

Technical Bulletin 34787

Using Feature Synchronized Automatic Call Distribution with Polycom® SoundPoint® IP Phones



This technical bulletin provides detailed information for system administrators and users on using feature synchronized Automatic Call Distribution on the Polycom SoundPoint IP phones operating with BroadSoft's BroadWorks platforms.

This information applies to SoundPoint IP phones running SIP application version 3.1.2 or later. This information applies to SoundPoint IP 321/331 phones running SIP 3.1.2RevC or later. This information applies to SoundPoint IP 335 phones running SIP application version 3.2.1RevB or later.

This technical bulletin has been superceded by TB 57216 for phones running Polycom® UC Software version 3.3.1 or later.

Introduction

Automatic call distribution (ACD) systems allow companies that handle a large number of incoming phone calls to direct them to a person who is able to talk at the earliest opportunity.

As of SIP 3.1.2, you can use your SoundPoint IP phones in a call center agent/supervisor role on a supported call server.

When this feature is enabled, the phone will indicate the ACD Call Center Agent state as directed by the call server. The call center agent is provided with an entry method to initiate Sign In/Sign Out and other ACD states through soft keys, however, the phone state will only change once the server has acknowledged that the phone can move into that new state—in this way, the ACD state is maintained in synchronization with the call server and any ACD computer-based soft-clients. The SIP signaling used for this implementation is described in Reference 1 (refer to [References](#) on [page 9](#)).

The feature synchronized ACD feature is supported on the SoundPoint IP 320/321/330/331/335, 430, 450, 550, 560, 650, and 670 desktop phones.

The topics in this technical bulletin include:

- [What Administrators Need to Know](#)
- [What Users Need to Know](#)
- [Supported Call Server Platforms](#)

Before you read this document, become familiar with your Server Call Center capabilities. Documentation should be obtained from your call server provider.



This feature synchronized ACD feature is distinct from the existing 'SIP-B' ACD functionality, which was added in SIP 1.6 . For more information, refer to the latest *SIP Administrator's Guide* at <http://www.polycom.com/voicedocumentation/>.

What Administrators Need to Know

Feature synchronized ACD is active if the feature is enabled on both the phone and the call server and the phone is registered. The feature synchronized ACD feature is applicable for any private registration on the phone.



Feature synchronized ACD is not supported on shared lines. If shared lines are configured in that way, unexpected behavior could result.

The user can sign in and sign out through the use of soft keys or the menu. The user can change their state through the use of soft keys or the menu. The user's current state appears in the status line of the phone and as an icon allocated with the line key that is registered with the feature synchronized ACD.

Configuration changes can be performed centrally at the boot server:

Central (boot server)	Configuration file: sip.cfg	Enable or disable feature synchronized ACD. <ul style="list-style-type: none"> For more information, refer to SIP <SIP/> on page 2. Turn this feature on or off. <ul style="list-style-type: none"> For more information, refer to Feature <feature/> on page 3.
	Configuration file: phone1.cfg	Set the registration to be used for feature synchronized ACD and the users sign-in state. <ul style="list-style-type: none"> For more information, refer to Automatic Call Distribution <acd/> on page 3.



Polycom recommends that you create another configuration file with your organization's modifications. If you must change any Polycom templates, back them up first.

For more information, refer to the "Configuration File Management on SoundPoint IP Phones" whitepaper at http://www.polycom.com/common/documents/whitepapers/configuration_file_management_on_soundpoint_ip_phones.pdf.

SIP <SIP/>

The new configuration attribute in **sip.cfg** is defined as follows:

Attribute	Permitted Values	Default	Interpretation
volpProt.SIP.acd.signalingMethod	0, 1	0	If set to 0 or Null, the 'SIP-B' signaling is supported. (This is the existing ACD functionality.) If set to 1, the feature synchronization signaling is supported. (This is the new ACD functionality.)

Feature <feature/>

This existing configuration attribute in **sip.cfg** is defined as follows:

Attribute	Permitted Values	Default	Interpretation
feature.14.enabled	0 or 1	1	If set to 1, the ACD sign-in/sign-out feature is enabled. If set to 0, the ACD sign-in/sign-out feature is disabled.
feature.15.enabled	0 or 1	1	If set to 1, ACD agent available/unavailable feature is enabled. If set to 0, ACD agent available/unavailable feature is disabled.



Both ACD sign-in/sign-out and ACD agent available/unavailable must be enabled for the feature synchronized ACD feature to work correctly.

Automatic Call Distribution <acd/>

This new configuration attribute in **phone1.cfg** is defined as follows:

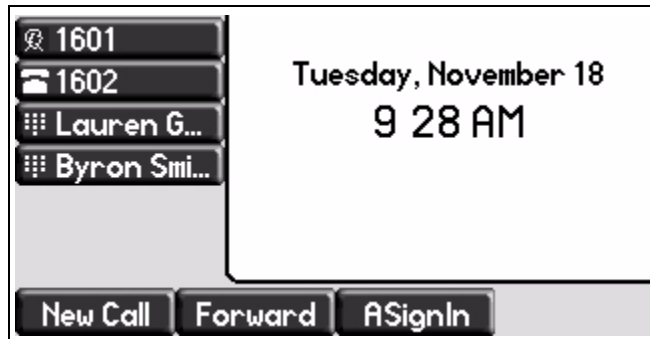
Attribute	Permitted Values	Default	Interpretation
acd.reg	1 to 34	Null	The registration index to be used for feature synchronized ACD. If set to Null, the value 1 is used.
acd.stateAtSignIn	0 or 1	Null	The state that the user must attain on signing in. If set to 1 or Null, the user's state will be set to Available. If set to 0, the user's state will be set to Unavailable.

What Users Need to Know

If feature synchronized ACD is configured on your phone, you will be able to:






- Sign in and sign out as an agent
- Change your agent state to unavailable or available using the phone's soft keys or through the menu

An idle screen similar to the one shown below appears.



On the SoundStation IP 320/321/330/331/335, you must press the **More** soft key to see the idle screen shown below (unless some idle screen soft keys are disabled through configuration).



Agent States	Line Icons
Sign Out	
Sign In, Available	
Sign In, Unavailable	alternating  and 
Wrap-up	


This section provides information on:

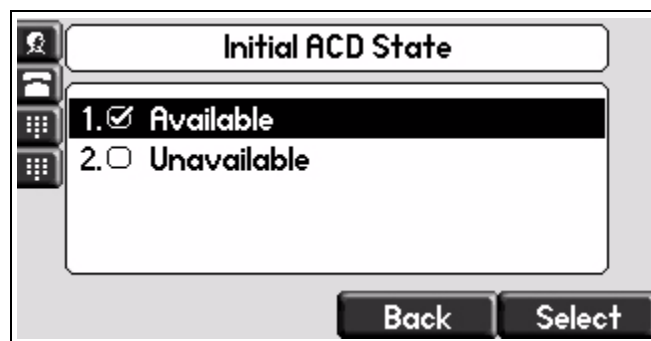
- [Setting the Initial Agent State](#)
- [Signing In and Out as an Agent](#)
- [Changing the Agent State](#)

Setting the Initial Agent State

When you sign in, your initial agent state is set to the configured initial value. By default, this value is Available.

To set the initial agent state:

- 1 Press , and then select **Features > ACD... > Initial Agent State**.



- 2 Scroll to the desired initial state, and then press the **Select** soft key.
The next time you sign in your initial agent state will be the value you selected.

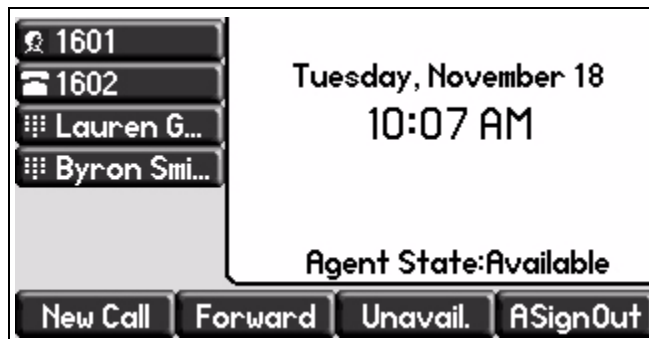
Signing In and Out as an Agent


You can sign in (and sign out) through the use of soft keys or the menu.


To sign in using soft keys:

>> Press the **ASignIn** soft key.

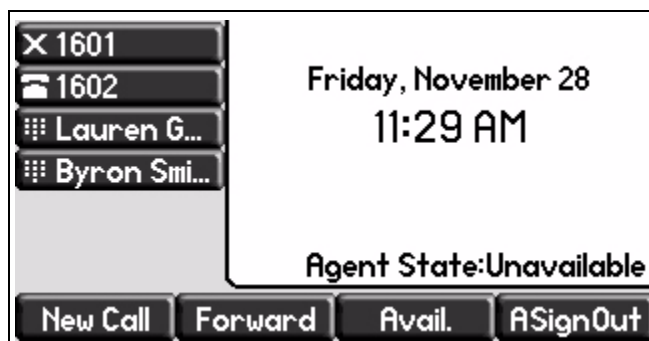
- If your initial agent state is **Available**, an idle screen similar to the one shown below appears:



The line icon changes to  and the **ASignOut** and **Unavail.** soft keys appear. The “Agent State:Available” message appears.

Calls will be directed to your phone, but only on the line associated with .


- If your initial agent state is **Unavailable**, an idle screen similar to the one shown below appears:



The line icon changes to alternating  and  and the **Avail.** soft key appears. The “Agent State:Unavailable” message appears.

Calls will not be directed to your phone.

To sign in through the menu:

>> Press , select **Features > ACD... > ACD SignIn/SignOut**, and then press the **Select** soft key.

To sign out using soft keys:

>> Press the **ASignOut** soft key.


An idle screen similar to the one shown below appears:



The line icon changes to  and a **ASignIn** soft key appears. No agent state message appears.

Calls will be no longer be directed to your phone.

To sign out through the menu:

>> Press , select **Features > ACD... > ACD SignIn/SignOut**, scroll to **Agent SignOut**, and then press the **Select** soft key.

Changing the Agent State

You can change the agent state through the use of soft keys or the menu. The agent state may, in some cases, also be changed through a third party computer-based soft-client. Generally, at the end of a call, the call server will put the phone into a “Wrap-up” state, which effectively makes the agent unavailable for calls for a set period of time while post-call work is done. The agent may leave this state early if they are ready for more calls by pressing the **Avail.** soft key. Changing the ACD state may also be done through a computer-based soft-client. The phone state will stay in synchronization with the state of this soft client if the state is altered through this computer-based client.



If you change the agent state to Unavailable while your phone is ringing, you may do one of the following to ignore the call and silence the ringing:



- Press the **Reject** soft key.
- Press the **DND** key (or select **Do Not Disturb** from the Feature menu).
- Wait for the ringing to stop.

In all cases, the call will be returned to the queue for the next available agent.


To change the agent state using soft keys:

>> Do one of the following:

- Press the **Unavail.** soft key.

The line icon changes to alternating  and  and the **Avail.** soft key appears. The “Agent State:Unavailable” message appears.


- Press the **Avail.** soft key.

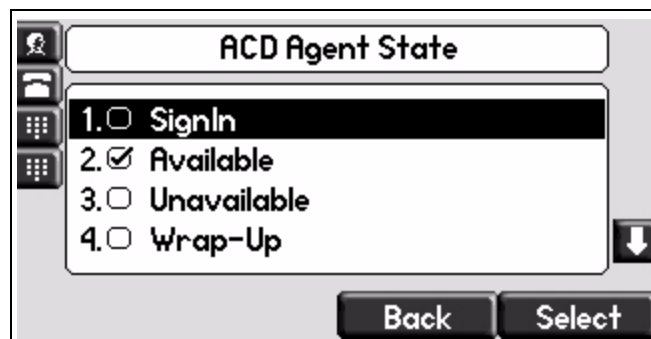
The line icon changes to  and the **Unavail.** soft key appears. The “Agent State:Available” message appears.

To change the agent state through the menu:



It is not expected that you will need to use this menu to change the agent state. It has been included for applications where you may need to set states other than Available and Unavailable as described above.

- 1 Press , and then select **Features > ACD... > ACD Agent State...**



- 2 Scroll to the desired state.

You can select from **SignIn**, **Available**, **Unavailable**, **Wrap-Up**, and **SignOut**.



The SignIn state is intended for use when an agent is performing certain tasks when starting a session and is not expected to be a state that the user will use very often.

The SignOut state is expected to be used when the agent is "Signed Out" of the Call Center queue.

- 3 Press the **Select** soft key.

References

- 4 BroadWorks Call Center Solution Guide available at <http://xchange.broadsoft.com/product-support-center/broadworks-platform/release-14sp3/Feature-Descriptions/BW-CallCenterSolutionGuide.pdf/view>

Contact Polycom Product Management for more information.

Supported Call Server Platforms

At this time, the following call server platforms are supported:

- 1 BroadSoft's BroadWorks R14 SP3 or later.

Trademark Information

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