

# Interchange Call Center Supervisor Guide



# **Interchange Call Center Supervisor Guide**

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# TABLE OF CONTENTS

<b>1. OVERVIEW .....</b>	<b>11</b>
1.1 ICC Supervisor Functions.....	13
1.2 Getting Started .....	14
1.2.1 Opening the Main Menu .....	14
1.2.2 Logging Into the System as the Supervisor .....	15
<b>2. REVIEWING THE QUEUE STATUS .....</b>	<b>17</b>
2.1 Charting the Results.....	20
<b>3. CREATING REPORTS .....</b>	<b>23</b>
3.1 Abandoned Calls Detail Report.....	26
3.2 Abandoned Calls Reports - Hourly.....	28
3.3 Agent Activity Detail Report.....	30
3.4 Agent Activity Summary Report.....	32
3.5 Customer Service Groups Report .....	34
3.6 Detailed Group Summary Report .....	35
3.7 Group Activity Report .....	37
3.8 Group Summary Report.....	39
3.9 Group Time to Answer Report .....	41
3.10 Summary Time to Answer Report.....	43
3.11 Custom Reports .....	44

**Table of Contents**

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**4. REVIEWING RECORDED CALLS .....45**

**5. WALLBOARD .....47**

5.1 Setting Up the Wallboard with ICC .....47

## REVISION HISTORY

Version	Changes	Date
01	Initial version	05-15-2004

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# Introduction

This manual describes how to use the Interchange Call Center (ICC) system from an supervisor's perspective.

This manual is intended to provide:

- basic knowledge of the functions and features of the ICC supervisor interface.
- step-by-step procedures for monitoring the system activity, managing the available resources, and running reports.

## Audience Description

This manual is intended for persons who:

- supervises ICC agents on a day-to-day basis.

This manual assumes:

- familiarity with performing as an supervisor in a call center environment,
- familiarity with using an Internet browser page.

You should:

- read this manual in normal reading sequence before first using the ICC Supervisor Interface.
- refer to this manual as necessary while using the system.

## Related Publications

This manual refers you to related publications, when appropriate, for additional information.

- *Interchange Call Center Agent User Guide*, part number GCA70-404

# Conventions Used in this Manual

Many of the procedures require you to enter settings or to choose from a list of variables. To signify when you are to act upon an item, parameter, button, etc. we italicize the name of the item being acted upon. For example, the following sentences instruct you to press a specific key on your keyboard.

- Press *Enter*.
- Press *Esc*.
- Press *Page Up* or *Page Down*.
- Press and hold the *Shift* and *Ctrl* keys simultaneously.

In contrast, the following sentence instructs you to type in a required response; notice the word “Enter” when used in this way is not italicized because you are not pushing a specific key name.

- Enter the value you want to use for this feature.

Similarly, when you select a menu option, we italicize the name of the menu item because you are required to take the action of choosing it, even though the item may not appear in italics on the system menu or display.

- Use the arrow keys to highlight *Programming* and press *Enter*.

At other times in the manual, we discuss prompts that the system displays to you. In these cases, we enclose the exact wording of the prompt in quotation marks to signify that the system is, in essence, speaking to you.

- The system prompts, “Enter your password now.”

If the system is actually playing a recording aloud, we enclose the exact wording of the prompt in quotation marks and italics to signify that the system is in actually speaking to you.

- The system says, “*You have no more new messages.*”

Italics and quotes are also of course used in their normal contexts, that is, for emphasis and to identify what words are spoken.

- This is called a *hot transfer*, that is, the system transfers the call without ringing the extension.

There are times when this manual will instruct you to enter a number from within a range of numbers. In this instance, we use the “~” character to indicate the range. For example, *05-01-1~3-001~100* tells you to enter:

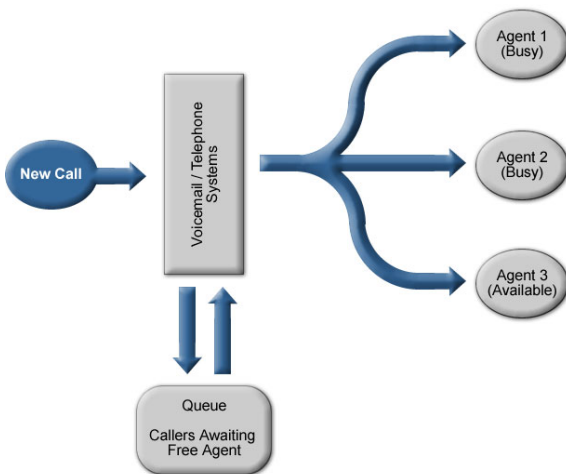
- 05
- 01
- a 1, 2, or 3,
- a three-digit number that falls in the 001 to 100 range.

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# 1. OVERVIEW

Comdial's Interchange Call Center is a versatile tool that helps you answer calls more effectively and efficiently to improve overall customer satisfaction. The system does this by ensuring that callers receive the fastest connection to the right person for their needs. And when there are more calls than people can answer, Interchange automatically queues the incoming calls.

When a caller calls into the system, the system routes calls to agents on the system. Agents answer these calls and provide the callers with the services they require. When all agents are busy, the system places new callers into a queue where the callers can wait for the next available agent to take their call. As each agent ends a call, the system automatically routes calls from the queue to the free agent's extension. This ensures that the calls are routed most effectively to the appropriate agents.



## Overview

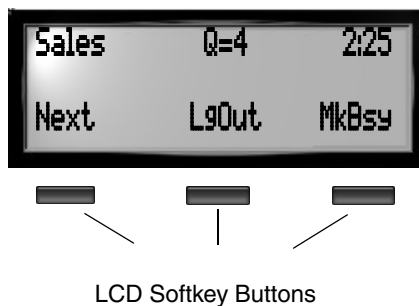
---

Depending on how the system is set up, calls can be routed to the first agent in a group of agents, the next available agent in a group of agents, or the agent that has spent the longest amount of time without a call. These methods ensure that calls are distributed in the most appropriate way for a group of agents. Contact your system administrator for information on how your system is set up to handle calls

Typically, when an agent logs into the system, they answer calls for a single customer service group. However, the system lets you log in and answer calls for multiple groups at the same time. For example, if they answer both customer service and sales calls for your company, they could log into both the Customer Service group and the Sales group and answer calls for both groups. As calls come into the system for either group, the calls are routed to their phone when they are not busy with another call.

There are two basic ways agents can use the system. They can use the telephone LCD features to log in and answer calls, or they can use the browser-based Client application in addition to their telephone to log into the system. Depending on how your system is set up, they may use either method or even both methods. Contact your system administrator for information on the preferred method.



### Telephone LCD



Regardless of whether agents use the telephone LCD or the browser-based Client application, they follow the same basic steps to use it.

1. Log into the system to notify it that they are ready to answer calls.
2. Answer calls that are automatically routed to their phone, and provide the callers with the services they require.
3. Log out of the system when they finish answering calls.

Another key feature is the ability to track information about each call that comes into the system. The system provides this information in a collection of reports that the system administrator and supervisors can use to track information about how calls are handled, such as how long calls waited in the queue and how many calls the system receives. This information can help improve how calls are handled so that callers' needs are met most efficiently and effectively.

<b>CAUTION</b>	
	To track calls correctly, it is critical that agents follow the instructions provided by the system administrator and supervisors when logging in and out of the system and making themselves available to answer calls.
	

## 1.1 ICC Supervisor Functions

This guide periodically refers to applets. An applet is a program designed to run from within a web browser such as Microsoft's Internet Explorer. The Interchange Call Center applets are designed to run on your network, and combines the features of the telephone and your computer to help you answer calls, manage resource allocation, or review information about your system.

Before you can use these applets, they must be installed on the network, or the networked PC you want to use for access. Contact your system administrator for information on installing and setting up the applets.

Two applets are unique to supervisory functions; Queue Status and Reports. Your extension must be pre-programmed as a supervisor's station to access these applications.

Depending on your authorized level of access, you can review or change the status of agents in specific groups or all groups, and access the historical reports.

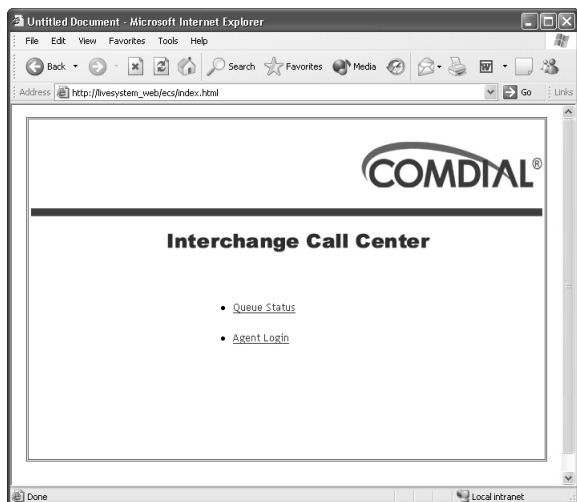
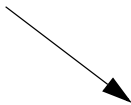
## 1.2 Getting Started

### 1.2.1 OPENING THE MAIN MENU

To open the Main Menu, perform the following steps.

1. Turn the computer on and start Windows, if it is not already started.
2. Double-click the Microsoft Internet Explorer icon and launch the browser. In the address bar, enter the IP address or URL of the web server where the applet resides. Check with your system administrator for this address.

**Enter ICC URL here**

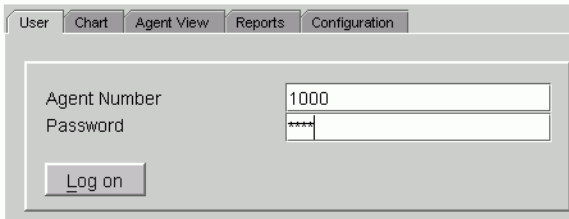


3. The application launches from within the browser and you are presented with a menu. To begin, click on the *Queue Status* menu item.

## 1.2.2 LOGGING INTO THE SYSTEM AS THE SUPERVISOR

To log into the system as a supervisor, perform the following steps.

1. Click on the *Queue Status* menu item.
2. Enter your extension and voice mail password, then click on the *Log on* button.

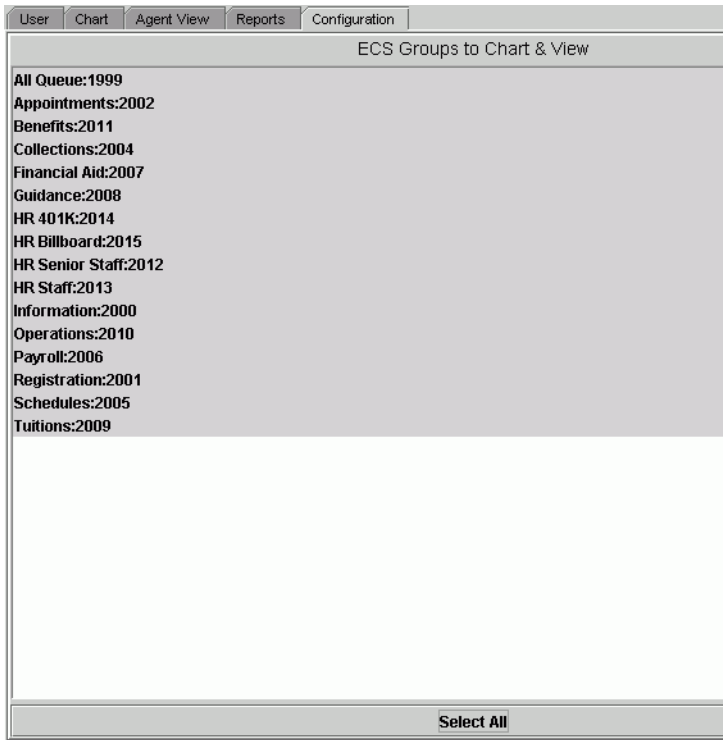


The screenshot shows a web application interface with a navigation menu at the top containing 'User', 'Chart', 'Agent View', 'Reports', and 'Configuration'. Below the menu is a login form with two input fields: 'Agent Number' containing '1000' and 'Password' containing '\*\*\*\*'. A 'Log on' button is positioned below the password field.

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## 2. REVIEWING THE QUEUE STATUS

To review the current status of agents, select the *Configuration* tab and select the group(s) you wish to monitor. Click on the *Select All* tab at the bottom of the screen to select all groups.



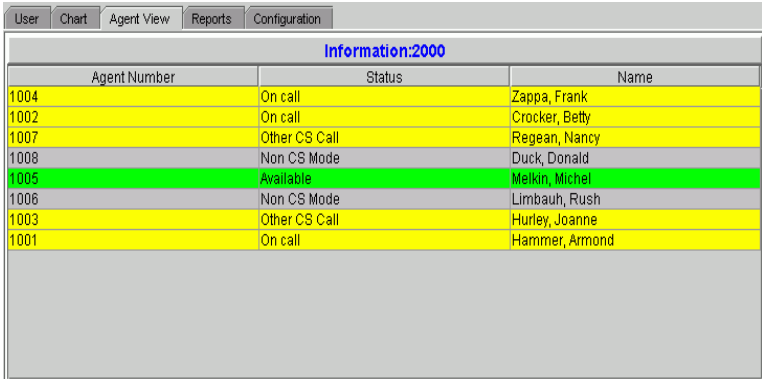
To select multiple adjacent groups, click on the first group name, then hold down the shift key while selecting the last group name.

To select multiple non-adjacent groups, select the first group name, then hold down the *Control* key while selecting the additional group names.

## Reviewing the Queue Status

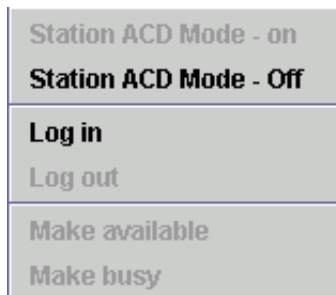
---

Select the *Agent View* tab to display the *Queue Status* for the selected group(s). To sort the results in ascending order, click on the column header. To sort the results in descending order, hold down the *Shift* key and click on the column header.

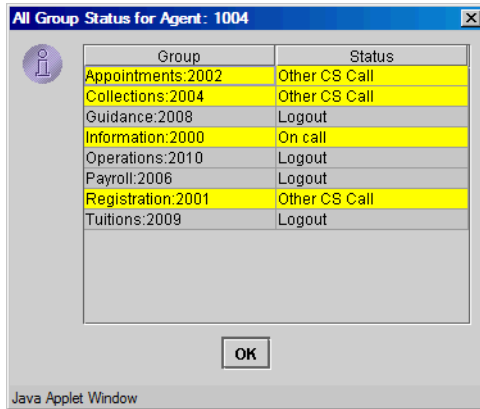


Information:2000		
Agent Number	Status	Name
1004	On call	Zappa, Frank
1002	On call	Crocker, Betty
1007	Other CS Call	Regean, Nancy
1008	Non CS Mode	Duck, Donald
1005	Available	Melkin, Michel
1006	Non CS Mode	Limbaux, Rush
1003	Other CS Call	Hurley, Joanne
1001	On call	Hammer, Armond

To change the status of an individual agent, position your cursor on the line for that agent, and right-click with the mouse button. ICC displays a pop-up window that you can use to move agents in or out of the queue, place an agent into a make busy or make available condition, or enable or disable the ACD Mode for each agent. The available choices are dependant on the agent's current status.

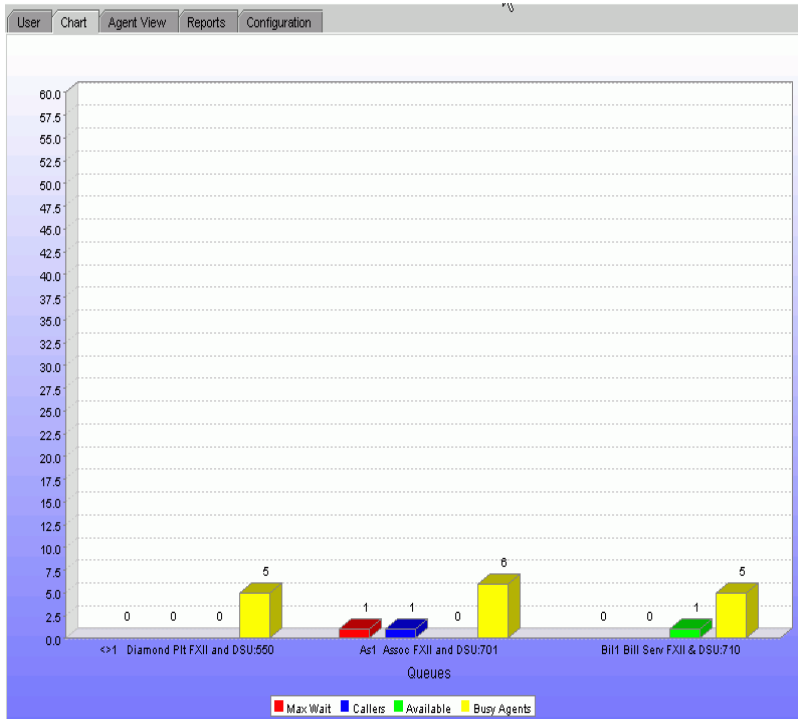


If you wish to review an agent's status for all groups of which they are a member, position your cursor anywhere on the line for that agent, and click with the left mouse button. Click on *OK* to return to the previous screen.



### 2.1 Charting the Results

To view a chart of the group activity, perform the following steps.



1. Select the group(s) to monitor, as described on page 17.
2. Select the *Chart* tab.
3. ICC presents a bar-chart with the following categories displayed:

Max Wait (Red) - Shows the number of seconds that the oldest un-answered call has waited.

Callers (Blue) - Shows the number of callers currently in queue.

Available (Green) - Shows the number of agents available to service calls for the reported group.

Busy Agents (Yellow) - Shows the number of agents that are busy for the reported group. This quantity also includes agents that are busy on personal calls, in wrap-up mode, or busy on calls for other groups (when the agent is a member of multiple groups).

4. As long as the chart remains displayed, the system automatically updates the results.

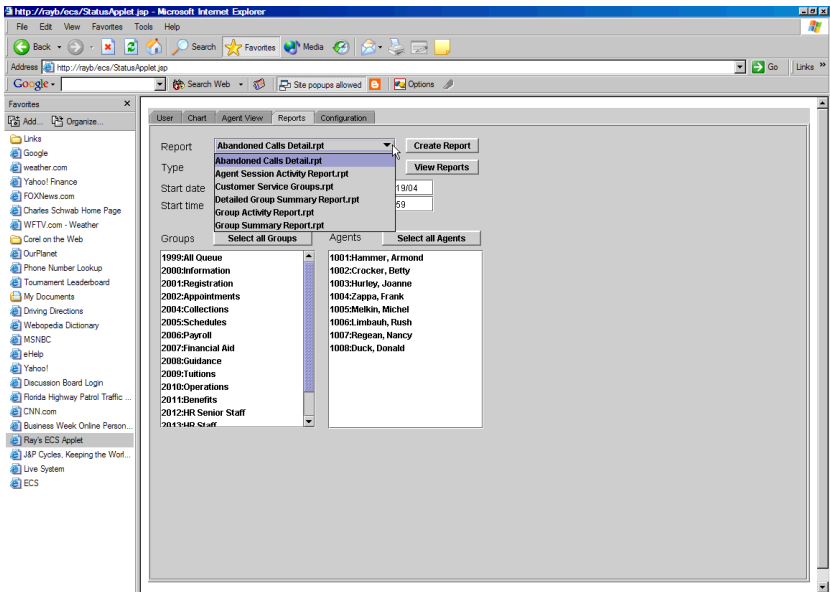
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## 3. CREATING REPORTS

The Interchange Call Center reports module provides summary and detail historical reports about the productivity of agents and groups.

To create an activity report, perform the following steps.

1. Log into the Queue Status applet with a valid System Supervisor mailbox number and password.
2. Click on the *Reports* tab.

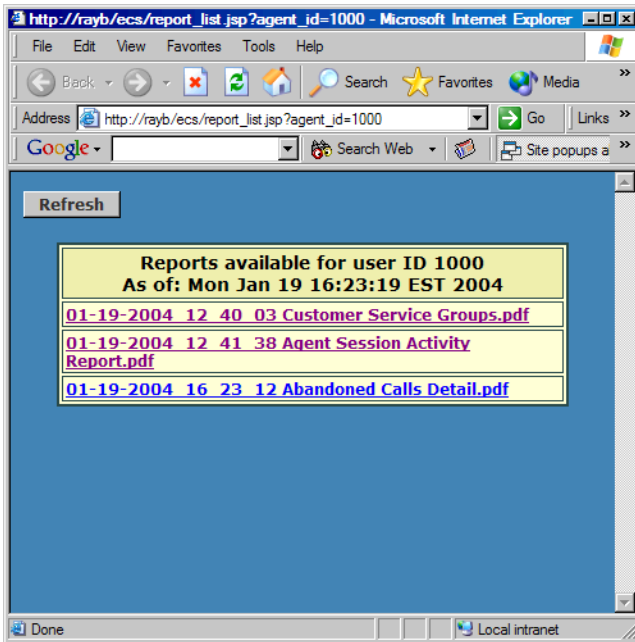


3. Select the report you want to prepare. The available choices include:

- Abandoned Calls Detail Report
- Abandoned Calls Report —Hourly
- Agent Activity Detail Report
- Agent Activity Summary Report
- Customer Service Groups Report

- Detailed Group Summary Report
  - Group Activity Report
  - Group Summary Report
  - Group Time to Answer Report
  - Summary Time to Answer Report
4. Select what time period you want the report to cover (report type). The available choices include:
    - Today
    - Previous Day
    - Previous Week
    - Previous Month
  5. Select the Date and Time range if different than the default values.
  6. Select the Group(s) and Agent(s) to include in the report. For multiple selections, select the first item, then use the Shift or Control key for subsequent selections.
  7. Click on the *Create Report* button.
  8. Click on *View Report*.

9. The system generates all reports in (.pdf) format and lists them in the order they are created. To view a report, select it from the list. **Note:** *Adobe Acrobat Reader is required to view (.pdf) files.*



Click on the *Refresh* button to refresh this display if needed.

### 3.1 Abandoned Calls Detail Report

The Abandoned Calls Detail Report provides detailed information about the number of calls that hang up before being answered or overflowed.

Page 1 of 4

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**Abandoned Calls Detail**

*During period: 2/1/2004 @ 12:01:00AM through 4/26/2004 @ 11:59:00PM*  
*For Groups: 701,702,703,704,705,710,711,712,713,714,715,*

Group	Name	Account	Caller	Call Start	Abandoned	Wait Time
701	As1 Assoc FXII and C	21652	Not Available	02-02-2004 10:20:20	02-02-2004 10:31:39	00:11:19
701	As1 Assoc FXII and C	21063	Not Available	02-02-2004 12:36:43	02-02-2004 12:46:01	00:09:18
701	As1 Assoc FXII and C	21680	Not Available	02-02-2004 15:44:16	02-02-2004 15:53:04	00:08:48
701	As1 Assoc FXII and C	20835	Not Available	02-02-2004 15:44:30	02-02-2004 15:53:52	00:09:22
701	As1 Assoc FXII and C	25825	Not Available	02-02-2004 17:12:34	02-02-2004 17:17:36	00:05:02
701	As1 Assoc FXII and C	11775	Not Available	02-03-2004 08:25:42	02-03-2004 08:30:04	00:04:22
701	As1 Assoc FXII and C	21680	Not Available	02-03-2004 09:21:18	02-03-2004 09:26:32	00:05:14
701	As1 Assoc FXII and C	Not Available	Not Available	02-03-2004 09:53:27	02-03-2004 09:54:29	00:01:02
701	As1 Assoc FXII and C	20941	Not Available	02-03-2004 15:08:24	02-03-2004 15:30:57	00:22:33
701	As1 Assoc FXII and C	29251	Not Available	02-03-2004 16:05:54	02-03-2004 16:24:28	00:18:34
701	As1 Assoc FXII and C	11637	Not Available	02-03-2004 17:18:25	02-03-2004 17:20:50	00:02:25
701	As1 Assoc FXII and C	20147	Not Available	02-04-2004 11:01:58	02-04-2004 11:15:24	00:13:26
701	As1 Assoc FXII and C	21901	Not Available	02-04-2004 11:32:41	02-04-2004 11:39:34	00:06:53
701	As1 Assoc FXII and C	39940	Not Available	02-04-2004 11:49:01	02-04-2004 11:53:40	00:04:39
701	As1 Assoc FXII and C	37851	Not Available	02-04-2004 12:38:11	02-04-2004 12:39:35	00:03:24
701	As1 Assoc FXII and C	Not Available	Not Available	02-04-2004 14:32:12	02-04-2004 14:36:44	00:04:32
701	As1 Assoc FXII and C	11725	Not Available	02-04-2004 15:28:33	02-04-2004 15:33:18	00:04:45
701	As1 Assoc FXII and C	11025	Not Available	02-04-2004 17:17:36	02-04-2004 17:18:32	00:00:56
701	As1 Assoc FXII and C	20784	Not Available	02-05-2004 10:47:54	02-05-2004 10:48:43	00:00:49
701	As1 Assoc FXII and C	10334	Not Available	02-05-2004 11:02:59	02-05-2004 11:03:49	00:00:50
701	As1 Assoc FXII and C	12087	Not Available	02-05-2004 14:23:44	02-05-2004 14:33:57	00:10:13
701	As1 Assoc FXII and C	20148	Not Available	02-05-2004 15:27:18	02-05-2004 15:37:07	00:09:49
701	As1 Assoc FXII and C	23705	Not Available	02-05-2004 15:32:19	02-05-2004 15:40:49	00:08:30
701	As1 Assoc FXII and C	20113	Not Available	02-05-2004 16:07:14	02-05-2004 16:10:18	00:03:04
701	As1 Assoc FXII and C	10751	Not Available	02-05-2004 17:44:02	02-05-2004 17:49:01	00:04:59

<b>Total for As1 Assoc FXII</b>	<b>Abandoned Calls: 25</b>	<b>Average Wait: 00:07:00</b>
---------------------------------	----------------------------	-------------------------------

Group	Name	Account	Caller	Call Start	Abandoned	Wait Time
702	As2 Assoc DX80	23790	Not Available	02-02-2004 09:29:11	02-02-2004 09:38:04	00:08:53
702	As2 Assoc DX80	40533	Not Available	02-02-2004 09:59:23	02-02-2004 10:19:55	00:20:32

**During Period** - The reporting period defined during the *Create Report* setup.

**For Groups** - The group numbers selected during the *Create Report* setup.

**Group** - The Interchange Call Center group being reported.

**Name** - The name for this group

**Account** - The account number entered by the caller if available. If the caller does not provide this information, this field contains 'Not Available'.

**Caller** - Caller ID information relayed from the FX phone system.

**Call Start** - represents the date and time of when the call first arrived

**Abandoned** - represents the date and time that the call was abandoned.

**Wait Time** - the total time the call was waiting before the caller abandoned the call.

**Abandoned Calls** - the total number of calls abandoned for the group during the reporting period.

**Average Wait** - the average wait time of all abandoned calls during the reporting period.

## 3.2 Abandoned Calls Reports - Hourly

The Abandoned Calls Reports - Hourly provides information about the call abandonment rate.

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**Abandoned Calls Reports - Hourly**

Page 1 of 3

*During period: 2/1/2004 @ 12:01:00AM through 4/26/2004 @ 11:59:00PM*  
*For Groups: 701,702,703,704,705,710,711,712,713,714,715,*

Group Number: 701 As1 Assoc FXII	Calls abandoned in the following increments						
	Total	< 1 Min	< 5 Min	< 10 Min	< 15 Min	< 20 Min	Other
08:00 - 08:59	1	0	1	0	0	0	0
09:00 - 09:59	2	0	1	1	0	0	0
10:00 - 10:59	2	1	0	0	1	0	0
11:00 - 11:59	4	1	1	1	1	0	0
12:00 - 12:59	2	0	1	1	0	0	0
14:00 - 14:59	2	0	1	0	1	0	0
15:00 - 15:59	6	0	1	4	0	0	1
16:00 - 16:59	2	0	1	0	0	1	0
17:00 - 17:59	4	1	2	1	0	0	0
<b>Queue Totals</b>	<b>25</b>	<b>3</b>	<b>9</b>	<b>8</b>	<b>3</b>	<b>1</b>	<b>1</b>
<b>Percent of Total:</b>		<b>12%</b>	<b>36%</b>	<b>32%</b>	<b>12%</b>	<b>4%</b>	<b>4%</b>

Group Number: 702 As2 Assoc DX80	Calls abandoned in the following increments						
	Total	< 1 Min	< 5 Min	< 10 Min	< 15 Min	< 20 Min	Other
09:00 - 09:59	3	0	0	1	1	1	0
10:00 - 10:59	3	0	0	1	1	0	1
11:00 - 11:59	3	0	1	0	1	1	0
12:00 - 12:59	4	1	0	0	1	2	0
13:00 - 13:59	8	0	0	5	0	0	3
14:00 - 14:59	1	0	0	0	1	0	0
15:00 - 15:59	4	0	1	0	2	1	0
16:00 - 16:59	2	1	1	0	0	0	0
17:00 - 17:59	1	0	0	1	0	0	0
18:00 - 18:59	1	0	1	0	0	0	0
<b>Queue Totals</b>	<b>30</b>	<b>2</b>	<b>4</b>	<b>8</b>	<b>7</b>	<b>5</b>	<b>4</b>
<b>Percent of Total:</b>		<b>7%</b>	<b>13%</b>	<b>27%</b>	<b>23%</b>	<b>17%</b>	<b>13%</b>

Group Number: 703 As3 Assoc	Calls abandoned in the following increments						
	Total	< 1 Min	< 5 Min	< 10 Min	< 15 Min	< 20 Min	Other
08:00 - 08:59	1	0	0	1	0	0	0

**During Period** - The period specified during the *Create Report* setup.

**For Groups** - The groups specified during the *Create Report* setup.

**Group Number** - The group number reported for this line.

**Total** - The total number of calls abandoned for this group

**<1 Min** - The total number of calls abandoned after less than one minute in the queue.

**<5 Min** - The total number of calls abandoned after less than five minutes in the queue.

**<10 Min** - The total number of calls abandoned after less than ten minutes in the queue.

**<15 Min** - The total number of calls abandoned after less than 15 minutes in the queue.

**<20 Min** - The total number of calls abandoned after less than 20 minutes in the queue.

**Other** - The total number of calls abandoned after greater than 20 minutes in the queue.

**Queue Totals** - The total calls abandoned for this time period.

**Percent of Total** - The percentage of the total for this time period.

### 3.3 Agent Activity Detail Report

The Agent Activity Detail Report provides information about the activity for each agent during the specified period.

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<b>Agent Activity Detail Report</b>		
<i>During Period:</i> 4/1/2004 @ 12:01:00AM through 4/1/2004 @ 11:59:00PM		
<i>For Groups:</i> 506,548,549,550,551,552,553,554,555,650,651,652,653,654,701,702,703,704,705,710,711,712,713,714,715,750,751,752,860,862,902,		
<i>Agents:</i> 1914,		

Agent Number: 1914 @Dant, &Steve

Date	Group	Active Session Time	Available Time	Calls Taken	Time on Calls	Time in Wrap up	Time busy on non queue calls	Time busy in other Groups	Unused Availability
4/1/2004	549	11:04:33AM 11:10:17AM	00:05:44	0	00:00:00	00:00:00	00:00:00	00:00:00	00:05:44
4/1/2004	549	11:15:43AM 11:16:46AM	00:01:03	0	00:00:00	00:00:00	00:00:00	00:00:00	00:01:03
4/1/2004	549	11:16:57AM 12:41:50PM	01:24:53	0	00:00:00	00:00:00	00:00:02	01:15:15	00:09:36
4/1/2004	549	1:00:11PM 2:16:05PM	01:15:54	0	00:00:00	00:00:00	00:00:00	01:07:51	00:08:03
4/1/2004	549	10:05:52AM 10:33:50AM	00:27:58	0	00:00:00	00:00:00	00:00:00	00:14:53	00:13:05
Group Totals for 549 Ovtl Overflow Box-TS			03:15:32	0	00:00:00	00:00:00	00:00:02	02:37:59	00:37:31
Average Time on Calls:			Session call time attributable to this group:			0.00%			
Average Time In Wrap:			Session call time attributable to other groups:			80.80%			
			Session time attributable to non queue activity			0.02%			
			Session time waiting for calls			19.19%			
4/1/2004	550	10:05:52AM 10:33:50AM	00:27:58	0	00:00:00	00:00:00	00:00:00	00:14:53	00:13:05
4/1/2004	550	11:04:33AM 11:10:17AM	00:05:44	0	00:00:00	00:00:00	00:00:00	00:00:00	00:05:44
4/1/2004	550	11:15:43AM 11:16:46AM	00:01:03	0	00:00:00	00:00:00	00:00:00	00:00:00	00:01:03
4/1/2004	550	11:16:57AM 12:41:50PM	01:24:53	3	00:47:29	00:05:54	00:00:02	00:21:52	00:09:36
4/1/2004	550	1:00:11PM 2:16:05PM	01:15:54	0	00:00:00	00:00:00	00:00:00	01:07:51	00:08:03
Group Totals for 550 <>1 Diamond P8 FXII			03:15:32	3	00:47:29	00:05:54	00:00:02	01:44:36	00:37:31
Average Time on Calls:			00:15:49	Session call time attributable to this group:			24.28%		
Average Time In Wrap:			00:05:54	Session call time attributable to other groups:			83.49%		
			Session time attributable to non queue activity			0.02%			
			Session time waiting for calls			19.19%			
4/1/2004	551	11:15:43AM 11:16:46AM	00:01:03	0	00:00:00	00:00:00	00:00:00	00:00:00	00:01:03
4/1/2004	551	11:16:57AM 12:41:50PM	01:24:53	0	00:00:00	00:00:00	00:00:02	01:15:15	00:09:36

**During Period** - The date and time range specified during the *Create Report* setup.

**For Groups** - The group numbers selected during the *Create Report* setup.

**Agents** - The agents selected for this report as defined during the *Create Report* setup.

**Agent Number** - Agent activity is reported separately for each agent. This field indicates the agents name and number for this section of the report.

**Active Session Time** - The field reports the start and end time of this session.

**Available Time** - The time in hours, minutes, and seconds that this agent was logged into the system.

**Calls Taken** - The number of calls taken for this reporting group, by this agent, during the reporting period.

**Time on Calls** - The total time on queued calls for this group, by this agent.

**Time in Wrap-up** - The total time this agent spent in the wrap-up mode for this reporting group.

**Time Busy on Non-Queue Calls** - the total time this agent was on a non-queued calls.

**Time Busy in Other Groups** - If an agent is logged into multiple groups, the total time this agent was busy on calls for those other queue groups is shown here.

**Unused Availability** - The total time this agent was idle during the reporting period.

### 3.4 Agent Activity Summary Report

The Agent Activity Summary Report provides information about an agent’s performance in each queue while logged into the system.

Comdial Corporation.	Page 1 of 4
<b>Agent Activity Summary Report</b>	
<i>During Period: 4/1/2004 @ 12:01:00AM through 4/1/2004 @ 11:59:00PM</i>	
<i>For Groups: 506,548,549,550,551,552,553,554,555,650,651,652,653,654,701,702,703,704,705,710,711,712,713,714,715,750,751,752,860,862,902,</i>	
<i>Agents: 1914,</i>	

Agent Number: 1914 @Dant, &Steve

	Available Time	Calls Taken	Time on Calls	Time in Wrap up	Time busy on non queue calls	Time busy in other Groups	Unused Availability
Group Totals for 549 Overflow Box-TS	03:15:32	0	00:00:00	00:00:00	00:00:02	02:37:59	00:37:31
Average Time on Calls:	Session call time attributable to this group:		0.00%				
Average Time In Wrap:	Session call time attributable to other groups:		80.80%				
	Session time attributable to non queue activity		0.02%				
	Session time waiting for calls		19.19%				
Group Totals for 550 <=1 Diamond PR FXII	03:15:32	3	00:47:29	00:05:54	00:00:02	01:44:36	00:37:31
Average Time on Calls:	00:15:49	Session call time attributable to this group:		24.28%			
Average Time In Wrap:	00:05:54	Session call time attributable to other groups:		83.49%			
	Session time attributable to non queue activity		0.02%				
	Session time waiting for calls		19.19%				
Group Totals for 551 <=2 Diamond PR DX80	03:15:32	0	00:00:00	00:00:00	00:00:02	02:37:59	00:37:31
Average Time on Calls:	Session call time attributable to this group:		0.00%				
Average Time In Wrap:	Session call time attributable to other groups:		80.80%				

**During Period** - The date and time range specified during the *Create Report* setup.

**For Groups** - The group numbers selected during the *Create Report* setup.

**Agents** - The agents selected for this report as defined during the *Create Report* setup.

**Agent Number** - Agent activity is reported separately for each agent. This field indicates the agents name and number for this section of the report.

**Active Session Time** - The field reports the start and end time of this session.

**Available Time** - The time in hours, minutes, and seconds that this agent was logged into the system.

**Calls Taken** - The number of calls taken for this reporting group, by this agent, during the reporting period.

**Time on Calls** - The total time on queued calls for this group, by this agent.

**Time in Wrap-up** - The total time this agent spent in the wrap-up mode for this reporting group.

**Time Busy on Non-Queue Calls** - the total time this agent was on a non-queued calls.

**Time Busy in Other Groups** - If an agent is logged into multiple groups, the total time this agent was busy on calls for those other queue groups is shown here.

**Unused Availability** - The total time this agent was idle during the reporting period.

## 3.5 Customer Service Groups Report

The Customer Service Groups Report provides information about each defined group.

Page 1 of 13

**Comdial Corporation.**  
**Customer Service Groups**

*During Period: 4/26/2004 through 4/26/2004*  
**For Groups:** 506,548,549,550,551,552,553,554,555,650,651,652,653,654,701,702,703,704,705,710,711,712,713,714,715,750,751,752,860,862,902,  
**Agents:** 1914,

Group	Group Name	Agent Name	Mailbox Number
506	CS1 Pricing/prod availability	,	1001
		,	1002
		Sanko, Marilyn	1118
		Shingle, Teena	1119
		Kiseleski, Ruth	1139
		Morris, Debbie	1140
		Magnant, Laurie	1328
		Biasi, Crystal	1802
		Little, Shirley	1803
		548	Critical
, Agent 1003	1003		
, Agent 1004	1004		
549	Ovfl Overflow Box-TS	, agent 10001	1001
		, Agent 1002	1002
		, Agent 1003	1003
		, Agent 1004	1004
		Ford, Anne	1819

**Group** - The group number assigned to this group.

**Group Name** - The name assigned to this group.

**Agent Name** - A list of agents who are authorized to log into this group.

**Mailbox Number** - The mailbox number associated with the named agent.

### 3.6 Detailed Group Summary Report

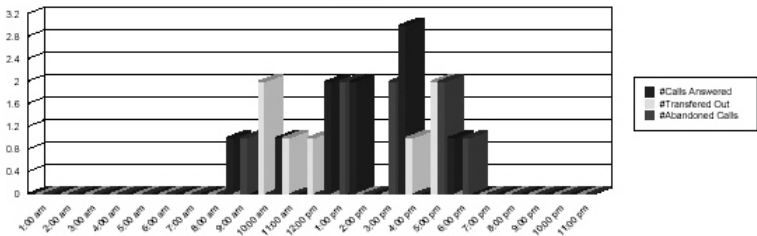
The Detailed Group Summary Report provides an hourly summary about the activity of an individual group.

Page 1 of 7

**Comdial Corporation.**  
**Detailed Group Summary Report**

*During Period: 3/1/2004 @ 12:01:00AM through 3/31/2004 @ 11:59:00PM*  
**For Group: 710,711,712,713,714,715,**

**24 Hour Call Volume**  
For 710



Time Ending	Calls Received	Calls Answered	Calls XFer Out	Calls Overflowed	Calls Abandoned	Average Wait Time	Maximum Wait Time
1:00 am	0	0	0	0	0	0:00:00	0:00:00
2:00 am	0	0	0	0	0	0:00:00	0:00:00
3:00 am	0	0	0	0	0	0:00:00	0:00:00
4:00 am	0	0	0	0	0	0:00:00	0:00:00
5:00 am	0	0	0	0	0	0:00:00	0:00:00
6:00 am	0	0	0	0	0	0:00:00	0:00:00

**For Groups** - The group numbers selected during the *Create Report* setup.

**During Period** - The date range as defined during the *Create Report* setup.

**Group** - The group number assigned to this reporting group.

**Time Ending** - The hourly reporting period for the time range specified during the *Create Report* setup.

**Calls Received** - The total number of calls received for this reporting group, during the reporting period.

## Creating Reports

---

**Calls Answered** - The total number of calls answered by agents in this group, during the reporting period.

**Calls Xfer Out** - The total number of calls transferred out of the group.

**Calls Overflowed** - The total number of calls that were not answered during the reporting period, and overflowed to a secondary target.

**Calls Abandoned** - The total number of calls that were abandoned by the caller during the reporting period.

**Average Wait Time** - The average time the caller waited before an agent answered the call.

**Maximum Wait Time** - The longest time a caller waited before an agent answered the call.

### 3.7 Group Activity Report

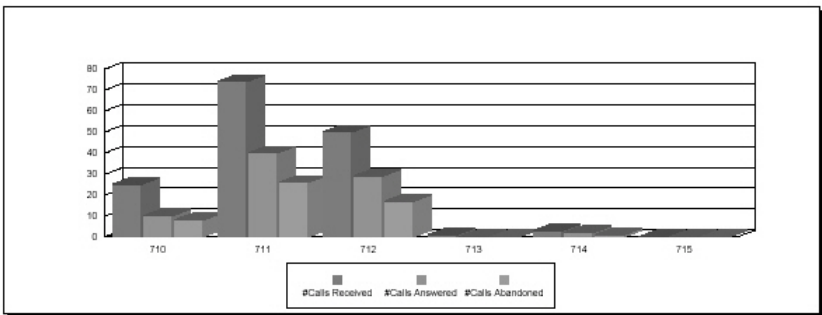
The Group Activity Report provides information about the group activity during the reporting period.

Comdial Corporation. Page 1 of 1

**Group Activity Report**

*During period 3/1/2004 @ 12:01:00AM through 3/31/2004 @ 11:59:00PM*

*For Groups: 710,711,712,713,714,715,*



Group	Name	Calls Received	Calls Answered	Callers Transferred out	Overflowed from other Groups	Calls Abandoned	Average Wait Time (hh:mm:ss)	Maximum Wait Time (hh:mm:ss)
710	Bi1 Bill Serv FXII & DSU	25	10	7	0	8	00:05:01	00:29:43
711	Bi2 Bill Serv DX30	74	40	8	0	26	00:07:00	00:29:41
712	Bi3 Bill Serv VM	50	29	4	0	17	00:09:48	00:37:36
713	Bi4 Bill Serv CTI Apps	1	0	1	0	0	00:04:33	00:04:33
714	Bi5 Bill Serv Other	3	2	0	0	1	00:16:19	00:48:01
715	Bi6 Bill Serv FXS,FXT,DX	0	0	0	0	0		00:00:00
<b>Totals:</b>		<b>163</b>	<b>81</b>	<b>20</b>	<b>0</b>	<b>62</b>	<b>00:07:45</b>	<b>00:48:01</b>

**During Period** - The date range defined during the *Create Report* setup.

**For Groups** - The group numbers selected during the *Create Report* setup.

**Group Number** - The group number assigned to this reporting group.

**Group Name** - The name assigned to this reporting group.

**Calls Received** - The total number of calls received by this group during the reporting period.

## Creating Reports

---

**Calls Answered** - The total number of calls answered by agents assigned to this group.

**Callers Transferred Out** - The total number of queued calls that were transferred out of the group during the reporting period.

**Overflowed From Other Groups** - The total number of calls that were presented to this group as a result of overflowing from another group.

**Calls Abandoned** - The total number of calls that were abandoned by the caller before being answered by an agent.

**Average Wait Time** - The average time a caller waited before being answered by an agent.

**Maximum Wait Time** - The longest amount of time a caller waited before being answered by an agent.

### 3.8 Group Summary Report

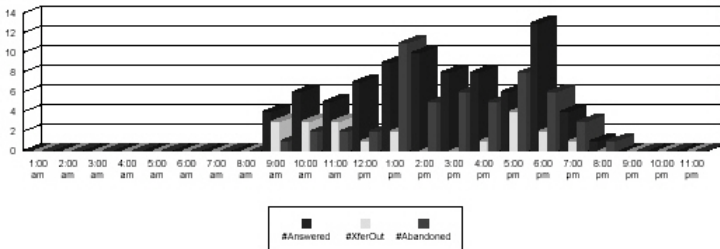
The Group Summary Report provides information about multiple groups during the specified time period.

Page 1 of 1

**Comdial Corporation.**  
**Group Summary Report**

*For Period: 3/1/2004 @ 12:01:00AM through 3/31/2004 @ 11:59:00PM*  
*For Group: 710,711,712,713,714,715,*

24 Hour Call Volume



Time Ending	Calls Received	Calls Answered	Calls XFer Out	Calls Overflowed	Calls Abandoned	Average Wait Time	Maxium Wait Time
1:00 am	0	0	0	0	0	00:00:00	00:00:00
2:00 am	0	0	0	0	0	00:00:00	00:00:00
3:00 am	0	0	0	0	0	00:00:00	00:00:00
4:00 am	0	0	0	0	0	00:00:00	00:00:00
5:00 am	0	0	0	0	0	00:00:00	00:00:00
6:00 am	0	0	0	0	0	00:00:00	00:00:00
7:00 am	0	0	0	0	0	00:00:00	00:00:00
8:00 am	0	0	0	0	0	00:00:00	00:00:00

**For Groups** - The group numbers selected during the *Create Report* setup.

**During Period** - The date range as defined during the *Create Report* setup.

**Group** - The group number assigned to this reporting group.

**Time Ending** - The hourly reporting period for the time range specified during the *Create Report* setup.

**Calls Received** - The total number of calls received for this reporting group, during the reporting period.

## Creating Reports

---

**Calls Answered** - The total number of calls answered by agents in this group, during the reporting period.

**Calls Xfer Out** - The total number of calls transferred out of the group.

**Calls Overflowed** - The total number of calls that were not answered during the reporting period, and overflowed to a secondary target.

**Calls Abandoned** - The total number of calls that were abandoned by the caller during the reporting period.

**Average Wait Time** - The average time the caller waited before an agent answered the call.

**Maximum Wait Time** - The longest time a caller waited before an agent answered the call.

### 3.9 Group Time to Answer Report

The Group Time to Answer Report provides details about the answer time for each group during the specified period.

Comdial Corporation.								Page 1 of 1
Group Time To Answer Report								
During period: 2/1/2004 @ 12:01:00AM through 4/1/2004 @ 11:59:00PM								
For Groups: 710,711,712,713,714,715,								
<hr/>								
Group Number: 710 Bill Bill Serv FXII		Time to Answer in the following increments (Queue Time)						
	<b>Total</b>	<b>&lt; 30 Secs</b>	<b>&lt; 1 Min</b>	<b>&lt; 5 Min</b>	<b>&lt; 15 Min</b>	<b>&lt; 20 Min</b>	<b>Other</b>	
10:00 - 10:59	1	0	0	0	1	0	0	
11:00 - 11:59	1	0	0	0	1	0	0	
19:00 - 19:59	1	0	0	0	1	0	0	
<b>Queue Totals</b>	<b>3</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>3</b>	<b>0</b>	<b>0</b>	
<b>Percent of Total:</b>		<b>0.00%</b>	<b>0.00%</b>	<b>0.00%</b>	<b>100.00%</b>	<b>0.00%</b>	<b>0.00%</b>	
<hr/>								
Group Number: 711 Bill2 Bill Serv		Time to Answer in the following increments (Queue Time)						
	<b>Total</b>	<b>&lt; 30 Secs</b>	<b>&lt; 1 Min</b>	<b>&lt; 5 Min</b>	<b>&lt; 15 Min</b>	<b>&lt; 20 Min</b>	<b>Other</b>	
08:00 - 08:59	1	0	0	0	1	0	0	
14:00 - 14:59	1	0	0	0	0	1	0	
17:00 - 17:59	2	0	0	0	1	0	1	
<b>Queue Totals</b>	<b>4</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>2</b>	<b>1</b>	<b>1</b>	
<b>Percent of Total:</b>		<b>0.00%</b>	<b>0.00%</b>	<b>0.00%</b>	<b>50.00%</b>	<b>25.00%</b>	<b>25.00%</b>	
<hr/>								
Group Number: 712 Bill3 Bill Serv VM		Time to Answer in the following increments (Queue Time)						
	<b>Total</b>	<b>&lt; 30 Secs</b>	<b>&lt; 1 Min</b>	<b>&lt; 5 Min</b>	<b>&lt; 15 Min</b>	<b>&lt; 20 Min</b>	<b>Other</b>	
12:00 - 12:59	1	0	0	0	0	0	1	
<b>Queue Totals</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>1</b>	
<b>Percent of Total:</b>		<b>0.00%</b>	<b>0.00%</b>	<b>0.00%</b>	<b>0.00%</b>	<b>0.00%</b>	<b>100.00%</b>	
<hr/>								
Group Number: 714 Bill5 Bill Serv		Time to Answer in the following increments (Queue Time)						
	<b>Total</b>	<b>&lt; 30 Secs</b>	<b>&lt; 1 Min</b>	<b>&lt; 5 Min</b>	<b>&lt; 15 Min</b>	<b>&lt; 20 Min</b>	<b>Other</b>	
13:00 - 13:59	1	0	0	0	0	0	1	
<b>Queue Totals</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>1</b>	
<b>Percent of Total:</b>		<b>0.00%</b>	<b>0.00%</b>	<b>0.00%</b>	<b>0.00%</b>	<b>0.00%</b>	<b>100.00%</b>	

**During Period** - The period specified during the *Create Report* setup.

**For Groups** - The groups specified during the *Create Report* setup.

**Group Number** - The group number reported for this line.

**Total** - The total number of calls answered for this group

**<30 Secs** - The total number of calls answered after the call has been in the queue for less than 30 seconds.

## Creating Reports

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**<1 Min** - The total number of calls answered after the call has been in the queue for less than one minute.

**<5 Min** - The total number of calls answered after the call has been in the queue for less than five minutes.

**<15 Min** - The total number of calls answered after the call has been in the queue for less than 15 minutes.

**<20 Min** - The total number of calls answered after the call has been in the queue for less than 20 minutes.

**Other** - The total number of calls answered after the call has been in the queue for greater than 20 minutes.

**Queue Totals** - The total calls answered for this time period.

**Percent of Total** - The percentage of the total for this time period.

### 3.10 Summary Time to Answer Report

The Summary Time to Answer Report provides a summary of the time to answer a call for each group. The calls are grouped on a per-hour basis and reported for each selected group.

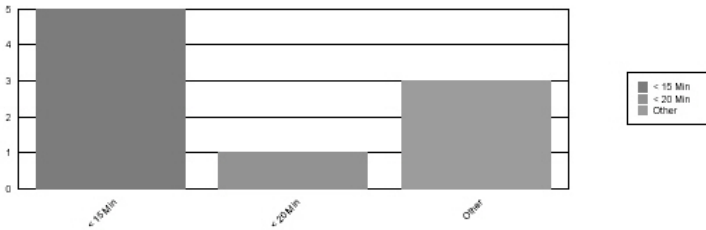
Comdial Corporation. Page 1 of 1

**Summary Time To Answer Chart**

During period: 2/1/2004 @ 12:01:00AM through 4/1/2004 @ 11:59:00PM

For Group: 710,711,712,713,714,715,

Time to Answer for Selected Groups



All Selected Groups	Total	Time to Answer in the following increments (Queue Time)					Other
		< 30 Secs	< 1 Min	< 5 Min	< 15 Min	< 20 Min	
08:00 - 08:59	1	0	0	0	1	0	0
10:00 - 10:59	1	0	0	0	1	0	0
11:00 - 11:59	1	0	0	0	1	0	0
12:00 - 12:59	1	0	0	0	0	0	1
13:00 - 13:59	1	0	0	0	0	0	1
14:00 - 14:59	1	0	0	0	0	1	0
17:00 - 17:59	2	0	0	0	1	0	1
19:00 - 19:59	1	0	0	0	1	0	0
<b>Queue Totals</b>	<b>9</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>5</b>	<b>1</b>	<b>3</b>
<b>Percent of Total:</b>		<b>0.00%</b>	<b>0.00%</b>	<b>0.00%</b>	<b>55.56%</b>	<b>0.11%</b>	<b>33.33%</b>

**During Period** - The period specified during the *Create Report* setup.

**For Groups** - The groups specified during the *Create Report* setup.

**Group Number** - The group number reported for this line.

**Total** - The total number of calls answered for this group

**<30 Secs** - The total number of calls answered after the call has been in the queue for less than 30 seconds.

## Creating Reports

---

**<1 Min** - The total number of calls answered after the call has been in the queue for less than one minute.

**<5 Min** - The total number of calls answered after the call has been in the queue for less than five minutes.

**<15 Min** - The total number of calls answered after the call has been in the queue for less than 15 minutes.

**<20 Min** - The total number of calls answered after the call has been in the queue for less than 20 minutes.

**Other** - The total number of calls answered after the call has been in the queue for greater than 20 minutes.

**Queue Totals** - The total calls answered for this time period.

**Percent of Total** - The percentage of the total for this time period.

## 3.11 Custom Reports

The Interchange Call Center reporting module design is based on *Crystal Reports* (version 9.0) by Business Objects Inc. Business Objects Inc. also provides software that permits you to design your own custom reports, using the source data provided by the Interchange Call Center reports server database. Go to <http://www.businessobjects.com/products/reporting/crystalreports/default.asp> for additional information on their products.

### WARNING



You must be proficient with SQL database queries and command line syntax before you attempt to create custom reports. Improper actions can damage the files. Comdial assumes no liability for SQL data file corruption resulting from improper actions.



## 4. REVIEWING RECORDED CALLS

Interchange Call Center optionally provides call-recording functions for up to ten agents within each customer service group. When configured by the installer, specific agents calls are recorded, based on a configurable call recording schedule. The recordings are stored in (.WAV) format and can be stored directly to your PC desktop, or any other network location.

Reviewing these recordings can provide you with an important tool for measuring productivity and performance.

*Note: To listen to the audio files, your PC must be equipped with a media player capable of playing a (.WAV) file, a sound card, and speakers.*

File names are assigned by the system and include the mailbox number, day of the week, and the time of the recording. For example, a recording for mailbox 1404, recorded at 3:31pm on Friday, is stored as 000001404\_FRI0331PM.WAV.

To play the recorded files, perform the following steps.

1. Locate the files to play. Check with your system administrator to determine the file storage location.
2. Open the file. Your audio media player should start and the recorded information is output to your speakers.

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## 5. WALLBOARD

The Wallboard application is available to provide a wallboard display of the agent statistics. The Wallboard application supports 1-line SPECTRUM wallboards, series 300C; but even without an attached wallboard, the application can be a valuable source of near-real-time information.

The Wallboard is a standalone application that can be installed on any PC that has access to the Reports Server and database.

All wallboard information is based solely on data in the Interchange Call Center database. The Wallboard application does not use real-time notifications, but instead pulls information from the database every 15 seconds and presents that data on a wallboard. Data displays on the client PC monitor whether or not a wallboard is connected to the application.

One application controls one wallboard. Connection to the Server is used only to check data eligibility. If the Reports Server is down, the database is not updated and the Wallboard displays error messages or current date/time instead of call information. (Wallboard has its own internal date/time source, which is set by the application according to current date and time on the PC on which it is installed.)

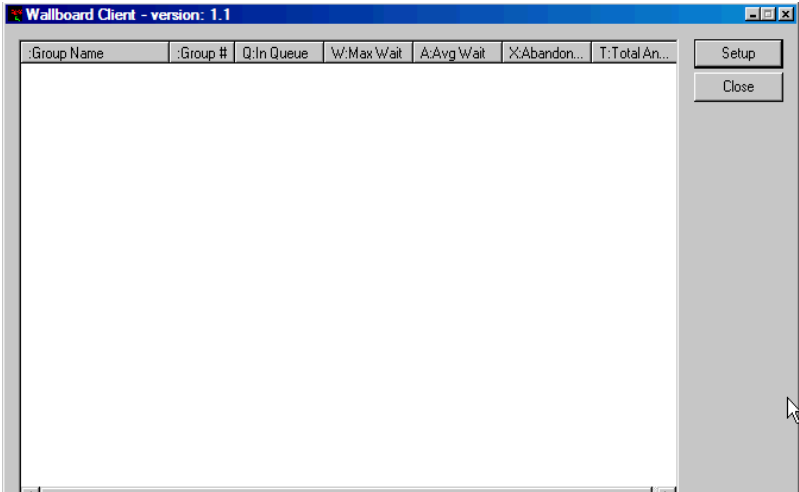
### 5.1 Setting Up the Wallboard with ICC

To display system status information on a wallboard, the application must be run on a PC that is connected to a Spectrum 300C series wallboard via a serial port (RS-232), and to the network that includes the Interchange Call Center web server. The wallboard setup is usually made by the system installer. If you wish, you can change the display characteristics by accessing the wallboard setup menu.

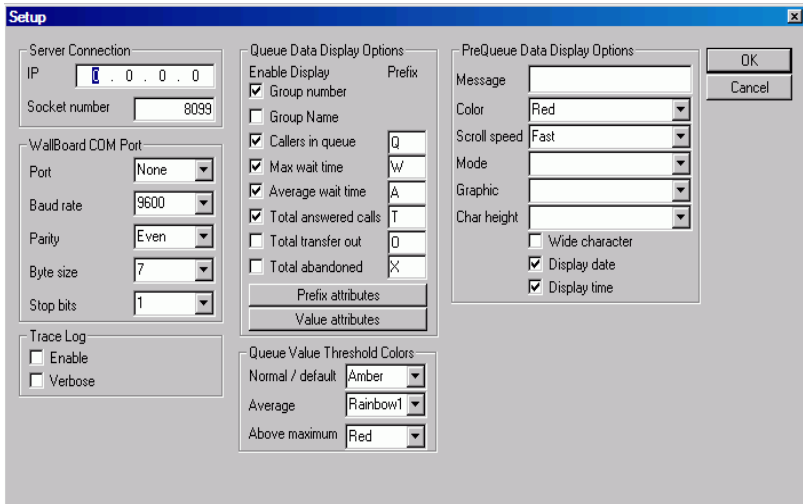
To set up the Wallboard for operation, perform the following steps.

1. Complete the software installation from the supplied CD.

2. Launch the application by clicking on the Wallboard.Exe icon. The following screen displays.



3. Click on the *Setup* button. The setup screen allows you to identify the IP address of the web-based reports server, set the serial port parameters, and identify the display options.



**Server Connection** - Enter the IP address of the web-based reports server.

**WallBoard COM Port** - Select the PC's communications port, baud rate, parity, bit size, and stop bits that you use for the Wallboard connection. By default, the serial port is set to None. You must choose a port number, otherwise information is not be sent to the Wallboard, or displayed on the PC that is running the application.

**Queue Data Display Options:** Information sent to the wallboard can include various types of information about the Customer Service Group. Click inside the box to choose the type and format of the information to display.

*Group Number* - Selecting this box causes the Customer Service Group number to be displayed. The Group Number field and Group Name field are mutually exclusive. That is, only one or the other can be displayed.

*Group Name* - Selecting this box causes the Customer Service Group name to be displayed.

*Calls in Queue* - Check this box if you wish to report the number of calls that are waiting in queue for this group. The default setting for the prefix identifier is '**Q**'. If you wish to change this value, position your cursor in the field and enter the new prefix.

*Max Wait Time* - Check this box if you wish to report the amount of time the oldest call is waiting for this group. The default setting for the prefix identifier is '**W**'. If you wish to change this value, position your cursor in the field and enter the new prefix.

*Average Wait Time* - Check this box if you wish to report the average time calls are waiting for this group. The default setting for the prefix identifier is '**A**'. If you wish to change this value, position your cursor in the field and enter the new prefix.

*Total Answered Calls* - Check this box if you wish to report the total calls answered for this group. The default setting for the prefix identifier is '*T*'. If you wish to change this value, position your cursor in the field and enter the new prefix.

*Total Transfer Out* - Check this box if you wish to report the total calls transferred out of the group. The default setting for the prefix identifier is '*O*'. If you wish to change this value, position your cursor in the field and enter the new prefix.

*Total Calls Abandoned* - Check this box if you wish to report the total calls abandoned. The default setting for the prefix identifier is '*X*'. If you wish to change this value, position your cursor in the field and enter the new prefix.

*Prefix Attributes* - Select the attributes for the *Prefix* portion of the message. This entry allows you to select the color and size of the displayed character.

*Value Attributes* - Select the attributes for the *Data* portion of the message. This entry allows you to select the color and size of the displayed characters.

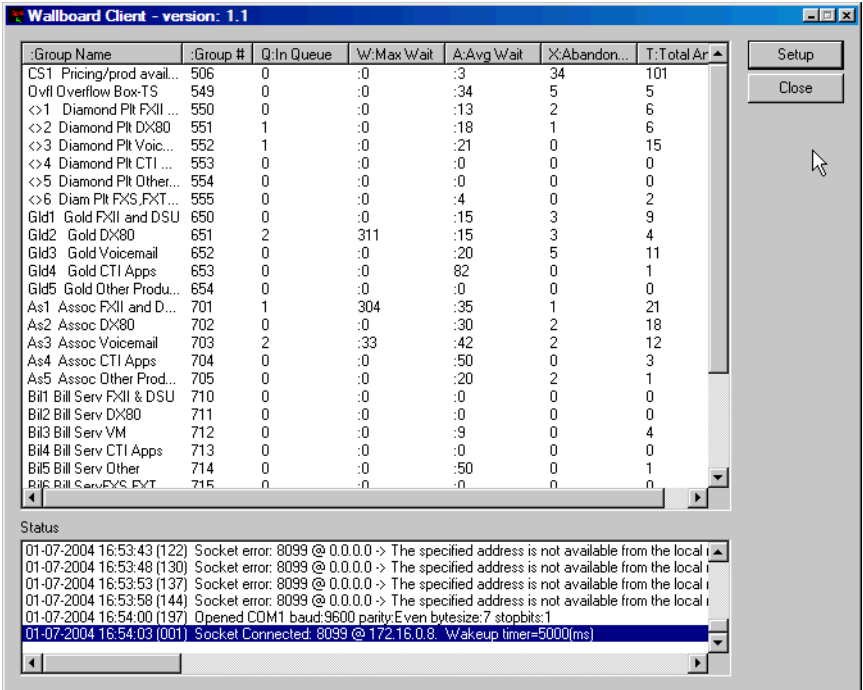
**Queue Value Threshold Colors:** Choose the color for the displayed data based on the threshold criteria. You can choose a unique color for items within the specified threshold range (normal), a unique color for averages, and a unique color for values that exceed the threshold level. The default colors for these attributes are:

Normal/default - Amber

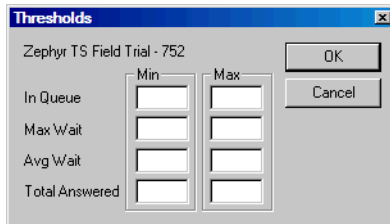
Average - Rainbow 1

Above Maximum - Red.

- Click on the *OK* button when all entries are complete. ICC updates your display to show a list of the Customer Service Groups that are active in your system.



- Next, you must define the thresholds for each group. Position your cursor on the group name and right-click with your mouse. This action opens a dialog box that permits you to enter the threshold information. To select multiple groups, hold down the Shift (adjacent groups) or Control key (non-adjacent groups) while clicking on the group names.



6. Enter the threshold values associated with each entry. Data is presented to the Wallboard based on these minimum and maximum entries. When you have completed the entries, click on the *OK* button.

To set the pre-queue display data on the wallboard, perform the following steps. Pre-queue data can include custom messages, graphics, or date and time. This information is displayed on the wallboard before the group information is presented.

1. From the Setup menu, enter your desired message in the *Message* entry box.
2. Select the *Color* of the text message from the drop-down menu choices.
3. Select the *Scroll Speed* from the drop-down menu choices.
4. Select the *display refresh* style from the *Mode* drop-down menu choices.
5. Select a graphic from the *Graphic* drop-down menu choices.
6. Select the character height from the *Char. height* drop-down menu choices.
7. Select the check boxes for *Date, Time, and Wide Characters* if you wish those items to be included.
8. Click *OK* when complete.

# INDEX

## A

Abandoned Calls Detail Report 26  
 Abandoned Calls Reports - Hourly 28  
 Agent Activity Detail Report 30  
 Agent Activity Summary Report 32

## C

Charting the Results 20  
 Creating Reports 23  
 Custom Reports 44  
 Customer Service Groups Report 34

## D

Detailed Group Summary Report 35

## G

Getting Started 14  
 Group Activity Report 37  
 Group Summary Report 39  
 Group Time to Answer Report 41

## I

ICC Supervisor Functions 13

## L

Logging Into the System as the  
 Supervisor 15

## M

main menu 14

## O

Opening the Main Menu 14  
 Overview 11

## Q

Queue Status Charts Tab 44  
 queue status, reviewing 17

## R

recorded calls, viewing 45  
 report  
     Abandoned Calls Detail 26  
     Abandoned Calls --Hourly 28  
     Agent Activity Detail 30  
     Agent Activity Summary 32  
     custom 44  
     Customer Service Groups 34  
     Detailed Group Summary 35  
     Group Activity 37  
     Group Time to Answer 41  
     Groups Summary 39  
     Summary Time to Answer 43  
 reports, creating 23  
 Reviewing Recorded Calls 45  
 Reviewing the Queue Status 17

## S

status, viewing queue 20  
 Summary Time to Answer Report 43  
 supervisor log on 15

## U

Using the Wallboard 47

## Index

---

### V

viewing queue status 20

### W

wallboard, using 47

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