

ACE Direct v2.1

Manager Operations Checklist

MITRE

Purpose

- This checklist demonstrates the ACE Direct functionality for the call center manager.
- It provides a step-by-step walkthrough to verify each of the call center manager's operational functions.

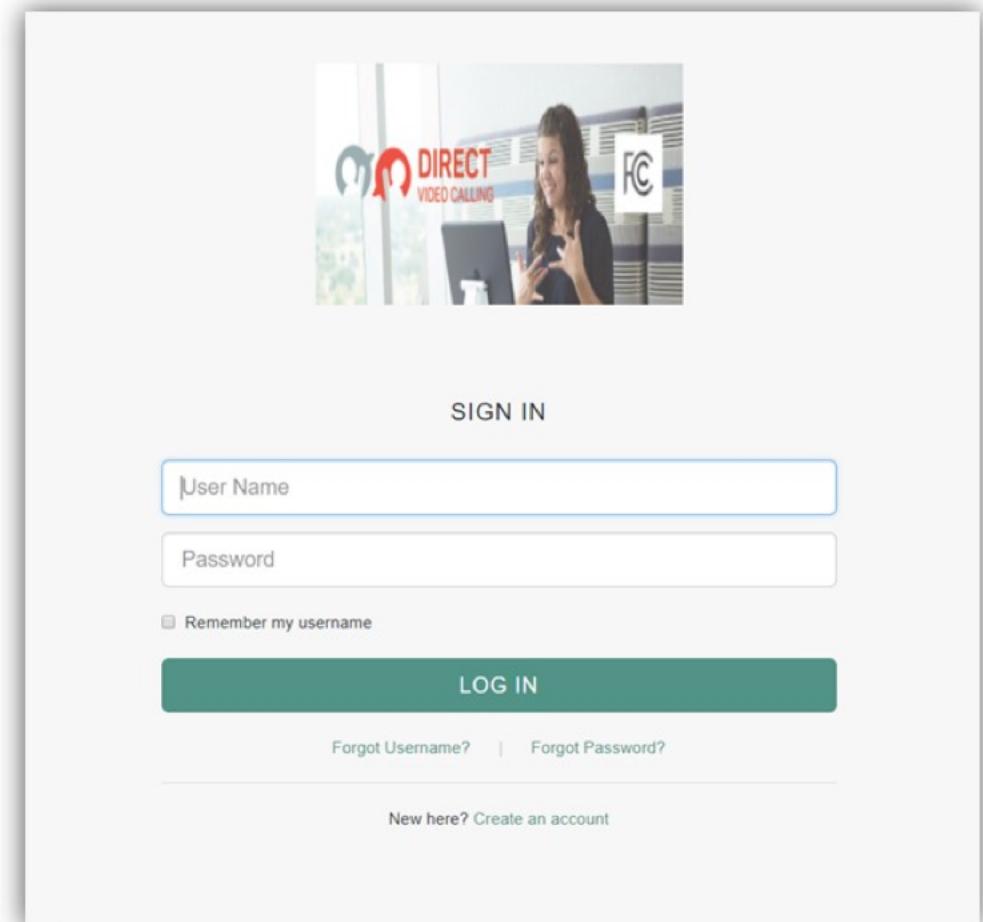
Note: For additional information, please reference the ACE Direct Platform Release Documentation, Release 2.1.

Step 1: Log in to Manager Portal

Purpose:

Verify account creation process and Log in

- 1. Follow the same steps in the Agent Checklist for testing the account creation, and Username/Password Resets.**
- 2. Log in to the portal using the Manager credentials.**



SIGN IN

User Name

Password

Remember my username

LOG IN

Forgot Username? | Forgot Password?

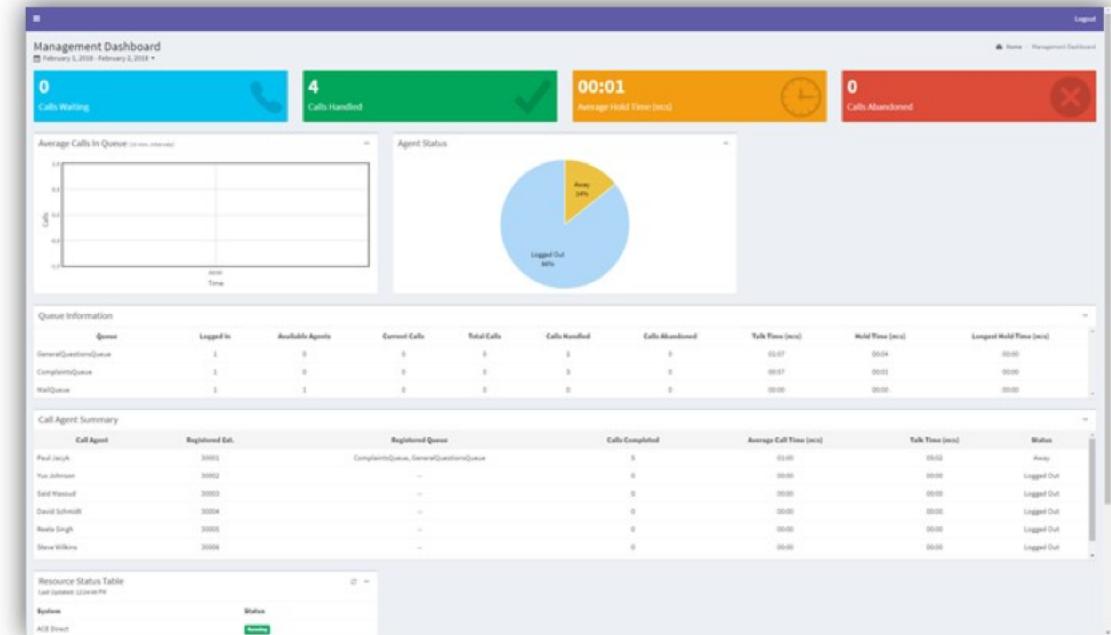
New here? [Create an account](#)

Step 2: Test Management Dashboard

Purpose:

Verify Management Dashboard metrics are updating

1. **Dashboard metrics will initially be set to zero.**
2. **Have several agents log in to ACE Direct in an “Away” state.**
3. **Place several calls into ACE Direct from both WebRTC and a Provider device.**
4. **Verify that the Agent and Queue metrics are updating appropriately by allowing the queue to build before answering calls.**



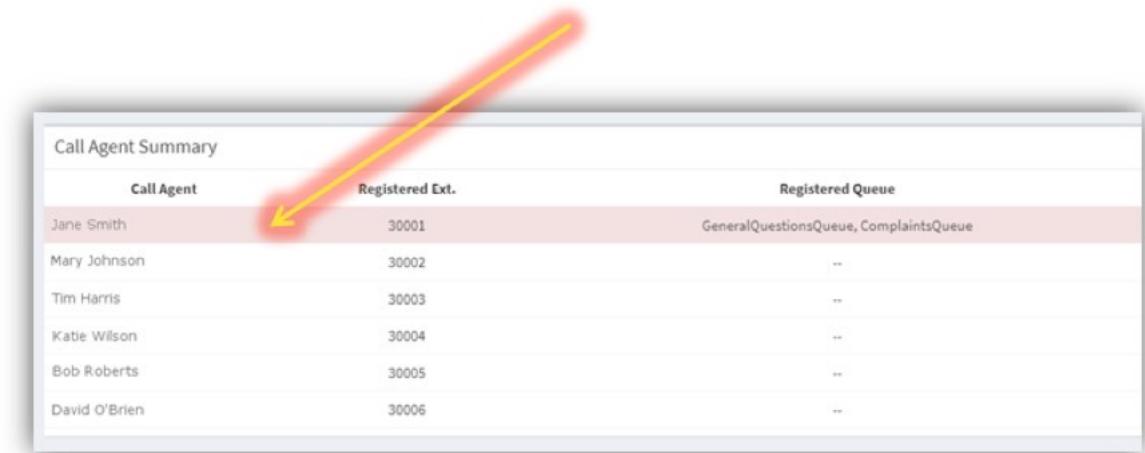
ACE Direct Platform Release Documentation, Release 2.1
Subsection 2.8.1

Step 3: Test Agent “Get Help” Request

Purpose:

Verify “Get Help” request triggers notification to Manager

1. Have an agent select the “Get Help” button on their portal.
2. Verify that the agent’s name flashes in the Call Agent Summary window.
3. Agent’s name stops flashing once selected.



A screenshot of a software interface titled "Call Agent Summary". The table has three columns: "Call Agent", "Registered Ext.", and "Registered Queue". The "Registered Queue" column contains a list of two queues: "GeneralQuestionsQueue, ComplaintsQueue". A yellow arrow points to the first row of the table, which corresponds to the agent "Jane Smith".

Call Agent	Registered Ext.	Registered Queue
Jane Smith	30001	GeneralQuestionsQueue, ComplaintsQueue
Mary Johnson	30002	--
Tim Harris	30003	--
Katie Wilson	30004	--
Bob Roberts	30005	--
David O'Brien	30006	--

Step 4: CDR Dashboard

Purpose:

Verify Call Detail Records (CDR) Dashboard functionality

1. Navigate to the CDR Dashboard.
2. Test Date Filtering.
3. Test number of records shown.
4. Test CDR search.
5. Verify that the CDR save function works correctly (CSV format).

The screenshot displays the ACE Dashboard interface. On the left, a sidebar lists navigation options: MAIN NAVIGATION (Management Dashboard, CDR Dashboard, Videomail Dashboard, Light Configuration, Hours of Operation), and a central area showing a summary card with 0 Calls. A yellow box highlights the 'Management Dashboard' button. A yellow arrow points from this button to the 'CDR Dashboard' section of the main content area. The CDR Dashboard shows a date range from January 27, 2018, to February 2, 2018. It includes a dropdown for date filtering (Today, Yesterday, Last 7 Days, Last 30 Days, This Month, Last Month, All Time, Custom Range) and a 'Source' column. Below this is a table with one row: 2018/02/02 12:41:30 pm, 90001. At the bottom are 'Apply' and 'Cancel' buttons. In the foreground, two smaller windows are shown: 'Call Detail Records' (listing 10 entries) and a search interface with fields for 'Search', 'Duration Seconds', and 'Billable Seconds'.

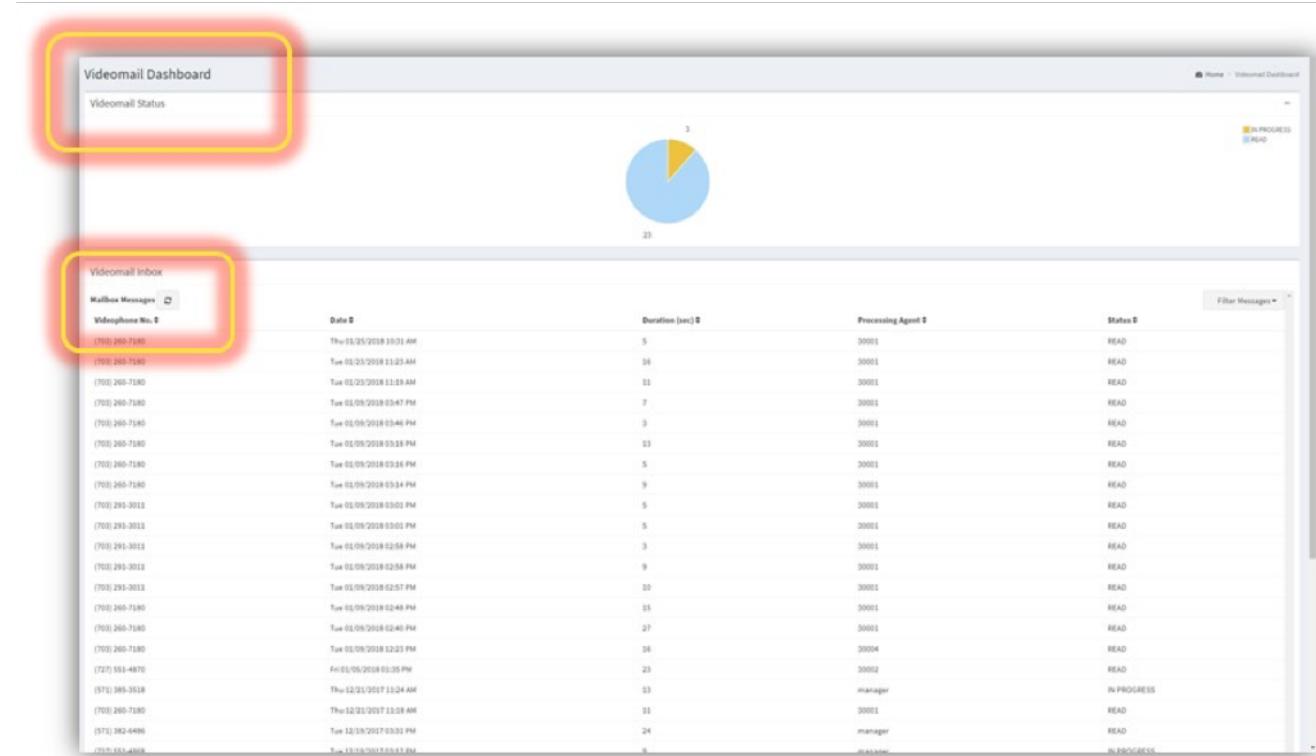
ACE Direct Platform Release Documentation, Release 2.1
Subsection 2.8.2

Step 5: Video Mail Dashboard

Purpose:

Verify Video Mail records are updating

1. Navigate to Videomail Dashboard.
2. Test “Videomail Status” chart by leaving a video mail message.
3. Inbox should show all messages and associated data.



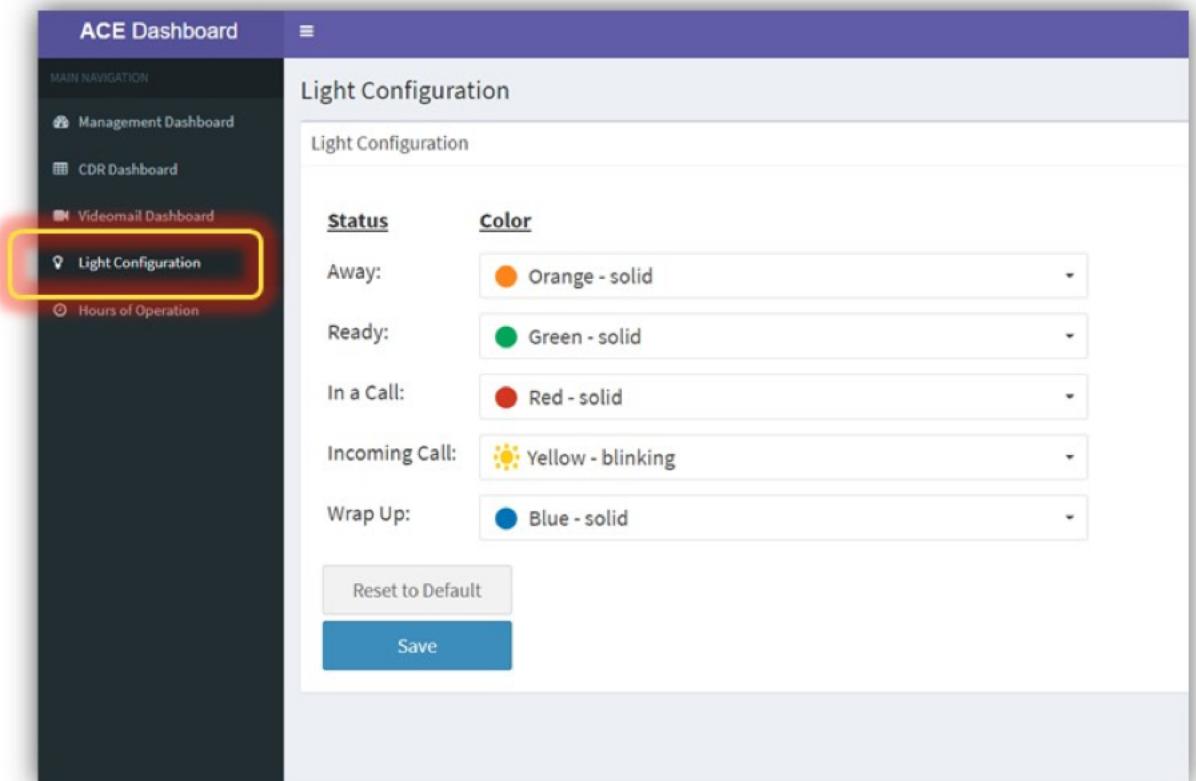
ACE Direct Platform Release Documentation, Release 2.1
Subsection 2.8.3

Step 6: Light Configuration

Purpose:

Verify status light updates to reflect agent status

- 1. Navigate to Light Configuration.**
- 2. Change the “Away” status color to verify the light connection works correctly.**
- 3. Set desired colors.**



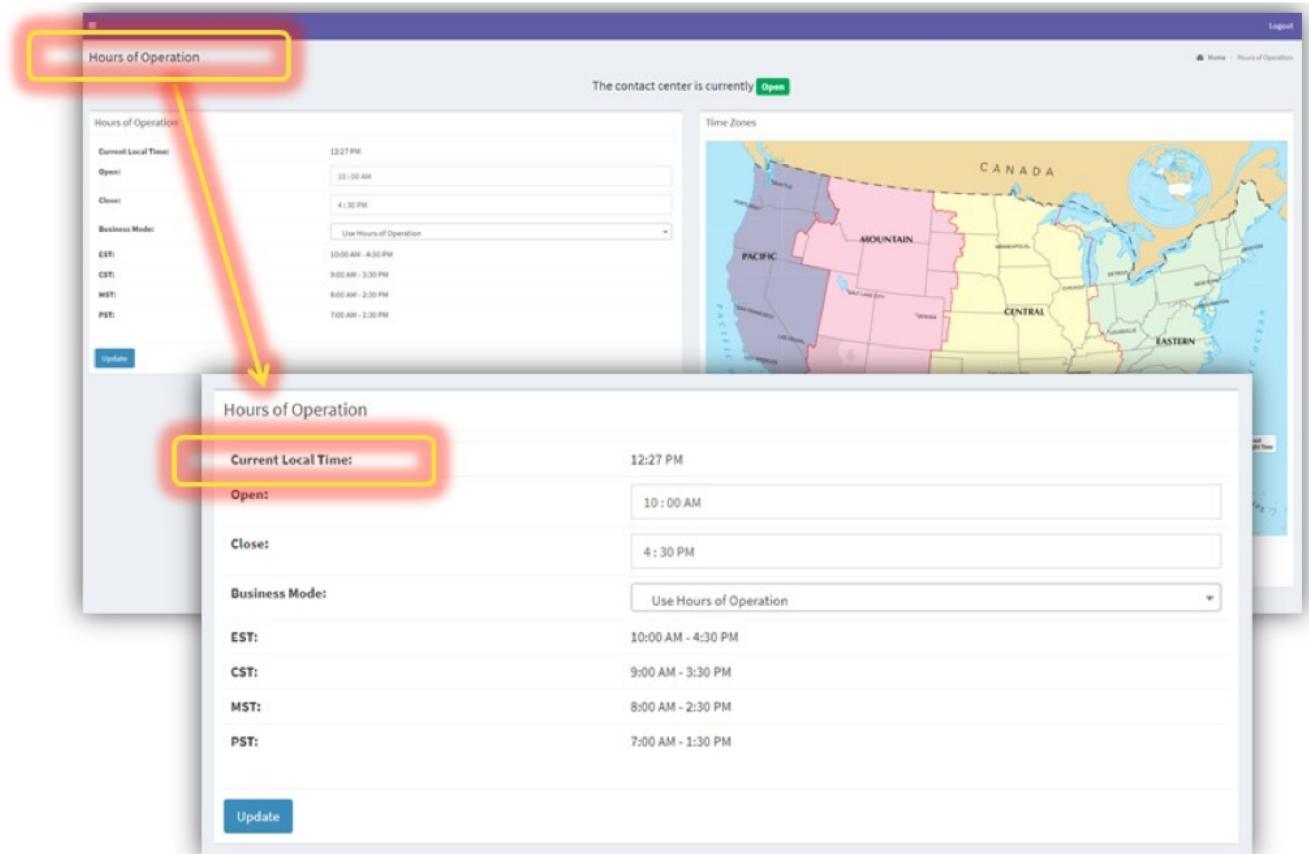
ACE Direct Platform Release Documentation, Release 2.1
Subsection 2.6.2

Step 7: Hours of Operation

Purpose:

Verify Hours of Operation can be updated

1. Navigate to Hours of Operation.
2. Alter hours of operation to after hours and verify correct operation.
3. Verify operation status is depicted on top portion of window.



ACE Direct Platform Release Documentation Release 2.1
Subsection 2.8.4

Step 10: WebRTC and Provider Device Video Calls

Purpose:

Verify WebRTC and call metrics are working correctly

1. **Change the agent's status to "Ready" to start accepting calls. Place a WebRTC call to ensure connectivity.**
2. **Test the Real-Time Text chat.**
3. **Messages from both parties are visible in the chat window. The text from the other party should be visible as that party types and before the message is committed to the chat.**
4. **Place a call to ACE Direct from a provider device to ensure connectivity.**
5. **Verify call metrics are changing appropriately.**



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