to a no answer treatment (i.e. voicemail) when:

- No available agents answer the calls
- All agents are busy and the set Call Queue limit is exceeded

Note: if an agent is not available to take incoming calls and forgets to logout of the Call Center, any incoming calls will go to the no answer treatment unless another agent who follows in the hunt sequence answers the call.

- 5) Agents must use the Web portal to login or logout of the Call Center.
- 6) If a distinctive ring is desired for calls coming from a Call Center, then the **Priority Alert** service can be assigned to the Call Center service.
- 7) A **Voice Messaging User** service may be added to the Call Center for callers to leave a voicemail if no agents answer the call. The Call Center voice mailbox will need to be checked periodically for voicemails as no “light indicator” is available. The Contact Center messaging service can be configured to send an email notification if a caller leaves a message. Alternatively, the voicemail can be sent as a .WAV attachment in an email.
- 8) If an agent is busy with a Call Center call, he will get a call waiting audible tone and notification on the phone screen if another call is coming in directly to his extension (i.e. not from the Call Center), and visa versa. However, when an agent is currently busy with a Call Center call and another Call Center call arrives, there is no call waiting notification—the call skips over the agent to the next agent in the hunt sequence.
- 9) There is no second line appearance for the Call Center on the agent’s phone. Incoming calls from the Call Center are identified as such (the Call Center name and the caller’s phone number will display on the agent’s phone screen).

However, if outbound calls made by an agent from a Call Center need to have a different caller ID than his own extension, a second phone line will need to be provisioned with a line appearance on the agent’s phone.

- 10) An active agent can enable **Do Not Disturb (DND)** (via the Web portal, Telephony Toolbar, or feature access code) to make his extension appear busy in the queue. This will cause incoming Call Center calls to rollover to the next agent in the hunt sequence since it appears the agent is busy with another call.

Enabling DND at the phone (i.e. using the phone’s DND button or call preference settings) will cause the agent’s phone not to ring and make the call go to the next agent in the hunt sequence. However, if no other agent in the hunt sequence answers the call, that call will go to the no answer treatment and not be held in queue.

Note: if all active agents place their phone on **DND** then, this makes the queue think all agents are available but busy and will hold all inbound Call Center calls in the queue. Callers will be held in the queue indefinitely unless the caller hangs up or presses 0 to opt-out of the queue and leave a voicemail.

If agents do not use the Web portal to log in or out of the Call Center, and use DND instead (fool the call queue into thinking the agent is busy with a call), then best practice would be for at least one of the agents to not use DND so inbound calls will go to voicemail when there are no agents available to take calls.

- 11) When agents use DND to take themselves out of the call queue instead of logging out using the Web portal, then callers dialing the agents extension directly (i.e. personal calls, inter/intra office calls) will be notified that the agent is not available and the caller will go to the agent’s personal voicemail.

To avoid this situation, it may be desired to have a separate phone line for use with the Call Center. The primary line appearance can be setup with the Call Center extension and the agent’s private extension can be configured on another line appearance. This way, the agent can easily use a feature code on his phone to place the Call Center queue on the primary line to DND and allow the private extension to remain available to take other calls.

- 12) Agents using DND to remove themselves from the queue will skew the Call Center statistics.

- 13) If all agents are busy with a call, and the maximum number of callers are being held in Queue, then the next caller will receive a busy signal. To remedy this situation, Call Forward Busy can be applied (note: applying CFB will change the behavior of the dial "0" to exit Queue), or the number of callers held in Queue can be increased.
- 14) If Call Forward Busy is added to the Queue, and the maximum number of callers are being held in Queue, the next caller will be forwarded to the number identified in the CFA option. Also, any callers held in Queue that press "0" to exit the Queue will be forwarded to the number specified in the CFA option, even if Voicemail Messaging has been assigned to the Queue.

3.2 Monitoring the Number of Waiting in Queue

To allow agents or Call Center supervisors to monitor the number of calls waiting in queue, they will need to log into the Web portal as an administrator and view the Call Center statistics screen and refresh periodically.

By default only Group Administrators are allowed to view Call Center Statistics. To allow agents to view Call Center statistics with limited Administrator abilities:

1. Create a new **Department** to use with the Call Center.
2. In the Call Center profile, specify the Department that was created for the Call Center.
3. Add an administrator account for each agent or supervisor and limit them to **Department administrator** for the Department that was created for use with the Call Center.
4. Agents or supervisors can then log into the web portal using their department administrator account id to view Call Center statistics

In this scenario the agent or supervisor will need to log into the web portal with their admin account to view statistics, and login to the web portal with their regular account to configure call control settings (i.e. login/logout of the Call Center).

* It may be desired to limit viewing Call Center statistics to strictly the Call Center supervisor, as agents would also have the ability to change the Call Center profile.