



xT911™

Call Taker Training

Version 3.9

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xT911 Call Taker Training

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xT911 is covered by one or more of the following patents: 6,064,722; 6,529,722.

NasdaqGM: TSYS

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Table of Contents

COURSE DESCRIPTION	1
INTRODUCTION	2
UNIT 1: INTERFACE OVERVIEW AND LOGGING INTO XT911	2
1.1 GETTING STARTED WITH XT911: LOGGING IN AS A CALL TAKER.....	2
1.2 INTERFACE OVERVIEW AND GENERAL SETTINGS.....	3
1.2a Panels used for Call Handling.....	3
1.2b Home and Customer Info Tab.....	4
1.2c xT911 Button.....	5
1.3 MANAGING PREFERENCES.....	6
1.3a Managing Audio Preferences.....	6
1.3d Customizing the Screen Layout.....	8
1.3e Customizing the Column Order.....	9
1.3F Sorting and Freezing Call Record Sort Orders in Columns.....	10
UNIT 1 REVIEW.....	11
UNIT 2: TAKING CALLS WITH XT911	12
2.1 LOGGING INTO THE CALL TAKING QUEUE.....	12
2.2 ANSWERING INCOMING 9-1-1 AND ADMIN (NON-EMERGENCY) CALLS.....	14
2.2a Call Manager.....	15
2.2b Call Control Features in Call Manager.....	16
2.2c Call Control Features on the Home Tab.....	16
2.3 ANSWERING INCOMING CALLS WHILE ON A CALL.....	17
2.3a Ring All Calls Panel.....	17
2.3b Placing a Call on Hold / Park.....	17
2.4 CONFERENCING AND TRANSFERRING CALLS WITH XT911.....	18
2.4a Conferencing Calls via Contacts.....	19
2.4b Transferring Calls via Contacts.....	19
2.4c Conferencing Calls via the Dial Pad.....	20
2.4d Transferring Calls via the Dial Pad.....	20
2.4e Conferencing Calls via Stations.....	21
2.4f Transferring Calls via Stations.....	21
2.5 MERGING CALLS.....	22
2.6 XT911 TEXT TO 9-1-1.....	23
2.7 JOINING AND MONITORING CALLS.....	25
2.7a Joining a Call.....	25
2.7b Monitoring Calls.....	26
UNIT 2 REVIEW.....	28
UNIT 3: CALL MANAGEMENT	29
3.1 CALLS INFORMATION AND MANAGEMENT.....	29
3.1a The Active Calls Panel.....	29
3.1b Managing Abandoned Calls.....	30
3.1c Adding Agent Notes.....	31
3.1d Call State.....	31
3.1e Vertical Toolbar.....	32
3.1f Playing Back Calls via the Playback Panel.....	33

xT911 Call Taker Training

3.1g IRR Radio Dispatch Recording 34

3.2 ADDITIONAL CALL FEATURES 35

 3.2a ALI Display Functions..... 35

 3.2b Performing a Reverse ALI Query 36

 3.2c Reporting an ALI Discrepancy..... 37

UNIT 3 REVIEW 38

UNIT 4: CALL HISTORY 39

 4.1 CALL HISTORY FEATURES 39

 4.1a Search Criteria 39

 4.1b Viewing Caller History 40

UNIT 4 REVIEW 41

UNIT 5: USING THE BROADCAST MESSENGER 41

 UNIT 5 REVIEW 42

UNIT 6: SUBMITTING A TROUBLE TICKET FOR ASSISTANCE 43

 6.1 LOGGING TROUBLE TICKETS 43

 6.2 CALLING SUPPORT 44

UNIT 6 REVIEW 45

Course Description

In this class, you will learn how to use xT911™ from the perspective of a call taker (those who are responsible for daily call handling tasks). This includes an overview of all aspects of the software, focusing on core functionality such as answering, transferring, and releasing calls.

Course Objectives

At the conclusion of the course, you will have an overall understanding of the xT911 software and be able to efficiently:

- Perform basic call handling functionality, including answering and releasing from calls
- Utilize call management features such as conferencing, transferring, or ringing back a call
- View call history and search for calls, as well as listen to call recordings

Note: This syllabus is subject to change depending on the varying needs of our customers.

Training Duration

The course may take up to four hours.

Introduction

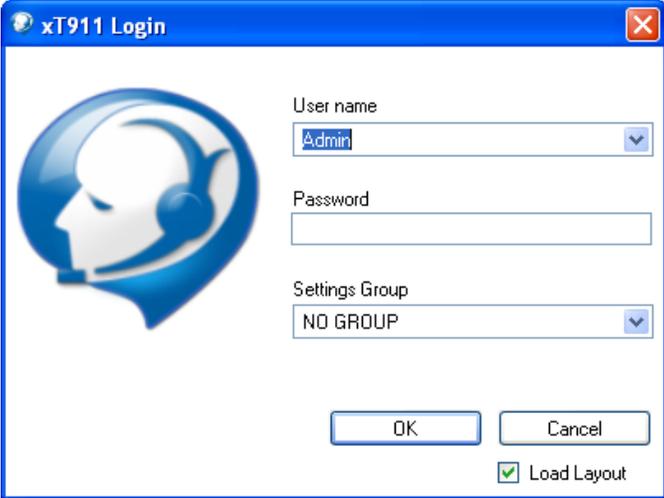
xT911 is the application that call takers will use to answer and manage calls. This training session will cover an introduction to the user interface, navigation controls, and other features of this application.

Unit 1: Interface Overview and Logging into xT911

1.1 Getting Started with xT911: Logging in as a Call Taker

To Log in to the xT911 Application

- Double click the xT911 shortcut icon located on the desktop.



The screenshot shows the xT911 Login dialog box. It features a blue title bar with the text "xT911 Login" and a close button. On the left side, there is a blue icon of a person's head wearing a headset. To the right of the icon are three dropdown menus: "User name" with "Admin" selected, "Password" (empty), and "Settings Group" with "NO GROUP" selected. At the bottom of the dialog are two buttons, "OK" and "Cancel", and a checked checkbox labeled "Load Layout".



Note: You must log in to ACD Queue before taking calls.



Unit 1 Exercise: Log in to xT911

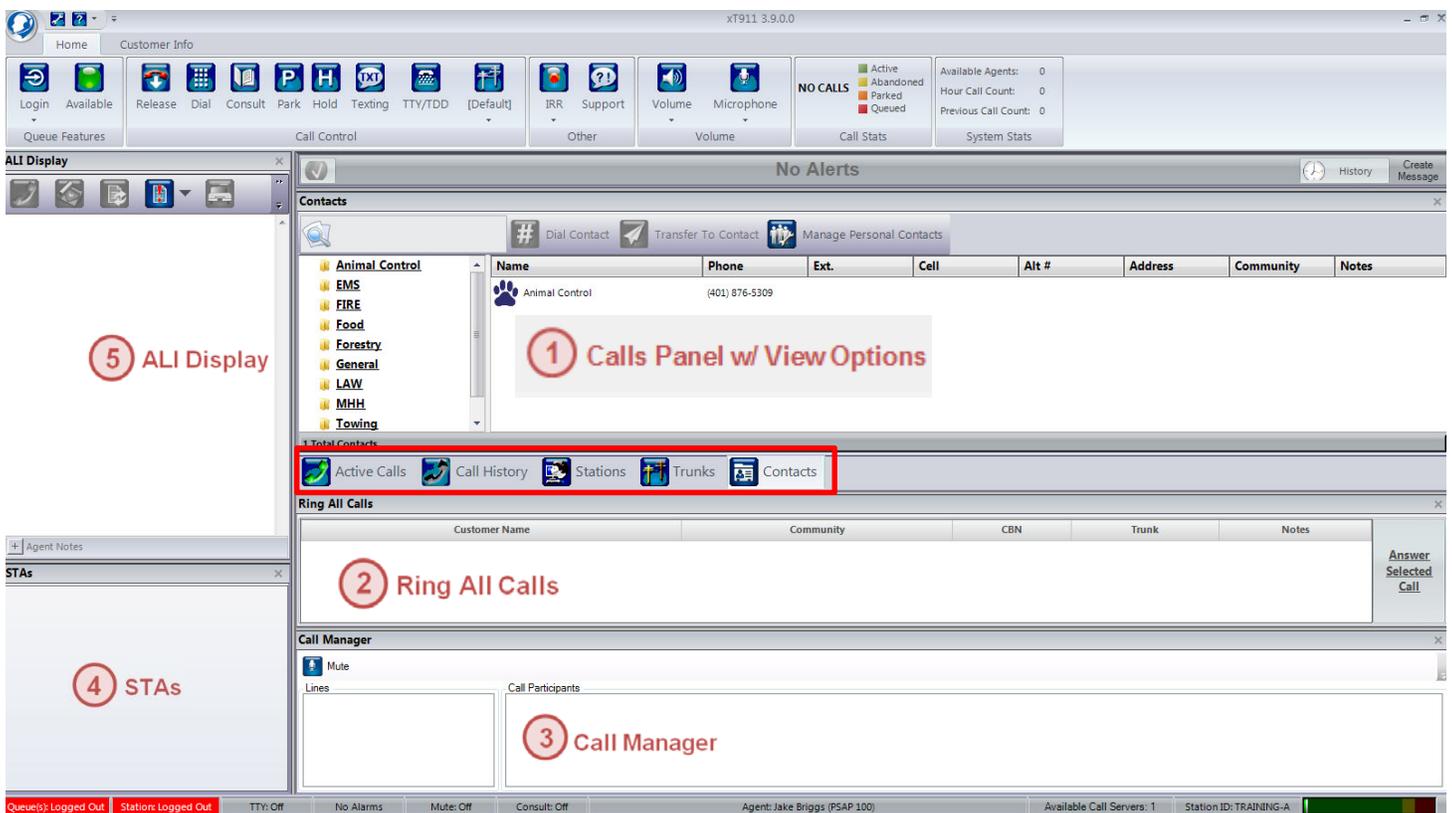
Launch the xT911 application and select your user name, type your password and then select **OK**.

1.2 Interface Overview and General Settings

The following overview explores the basic navigation and terminology of the xT911 application. The xT911 interface has different call taking panels that may be used, depending on your needs for call management.

1.2a Panels used for Call Handling

1. **Calls** panel: Displays information for **Active Calls**, **Call History**, **Stations** and **Contacts**, depending on which view is selected
 - **Active Calls**: Displays Information on *all* active and abandoned calls for the agency.
 - **Call History**: Displays historical view of calls within the agency.
 - **Stations**: Displays call station information for call takers in the agency.
 - **Contacts**: Displays contact information (for placing outbound calls, conferencing, or transferring calls to a specific contact).
2. **Ring All Calls Queue**: Displays all ringing calls.
3. **Call Manager**: Populated when a call is answered at your workstation. Individual icons are displayed for each call participant.
4. **STAs (Selective Transfer Agencies)**: May be populated with a list of responders based on the incoming ALI, or a custom list configured by the agency system administrator.
 - **ALI Display**: When a call is answered, the corresponding ALI information is displayed if available.



1.2b Home and Customer Info Tab

You can switch between the **Home** and **Customer Info** tabs at any time. The information and options displayed in the top part of the screen will change based on which tab is currently selected.

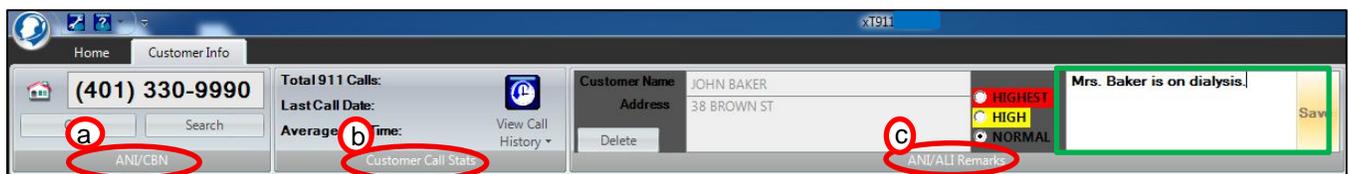


Home tab: Contains core functionality options, volume controls, system statistics for calls, and call server status.

- a. **Queue Features:** Login and Logout out of the ACD and change Busy status.
- b. **Call Control:** Release, Dial, Consult, Park, Hold, Texting, TTY/TDD.
- c. **Other:** Playback Most Recent Call (IRR) and contact Support.
- d. **Volume:**
 - (if on an active call) Adjust Volume and Microphone levels for active calls only
 - (if not on an active call) Adjust Volume and Microphone levels for all calls (adjusts volume on the call station)

Consult is used to consult with an outside party during an active call. This will mute all call participants to the caller, who will only hear a periodic audio prompt (usually a chime-like sound). **All call participants will still be able to hear the caller.**

Note: *Consult will not correctly function on outbound 911 calls or tandem transfers. All call participants, including the caller, are recorded while **Consult** is applied.*



Customer Info tab: Displays information relating to the incoming call.

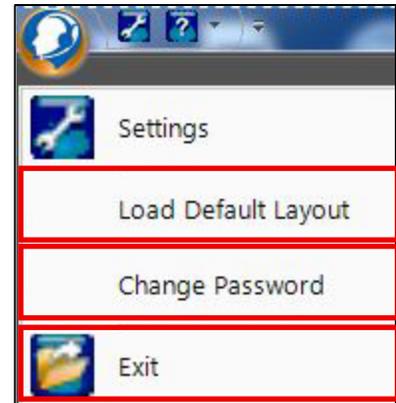
- a. **ANI/CBN:** Customer phone number
- b. **Customer Call Stats:** View **Call History**, **Last Call Date** and **Average Call Time**
- c. **ANI/ALI Remarks:** **Customer Name**, **Address**, **Remarks** added

Note: *It is possible to add and edit **ANI/ALI Remarks** which become associated with the ANI. This feature is useful for flagging certain customers' numbers with pertinent information.*

1.2c xT911  Button

The **xT911 Button** allows access to maintenance functionality, such as changing a password and resetting the layout of the xT911 default interface.

You may also use the **Exit** option under the **xT911 Button** to close the application.



1.3 Managing Preferences

xT911 users may configure the application to reflect preferences for an optimal call taking environment. It is highly recommended that all call takers try different settings to establish the preferences that work best for their individual call taking needs.

1.3a Managing Audio Preferences

Managing audio preferences is the most important setting in xT911. It is highly recommended to establish a preferential audio setting for the call taking process before logging in each time.

Note: Audio settings are preferences that are stationdependent. The audio settings are not user preferences and do not follow the call taker to another station.

To Set up individual audio preference levels

- Use the **Audio Tester/Tuner** to set individual audio preference levels for calls at the call taker's station.

The screenshot shows a software menu with 'Audio Tester' highlighted. An arrow points from this menu item to the 'Audio Tuner' dialog box. The dialog box contains three sections: 'Microphone' with a volume slider and a 'Use Microphone Boost' checkbox (which is unchecked); 'Speakers' with a volume slider; and 'Ringer/Notification' with a volume slider. At the bottom of the dialog is an XML configuration window showing settings for audio output and input devices. 'Save' and 'Cancel' buttons are at the bottom right of the dialog.

```
<cAudioSettings primaryAudioOutputDevice="{x:Reference __Referenc
  <cAudioSettings.notificationAudioOutputDevice>
    <cAudioDevice x:Name="__ReferenceID0" deviceDescription
  <cAudioSettings.recordAudioInputDevice>
    <cAudioDevice deviceDescription="Jack Mic (IDT High Defini
  <cAudioSettings.recordAudioOutputDevice>
    <cAudioDevice deviceDescription="NONE" deviceID="NONE
```

Note: Be sure to keep the **Use Microphone Boost** option *unchecked*. The microphone gain/volume should be adjusted using the slider only. Using Microphone Boost can lead to audio distortion and echo issues! Used for trouble-shooting purposes only.

<u>Icon</u>	<u>Description and Adjustment</u>
 <p>Microphone:</p>	Controls the Volume that Call Participants hear (outgoing volume). Select Record  and when the countdown timer displays 5 , begin speaking as if answering a call. The recording will automatically play back. Adjust the Microphone slider and repeat the recording and playback until the desired volume is achieved.
 <p>Speakers:</p>	Controls the Volume that the Call Taker hears. Select Play  to hear a pre-recorded voice prompt and adjust slider to the desired volume.
 <p>Ringer/ Notification:</p>	Controls the Volume for Call Ringing and Notification . Select Play  to hear a pre-recorded ring tone and adjust the slider to the desired volume.
	Select Save to apply and save the new settings.

 **Note:** The Audio Tester/Tuner cannot be accessed while logged into ACD queue(s).

Adjusting the Call Volume with the Home Tab Volume Controls

At times, it may be necessary to adjust the volume and/or microphone for a particular caller.

To adjust the volume and microphone for the *current call only*

- Adjust the volume and microphone through the **Volume** and **Microphone** sliders on the **Home** tab while on an active call. *This will adjust the levels for the current call only.*

To adjust the volume and microphone for *all calls*

- Use the **Volume** and **Microphone** sliders on the **Home** tab while *not* on a call. This will adjust the levels for all future calls.

To mute and unmute the Call Taker

- Select the **Microphone icon** itself to mute the call taker. A red slash will appear across the icon, indicating that the call taker is muted. Select the **Microphone icon** again to unmute the call taker.



Using the VU (Volume Unit) Meter

The **VU Meter** is located at the lower right corner of the xT911 interface and is intended to help set the microphone level while on a call by indicating the current gain.



While speaking into the headset, the meter will move. Ideally, the meter should peak in the yellow range, or at the high end of the green range.



If the meter peaks below the yellow, or in the red range, adjust the microphone gain to a higher or lower level, respectively.



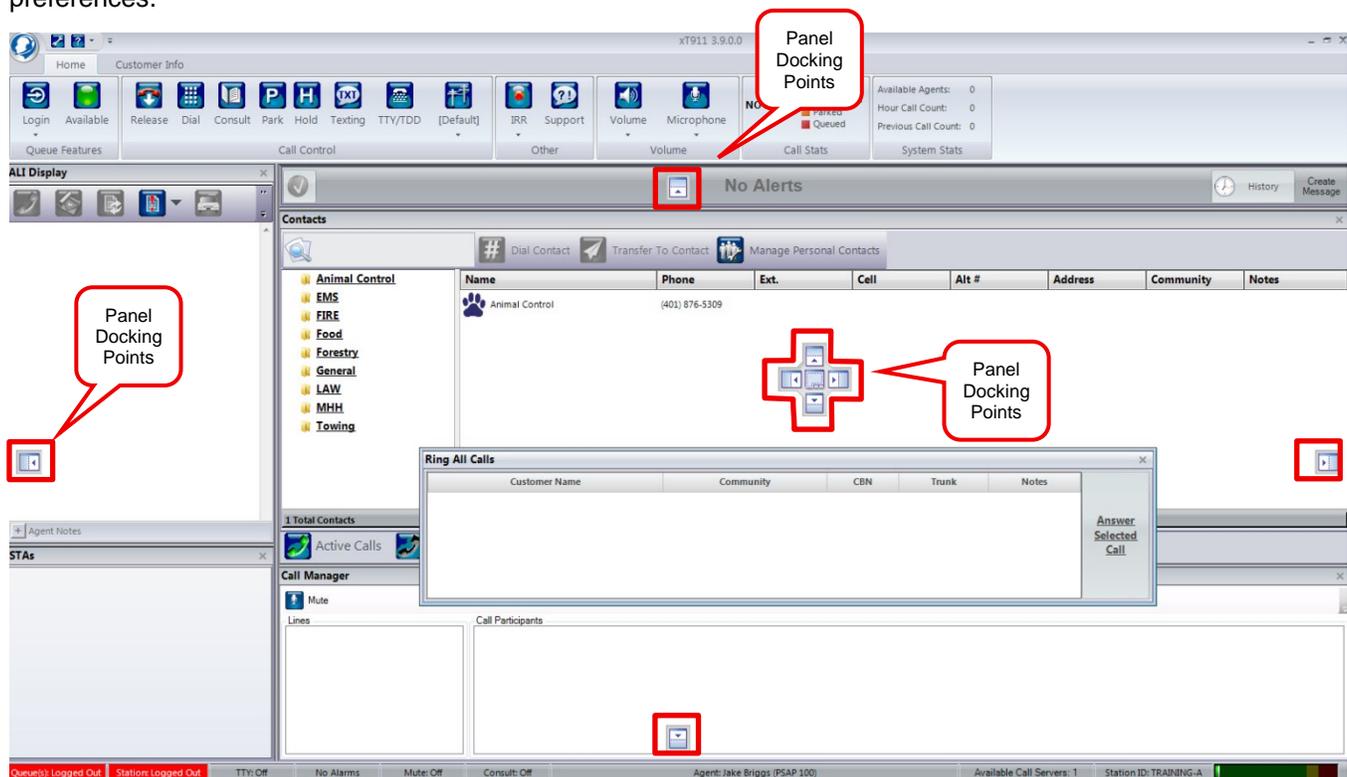
Gain levels that peak in the red for more than five seconds while on a call will result in a **Gain Warning** message. Should the warning appear, adjust the microphone gain down to peak in the yellow or upper green range.



Unit 1 Exercise: Audio Tester/Tuner & Volume and Microphone
Use the Audio Tester/Tuner to establish a preferential audio setting.
Use Volume and Microphone on the Home tab to adjust audio.

1.3d Customizing the Screen Layout

The layout of the five main panels in the xT911 interface can be customized to suit individual call taker needs or preferences.

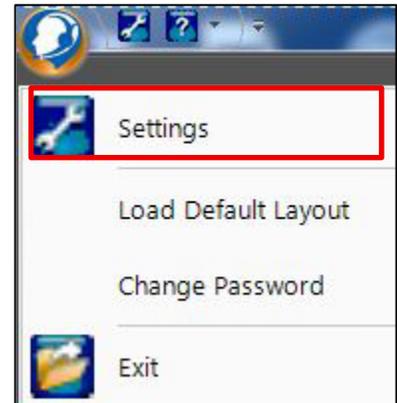


To customize the layout of the xT911 user interface:

1. Select and drag the top of the panel (Ring All Calls in this example). Panel Docking Points appear while the panel is being moved.
2. Point and release the left mouse button on any one of the Docking Points that appear. The panel will then be docked at that selected point and the system will adjust the other panels accordingly.
3. To save the new layout for subsequent sessions, no additional call taker action is required. Simply logging out at the end of the session will save the new layout.

To Return to the xT911 Default Layout

- From the **xT911 Button**, select **Load Default Layout** to return to the default layout of xT911's user interface. This can be done to recover an accidentally closed or moved panel.



Note: The **Load Default Layout** option from the xT911 menu loads the system default Screen Layout only.

1.3e Customizing the Column Order

The **Active Calls** panel and the **Call History** panel both have the option to rearrange columns to suit the call taker's preference.

To Customize the Column Order

- Select the top of the column, and then drag it to the desired position.

Rearranged columns will be saved upon exiting the application.

To Restore the Default Column Order

- Uncheck the **Load Layout** check box on the **Login** panel when logging back into the application. (Note that using the using **Load Default Layout** from the xT911 menu will *not* reset columns to the system default order.)



Note: The **Load Layout** check box is checked by default, therefore the user layout will be loaded unless the call taker unchecks the option prior to logging in.

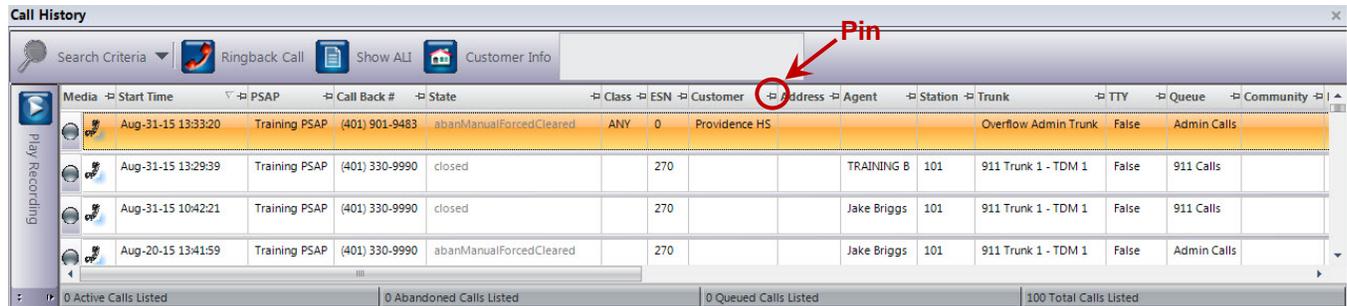
1.3F Sorting and Freezing Call Record Sort Orders in Columns

Call records can be resorted in any column in ascending or descending order. The default sort is by the most recent call time in descending order.

Columns can also be *frozen* in **Call History** so that they remain in place while the call taker scrolls across the panel.

To Freeze Call History Columns

- Select the **Pin** icon at the top of the column. When the **Pin** is in the *vertical* position, the column is pinned or frozen in place on the left. A *horizontal* Pin indicates that the column will scroll.



Note: *Screen Layout* and *Column Order* are user preferences and will follow the call taker from station to station.

Note: The *Load Layout* option in the xT911 Login panel will load the system default **Screen Layout** AND the system default **Column Order**.



Unit 1 Exercise: Screen Layout & Column Order
 Modify the screen layout to become familiar with the different settings. Reset the layout by selecting **Load Default Layout**. Change the column order and freeze.

Unit 1 Review

Topic	<input checked="" type="checkbox"/>	Comments
Logging in to xT911	<input type="checkbox"/>	
Panels: Active Calls	<input type="checkbox"/>	
Panels: Stations	<input type="checkbox"/>	
Panels: Call History	<input type="checkbox"/>	
Panels: Contacts	<input type="checkbox"/>	
Panels: Call Manager	<input type="checkbox"/>	
Panels: ALI Display	<input type="checkbox"/>	
Tabs: Home - Function Icons	<input type="checkbox"/>	
xT911 Button: Menu options	<input type="checkbox"/>	
Audio: Setting up with Audio Tester/Tuner	<input type="checkbox"/>	
Audio: Volume & Microphone	<input type="checkbox"/>	
Preferences: Moving, floating, resizing, docking	<input type="checkbox"/>	
Preferences: Resetting layout	<input type="checkbox"/>	
Preferences: Column Order	<input type="checkbox"/>	

Unit 2: Taking Calls with xT911

2.1 Logging into the Call Taking Queue

Logging into the xT911 application does not automatically enable a call taker to take calls. Call taking is only enabled after the call taker has logged into one or more ACD (Automatic Call Distribution) queues. ACD queues are created and managed by the system administrator.

The **Status Bar** (in the bottom left corner) will indicate that the user is not logged in to any queues.



<p>ALLOCATED</p>	<p>READY</p>	<p>After initially logging into the xT911 application, the station is <u>allocated</u> but <u>not available</u> to take calls. To make a station ready to take calls, select Login from the ACD Features.</p> <p>Depending on the system configuration, one or more queues may be available for selection from the Login dropdown menu.</p> <p>After logging into the ACD queue, the Login icon changes to Logout. The station is now <u>ready</u> and <u>available</u> to take calls. The Status Bar will now show that the queue(s) are logged in and the station will be a neutral color.</p>
<p>AVAILABLE</p> <p>Green = Available (In Queue)</p>	<p>BUSY</p> <p>Red = Busied (Unavailable)</p>	<p>The Busy toggle button will set the call taker's status to Busy. The Status Bar will indicate that the call taker is Busy.</p> <p>With Busy toggled on, the station will not be presented with the audible alert or the flashing ringer dialog box associated with incoming calls. Incoming calls can still be answered via the Answer Selected Call button in the Ring All Calls window. Outgoing calls can still be made by the call taker. If the call taker chooses to take or make a call, then the status will automatically default from Busy to Available.</p> <p>Other stations will not be able to call or transfer a caller to the busied station.</p>

Depending upon system configuration, a popup reminder along with an audio tone will appear if the user has been in a busy state for a designated amount of time.



Unit 2 Exercise: Log In to Queue(s) and Busy Status

Log in to the Queue(s) to be available to take calls.
Utilize the **Busy** toggle.

2.2 Answering Incoming 9-1-1 and Admin (Non-Emergency) Calls

When a station receives a 9-1-1 call, a pop-up appears indicating that a call is coming in.



To Answer a Call

You can answer a call through any of the following methods:

- Select **Answer** in the **Ringer Dialog box**.
- Click anywhere on the **9-1-1 Globe**.
- Press the **Space Bar** on the keyboard.
- Press the  key on the keyboard.
- Press the relevant **Function** key on the keyboard. (This is usually **F1**, but please check with the system administrator, as this is a configurable option.)



Calls that come in through the *Admin* (non-emergency) queue will display a different ringer dialog box for ease of differentiating them from 911 calls. Admin calls are answered in the same way as a 911 calls.

To Release Yourself from a Call

- Use the Release Button , release shortcut key (default F12), or the release button attached to your call participant to release yourself from any active call.



Unit 2 Exercise: Answer & Release Calls

Answer an incoming 911 or non-emergency call and release.

2.2a Call Manager

When connected to a call, the **Call Manager** panel is populated with information regarding the connectivity of the call. Use the **Call Manager** to perform a variety of call-related operations.



Remember: The **Call Manager** will only populate for call takers who are participating in the call (actively on a call).

The **Call Manager** panel displays information about all call participants, including:

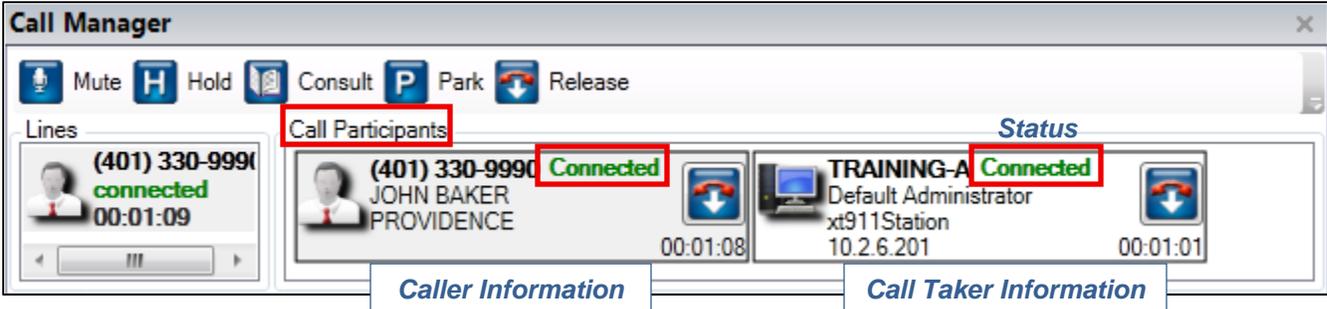
- **CALLER:** The name of the person to whom the calling party phone is registered
- **CALL TAKER:** The call taker name and station they are logged into

The status of all call participants – **Connected**, **Holding** is displayed. Each call participant has an accompanying **Release** button, which can be clicked to release the individual participant from the selected call.

Each call participant has a call timer. The timer for the caller starts at *ring time*, or when a call first rings into a station. The call taker’s timer starts when the call is answered. **Call Participants** display left to right in order of their start time as a participant in a call.



Note: Placing a call on **Hold** results in the station call timer being reset to zero. The timer will start running when the call is picked up.



Lines	Call Participants	Status
(401) 330-9990 connected 00:01:09	(401) 330-9990 JOHN BAKER PROVIDENCE 00:01:08	TRAINING-A Default Administrator xt911Station 10.2.6.201 00:01:01

2.2b Call Control Features in Call Manager

Button (Feature)	Description and notes
 Mute	Use to Mute the call taker.
 Hold	Select Hold to put an active call on hold. The call can only be picked up at the station where the call was placed on hold. The Call Participants will be <i>hidden</i> while on Hold and the Hold icon in the Call Manager panel displays Pickup Holding Call . Select this option to pick up the call.
 Pickup Holding Call	 The recording of a call is stopped while Hold is applied. When the call is picked up, recording of the call is resumed and is appended to the pre-hold portion of the call.
 Park	Select Park to put an active call on <i>public hold</i> . The call will display in the Active Calls panel with a <i>parked</i> status. Call information will disappear from all other xT911 interface panels when a call is parked. See section 2.2c for directions on picking up a parked call.  The recording of a call is stopped while Park is applied. When the call is picked up, recording of the call is resumed and is appended to the pre-park portion of the call.
 Release	Select Release to be released from an active call. If there are only two call participants, the call will be terminated. If there are more than two call participants, only the call taker is dropped from the call. The other call participants remain connected and the call remains active.

2.2c Call Control Features on the Home Tab

The **Home Tab** contains the following **Call Controls** used in managing a call.

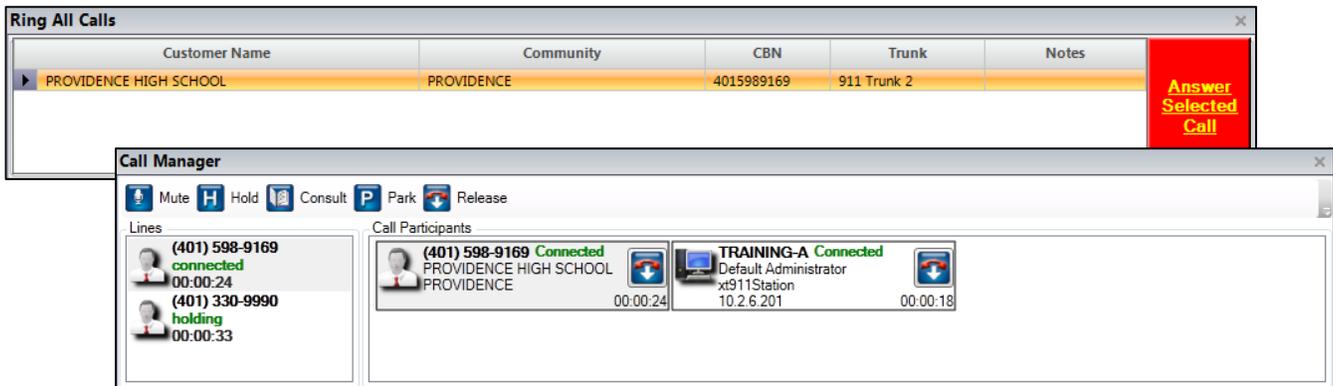
Button (Feature)	Description and notes
 Release	Select Release to be released from an active call. If there are only two call participants, the call will be terminated. The call taker then becomes available to receive a new call. If there are more than two call participants on the call, only the call taker is released from the call. The other call participants remain connected and the call remains active.
 Dial	Activates a Dial Pad to manually dial a call. Digits can be entered by using a computer keyboard or by using the mouse to click the buttons on the Dial keypad.
 Park  Answer Call	Used to Park an active call or put the call in a <i>public hold</i> ACD queue. The call will display in the Active Calls panel with a <i>parked</i> status. Call information will disappear from all other xT911 interface panels when a call is parked. To pick up a parked call, select the call in the Active Calls window and click the Answer Call button.  The recording of a call is stopped while Park is applied. When the call is picked up, recording of the call is resumed and is appended to the pre-park portion of the call.
 Hold	Select Hold to put an active call on hold. Doing so will place the call in the hold ACD queue specific to the station. The call can only be picked up by the call taker at the station where the call was placed on hold. The Call Participants will be <i>hidden</i> while on Hold .  The recording of a call is stopped while Hold is applied. When the call is picked up, recording of the call is resumed and is appended to the pre-hold portion of the call.
 Texting	Used to access the Text features in xT911.
 TTY/TDD	xT911 can detect audible tones consistent with a TTY call. If these tones are detected at the call taker station at the time of a call, xT911 will automatically display the TTY/TDD dialog box if configured to do so. Use this to quickly begin receiving and returning messages from a deaf, hearing impaired, or speech impaired caller.

 **Note:** A Genovation Keypad may be programmed with functions similar to that in the Call Control panel to assist with call handling.

2.3 Answering Incoming Calls While on a Call

2.3a Ring All Calls Panel

When on an active call, the **Ring All Calls Panel** will alert the Call Taker of calls ringing into the PSAP without displaying the ringer popup. Calls in the Ring All Calls Panel are prioritized by longest ringing 9-1-1 calls down to the most recent Admin call. **Answer Selected Call** will flash red, allowing the call taker to answer by selecting the call and clicking **Answer Selected Call**. A call taker can also click the **Answer Selected Call** button to answer the highest priority, longest ringing call. The active call will automatically be placed on Hold.



2.3b Placing a Call on Hold / Park

When on an active call, placing the caller on **Hold** or **Park** will allow the ringer popup to display and the call to be answered. This method will present the longest ringing 9-1-1 call automatically.



Unit 2 Exercise: Answer a Call While on a Call
 Answer an incoming call while on a call using **Answer Selected Call** in the **Ring All Calls** panel.



Unit 2 Exercise: Hold & Park
 Place an active call on **Park** or **Hold** and answer incoming call using pop-up.

2.4 Conferencing and Transferring Calls with xT911

During the course of an active call it may be necessary to conference in or transfer to another party. Conferencing allows the call-taker to “pre-announce” or “introduce” the caller to the party receiving the call. Transferring is “blind” and does not provide the opportunity for the call-taker to speak to the party receiving the call. There are a number of methods for conferencing and transferring.

To Conference Calls from the STAs Panel

- Select  next to a record in the STAs panel to conference that STA. Three parties will then be conferenced on the call. Additional parties can be added and released as needed.

To Drop the Call Taker from a Conferenced Call

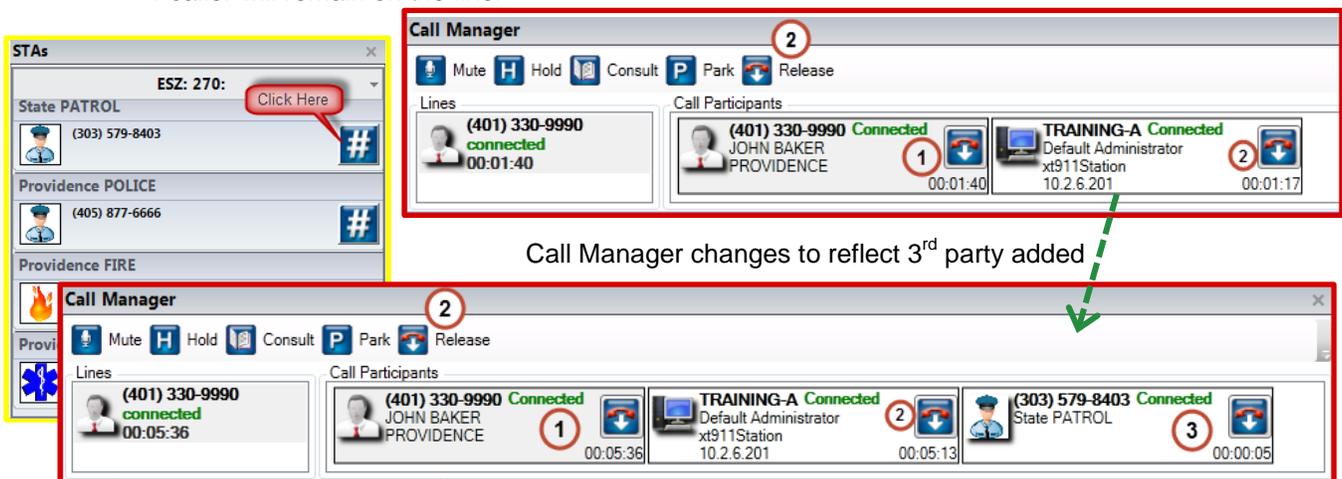
- Select **Release** on the call taker’s own **Call Participant** entry (*Participant 2 in the example*). The Call Taker is dropped from the call, allowing the other participants to continue their conversation. It is recommended that the main **Release** button in the **Call Manager** be used to release the call taker from the call.

To Drop the Person who Initially Made the 9-1-1 Call

- Select **Release** on the Caller’s **Call Participant** entry (*participant 1 in the example*). The person who initially made the 9-1-1 Call will be dropped from the call.

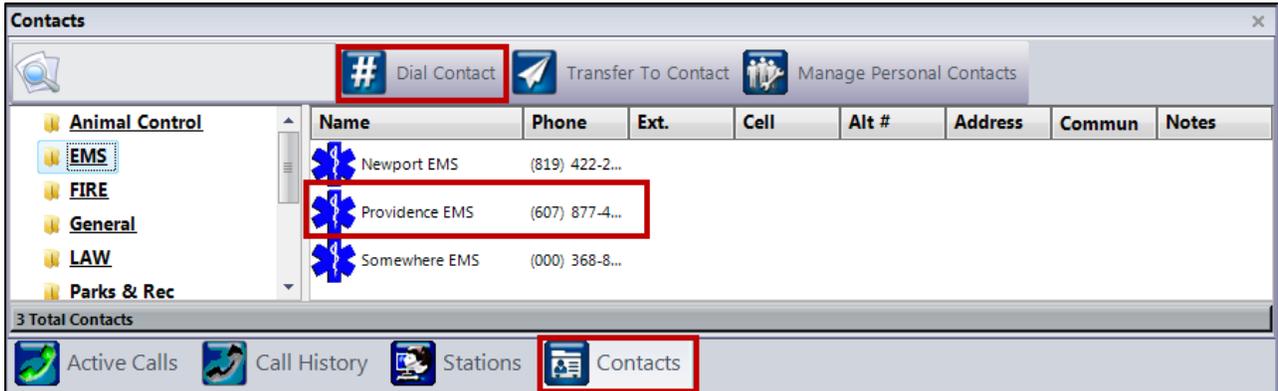
To Drop the Newly Conferenced Party

- Select **Release** on the most recently conferenced party’s **Call Participant** entry (*Participant 3 in the example*). The newly conferenced party will be dropped from the call. The Call Taker and the 9-1-1 caller will remain on the line.



2.4a Conferencing Calls via Contacts

Contacts can be speed-dialed from the **Contacts Explorer** window.



To Speed Dial a Contact

1. In the **Contacts Explorer** window, select a category from the list of folders on the left side. The Contacts for the selected folder will open in the right side.
2. Search for a Contact by name by clicking in the search box (next to the magnifying glass), and begin typing the name of the Contact. The list in the right side of the **Contacts Explorer** window will “filter” to those that match what is entered in the search box.
3. Select the Contact to be dialed
4. Select the **Dial Contact** button, right-click the contact entry and select **Dial Contact**, or double-click the contact. xT911 will automatically speed-dial the selected contact’s primary phone number.

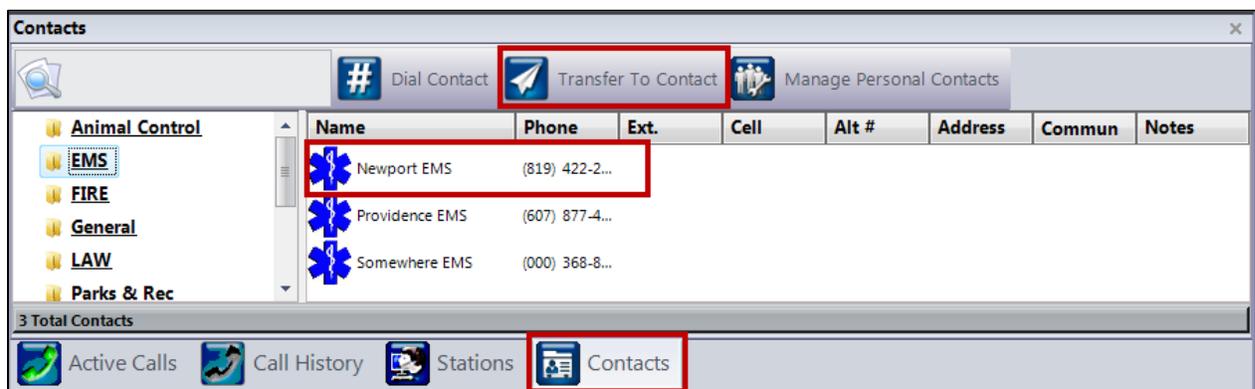
To speed-dial a cell or alternate number for the selected contact, right-click the contact and select the appropriate number from the list.

2.4b Transferring Calls via Contacts

You can transfer a call to a contact via the Contacts Explorer window.

To Transfer a Call to a Contact

1. In the **Contacts Explorer** window, select the Contact to be dialed.



Select **Transfer to Contact** or right click the contact and select **Transfer to Contact**. xT911 will transfer the call to the selected contact’s primary phone number.



Remember: Transferring does not give the option to “pre-announce” the caller. Transfer is “blind.”

2.4c Conferencing Calls via the Dial Pad

You can also conference a call by using the **Dial Pad**.



To conference an existing call with an outbound call via the Dial Pad

1. Select the **Dial** icon from the **Call Control** icons on the **Home** tab.

To dial a call, type in the phone number using your keypad and select **Dial** or press **Enter**, or use your mouse to point and click the numbers on the dial pad and select **Dial** (the point and click method must select **Dial**).

To conference in another party, click the **Flash** button on the **Dial** keypad, then dial the phone number. (The **Flash** button is generally not utilized on the **Dial Pad** and is dependent on system configuration.) The number dialed is conferenced in.

Any number dialed since logging into the xT911 application will be available directly from the **Dial Pad** by clicking the dropdown arrow next to **Dial**.



2.4d Transferring Calls via the Dial Pad

The xT911 call taker may transfer an existing call to an outbound dialed number by entering the number in the **Dial Pad**.

To Transfer Calls via the Dial Pad

1. Select the **Dial** icon from the **Call Control** icons on the **Home** tab.



Enter the phone number for the transfer destination

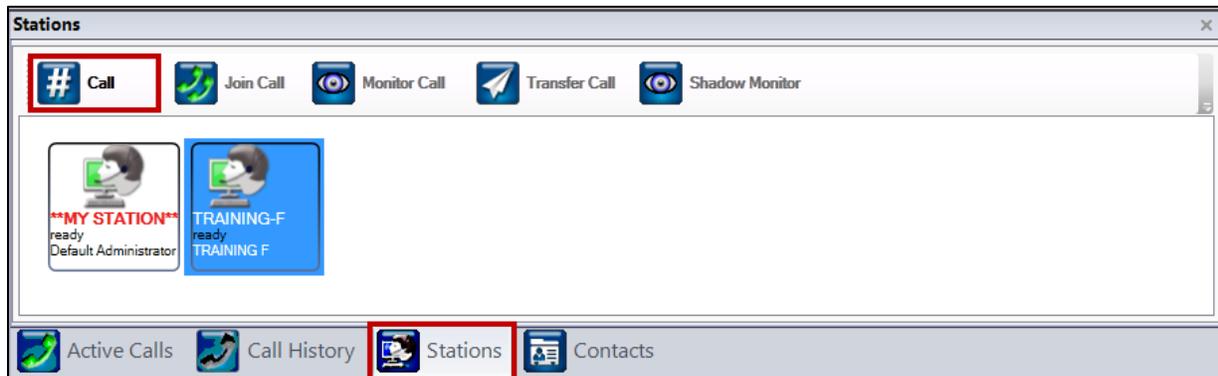
Select **Transfer**. The call is transferred to the dialed number, and the xT911 call taker is immediately released from the call.

If the **Mute Tones From Caller** option is checked, the tones being dialed by the call taker will be muted from the caller. Be sure to uncheck the option if the receiving end of the call is an IVR (Interactive Voice Response) system.



Note: It is not necessary to enter parentheses (for area codes) or dashes. The phone number will automatically format based on the number of digits entered.

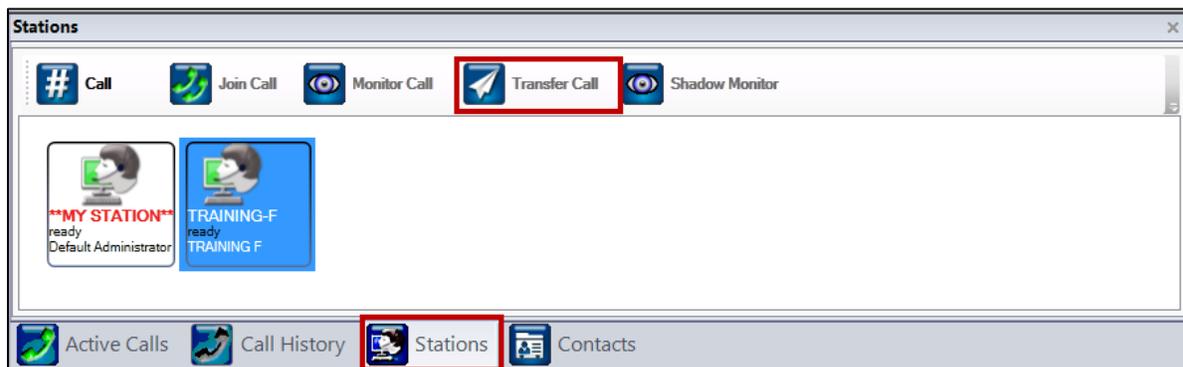
2.4e Conferencing Calls via Stations



1. In the **Stations** panel, select a **Station**
2. Select  **Call** or double-click the **Station**

2.4f Transferring Calls via Stations

1. In the **Stations** panel, select a desired **Station**
2. Select **Transfer Call**



Note: Multiple contacts, dialed parties or stations can be conferenced into a call.



Unit 2 Exercise: Call Conferencing & Transfer

Conference and/or transfer active calls using various different methods.

2.5 Merging Calls

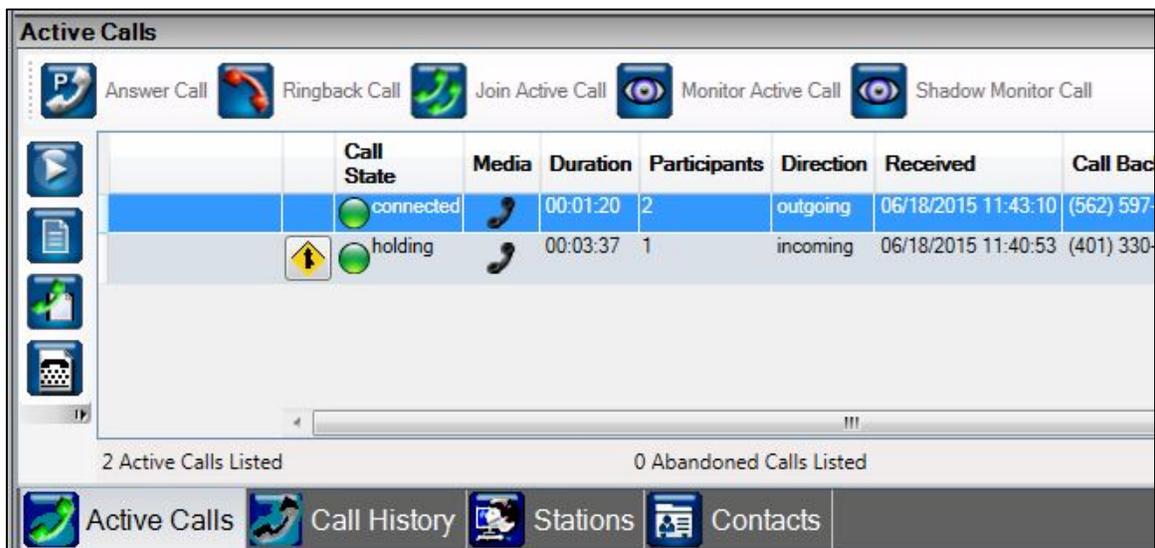
xT911 agents can merge a parked or held voice call with their currently active voice call. This is done via

the **Merge** button  that displays for parked and held calls in the **Active Calls** tab of the Calls Window.

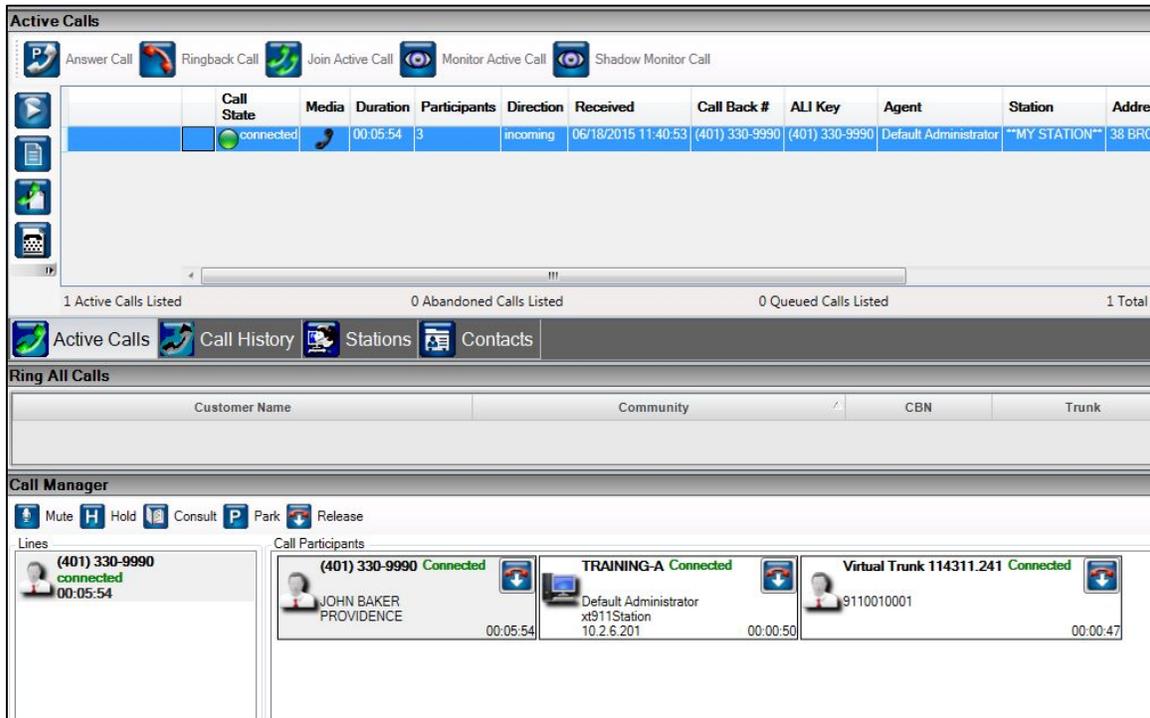
Both 9-1-1 and admin calls can be merged depending on how the system is provisioned. If a parked or held call is displayed for an xT911 agent in **Active Calls**, then the agent is able to merge the parked/held call with the agent’s current active voice call.

To merge calls in xT911

1. Take an incoming call or place an outgoing call.
2. In **Active Calls**, the **Merge** button  will display next to any parked or a previously held call.
3. To merge the current call with the parked or held call, click the **Merge** button. In the **Call Manager Window**, the **Lines** section will display as “merging” for one or two seconds and then change to “connected.” All parties will then be participants on the call.



There is now only one call in **Active Calls**. The agent continues to retain full call control. If the agent releases the call, the other parties will remain connected.



When two calls are merged, the active call keeps all its call information, while the parked/held call is closed. The caller on the parked/held call is conferenced into the active call.

If a parked or held 9-1-1 call is merged with an active admin call, the admin call is parked and the 9-1-1 call is made active before merging.

Additional callers can be added to previously merged call session by selecting a parked or held call in Active Calls and clicking the Merge button to add a caller to the merged call session.

2.6 xT911 Text to 9-1-1

Incoming emergency text messages are answered the same way as a normal incoming voice call.

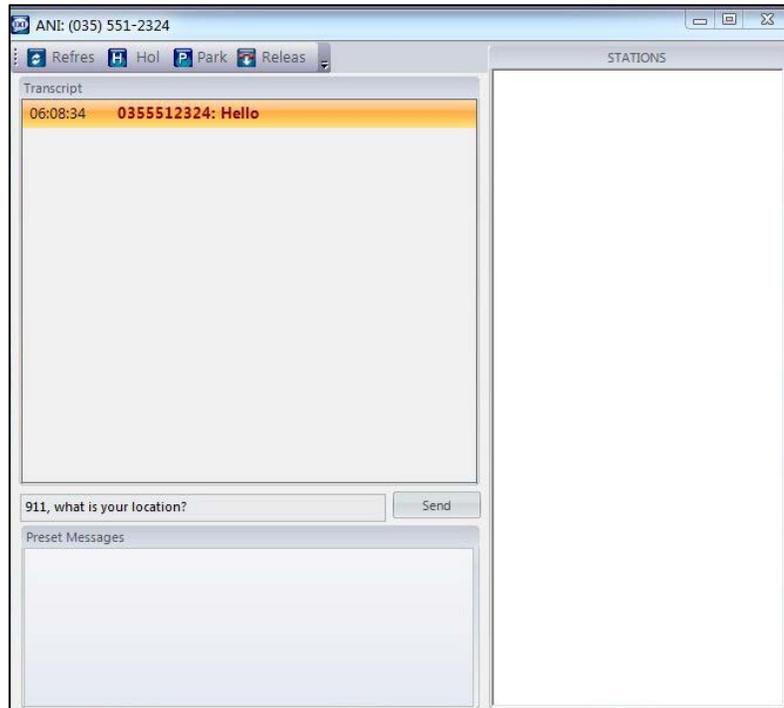
To Answer and Incoming Text to 9-1-1 Message

Users can perform one of the following functions to answer an incoming Text to 9-1-1 message:

- Click the **Answer** button, or
- Click anywhere inside the **Text Envelope**, or
- Click the call tile where ANI data for the call is displayed, or
- Press the **space bar** or the **Enter** key as the SMS icon is flashing

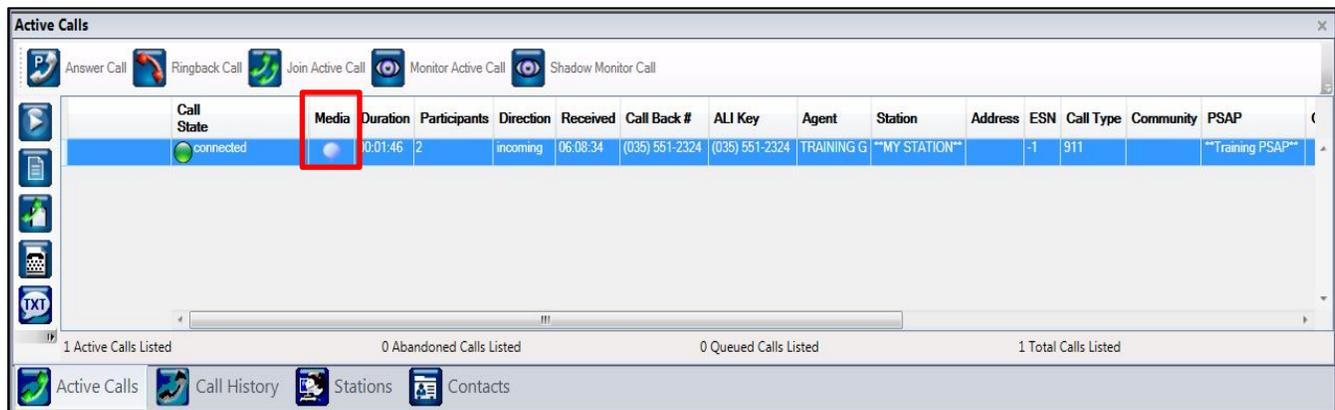


Once an emergency text call is answered, the **Text Communication Dialogue Window** will automatically be displayed to the user. The user can type any message needed or select from a list of predefined messages. This window will also display a list of logged-in stations. The text “call” can be conferenced to any of the available stations in this list, should the need arise.



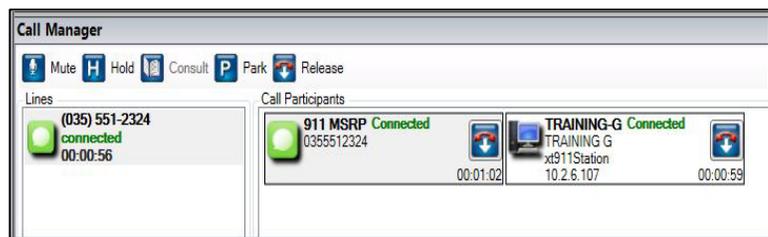
Active Calls Window

After an incoming emergency text message has been answered, it will be displayed in the Active Calls Window. In the **Media Column**, it is displayed as a **Text Call**; the other columns will include information related to that text message.



Call Manager

When a user answers an incoming **Emergency Text Message**, the **Call Manager** window will automatically display information and provide a number of call controls. The **Call Manager** will display a participant tile for the reporting party who has sent the text message and a participant tile



for the call taker who is handling the call. Call control functions (release, hold, park, etc.) will also be displayed while an active **Emergency Text Message** is in progress.

Releasing a Text Message

A text message can be released in the same manner as a voice call.

To Release a Text Message

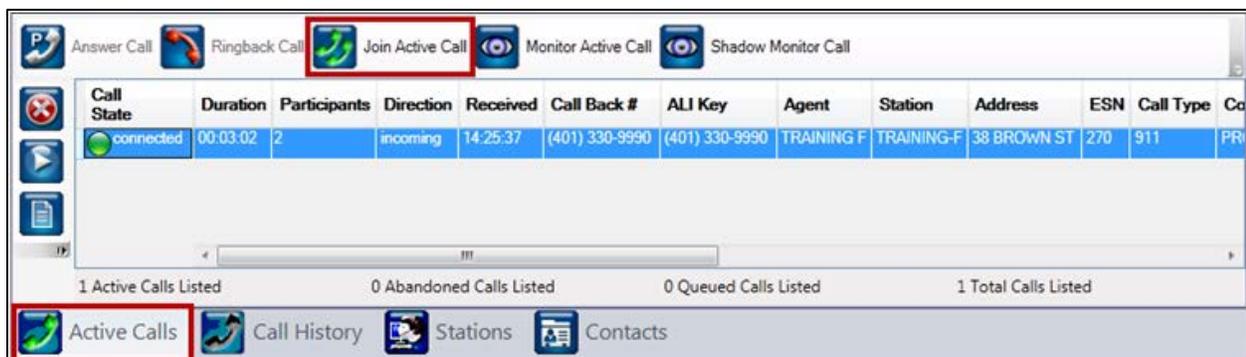
- Release a Text Message from one of the following locations:
 - The **Call Manager Release** window
 - The release button on the ribbon, or
 - pressing the short-cut key, **F12**.

2.7 Joining and Monitoring Calls

These call options allow users, with permission, to join or monitor active calls. These options can be useful if another call taker needs advice or assistance.

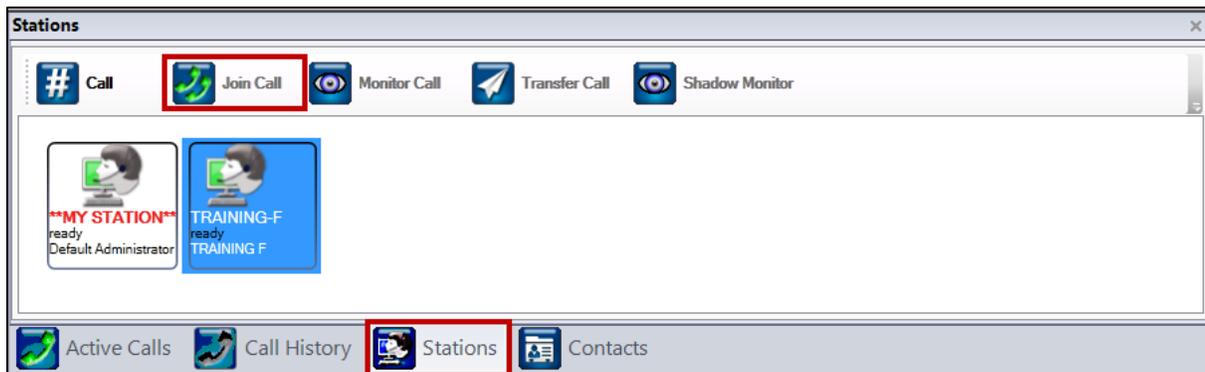
2.7a Joining a Call

Joining a call allows the call taker to join a call as an active participant. When using the **Join** feature, the joining call taker is *not muted*.



To Join a Call Via the Active Calls Panel

1. Select the call to be joined
2. Select **Join Active Call**



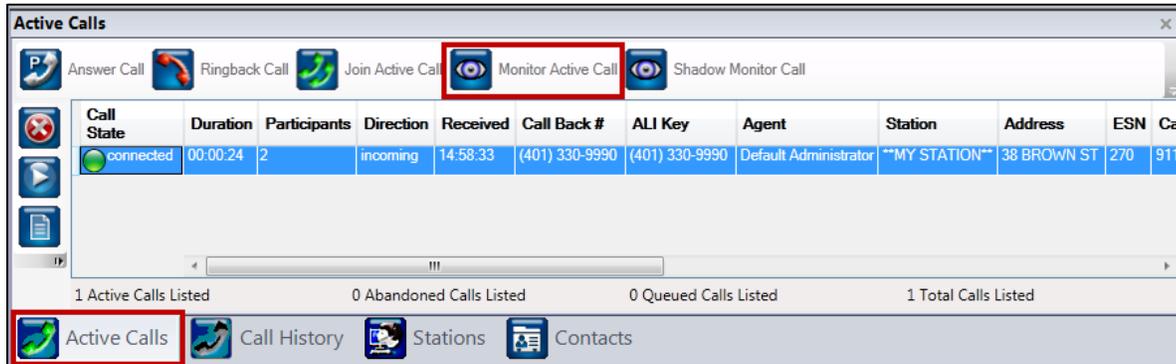
To Join a Call Via the Stations Panel

1. Select the Station with the call to be joined

2. Select **Join Call**

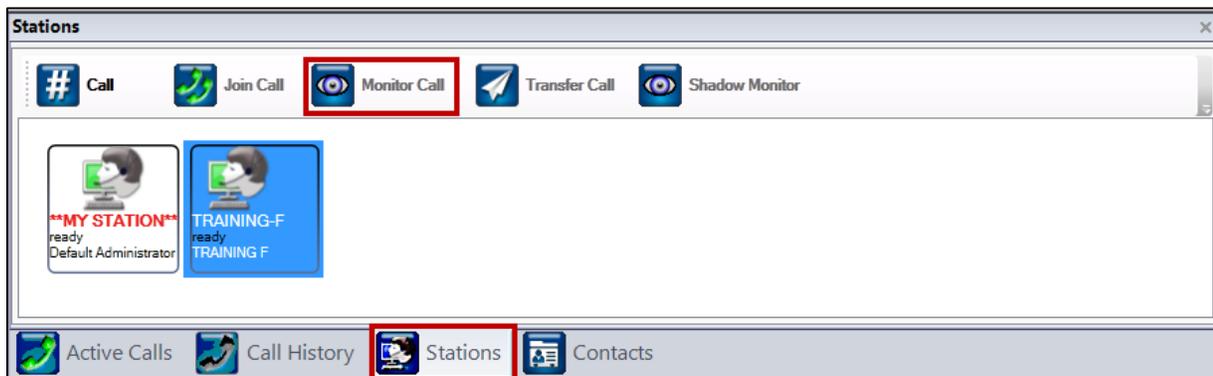
2.7b Monitoring Calls

Monitoring allows the call taker to *listen* to an active call. When using the **Monitor** feature, the listening call taker *is automatically muted*.



To Monitor a Call Via the Active Calls Panel

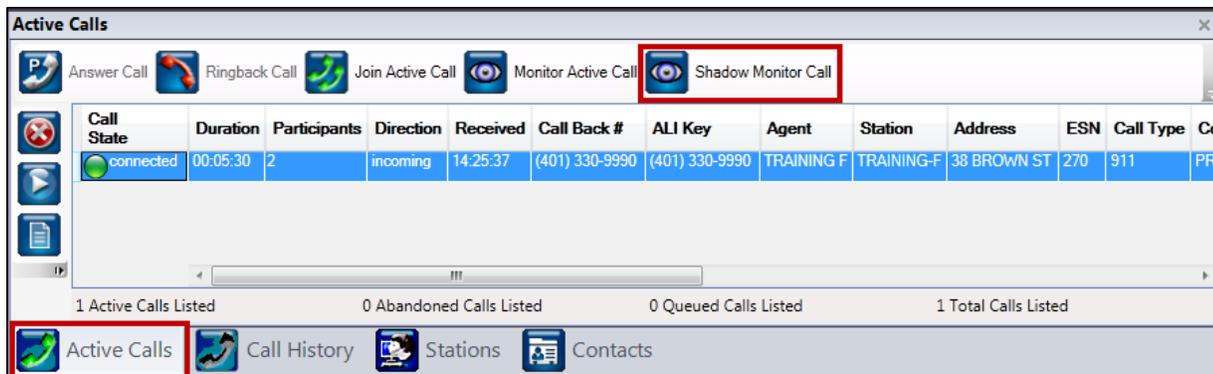
1. Select the call to be monitored
2. Select **Monitor Active Call**



To Monitor a Call Via the Stations Panel

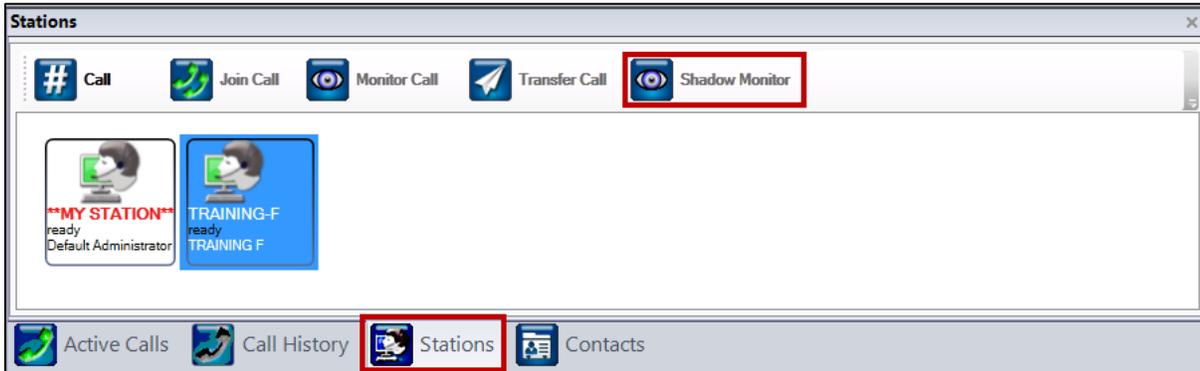
1. Select the Station with the call to be monitored
2. Select **Monitor Call**

Shadow Monitoring, with permission, allows the user to monitor an active call without any notification in the system that the call is being monitored. When using the **Shadow Monitor** feature, the listening call taker or supervisor *is automatically muted*.



To Shadow Monitor a Call via the Active Calls panel

1. Select the call to be monitored
2. Select **Shadow Monitor Call**



To Shadow Monitor a Call Via the Stations Panel

1. Select Station with the call to be monitored
2. Select **Shadow Monitor**



Note: It is not necessary to Release from a call to switch between Join and Monitor. The call taker can simply toggle between mute and unmute.



Unit 2 Exercise: Joining / Monitoring / Shadow Monitoring Calls

Join, Monitor and Shadow Monitor an active call or another station's active call.

Unit 2 Review

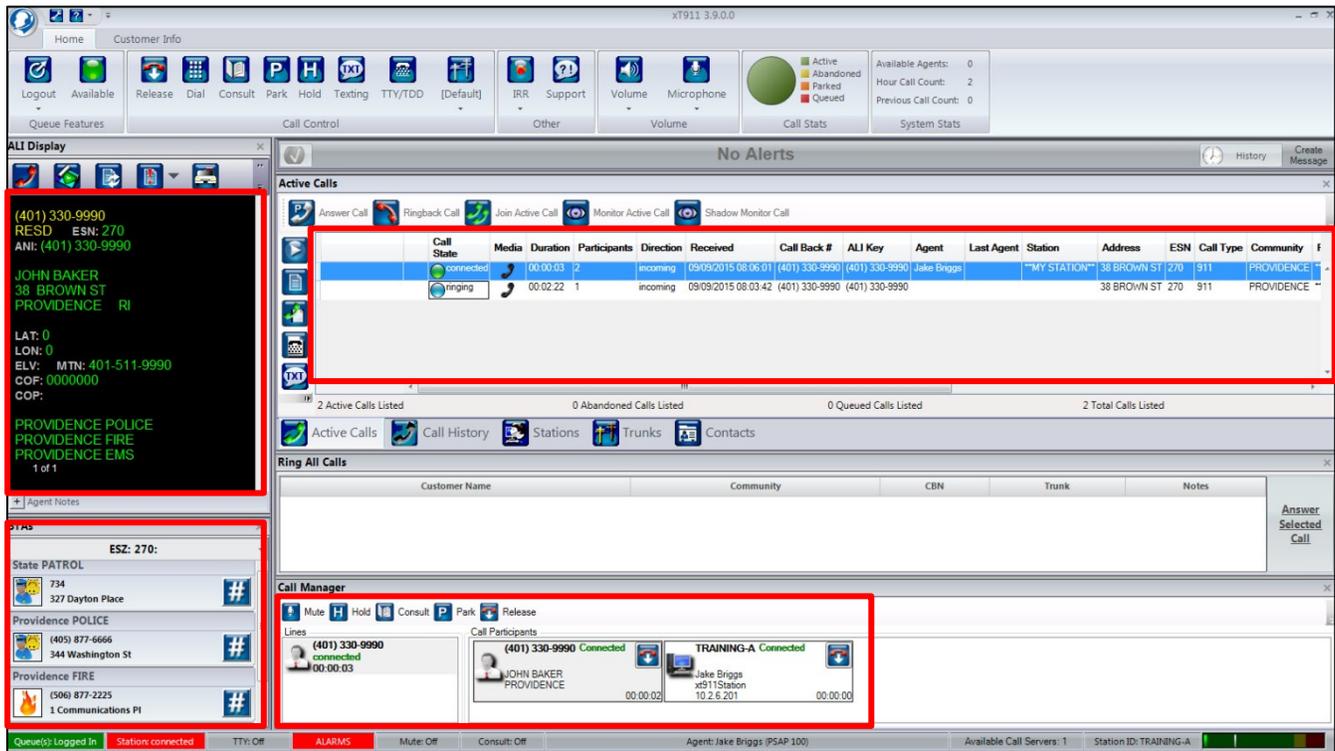
Topic	<input checked="" type="checkbox"/>	Comments
Logging in to the Call Taking Queue	<input type="checkbox"/>	
Busy Status: Toggle	<input type="checkbox"/>	
Answering a 911 Call: Options	<input type="checkbox"/>	
Answering an Admin Call: Options	<input type="checkbox"/>	
Release: Options	<input type="checkbox"/>	
Answering a Call: When on a call	<input type="checkbox"/>	
Call Control Features: Call Manager and Home Tab	<input type="checkbox"/>	
Hold vs. Park	<input type="checkbox"/>	
Transferring vs. Conferencing	<input type="checkbox"/>	
Dial Pad	<input type="checkbox"/>	
Contacts	<input type="checkbox"/>	
Stations	<input type="checkbox"/>	
Merging	<input type="checkbox"/>	
Texting	<input type="checkbox"/>	
Join vs. Monitor	<input type="checkbox"/>	
Mute: Options	<input type="checkbox"/>	

Unit 3: Call Management

The xT911 application offers the call taker a variety of functions for active calls in addition to the basic functions covered in the previous section.

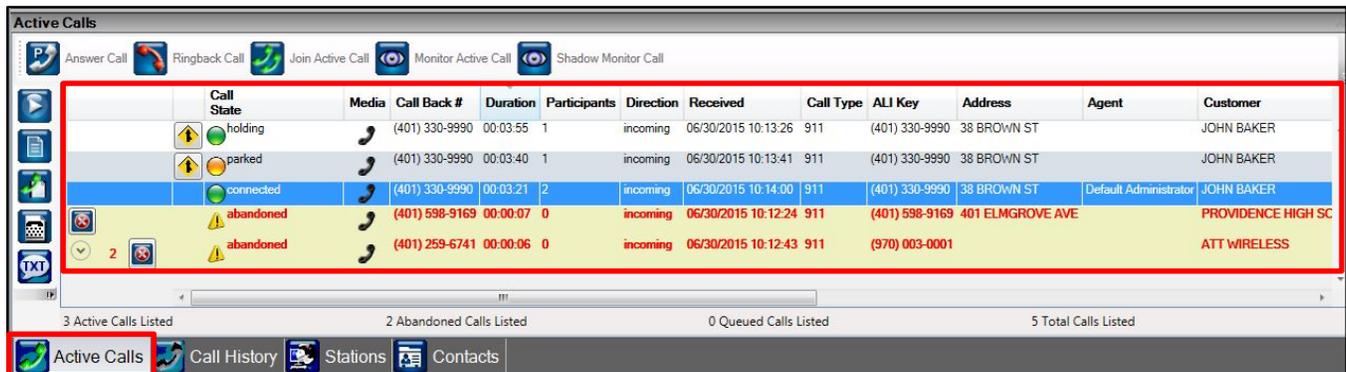
3.1 Calls Information and Management

Once a call is answered, details will appear in **Active Calls** and **Call Manager** and may appear in the **ALI** and **STAs** panel.



3.1a The Active Calls Panel

Use the **Active Calls** panel to view all active calls at the PSAP. Selecting **Call Control** features such as **Park** and **Hold** enables the call taker to manage and interact with multiple calls. The **Call State** may change based on which *call controls* are applied during the course of a call.



3.1b Managing Abandoned Calls

Call takers can quickly ring back an abandoned call from xT911. Abandoned calls are 911 calls in which a caller disconnects before a call taker answers the call.

Abandoned calls can be displayed two ways. If there is only a single abandoned call from a specific Call Back # then the abandoned call will be displayed in **Active Calls** as shown here.



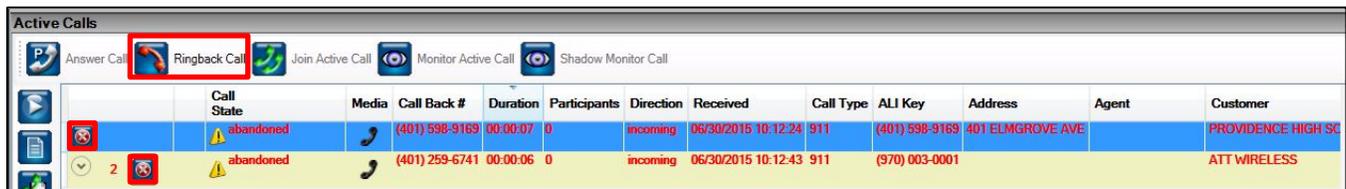
Abandoned calls are grouped if there are two or more abandoned calls from a specific Call Back #. Grouped calls will be displayed in **Active Calls**, as shown here.



Abandoned calls remain in the **Active Calls** panel until they are called back or manually cleared without a call back.

To Call Back an Abandoned Call

- Highlight the call and click on **Ringback Call**, or, right-click and select **Ringback Call**.

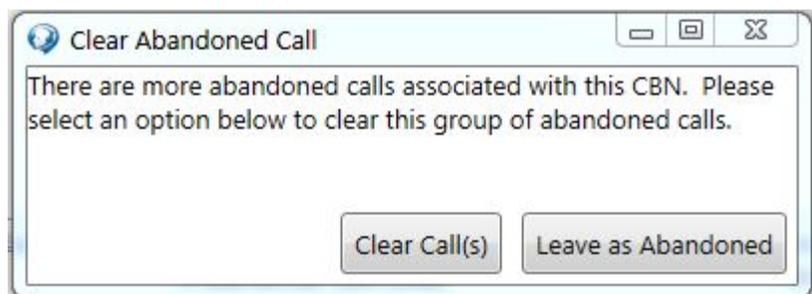


To Manually Clear a Call

- Click the white “x” icon . xT911 tracks which agent clears or rings back an abandoned call.

When a call has been called back, a pop-up panel will appear. The call taker can then either **Clear Call(s)** or **Leave as Abandoned**.

This pop-up will also appear if there are **Abandoned Calls** listed and the call taker transfers, releases, or parks an active call.



Unit 3 Exercise: Ringback / Clear an Abandoned Call

Select an abandoned call from the Active Calls panel and Ringback the caller. Clear an abandoned call manually.

3.1c Adding Agent Notes

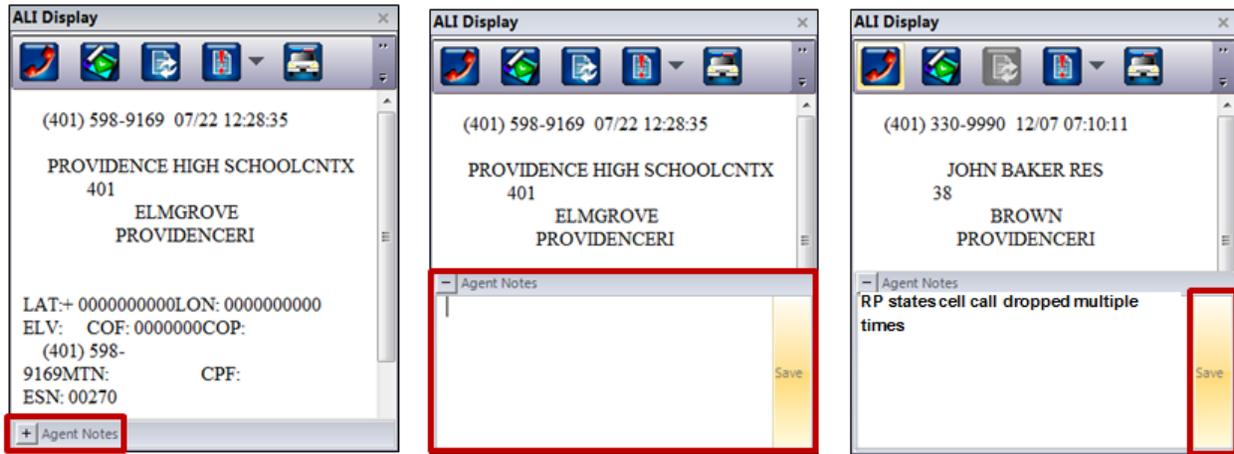
Agent Notes are added in a pane that can be expanded and collapsed in the **ALI Display** panel. This feature can be used on active calls, as well as completed calls in **Call History**. Notes can be added by any user with the rights to do so, therefore notes are not limited to being added by the original call taker.

To Enter Agent Notes

1. In the lower-left corner of the **ALI Display** panel, select the plus sign to expand the **Agent Notes** text box in which the notes can be entered.

After entering the notes, select **Save** at the right of the text box. This saves the notes, which will now be associated with the call. Completed **Agent Notes** can be viewed in **Call History**.

To collapse the **Agent Notes** text box, select the minus sign.



Example: A caller attempts to call 9-1-1 several times from a cell phone and loses the call each time before anyone answers. One of the abandoned calls is called back to take care of the caller and the other abandoned calls from the same number can be cleared after adding notes as to why the calls were not called back.

3.1d Call State

Call Statuses displayed in the **Active Calls** panel include:

Call State	Description
ringing	Incoming calls which are currently ringing
connected	Calls that have been answered and are Connected with a call taker
holding	Calls that have been answered and placed on Hold
parked	Calls that have been answered and are Parked
queued	Calls which are in the Active Calls Queue waiting to be answered
abanCallbackInProgress	An abandoned call currently being called back
abandoned	The call was disconnected before being answered by a call taker

3.1e Vertical Toolbar

The **Vertical Toolbar** is displayed in the **Active Calls** and **Call History** panels. The **Vertical Toolbar** provides the following selections:

	<p>Clear Abandoned Call – Accessible in the call row in Active Calls, Accessible in the Vertical Toolbar in the Call History Panel Clears the selected abandoned call from the Active Calls panel. This does not ringback the caller.</p>
	<p>Play Call Recording Plays the recording of the active call</p>
	<p>Show ALI – Active Calls Panel Only Populates the ALI Display for the selected call in the Active Calls or Call History panel.</p>
	<p>Show On Map – Call History Panel Only Shows the location of the ALI on the map. Only for use with xTrakker mapping application.</p>
	<p>Show CDR Opens the Call Detail Record (CDR)– used for troubleshooting</p>
	<p>Show TTY Transcript Displays the TTY transcript for a call</p>
	<p>Lock Record Locks/unlocks a call record, making the call recording, TTY transcript, and CDR available only to authorized users. Typically only administrators can lock/unlock calls.</p>
	<p>Refresh Updates the panel. Use when the display is not representative of latest call data.</p>
	<p>Stacked View / List View – Call History Panel Only Switch between Stacked View or List View in the Call History panel.</p>
<p> Active Calls</p>	<p>Log Trouble Ticket – Accessible via right click in the Active Calls Panel. Also accessible in the vertical toolbar in the Call History Panel</p>
<p> Call History</p>	<p>Launches the form used to submit a Trouble Ticket on a selected call. Trouble Tickets are discussed in detail in Section 6.</p>

3.1f Playing Back Calls via the Playback Panel

Clicking **Play Recording** on a selected call in the **Active Calls** panel will automatically open the **Playback Panel** and begin playing back the call.

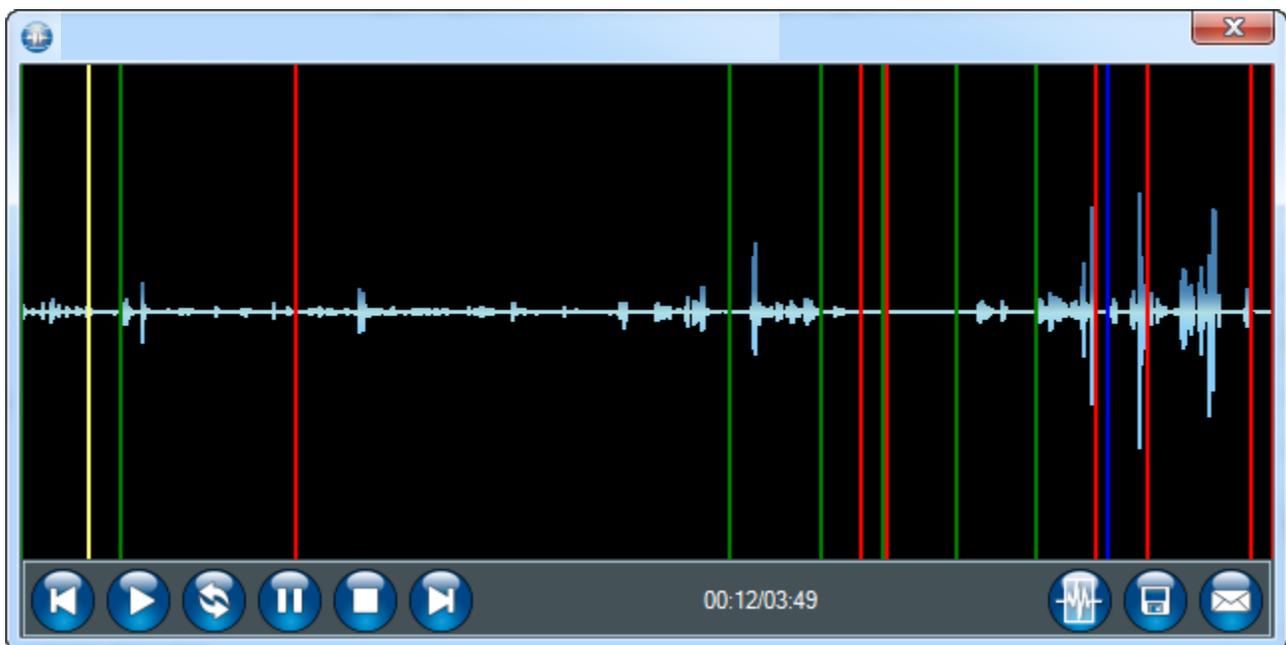
Hover over the colored lines to view a label at the top of the **Playback Panel** that states the activity associated with the line.

Yellow Line: A call taker **Answered** the incoming call

Green Line: Added a participant to the call

Red Line: **Removed** or **Disconnected** a participant/station from the call

Blue Line: Indicates **Consult** was turned on



Unit 3 Exercise: Call Playback

Playback an active call.

In addition to the **Active Calls** panel, **Play Recording** is also available for the selected call in the **Call History** panel.



The **IRR** icon from the **Other** section of the **Home** tab is another way to playback a call recording. The **IRR** button will playback either the active call, or if not on an active call, the previous call that the call taker was on.

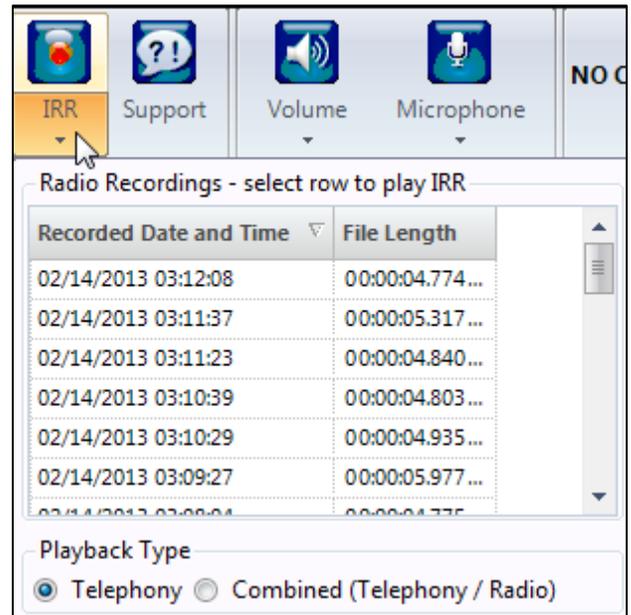
3.1g IRR Radio Dispatch Recording

The **Instant Recall Recorder (IRR)** allows for the recording and instant playback of radio traffic. xT911 workstations can record the active radio channel independently from the call, and the IRR playback can be a combination of telephony and radio or telephony only.

To access IRR radio recordings

- On the **Home** tab, click the bottom half of the **IRR** button to display the **IRR** dialog box. If any radio recordings have been made within the time frame that recordings are to be retained, they will be listed in the **IRR** dialog box.

There are two columns for each recording entry: **Recorded Date and Time** and **File Length**. The most recent recordings will display at the top of the list and these can be sorted by clicking the column header.

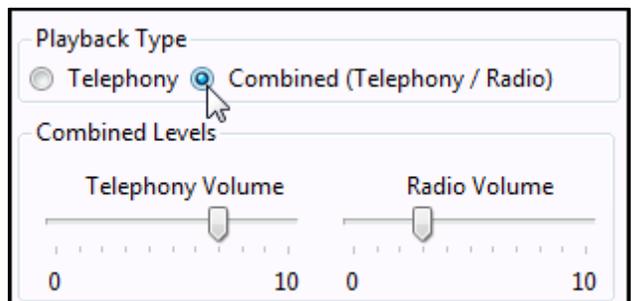


To play recordings

- Click a recording for playback via the **IRR** player. Two types of IRR playback can be selected in the **IRR** dialog box:
 - Telephony:** Plays telephony only recordings
 - Combined (Telephony/Radio):** Plays telephony and radio recordings together

If **Combined** is selected, two additional volume settings will display:

- Telephony Volume:** Slider control (0-10) for telephony recordings
- Radio Volume:** Slider control (0-10) for radio recordings

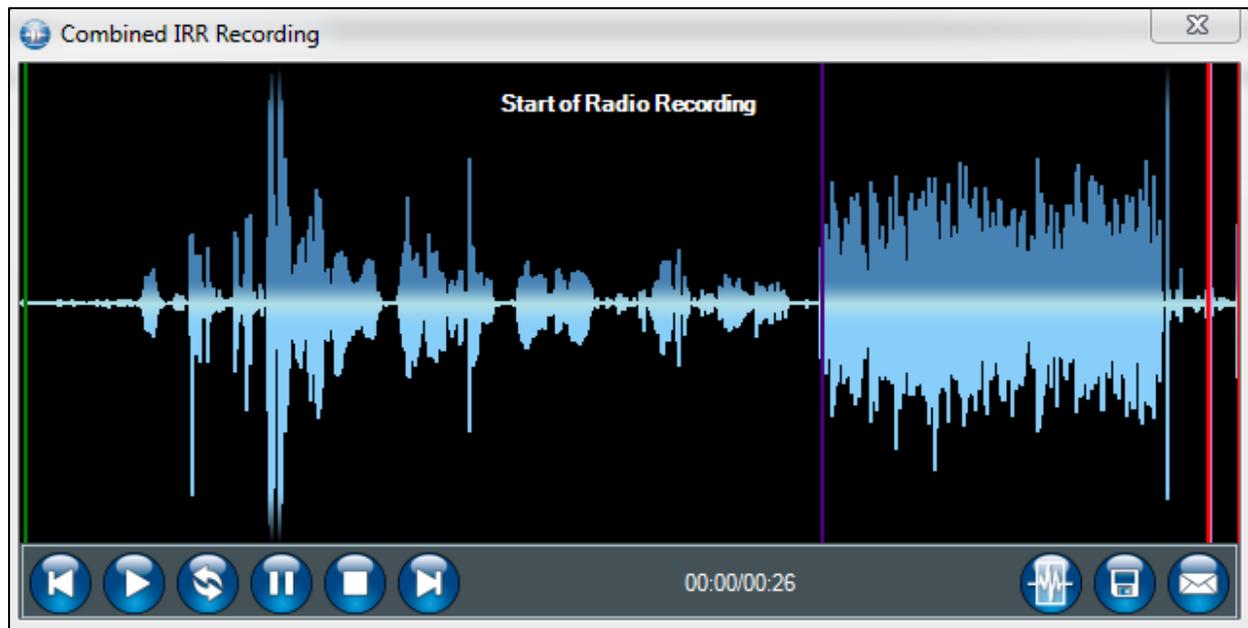


Playing back combined recordings

Playback of combined telephony/radio recordings via xT911's IRR player features added visual identifiers to distinguish between the radio and telephony portions of the recording:

- **Purple Line:** Start of radio recording
- **Pink Line:** End of radio recording

All other IRR player controls and visual identifiers are the same described above.



3.2 Additional Call Features

The following are some commonly used features in xT911; however, these features may or may not be configured for use. Please contact the system administrator regarding availability.

3.2a ALI Display Functions

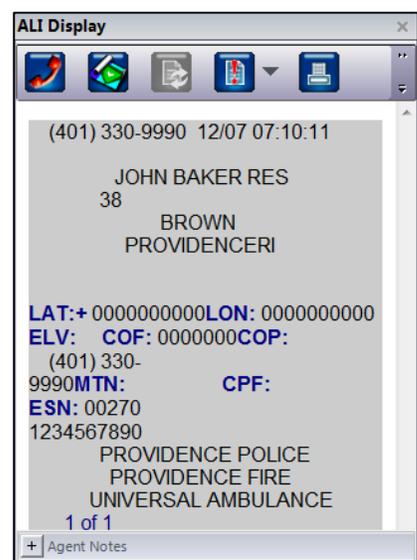


If the **ALI Display** panel is empty, the function icons will not be active.

To populate the **ALI Display** panel and activate the function icons, select a call in **Active Calls** and click 

Or select a call from **Call History** and click  Show ALI

The **Show ALI** feature displays ALI details associated with the selected active or historical call and activates the function icons at the top of the panel. When the **ALI Display** is updated the title bar will flash red several times.



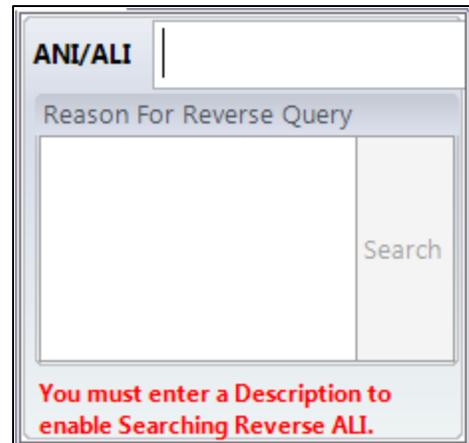
	Dial ALI – Admin and 9-1-1 calls Calls back the number associated with the ALI
	Show On Map – 9-1-1 calls only Shows the location of the ALI on the map. For use with xTrakker mapping application only.
	Rebid ALI – 9-1-1 calls only Sends a manual rebid for ALI. Check with the system administrator regarding the ability to manually rebid ALI.
	ALI Discrepancy – 9-1-1 calls only Used to report a discrepancy for the associated ALI. The down arrow displays a tabbed list of ALI Discrepancies entered in the system. Check with the system administrator regarding the ability to enter ALI Discrepancies.
	Send to CAD – 9-1-1 calls only Sends ALI to the CAD system. Send To CAD is dependent upon system configuration.
	Print ALI – Admin and 9-1-1 calls Sends ALI to a printer
	Reverse ALI Query – 9-1-1 calls only Used to enter a Reverse ALI Query. Check with the system administrator regarding the ability to perform reverse ALI queries.

3.2b Performing a Reverse ALI Query

Reverse ALI Query is used to perform a lookup of ALI based on a phone number.

To perform a reverse ALI Query

2. Select the Reverse ALI Query icon. 
3. Enter the phone number in the **ANI/ALI** box, type a reason for the query, and select the **Search** button. (You must click on the search; the enter key on the keyboard will not function in this application).



 **Note:** The Search button will not activate until a reason for the query has been entered.

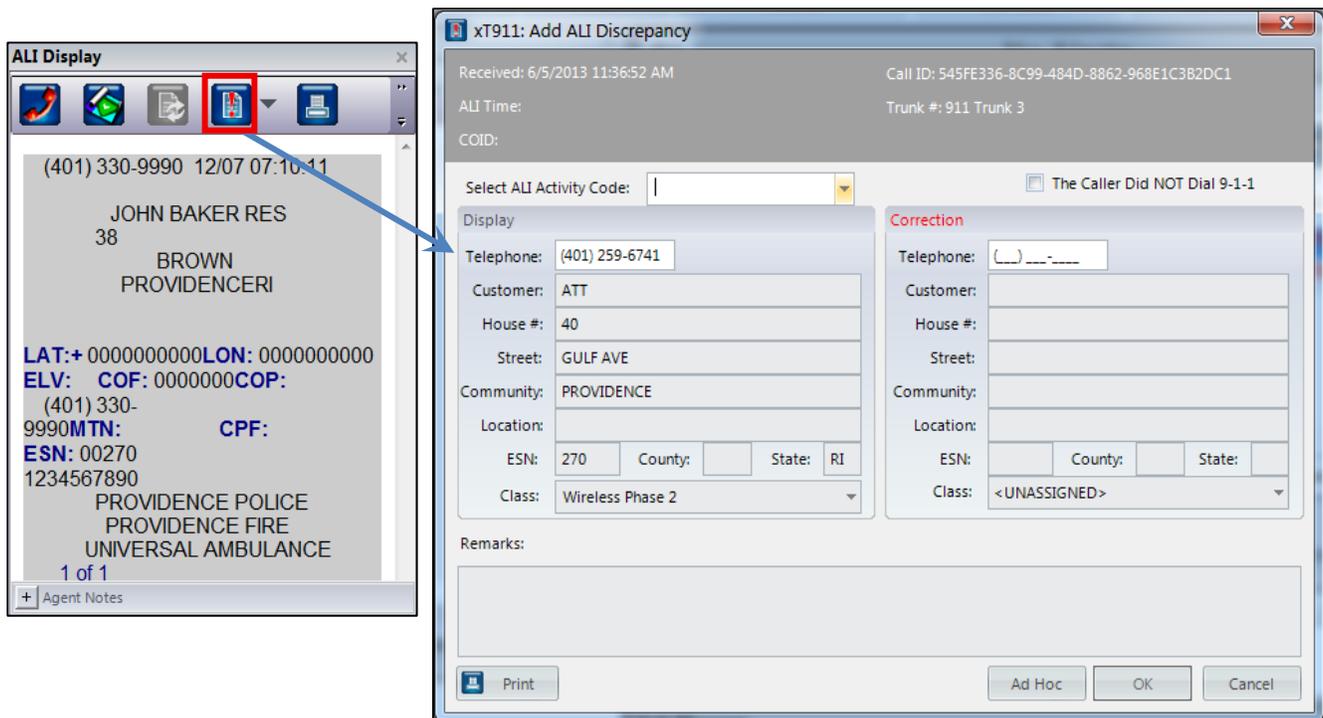
3.2c Reporting an ALI Discrepancy

This feature is used to report a discrepancy with an ALI in the **ALI Display**. **ALI Discrepancy** is accessed from the **ALI Display** panel during an active or historical call.

To report an ALI discrepancy

- Select the **ALI Discrepancy** icon in the **ALI Display** panel. (Selecting the drop down arrow instead of the icon will provide ALI Discrepancy history, not the discrepancy menu.)

The ALI information displayed with the call will automatically populate in the Display (left side). On the Correction side (right side) only enter the data to be corrected for the ALI record.



Unit 3 Exercise: Adding an ALI Discrepancy

Create an ALI discrepancy using the Add ALI Discrepancy dialog box

Unit 3 Review

Topic	<input checked="" type="checkbox"/>	Comments
Abandoned Calls: Ringback & Clear	<input type="checkbox"/>	
Call Playback	<input type="checkbox"/>	
Show ALI	<input type="checkbox"/>	
TTY/TDD	<input type="checkbox"/>	
ALI: Ringback ANI	<input type="checkbox"/>	
ALI: Send to Map	<input type="checkbox"/>	
ALI: Rebid (retry)	<input type="checkbox"/>	
ALI: Create a Discrepancy	<input type="checkbox"/>	
ALI: View Discrepancies	<input type="checkbox"/>	
ALI: Send to CAD	<input type="checkbox"/>	
ALI: Print	<input type="checkbox"/>	
ALI: Reverse ALI Query	<input type="checkbox"/>	

Unit 4: Call History

Access historical call information by selecting the **Call History** tab at the bottom of the **Calls** panel. The **Call History** panel displays call records for the agency. By default, the last 100 calls are displayed at the startup of the xT911 application.

4.1 Call History Features

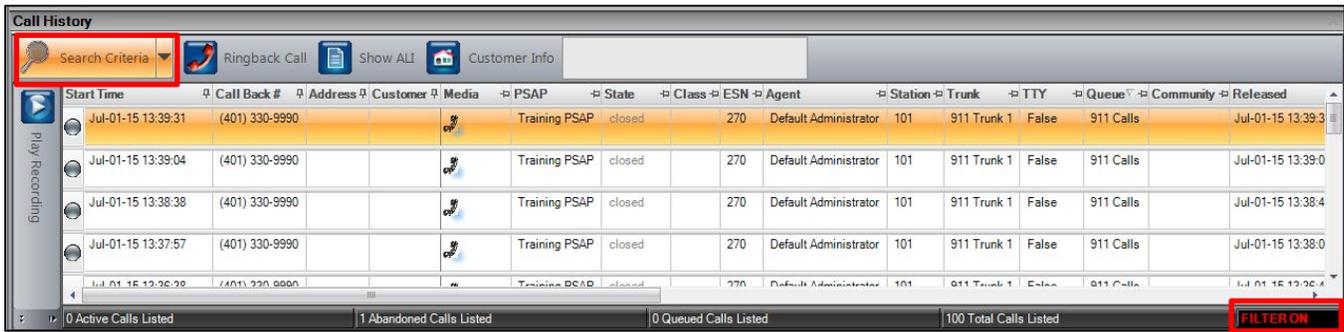
 Search Criteria ▼	Create a search based on specific queries or criteria
 Ringback Call	Call back the number associated with the call
 Show ALI	Display the ALI for the selected call
 Customer Info	Display the detailed Customer Information including call history in the customer info tab of the ribbon.

4.1a Search Criteria

The **Search Criteria** dropdown allows a call taker to narrow call search based on custom criteria as well as pre-defined searches.

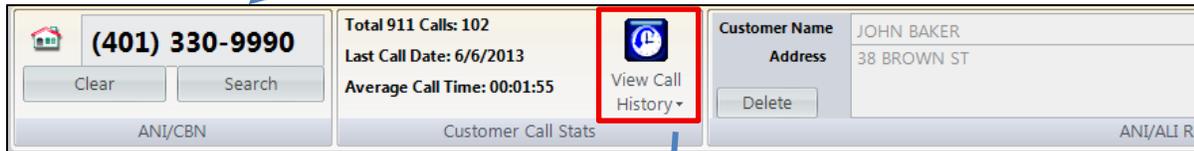
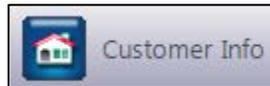
- Custom date and time search
- Search based on customer fields. Automatic wildcards are used at the beginning and end of the value entered.
- Preset** search queries; select the desired option
- Clear Search** clears all custom search criteria entered
- Select **Search** to execute a search based on the criteria entered

Note: The **Search Criteria** button will be highlighted orange (top left) and **FILTER ON** will blink in red (bottom right) whenever the **Call History** panel is displaying the results of a filtered search. Click the highlighted **Search Criteria** button to toggle between the search results and the full set of **Call History** records. Once the search is cleared, the **Search Criteria** button will no longer be highlighted, **FILTER ON** will no longer be present, and the default number of calls will be displayed in **Call History**.



4.1b Viewing Caller History

Select **View Call History** in the **Customer Info** section to display the history of calls from a specific phone number. If the **Customer Info** tab is empty, search by the known phone number or select a call in **Call History** and click **Customer Info**.



The screenshot shows the 'Call History' table for the number (401) 330-9990. The table has columns for Phone, Service Class, Duration, Address, and Agent Comments. A blue arrow points from the 'View Call History' button in the previous image to this table.

Phone	Service Class	Duration	Address	Agent Comments
(401) 330-9990	RES	109	38 BROWN ST	Test Note 1
JOHN BAKER	Jun-06-13 16:29:06			
(401) 330-9990	RES	14	38 BROWN ST	Test Note 2
JOHN BAKER	Jun-06-13 15:57:55			
(401) 330-9990	RES	143	38 BROWN ST	
JOHN BAKER	Jun-06-13 15:53:55			

When entering a phone number, enter just the 10 digits. The phone number will auto-populate with parenthesis for the area code and dashes. The history displayed here will show ALL calls made by or to this number.

 **Note:** Click on the **View Call History** dropdown arrow to display the call history, **not** the blue icon 

 **Unit 4 Exercise: Viewing Caller History**
 Select a call from **Call History** and using the **View Call History** option on the **Customer Info** tab, activate the caller's history.

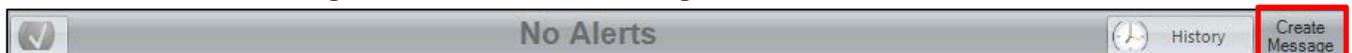
Unit 4 Review

Topic	<input checked="" type="checkbox"/>	Comments
Search: Pre-defined reports	<input type="checkbox"/>	
Search: By date, station, agent, caller number, etc.	<input type="checkbox"/>	
Search: Clearing the Search Criteria	<input type="checkbox"/>	
Customer Info	<input type="checkbox"/>	
Caller History: Viewing	<input type="checkbox"/>	

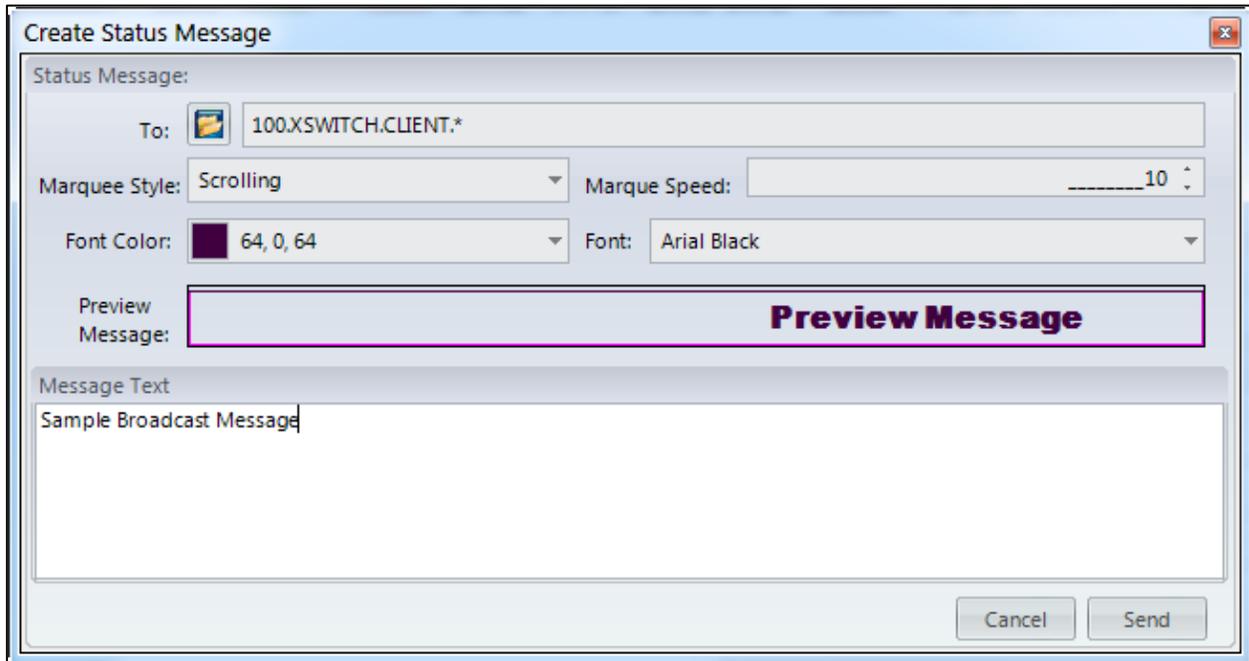
Unit 5: Using the Broadcast Messenger

Use the **Broadcast Messenger** to display important messages to all logged-in stations at selected PSAPs.

To enter a message in the Broadcast Messenger



1. Click **Create Message** in the **Alert** area just above the **Calls Panel**.
2. In the **Create Status Message** window, choose the preferred display settings and the PSAP(s) the message should be sent to. Type the message in the **Message Text** box and click **Send**.



The message will display in the **Alert** area with the Marquee Style selected. Users can click the green checkmark to the left of the message to acknowledge and clear the message from their own display. Unacknowledged messages will clear from the **Alert** area when their delay time has expired. Message display times are configured by the system administrator.



Unit 5 Review

Topic	<input checked="" type="checkbox"/>	Comments
Broadcast Messenger: Create message	<input type="checkbox"/>	
Broadcast Messenger: Acknowledge message	<input type="checkbox"/>	
Broadcast Messenger: Scroll through multiple messages	<input type="checkbox"/>	

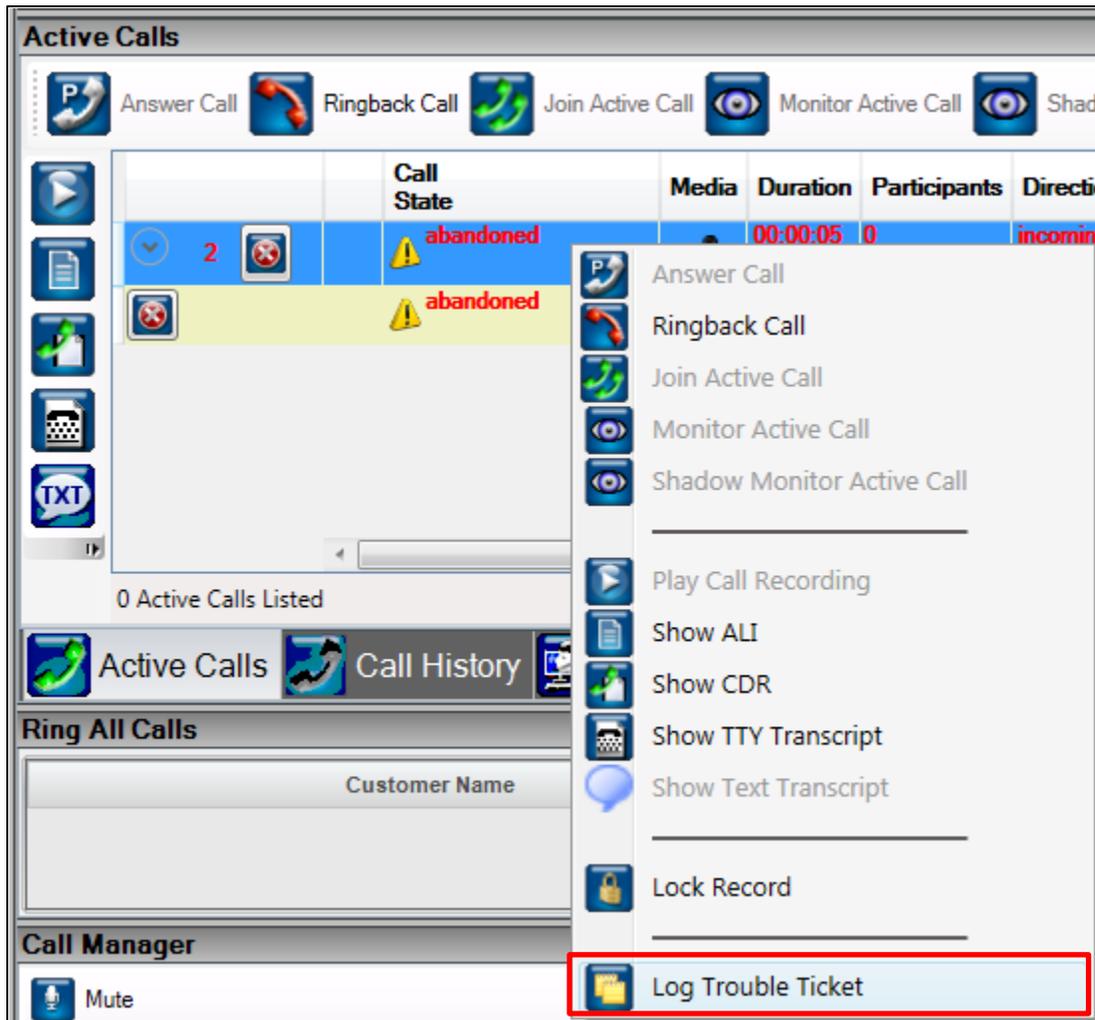
Unit 6: Submitting a Trouble Ticket for Assistance

6.1 Logging Trouble Tickets

Trouble tickets can be used to report an error from **Active Calls** or **Call History**.

To log a trouble ticket from the Active Calls panel

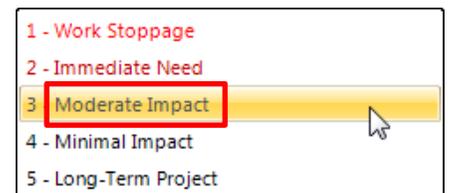
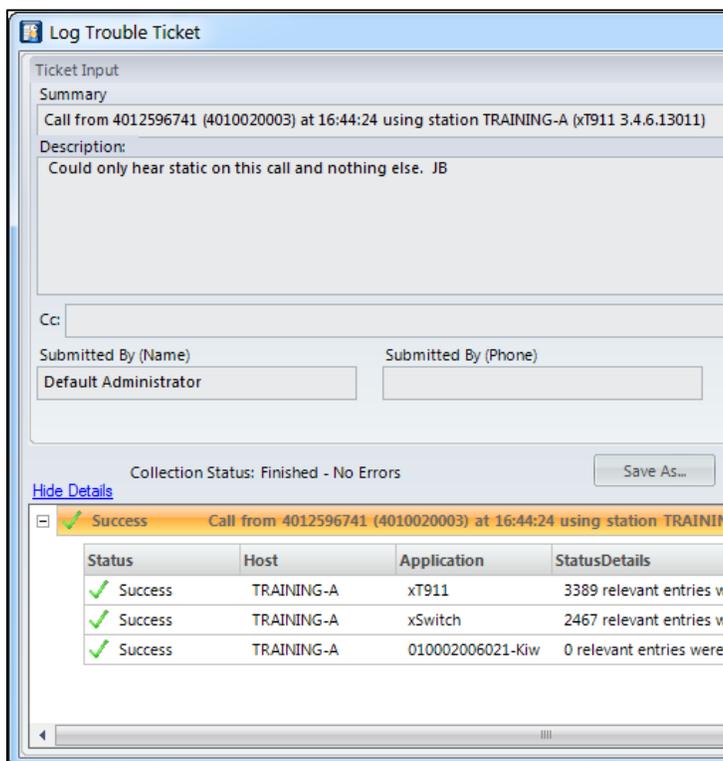
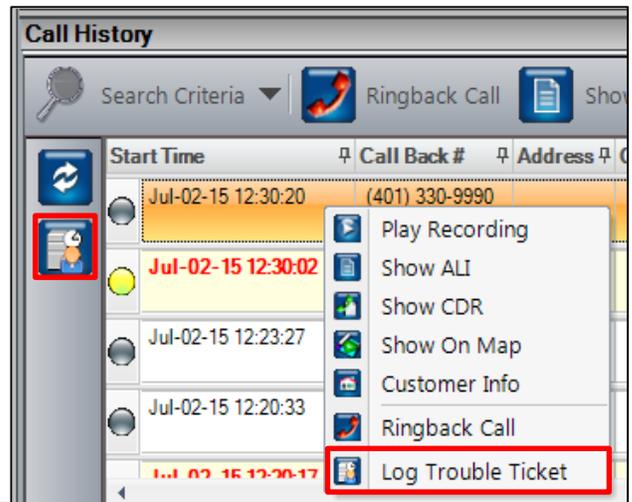
- In **Active Calls**, select a call, right click, and select **Log Trouble Ticket**.



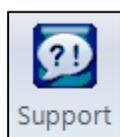
To log a trouble ticket from the Call History panel

Note: The capability to submit a trouble ticket is dependent upon system configuration. Check with the system administrator regarding your system's trouble ticket logging capability.

1. From Call History, select a call and either right click and select Log Trouble Ticket or select Log Trouble Ticket from the vertical toolbar.
2. Enter a description of the call issue or error and select a **Ticket Severity** level from the drop-down menu. Provide as much information as possible for the best assistance with problem resolution. Click **Submit** when the ticket is completely filled out.



6.2 Calling Support



The **Support** icon in the **Other** section on the **Home** tab is a direct dial to the support provider for xT911. The support provider is dependent upon system configuration.

