

# ACE Direct v2.1

---

## Manager Operations Checklist

# 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.

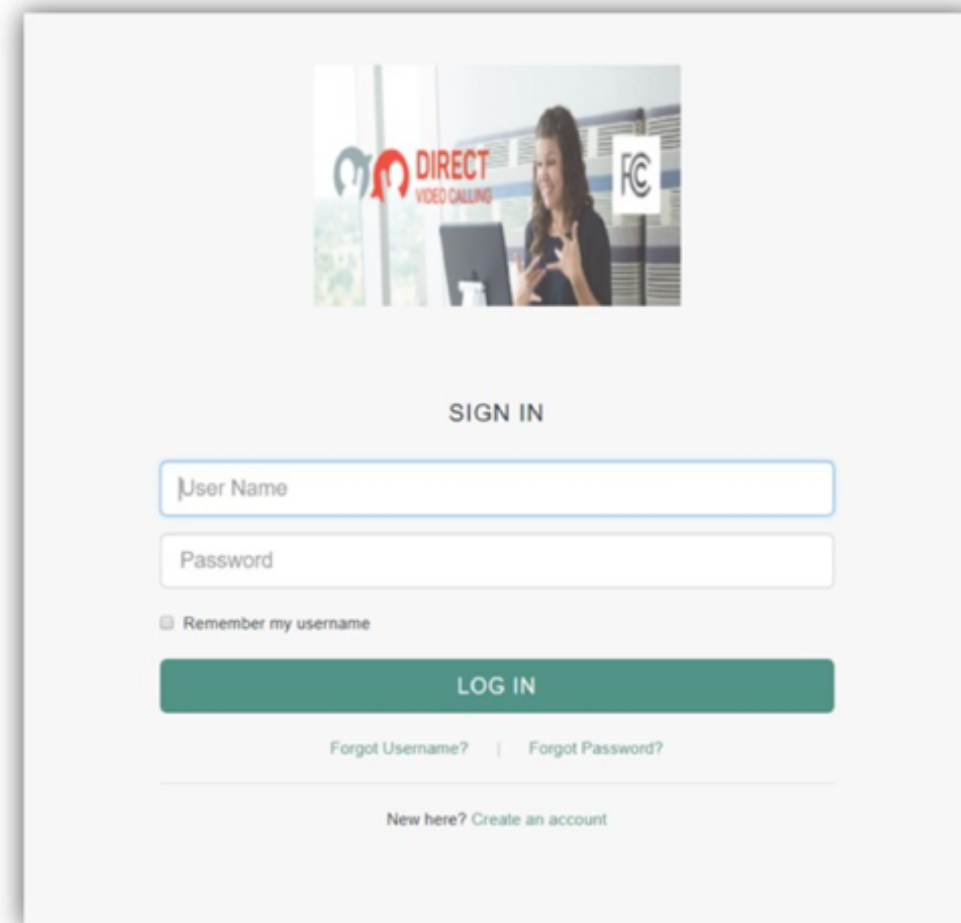
**Note:** For additional information, please reference the ACE Direct Platform Release Documentation, Release 2.1.

# 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.**



The screenshot displays the login interface for the ACE Direct Manager Portal. At the top, there is a banner image featuring a woman in a call center setting, with the 'DIRECT VIDEO CALLING' logo and an 'FC' badge. Below the banner, the text 'SIGN IN' is centered. The login form consists of two input fields: 'User Name' and 'Password'. Below these fields is a checkbox labeled 'Remember my username'. A prominent green 'LOG IN' button is positioned below the checkbox. At the bottom of the form, there are two links: 'Forgot Username?' and 'Forgot Password?'. At the very bottom, a link reads 'New here? Create an account'.

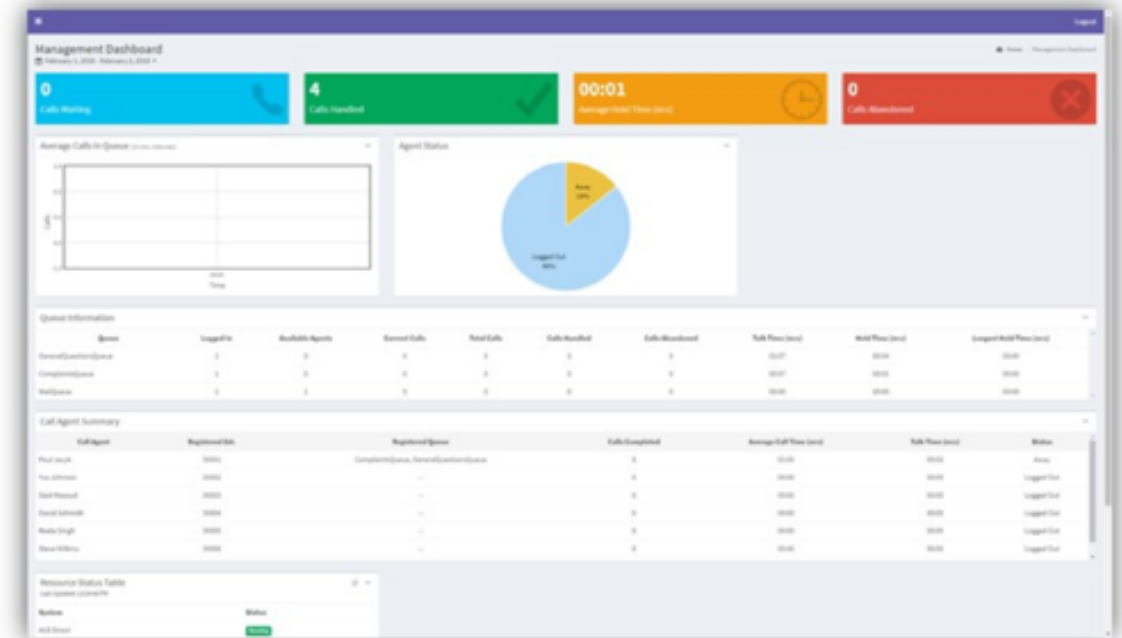
ACE Direct Platform Release Documentation, Release 2.1  
Subsection 2.9.1

# 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.



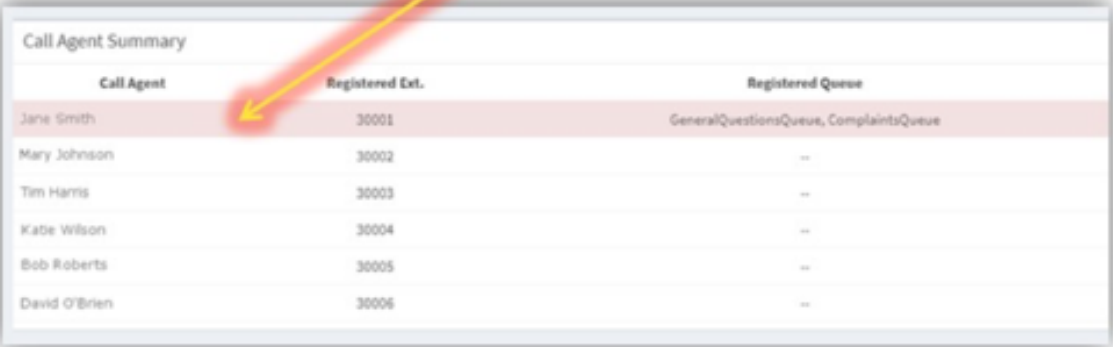
ACE Direct Platform Release Documentation, Release 2.1  
Subsection 2.8.1

## 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.



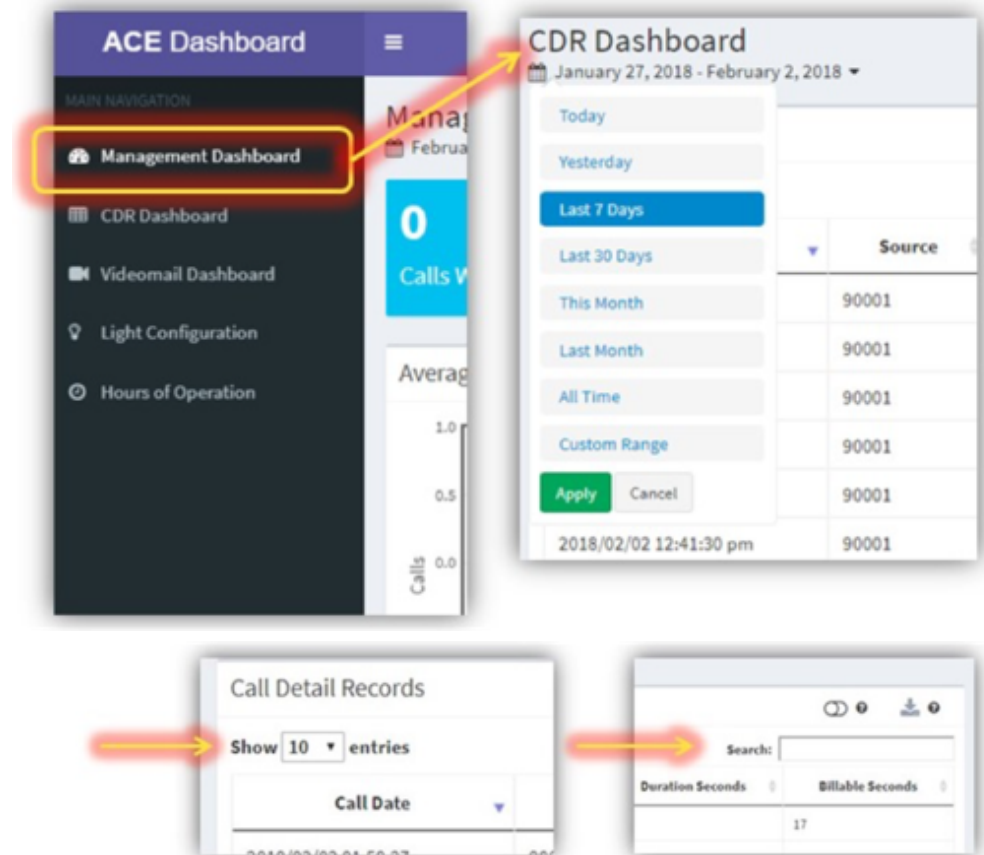
Call Agent	Registered Ext.	Registered Queue
Jane Smith	30001	GeneralQuestionsQueue, ComplaintsQueue
Mary Johnson	30002	--
Tim Harris	30003	--
Kate Wilson	30004	--
Bob Roberts	30005	--
David O'Brien	30006	--

## 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).



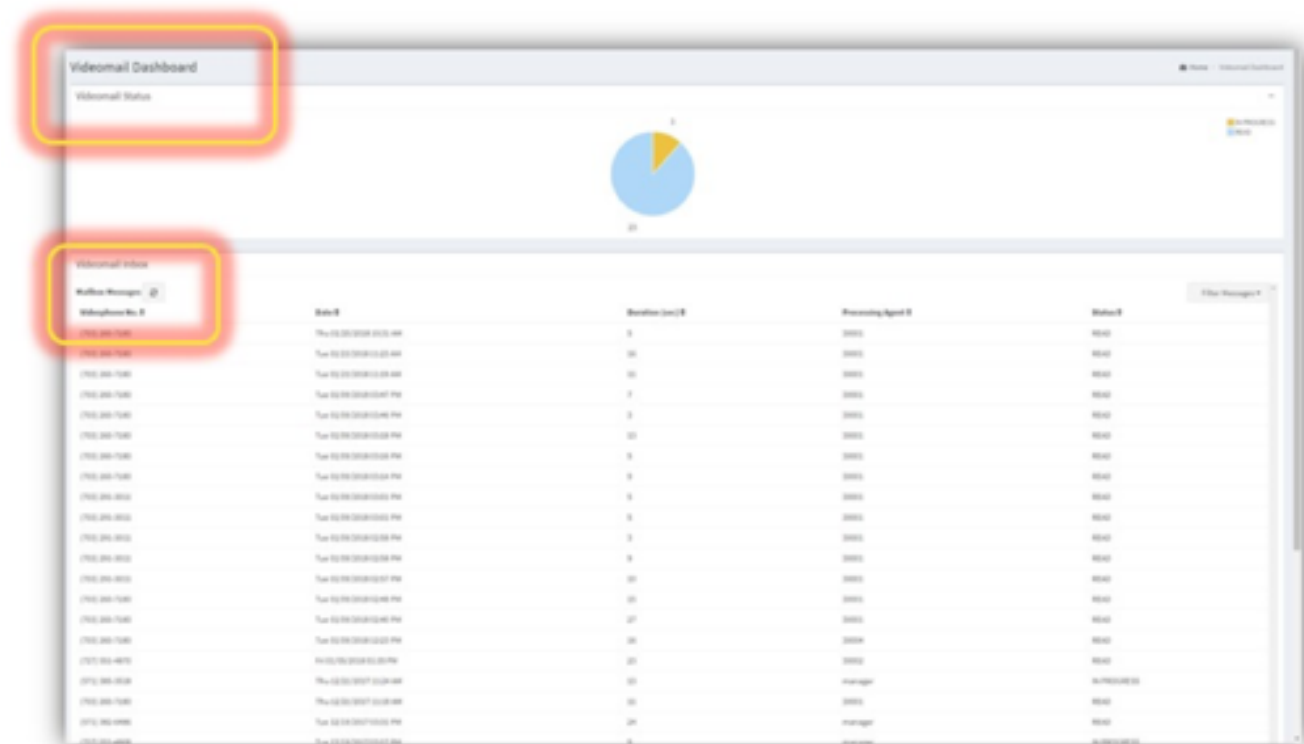
ACE Direct Platform Release Documentation, Release 2.1  
Subsection 2.8.2

## 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.**



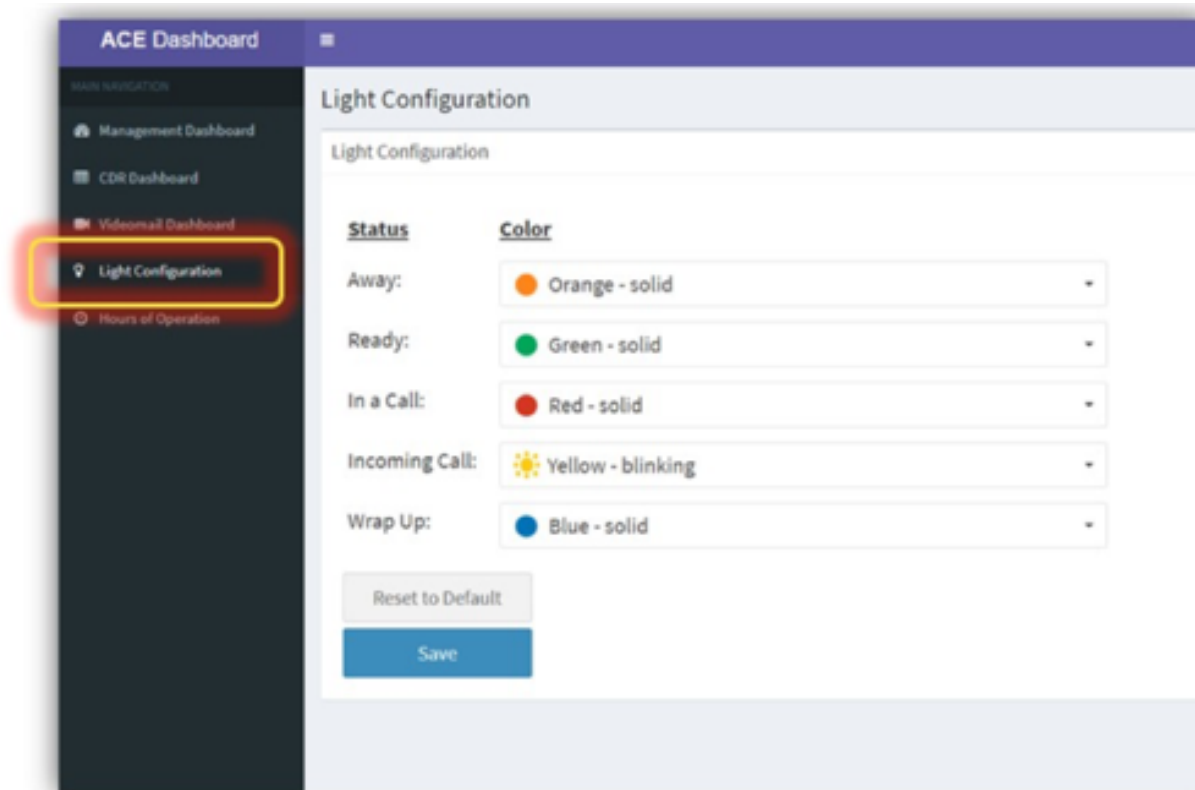
ACE Direct Platform Release Documentation, Release 2.1  
Subsection 2.8.3

# 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.**

The screenshot displays the 'Hours of Operation' configuration window. At the top, a status bar indicates 'The contact center is currently Open'. The main form contains the following fields:

- Current Local Time:** 12:27 PM
- Open:** 10:00 AM
- Close:** 4:30 PM
- Business Mode:** Use Hours of Operation
- EST:** 10:00 AM - 4:30 PM
- CST:** 9:00 AM - 3:30 PM
- MST:** 8:00 AM - 2:30 PM
- PST:** 7:00 AM - 1:30 PM

A map of the United States is shown on the right side of the window. A red arrow points from the 'Hours of Operation' tab to the 'Current Local Time' field.

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.**

 **DONE!**

# Notice

---

This work was produced for the U. S. Government under Contract Number HHSM-5000-2012-000081, and is subject to Federal Acquisition Regulation Clause 52.227-14, Rights in Data—General, Alt. II, III and IV (DEC 2007) [Reference 27.409(a)].

No other use other than that granted to the U. S. Government, or to those acting on behalf of the U. S. Government under that Clause, is authorized without the express written permission of The MITRE Corporation.

For further information, please contact The MITRE Corporation, Contracts Management Office, 7515 Colshire Drive, McLean, VA 22102-7539, (703) 983-6000.

©2018 The MITRE Corporation. All Rights Reserved.