

Using Premium Automatic Call Distribution for Call Centers

Feature-synchronized Automatic Call Distribution (ACD) enables organizations to manage a large number of phone calls on an individual basis. ACD enables use of your Polycom phones in a call center role by automatically directing incoming calls to available persons, or *agents*.

The ACD feature is available on Polycom phones as either a Standard or a Premium service. As of Polycom UC Software 4.0.2, Polycom has made two enhancements to the Premium ACD service available on Polycom phones. These enhancements, explained next, apply to SoundPoint IP 450, 550, 560, 650, and 670 desktop phones configured with the BroadSoft BroadWorks R17 platform.



Web Info: Understanding the ACD Feature

If you are not familiar with the ACD feature, Polycom recommends reading [Feature Profile 57216: Using Feature Synchronized Automatic Call Distribution](#), as this document builds on information presented there.

The Premium ACD service has been enhanced in two ways:

- **Hoteling** This enhancement enables agents to use any available host phone by logging in with agent credentials. After logging in, agents have access to their guest profile and ACD settings on the host phone. The Hoteling enhancement is independent of the ACD feature, meaning agents can use Hoteling whether the Premium ACD feature is enabled or disabled.
- **Queue Status Notification** This enhancement lets agents view the queue status for a call center so agents can adjust their call response according to the queue status. Agents can use this capability only if the Premium ACD feature is enabled.

These enhancements, explained in more detail in the following sections, improve ACD functionality for call center operations by enabling your organization to improve management of incoming calls and better organize your call center facility.

See the following table for a quick summary of compatible phone models, dependencies, and available documentation.

Table 1: BroadSoft Synchronized Premium ACD at a Glance

Released:	December 2011	Dependencies:	BroadSoft BroadWorks R17; ACD must be configured on the phone
Applies to models:	SoundPoint IP 450, 550, 560, 650, 670	Security issues:	Users will need login credentials



Applicable UC Software version(s):	UC Software 4.0.2 and later	Limitations:	Phones support the Standard and Premium packages ; only works for private lines
Main business size:	Enterprise	Maintenance:	One-time setup
Primary users:	Call centers	Available documentation:	Polycom UC Software 4.0.1 Administrators' Guide
Required Licenses :	None	Required Resources :	XML editor; administrator access to BroadWorks

Enabling the Hoteling Enhancement

To begin using the Hoteling enhancement, you will need to enable Hoteling on the BroadWorks platform, and then on the phone. When enabling Hoteling on the BroadWorks platform, you will need to create a host profile and a guest profile. The host profile enables agents to log in to a guest profile, and the guest profile contains an agent's ACD settings. Note that the Hoteling capability can be used only on private lines; you cannot use Hoteling on a shared line.

Enabling Hoteling on the BroadWorks Platform

This section takes you through three steps that enable Hoteling on the BroadWorks platform. On the BroadWorks platform, you will need to:

- Setup a Premium Call Center
- Configure a host profile
- Configure a guest profile

To setup a Premium Call Center:

- 1 Log in to the BroadWorks platform.
- 2 Navigate to the **Call Centers** menu, and create a Premium call center.
- 3 Select your Premium call center, and add agents to your call center.
- 4 Assign the *Call Center – Premium* service to all agents.

To configure a host profile:

- 1 Navigate to an agent's profile.



- 2 Assign the *Hoteling Host* service to the agent.
- 3 Navigate to the **Call Control** menu and enable the agent as a *Hoteling Host*.

To configure a guest profile:

- 1 Navigate to an agent's profile.
- 2 Assign the *Hoteling Guest* service to the agent.
- 3 Navigate to the **Call Control** menu and enable the agent as a *Hoteling Guest*.

When this agent logs into a phone as a guest agent, the agent's id will display on the phone user interface. Note that you can configure the duration of the guest login—the maximum time after which the agent is automatically logged out of the guest profile.

Enabling Hoteling on the Phone

After you've set up Hoteling on the BroadWorks platform, you'll need to enable the ACD feature on each host phone. For complete instructions on how to enable ACD on the phone, go to the section *Configuring Feature Synchronized Automatic Call Distribution* in Chapter 6 of the [Polycom UC Software 4.0.1 Administrators' Guide](#).

Once you have enabled ACD on the phone, you can set up Hoteling for your Polycom phones by editing the configuration parameters listed in the following table. You can locate these parameters in the **features.cfg** template configuration file included in your UC Software download. Note that the Hoteling enhancement is independent of the ACD feature, meaning agents can use Hoteling whether the Premium ACD feature is enabled or disabled.

Table 2: Configuration Parameters for the Hoteling Enhancement

<i>Configuration Parameter</i>	<i>Permitted Values</i>	<i>Default Value</i>	<i>Description of the Parameter</i>
<code>feature.hoteling.enabled</code>	0 or 1	0	If 0, Hoteling is disabled. If 1, Hoteling is enabled.
<code>hoteling.reg</code>	1 to 34	1	If ACD is disabled, the phone will use this line registration index for Hoteling. If ACD is enabled, this value must be the same as the ACD line registration index.

To enable Hoteling:

- 1 Launch an XML editor and locate and open the **features.cfg** template configuration file.
- 2 Locate the parameter `feature.hoteling.enabled` and set the value to **1**.
- 3 Locate the parameter `hoteling.reg` and set the value to the line registration you are using for Hoteling and ACD.

To use ACD and Hoteling at the same time, you will need to set the values in `acd.reg` and `hoteling.reg` to the same line index number. If the index number is not the same, ACD will be enabled and Hoteling will be disabled.

You've successfully enabled the Hoteling feature on the phone.



Admin Tip: Using Hoteling Without ACD

If you want to use hoteling without ACD, but ACD has been previously enabled, make sure `voIpProt.SIP.acd.signalingMethod` is set to 0.

Using Hoteling on Phones

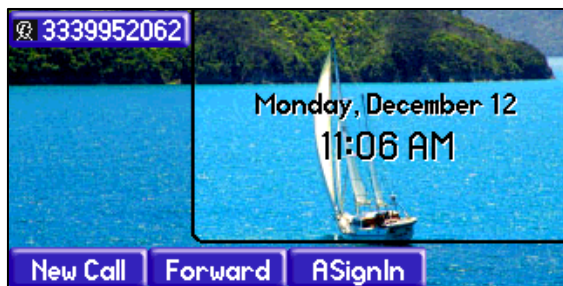
Once you have enabled the Hoteling enhancement on a host phone, agents can log in and out of a guest profile on the phone. This section shows you how to use Hoteling both with and without ACD.

Using Hoteling When ACD is Enabled

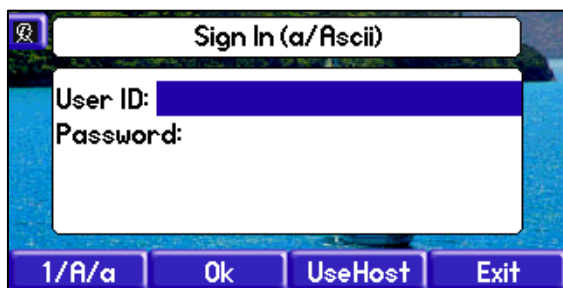
This section shows you how to sign in when both Hoteling and ACD are enabled.

To log in to a host phone when the ACD feature is enabled:

- 1 From the host idle screen on the phone, press the **ASignIn** soft key as shown next.

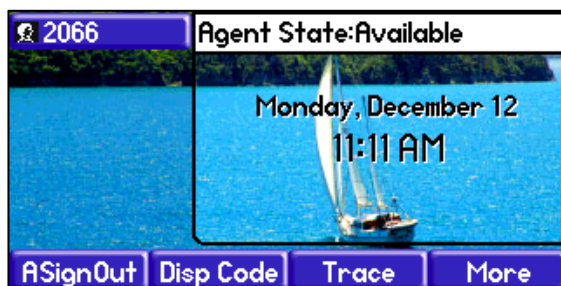


The *Sign In* menu displays.



- 2 To log in to a guest profile, go to step **a**). To log in to a host profile, go to step **b**).
- a** Enter your guest user ID and password (supplied by the BroadWorks administrator), and press the **Ok** soft key.

The phone will verify your login credentials with the BroadWorks platform. When your registration is complete, the phone will log in to the guest profile and your Agent state will show *Available*.



If you receive the *Invalid login credentials* error message, try re-entering your login credentials. By default, you are allowed five retries. If you lock your account, you must contact the BroadWorks administrator.

- b** Press the **UseHost** soft key.
- The phone will log in to the host profile.

To log out of a host phone when the ACD feature is enabled:

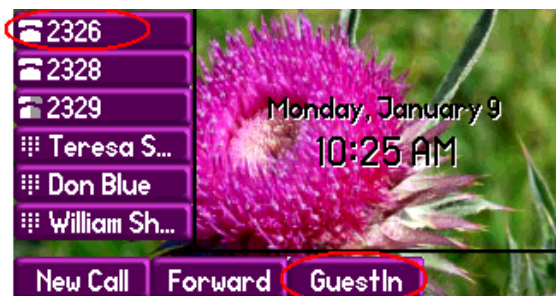
- Press the **ASignOut** soft key.
- Your phone will return to the host idle screen.

Using Hoteling When ACD is Disabled

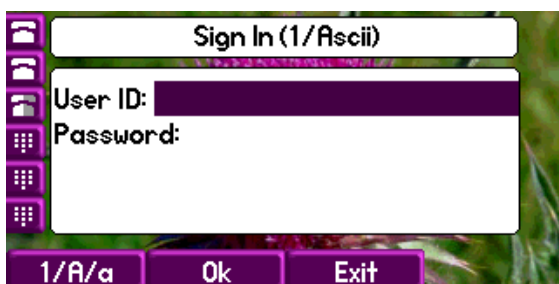
This section shows you how to sign in when only Hoteling is enabled.

To log in to a host phone when the ACD feature is disabled:

- 1 Press **GuestIn** soft key as shown next.

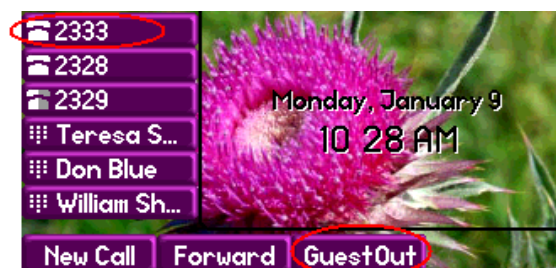


The *Sign In* screen displays as shown next.



- 2 Enter your guest user ID and password, and press the **Ok** soft key.

The phone will verify your login credentials with the BroadWorks platform. When your registration is complete, the phone will display the guest id as shown next.

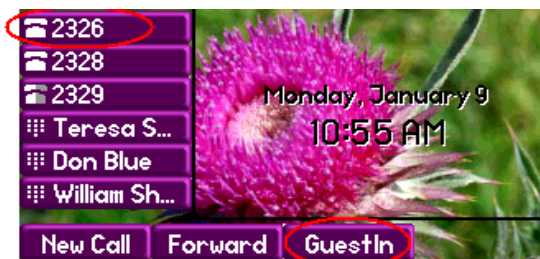


If you receive the *Invalid login credentials* error message, try re-entering your login credentials. By default, you are allowed five retries. If you lock your account, you must contact the BroadWorks administrator.

To log out of a host phone when the ACD feature is disabled:

- Press **GuestOut** soft key as shown above.

Your phone will return to the host idle screen.



Enabling Queue Status Notification

The Queue Status Notification enhancement enables you to view the status of the call center queue on your phone. The queue status can be in one of three states and will scroll across the guest profile screen:

- **empty** Indicates that no calls are currently in the queue
- **q'ing** Indicates that one or more calls are currently in the queue
- **ALERT** Indicates that the call queue has reached the maximum number of calls, or that a call has been in the queue for too long. The Message Waiting Indicator LED will also flash red. The LED will stop flashing once the call center status changes back to **empty** or **q'ing**. You can configure both the maximum number of calls and the maximum queue time.

Queue Status Notification can display the queue status of up to 20 different call centers.

Enabling Queue Status Notification on the BroadWorks Platform

This section shows you how to enable Queue Status Notification on the BroadWorks Platform.

To enable Queue Status Notification:

- 1 Log in to the BroadWorks platform.
- 2 Navigate to your call center **Profile** screen and click **Queue Status Notification**.
- 3 Enable the following fields:
 - Enable notification of queue status to agent devices
 - Number of calls in queue
 - Longest waiting time
- 4 Edit the values for the number of calls in queue and the longest waiting time.
These will be the threshold values used to determine when an *ALERT* status will display.
- 5 Press **OK** to save your changes.

Enabling Queue Status Notification on the Phone

After you've set up Queue Status Notification on the BroadWorks platform, you'll need to enable it on each phone by editing the `feature.callCenterStatus.enabled` parameter in the **features.cfg** template configuration file. Use the following table to understand this configuration parameter.

Table 3: Configuration Parameter for Queue Status Notification

Configuration Parameter	Permitted Values	Default Value	Description of the Parameter
<code>feature.callCenterStatus.enabled</code>	0 or 1	0	If 0, the Status Event Threshold capability is disabled. If 1, the Status Event Threshold capability is enabled.

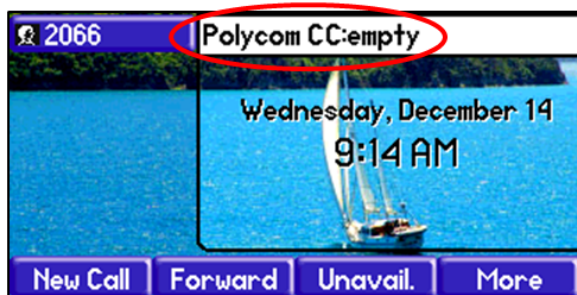
To enable Queue Status Notification:

- 1 Launch an XML editor and locate and open the **features.cfg** template configuration file.
- 2 Locate the parameter `feature.callCenterStatus.enabled` and set the value to **1**.
- 3 Reboot the phone.

You've successfully enabled Queue Status Notification.

Using Queue Status Notification

Once you've enabled Queue Status Notification, the status of the call center queue will scroll continuously along the phone's guest profile screen as shown in the following illustration.



The status will display either as *empty*, *q'ing*, or *ALERT* depending on the number of calls in the queue or the amount of time that each call has been in the queue.



Note: Call Center Names with Special Characters Not Displayed

If the Call Center name contains special characters, like CALLCENTER@12 POLYCOM1@3&4, that call center and any subsequent call centers will not display in the status bar.

Hoteling and Queue Status Notification provide your organization with an efficient method for handling incoming calls. In this feature profile, you've learned how to setup and enable these two enhancements to the Premium ACD service on Polycom phones.



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