

# **ACD System Administrator Guide**

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### Chapter 2 – Strata ACD

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# Introduction

This guide provides set up and operating instructions for Strata Automatic Call Distribution (ACD) System Administrator software. This guide assumes that all of the proper equipment and set up procedures regarding the Net Server, Voice Assistant, Network ACD, and the Strata ACD requirements have been met.

## Organization

- Chapter 1 System Administrator explains how to use the Strata ACD System Administrator software.
- Chapter 2 Strata ACD explains how to use the Strata ACD software.

# Conventions

Conventions	Description
Note	Elaborates specific items or references other information. Within some tables, general notes apply to the entire table and numbered notes apply to specific items.
Important!	Calls attention to important instructions or information.
Tilde (~)	Means "through." Example: 350 ~ 640 Hz frequency range.
>	Denotes the step in a one-step procedure.
>	Denotes a procedure.
Start > Settings > Printers	Denotes a progression of buttons and/or menu options on the screen you should select.
See Figure 10	Grey words within the printed text denote cross-references. In the electronic version of this document (Library CD-ROM or FYI Internet download), cross-references appear in blue hypertext.

# **Related Documents/Media**

**Note** Some documents listed here may appear in different versions on CD-ROM or in print. To find the most current version, check the version/date in the Publication Information on the back of the document's title page.

## **General Description**

• Strata CIX Call Center Solutions General Description

## **User Guides and Manuals**

- Strata CIX ACD Agent/Supervisor User Guide
- Strata CIX ACD Installation Guide
- Strata CIX IPT/DKT Telephone User Guide
- OAISYS Net Server Operations Manual
- OAISYS Voice Assistant Installation Guide
- OAISYS Chat, System Administrator's Guide
- OAISYS Call Router on CIX Operations Manual
- OAISYS Net Phone System Administrator's Guide

## **CD-ROMs**

- Strata CIX Call Center Solutions Application Software and Documentation Library for Strata ACD, Insight, Net Server, and Voice Assistant
- OAISYS includes software and documentation for OAISYS Chat, Call Router, and Net Phone

For *authorized users*, Internet site FYI (http://fyi.tsd.toshiba.com) contains all current Strata documentation and enables you to view, print and download current publications.

## Introduction

Related Documents/Media

This chapter explains how to use the Strata ACD System Administrator features. This guide assumes that the Strata ACD System Administration software has been properly installed on your Strata ACD PC or MAS.

Use this program to set up and control Strata ACD operation.

#### ► To open the ACD System Administrator window

- 1. Click on Start > Programs > OASIS > ACD Administrator.
- 2. From the Strata ACD System Administrator window, access the database by selecting File, Open, then select and open the "ACDcore.mdb" file. (This step is only required once per PC or MAS.)
- 3. Select the appropriate Work Mode radio button (shown below). Select Connect to the Net Server; for real time work mode or select Work Offline for back up.

Select Worl	k Mode	×
<ul> <li>features that automaticall</li> </ul>	the Net Server. In this mode, ACD Admin will show only those t the copy key supports. This mode also allows for changes to y propagate to Strata ACD. calhost	
🔿 Changes ma	. In this mode, the user defines the agent limit and feature set. ade will not take affect in Strata ACD until the next time Strata ACD I only if the copy key actually supports the changes made.	
Agent Limit:	100 Enhanced Feature Set	
Database:	C:\Program Files\CTS\C_ACD\ACDCore.mdb Browse,	
	<u> </u>	

- 4. Click on the Strata ACD System Administrator icon on the Windows toolbar.
- 5. Log in with a valid username and password, then press Enter. The defaults are:

Username: Admin Password: Admin

Once you've successfully logged on, you should see a screen similar to the one shown below:

Ġ	<b>o</b> Stra	ata ACD Sy	stem Administral	tor (Offline)			_ 🗆 ×
F	ile E	dit Help					
2	2 Pe		Licensed for: Enha Agents/Supervisors	nced Features : Licensed: 100 Used: 2	ACD Groups Licens	ed: 50 Used: 4	
ſ	ACD (	Groups Age	nts Supervisors .	Actions 🛛 Unavailable Reasons 🗍 M	fiscellaneous		
Γ	_						
	ID	Group ID	Group Name	Group Description	Search Type		
	1	500	TSD Document		Linear		
	2	520	Marketing		Linear		
	3	600	Product Manage		Linear		
	4	700	Customer Support		Linear		200

> To log in if the ACD System Administrator program is already activated

- 1. Select File > Log In.
- 2. Log on with a valid username and password, then press Enter.

### ► To log out

► Select File > Log Out.

## **Action Buttons**

Across the top of the Strata ACD System Administrator screen is a series of four action buttons. These buttons are shortcuts to four basic functions. The buttons are:



Edit selected records.



Copy selected record.



New record.



Delete selected records.

# First-time Set Up

The first time you use the ACD Administrator to create ACD Groups, add Agents, Supervisors, and define or select alarms and actions, it is actually better to select the tabs from right to left. First, define items on the Miscellaneous tab, then Unavailable Reasons, Actions, Supervisors, Agents, and ACD Groups last. This is because some of the items defined in the tabs on the right must be established so that they will show up in the ACD Groups tab.

## Miscellaneous Tab

Strata ACD System Administrator (Connected to localhost)	
File Edit Help	
Licensed for: Enhanced Features Agents/Supervisors Licensed: 100 Used: 35	
ACD Groups Agents Supervisors Actions Unavailable Reasons Miscellaneous	
Trunk-Access Code	
Intermediate ACD Pilots View/Change	

**FIFI D** 

DESCRIPTION

Code

**Trunk Access** The trunk access code for dialing out (e.g., 8 or 9. Field defaults to 8. **Intermediate ACD Pilots** Intermediate Pilot DNs are provided as a means for directing a call into an ACD Pilot. This simulates getting a DNIS number for MIS reporting.

FIELD	DESCRIPTION
Pilot DN	Define the Pilot DN where the ACD calls for this group will be delivered. From the ACD Groups tab, go to the Main Menu and select Edit. The Edit ACD Group window opens. Pilot DNs are created in Program 540. (See the <i>Strata CIX ACD Installation Guide</i> .)
	From the General tab, enter a Name. Then fill in or select the appropriate parameters.
Route Destination	Enter a Pilot DN destination for the routing point of an Intermediate Pilot DN.

#### ► To change the access code

- 1. From the Miscellaneous tab, click Change in the Trunk Access Code section of the screen. The field changes to a white background.
- 2. Enter the new access code. The code is saved automatically.

#### ► To reset the Agent Idle time

Check Reset the Agent Idle Time checkbox when agents go un-available. This is used when Longest Idle is selected as the Call Distribution type on the Agents tab when configuring the ACD Group.

#### > To view or change an Intermediate ACD Pilot

- 1. From the Miscellaneous tab, click View/Change. The Intermediate ACD Pilots screen displays.
- 2. Click Add or highlight a Pilot DN and click Edit. A screen displays with Pilot DN and Route Destination fields. Make your changes and click OK.

# **Unavailable Reasons**

The DKT telephone has two fixed unavailable codes – Forced and General Unavailable. Forced is used when Strata ACD forces an agent unavailable due to a call not being answered in the allocated time frame. General is used when the manual button on the phone is used.

The 10 additional codes shown on this screen are not available from the telephone, but can be entered using Net Phone. By clicking Change, these reasons can be changed to meet the customer's needs by replacing the text with your own customized text.

Strata ACD System Admin	strator (Offline)	
e Edit Help		
Licensed for: Agents/Supe	Enhanced Features visors Licensed: 100 Used: 0 ACD Groups Licensed: 50	Used: 1
CD Groups Agents Supervis	ors Actions Unavailable Reasons Miscellaneous	
1: Unavailable	<u>B</u> : Sales Demo	
2: On Break	Z: In a Meeting	
3: Away from Desk	8: In Conference	
4: Wrapping Up	9 Scheduling	
5: Making Calls	10: Conference Call	
	Change	

# **Actions Tab**

Defines what needs to happen when certain events take place. For example, when a new call arrives it can have a delayed answer to reduce 800 number charges while looking for an available Agent, but if an Agent is not found before the answering time, then an "Action," such as "Play an Initial Announcement" can be created.

The Actions shown are predefined and come with the system (shown below), so generally, you can just select one of these. See Table 1 for detailed information on the scripts and parameters.

	es 100 Used: 2 ACD Groups Licensed: 50	Used: 1
CD Groups Agents Supervisors Actions U	navailable Heasons   Miscellaneous	
Name	Туре	<u> </u>
Initial Announcement (simple)	Transfer To VA/Announce	
Periodic Announcement (simple)	Transfer To VA/Announce	
Initial Announcement (position)	Transfer To VA/Announce	
Periodic Announcement (position)	Transfer To VA/Announce	
Initial Announcement (wait time)	Transfer To VA/Announce	
Periodic Announcement (wait time)	Transfer To VA/Announce	
Initial Announcement (position + VM option)	Transfer To VA/Announce	
Periodic Announcement (position + VM option)	Transfer To VA/Announce	
Initial Announcement (wait time + VM option)	Transfer To VA/Announce	
Periodic Announcement (wait time + VM option)	Transfer To VA/Announce	
Initial Announcement (preferred agent)	Transfer To VA/Announce	
Overflow Announced	Send LCD Message	
Overhead page	Run VA Script	
Alarm Active Agents	Send LCD Message	_
Alarm Avail Agents	Send LCD Message	
Alarm Abandoned Call	Send LCD Message	
Alarm Calls Waiting	Send LCD Message	•

The following procedure is for defining custom actions.

### ► To change an action

- 1. From the Actions tab, highlight an Action in the list.
- 2. Click the Edit Selected Record icon. The Edit screen displays.
- 3. Make your changes and click OK.

#### Notes

• It is not recommended that you change the default Actions. The recommended method is to copy an Action, rename it, and edit this version for a specific group of functions.

### ► To add an action

- 1. From the Actions tab, click the New Record icon. The New Action screen displays (shown right).
- 2. From the New Action window, enter the action name and type (or select one from the drop-down box). Depending on the type selected, a group of fields display on the lower portion of the screen (see

ne:		Action Class
oe: Send LCD Message		Periodic Announce
Action Settings iend LCD Message To:	Recipient available status:	Cverflow/ReRoute
<ul> <li>All Supervisors</li> </ul>	C Available	Alarms/Notifications
C All Agents C Whole Group	<ul> <li>Unavailable</li> <li>Avail or Unavail</li> </ul>	Enhanced Call
C Individual	<ul> <li>Avail or Unavail</li> </ul>	Management *e
Message String:		
Tone: Emergency	Play Continous	

Field Descriptions below for explanations of the fields).

- 3. Check any Action Classes you want applied. Greyed out options do not apply to the type chosen.
- 4. Click OK.

FIELD	DESCRIPTION
Name	Enter a name for the Action to be added or change the name of an existing action. We suggest selecting an action "Type" prior to creating a name to avoid re-defining an existing action.
Action Class	These items enable you to set system-wide functions. Only the actions which apply can be checked. Items in grey do not apply. Available options are:
	<ul> <li>Initial Announce</li> <li>Periodic Announce</li> <li>Overflow/ReRoute</li> <li>Alarms/Notifications</li> <li>Enhanced Call Management (Enhanced)</li> </ul>

## System Administrator

Actions Tab

FIELD	DESCRIPTION
Туре	This pull-down list enables you to select the type of action to be performed for the item named. Predefined Types include:
	Transfer to VA/Announce
	Run VA Script
	Transfer Call
	Send DDE Message
	Log to File
	Send LCD Message
	Send Email
	<ul> <li>Announce with Callback (Enhanced)</li> </ul>
	<ul> <li>Interflow (Enhanced)</li> </ul>
	<ul> <li>Share Agents (Enhanced)</li> </ul>
	Action Settings
	These fields vary based on "Type" selected.
	Type: Transfer to VA/Announce or Run VA Script
VA Script #	Specific Voice Assistant (VA) script should be invoked with this action. Enter the script number here. A series of announcement scripts are provided with the system. The announcement prompts are shown on Table 6.
VA Ports	If a VA script is used, enter the port group associated with this ACD group.
Parameters	You can further define additional actions by entering parameters. See following tables. These parameters will be used by the VA script as part of its processing (see Parameter Variables table).
Prevent any agent seizing this call	If an agent becomes available while a call is listening to an announcement, this checked will prevent the call from being moved to that agent until the announcement is complete.
Prevent any lower priority call in queue from	When this box is checked, calls will follow a strict order sequence for agent delivery independently of whether an announcement is being played or not.
preempting this call	When not checked, the call with the highest priority not connected to an announcement will get delivered to an available agent.

### System Administrator Actions Tab

FIELD	DESCRIPTION
	Type: Transfer Call
XFR To	Transfer calls to specified station (must be a station within same node).
Tone	Available settings: Music-On-Hold (default), Ringback
CP (Call Priority)	Available settings: ACD (default), Emergency, External, Internal
MS (Music Source)	Available settings: None (default), MS01~MS15
Override DND	Sends a call waiting tone or ringing to a station in DND mode to indicate that a call is coming in.
Override FWD	Sends a call ringing tone to a station in forward mode to indicate that a call is coming in.
Allow Campon	Allows a call to go to a busy station and remain on hold. When the line becomes free, the station rings.
	Type: Send DDE Message
App Name	Application Name.
Арр Торіс	Application subject matter.
DDE Message	Specify the application message needed.
	Type: Log to File
Write to File	Available settings: Append (default), Overwrite
Log Filename	Name of target file.
Log String	Setup string of characters.
	Type: Send LCD Message
Send LCD Message to	Available settings: All Supervisors (default), All Agents, Whole Group, Individual or Agent
Recipient available status	Available settings: Available, Unavailable, Avail or Unavail (default)
Display alarm only when keyset is idle	Select when you don't want alarm to display on a busy telephone.
Tone (When Idle/ Alerting)	Available settings: (none), Emergency, Reject (One Shot), Reject (Continuous), Splash (One Shot), Splash (Continuous).
Tone (When Talking)	Available settings: (none), Emergency, Reject (One Shot), Reject (Continuous), Splash (One Shot), Splash (Continuous).
	Type: Send Email
Address	E-mail address where e-mails will be sent.

#### System Administrator

Actions Tab

FIELD	DESCRIPTION
Subject	Subject of e-mail.
Message	Message being sent.
Attach	Any attachments which should be sent along with the e-mail.
	Type: Interflow (Enhance)
Interflow To	Available settings: None (default), Group IDs/names of available ACD groups
Target Threshold	Available settings: Agent Utilization > X% (default), Busy Ratio > X%, Calls Waiting > X
	Type: Share Agents (Enhance)
Share agents from the following	Available settings: None (default), Group IDs/names of available ACD groups
group	<b>Note</b> See Table 3 for additional information on Share Agents.

#### Table 1 Default Actions, Scripts and Parameters

Action Name	Action Type	VA Script	Ports	Parameters: Variables (see Table 2)
Alarm Abandoned Call	Send Message to LCD phone	n/a	n/a	Abandon Call @%G
Alarm Active Agents	Send Message to LCD phone	n/a	n/a	Active Agts <%Y@%G
Alarm Available Agents	Send Message to LCD phone	n/a	n/a	Avail Agts <%X@%G
Alarm Calls Waiting	Send Message to LCD phone	n/a	n/a	Calls Wait = %Q@%G
Alarm Calls Waiting per Agent	Send Message to LCD phone	n/a	n/a	Calls/Agt High @%G
Alarm Longest Waiting Call	Send Message to LCD phone	n/a	n/a	LCW >%O&%G
Initial Announcement (simple)	Transfer Call to IVR/ Announcement	801	G1	%G
Periodic Announcement (simple)	Transfer Call to IVR/ Announcement	806	G1	%G

Table 1	Default Actions,	<b>Scripts and Parameters</b>	(continued)
	Bolaan Aonono,	oonpto ana i aramotoro	(contantaca)

Action Name	Action Type	VA Script	Ports	Parameters: Variables (see Table 2)
Initial Announcement (position)	Transfer Call to IVR/ Announcement	811	G1	%G,%B,%S
Periodic Announcement (position)	Transfer Call to IVR/ Announcement	816	G1	%G,%B,%S
Initial Announcement (wait time)	Transfer Call to IVR/ Announcement	821	G1	%G,%B,%S <sup>1</sup>
Periodic Announcement (wait time)	Transfer Call to IVR/ Announcement	826	G1	%G,%B,%S <sup>1</sup>
Initial Announcement (position + VM option)	Transfer Call to IVR/ Announcement	831	G1	%G,%B,%S, <b>#407,%G</b> <sup>2</sup>
Periodic Announcement (position + VM option)	Transfer Call to IVR/ Announcement	836	G1	%G,%B,%S, <b>#407,%G</b> <sup>2</sup>
Initial Announcement (wait time + VM option)	Transfer Call to IVR/ Announcement	841	G1	%G,%B,%S, <b>#407,%G</b> <sup>3</sup>
Periodic Announcement (wait time + VM option)	Transfer Call to IVR/ Announcement	846	G1	%G,%B,%S,# <b>407,%G</b> <sup>3</sup>
Initial Announcement (preferred agent)	Transfer Call to IVR/ Announcement	851	G1	%G,%l
Initial Announcement (position + CB option)	Transfer Call to IVR/ Announcement	861	G1	%G,%P,%B
Periodic Announcement (position + CB option)	Transfer Call to IVR/ Announcement	866	G1	%G,%P,%B
Initial Announcement (wait time + CB option)	Transfer Call to IVR/ Announcement	871	G1	%G,%P,1,%K
Periodic Announcement (wait time + CB option)	Transfer Call to IVR/ Announcement	876	G1	%G,%P,1,%K

1. To use the calculated wait time use %G, 1, %K.

2. To use the calculated wait time use G,1,K,#407,G.

3. Parameters in bold, **#407,%G**, can be changed. In this case, **#407,%G** represents the extension to transfer the call to (either a Voice Mailbox or Quick Message code.

### Network ACD Voice Announce (VA) Port Script

VA port script uses the predefined parameter. For example, %G represents the group number which is Node+DN under Network ACD environment. For example, the default VMS transfer script uses %G as the mailbox, and it is Node+DN. If DN alone needs to be used for the mailbox, the parameter for the script needs to be edited to use mailbox such as 200 instead of %G that may represent 11200.

### **Parameter Variables**

Variables are used within the definitions of actions to dynamically provide information about the triggering ACD group or call.

Var.	Group Variables Description	
%G	ACD group's unique ID or Pilot Extension. (For Network ACD, this will be Node number + ACD group's unique ID or Pilot Extension).	
%K	The group's running average-talk time.	
%M	The total number of Agents and Supervisors that belong to the group.	
%0	The duration of the longest waiting call, in seconds.	
%Q	The total number of waiting calls. Note that a waiting call is a queue call that ACD failed to push to an Agent because there are no ready Agents.	
%R	The total number of calls that are currently alerting an Agent station.	
%S	The group's programmable, estimated average-talk time.	
%W	The group's programmed name.	
%X	The total number of available Agents and Supervisors in the group.	
%Y	The total number of active Agents and Supervisors in the group.	
%Z	Ratio: %Q / %X, or Waiting Calls> / <total agents="" and="" available="" supervisors="">.</total>	
Var.	Call Variables Description	
%A	The call's account number.	
%В	The call's position in the queue. The first position in the queue is one.	
%D	The call's associated DNIS value.	
%F	The extension of the device that last redirected this call.	
%I	PBX call ID.	

#### Table 2 Variables

%N	Calling party name (outside calls only).
%P	Calling phone number.
%Т	Call type.
%U	The number of times the call has gone to periodic announcement.

#### Table 2Variables (continued)

#### Share Agent's Behavior

The main group borrows, but does not claim ownership over the agents from the shared group. The main group is restricted to sending a call to a shared agent only if the shared group has no waiting calls. When the main group gets the opportunity to send a call to a shared agent, the main group follows the search algorithm of the shared group.

When the main group sends a call to a shared agent, the main group treats the agent in the same way the shared group would have treated it. That is, it gives the same wrapup time that the shared group would have given, using the "logout on missed call settings of the shared group, and so on.

If the shared agent fails to answer the call, the main group moves the call back to itself. Table 3 shows how the call is processed and the Share Agent is treated.

Operation	Behavior
Call Distribution	Share Group
Wrap-up	Share Group
No-answer Advance Timer	Main Group
No-answer Advance Destination	Main Group
Logout on Missed Call	Share Group
Logout on Missed Calls from which Group	Share Group
Unavailable on Missed Call	Share Group

Table 3 Share Agent's Behavior

Table 3	Share Agent's Behavior	(continued)
---------	------------------------	-------------

Operation	Behavior
Prevent last agent logout/ unavailable if calls waiting	Share Group
Agent List — use for Linear and Round Robin Call Distribution	Share Group
Send LCD Message and Alarm Tone	Agents in Share Group do not get LCD Message and Alarm Tone sent by Main Group.
Thresholds calculation	Agent in Share Group is not used in threshold calculations.
Preferred Agent	Preferred Agent feature only applies to agents in the Main Group and in the Share Group.
ACD Help	When an agent in Share Group (while taking a call that came from the Main Group) requests ACD Help, the agent gets help from a supervisor in the Main Group. This is appropriate since those supervisor(s) are probably the most able to give help since the call came from that group.
Monitoring Calls	A supervisor is only allowed to monitor an agent that belongs to the same ACD Group, that is he/she supervises.

### **Call Back Behavior**

During a Voice Assistant announcement (initial or periodic), the caller can be offered the choice to be called back when his place in queue occurs. When callback is offered, the caller can reject it and stay in the queue or accept the call back.

If the caller chooses the Call Back option he will be prompted for his call back number and optionally to describe the reason for his call. The ACD then holds his place in queue, and when it's ready to be answered by an Agent, the ACD uses a Voice Assistant port to call the Agent, play the call back information, and then place the call back call.

Once a call back has been registered, ACD replaces the call with a call back's placeholder and keeps its position in the same queue. When it comes time for the call back placeholder's turn, ACD initiates a call from a Voice Assistant port to that Agent. Upon answering, the Agent has three options:

- 1. Press 1 to accept
- 2. Press any other key such as  $\star$  to repeat the call back number and the message that the caller left.

If the Agent presses 1 to accept, the call back call is made from the agent to the caller. If the agent hangs up or logs out before pressing 1, the call would remain in the queue and will be delivered to the next available agent.

Table 4 shows how the call back placeholder is processed.

Operation	Behavior
Initial Announcement	No announcement is used for the placeholder.
Periodic Announcement	No announcement is used for the placeholder.
Overflow	The placeholder does not follow overflow/ re-route parameters and remains in the queue.
Re-route	The placeholder does not follow overflow/ re-route parameters and remains in the queue.
Enhanced Call Management	
Interflow	The placeholder does not follow interflow parameters and remains in the queue.
Agent Sharing	Agent sharing setup is used for the placeholder.
Call Distribution	The call back call follows the parameters set for the queue where the call is attached.
Wrap Up	The call back call follows the parameters set for the queue where the call is attached.
No-answer Advance Time	The call back call follows the parameters set for the queue where the call is attached.
No-answer Advance Destination	The call back call follows the parameters set for the queue where the call is attached.
Logout on Missed Call	The call back call follows the parameters set for the queue where the call is attached.
Logout on Missed Call from which Group	The call back call follows the parameters set for the queue where the call is attached.

#### Table 4 Call Back Behavior (continued)

Operation	Behavior
Unavailable on Missed Call	The call back call follows the parameters set for the queue where the call is attached.
Prevent Last Agent Logout/ Unavailable Calls Waiting	The call back call follows the parameters set for the queue where the call is attached.
Agent List – Use for Linear and Round Robin Call Distribution	The call back call follows the parameters set for the queue where the call is attached.
Thresholds Calculation	Call back's placeholder is not used in thresholds calculation.
Preferred Agent	Preferred Agent feature applied to Call Back's placeholder.
ACD Help	ACD Help is available to Call Back's calls when the agent is connected to the caller.
Monitoring Calls	Supervisor is only allowed to monitor Call Back's calls when the agent is connected to the caller.

# **Supervisors Tab**

This screen defines the supervisors, their IDs, and passwords. A series of buttons are provided across the top of the screen for editing, copying, adding or deleting supervisors in the list (shown below).



### > To change or add a Supervisor

- 1. From the Supervisors tab, select Edit, followed by Edit, Copy or New Record. The Supervisor screen displays (shown at right).
- 2. Enter (or change) the Supervisor ID, Name, and/or Password.
- 3. If you want the calls to be auto-answered, check the last field.
- ID:
   ID:

   Name:
   ID:

   Password:
   ID:

   Auto Answer w/Zip Tone

   Image:

   Image:

   Image:

4. Click OK.

FIELD

#### DESCRIPTION

ID	This is a unique number; the system does not allow duplicate IDs. Digit length must be five digits or less. For Network ACD, the Node Number does not need to be inserted in front of the Supervisor ID.
Name	This name will appear on the Supervisors tab.
Password	This is optional and can be the same as the ID.
Auto Answer w/Zip Tone	If you check this option, each ACD call is auto-answered and an audible tone is sent to the connection.

# **Agents Tab**

This screen defines the agents, their Agent IDs, passwords, and Agent priority values used as part of the Agent Priority Routing. A series of buttons are provided across the top of the screen for editing, copying, adding or deleting agents in the list (shown below).

itrata AC	D System Administrator			
Edit He	elp			
			2 ACD Groups Licensed: 50	Used: 1
D Groups	Agents Supervisors Ac	tions   Unavailable Rea	sons Miscellaneous	
lgent ID	Agent Name	Priority	Auto Answer w/ Zip tone	
5	jane			
	11/2			

### ► To change or add an Agent

- 1. From the Agents tab, select Edit, followed by Edit, Copy or New Record. The screen at right displays.
- 2. Enter (or change) the Agent ID, Name, Password and Priority.
- 3. If you want the calls to be auto-answered, check the last field.
- 4. Click OK.

New Age	nt 🔀
ID:	
Name:	
Password:	
Priority:	
	🔲 Auto Answer w/ Zip Tone
	<u>O</u> kay <u>C</u> ancel

FIELD	DESCRIPTION
Agent ID	This is a unique number; the system does not allow duplicate IDs.
	Digit length must be five digits or less. For Network ACD, the Node Number does not need to be inserted in front of the Agent ID.
Name	This name will appear on the Agents tab.
Password	This is optional and can be the same as the ID.
Priority	This assigns the call handling priority level for this individual. Valid entries are 0~100. Incoming ACD calls will always be sent to agents with the highest priority number when Agent Priority routing is used. You can assign multiple agents with the same priority number. A Priority value of 0 disables this parameter.
Auto Answer w/Zip Tone	If you check this option, each ACD call is auto-answered and an audible tone is sent to the connection.

# **ACD Groups Tab**

After ACD Agents have been assigned under the ACD Agents tab, you can create ACD Groups.

#### **>** To create ACD Groups

- 1. From the ACD System Administrator window, click the ACD Groups tab. The group summary appears on the tab.
- 2. Select Edit, New Record or click the Edit or Add action button. The Add/Edit ACD Group window displays. You can access the General, Call Management, Agents, Supervisors, Alarms and Miscellaneous tab screens.
- 3. Add/change the information on the screens and click OK.

Ō	<b>j Str</b> a	ata ACD Sy	stem Administral	tor (Offline)			×
F	ie E	dit Help					
2	1		Licensed for: Enha Agents/Supervisors	nced Features : Licensed: 100 Used: 2	ACD Groups Licens	red: 50 Used: 4	
ſ	ACD (	Groups Age	nts Supervisors .	Actions Unavailable Reasons M	tiscellaneous		
Γ	_						
	ID	Group ID	Group Name	Group Description	Search Type		
	1	500	TSD Document		Linear		
	2	520	Marketing		Linear		
	3	600	Product Manage		Linear		
	4	700	Customer Support		Linear		000
							0

## **General Tab**

-	ACD Group Call Managem	nent Agents   {	Supervisors Alarr	ns   Miscellane	ous	2
G	tification roup ID: 500 scription:	Nar	ne: TSD Docur	mentation		
O Er O Di	IP Enabling nabled Always isabled Always se Schedule	☐ Sunday ✔ Monday ☐ Tuesday	🔽 Thursday		Start: 3:00 Stop: 5:00	*e
					<u>O</u> kay	<u>C</u> ancel

Refer to the following field definitions to enter or change ACD group information.

FIELD	DESCRIPTION
Group ID	(Required) Enter a group identification number. This would be Pilot DN programmed into the CIX System for ACD.
	For Network ACD, this will be Node number (the node number where the ACD Server is connected) and Group Identification Number (the Pilot DN for the ACD Group that is programmed in the Node where the ACD server is connected).
Name	(Required) Enter a name for the ACD Group.
Description	(Optional) Enter a description for the ACD group.

ACD Groups Tab

FIELD	DESCRIPTION
Group Enabling	Select one of the following: Enabled Always, Disabled Always, Use Schedule. These options define whether the Strata ACD is handling the calls or whether the calls follow the re-route action. When a queue is disabled, all existing calls in the queue are to be handled normally and all newly arriving calls immediately take the re-route action from the queue.
	Use Schedule: If this option is selected, the following fields are activated: Sunday ~ Saturday and Start/Stop. These fields define the day of the week and starting and ending times for a queue session. Note: The Use Schedule is only available in the Enhanced Model.

## **Call Management Tab**

	neral-Call Management	0	Secs	<none></none>	
	nitial Announcement: After	(a)	_ Secs		<u> </u>
Pe	riodic Annoucement: Every	30	Secs	<none></none>	<u> </u>
	Overflow Call: After	45	Secs	<none></none>	-
Re	route when Disabled:	(All (	Calls)	<none></none>	•
i <b>nh</b> ‡1	nanced-Call Management —			Action:	*e
+1	<none></none>	-		<none></none>	•
 ‡2	Lu.			Action:	
72	<none></none>	<u> </u>		<none></none>	•
 ‡3	<none></none>			Action:	
	<none></none>	<u> </u>		<none></none>	•
<del>1</del> 4	- Allen es	=		Action:	
	<none></none>	Ľ		<none></none>	•
22					

Refer to the following field definitions to enter or change ACD group information.

FIELD	DESCRIPTION
	General Call Management
Initial Announcement	Specify the time the call may ring into the queue before taking the specified action. Typically, this defines how long the caller will hear Ring Back Tone prior to being transferred to the Initial Announcement if no Agents are available when the call arrives. The actions are defined later in the Actions Tab.
Periodic Announcement	This specifies how long a call will wait on a Music-on-hold source prior to following a periodic action. Typically, this action is a secondary announcement to indicate to the caller that the call is still being handled in the order received.
Overflow Calls	Define the overall time and action to be taken if the call has not been handled. The Overflow action is followed after the specified time or if the queue becomes Disabled while the call is waiting in queue. This timer starts from the beginning of the call.

-

FIELD	DESCRIPTION
ReRoute when Disabled	This action is followed if the queue is Disabled.
	Enhanced Call Management (This section is only available in the Enhanced Model.)
#1~#4	Choose one of the triggers from the drop-down menu. They are: None, Agent Utilization, Busy Ratio and Calls Waiting. When you select Agent Utilization or Busy Ratio, you must also enter a percentage in the next field. If you select Calls Waiting, you must also enter the number of calls.
	Action: Choose an action from the list to be taken when the trigger criterion is met.

## **Agents Tab**

Behavior and Tim Call Distribution: Wrap Up: No-Anwer Advance:	Logout on missed call     Unavailable on missed call     Prevent last agent     logout/unavailable if calls waiting
Agent List n this Group: Agent ID Name	Available:

Refer to the following field definitions to enter or change ACD group information.

FIELD	DESCRIPTION
	Behavior and Timers
Call Distribution	Choose the routing algorithm to find an available Agent. Three options are available in Basic ACD (Linear, Round-Robin, and Longest Idle) and five are available in Enhanced ACD (Linear, Round-Robin, Longest Idle, Balanced Call, and Agent Priority).
	Use this search when more than one agent logs into the same group.
Wrap-Up	Set the length of time to allow the agent to wrap-up the work before making the agent available for the next call.
No Answer Advance	Set the length of time for ringing an Agent before advancing the call to an available Agent.
Logout on missed call	Check this box to automatically log out any agent that does not answer a call within the Ring No-Answer time period.
Unavailable on missed call	Check this box to automatically designate the agent as unavailable when the agent does not answer a call within the Ring No-Answer time period.

FIELD	DESCRIPTION		
Prevent last agent logout/ unavailable calls waiting	Prevents the last available agent from logging out or becoming unavailable when there are one or more waiting calls. This option takes precedence over the "Logout on missed call" and "Unavailable on missed call" options.		
Check box combinations	By checking boxes 1 and 3 or 1, 2 and 3, the last Agent will not be logged out automatically if there are calls in queue.		
	If Check Boxes 2 and 3 are checked, the last Agent will not go unavailable automatically if there are calls in queue.		
	Agent List		
In this Group:	This box shows the agents assigned to this group.		
Available:	Available: Displays a list of available agents. The ordering of the agents can be assigned using this screen. This ordering is used for selected agent search algorithms such as Linear or Round-Robin to define the sequence of the search.		
	Agent Availability is defined as: An agent is available if the agent is logged in and NOT unavailable.		
	<b>Note</b> According to this definition, an agent can be available and not ready to receive a call (e.g., busy) at the same time.		
Agent Priority	The Agent priority number can be re-assigned by double-clicking on the Agent in the Edit ACD Group screen (when Agent Priority *e is selected in the Call Distribution pulldown).		
	🕏 Edit ACD Group		
	General       Call Management       Agents       Supervisors       Alarms/Notifications       Miscelaneous         Behavior and Timers       Call Distribution:       Agent Priority "e       Image: Call Distribution:       Logout on misced call         Wriap Up:       0       Seconds       Image: Prevent last agent         No-Anvert Advect:       12       Seconds       Image: Prevent last agent         Agent List       Call List       Call List       Call List		
	Agent ID     Name       3001     Agt #2       3002     Agt #3       3003     Agt #4       3004     Agt #5       3005     Agt #6       3007     Agt #8       3008     Agt #8       3008     Agt #8       3008     Agt #1       30107     Agt #8       30108     Agt #1		
## **Supervisors Tab**

Call Distribution: Linear Wrap Up: 15 Seconds	Logout on missed call Make Unavailable on missed call Prevent last agent
Io-Anwer Advance: 45 Seconds	Prevent last agent logout/unavailable if calls waiting
iupervisor List n this Group:	Available:
Agent ID Name	Agent ID Name
	22

Refer to the following field table when entering or changing Supervisor information.

FIELD	DESCRIPTION
	Behavior and Timers
Call Distribution	Choose the routing algorithm to be used for finding an available supervisor. Two options are available, Linear or Round-Robin. The supervisor is an agent of last resort when answering the login question to answer calls as part of the group (the Supervisor may opt upon log in to take calls as an agent of last resort). This search is only used when more than one Supervisor logs into the same group.
Wrap-Up	Set the length of time allowed the agent to wrap-up the work before making the agent available for the next call.
No Answer Advance	Set the length of time for ringing an agent before advancing the call to an available agent.

#### System Administrator

ACD Groups Tab

FIELD	DESCRIPTION
	Supervisor List
In this Group:	In this Group: This box shows the supervisors assigned to this group.
Available	Available: Displays a list of available supervisors. The ordering of the supervisors may be assigned. This ordering is used for selected supervisor search algorithms such as Linear or Round-Robin to define the sequence of the search.
	Supervisor Availability is defined as: A supervisor is available if the supervisor is logged in, willing to receive calls, and NOT unavailable.
	<b>Note</b> According to this definition, a supervisor can be available and not ready to receive a call (e.g., busy) at the same time.

## **Alarms/Notification Tab**

#1			Action:	
#1	Agent Utilization > X%	2 Percent	<none></none>	•
#2	Available Agents+Supers <	=) 🕶 🚺	Action:	
#3	<none></none>	Agents	Action:	-
-			<none></none>	
#4	<none></none>	•	<none></none>	
#5	<none></none>	•	Action: <none></none>	
HE.			Action:	1
	<none></none>	<u> </u>	<none></none>	
#7	<none></none>	•	Action: <none></none>	Ŧ
#8	<none></none>	•	Action: <none></none>	

Up to eight alarms can be reported to the Supervisor for each ACD Group. These alarms are defined by choosing an alarm to be reported and then selecting the action to be performed when the alarm occurs. See Table 5 for a list of available alarms.

FIELD	DESCRIPTION
#1~#8	Choose one of the alarms from the drop-down menu. They are:
	• None
	<ul> <li>Agent Utilization &gt; X%</li> </ul>
	• Busy Ratio > X%
	<ul> <li>Active Agents + Supers &lt;= X</li> </ul>
	<ul> <li>Available Agents + Supers &lt;= X</li> </ul>
	Call Abandoned
	<ul> <li>Calls Waiting &gt; X</li> </ul>
	<ul> <li>Longest Call Waiting &gt; X seconds</li> </ul>
	<ul> <li>Calls Ringing &gt; X</li> </ul>
	<ul> <li>Longest Call Ringing &gt; X seconds</li> </ul>

FIELD	DESCRIPTION
Action	Create an action for the alarm by placing your cursor in the field and typing over "None." A few examples of what you could create are:
	Overhead page
	<ul> <li>Alarm Active Agents - Send Message to LCD phone.</li> </ul>
	Alarm Available Agents - Send Message to LCD phone.
	Alarm Abandoned Call - Send Message to LCD phone.
	<ul> <li>Alarm Calls Waiting - Send Message to LCD phone.</li> </ul>
	Alarm Longest Wait - Send Message to LCD phone.
	<ul> <li>Alarm CW per Agent - Send Message to LCD phone.</li> </ul>
	<ul> <li>Select Tone – none - Send Message to LCD phone.</li> </ul>
	Select Tone – Emergency Ring - Send Message to LCD phone.
	<ul> <li>Select Tone – Splash - Send Message to LCD phone.</li> </ul>
	Select Rate – Play Continuous - Send Message to LCD phone.
	<ul> <li>Select Rate – Play once - Send Message to LCD phone.</li> </ul>

Alarm	LCD Display
Active Agents+Supers <= X (X = alarm threshold that you set)	ALM Active Agts <%Y
Avail Agents + Supers <= X (X = alarm threshold that you set)	ALM Avail Agts <%X
Call Abandoned	ALM Abnd Call
Calls Waiting > X (where X = Calls)	ALM %Q Calls Wait
Longest Call Waiting > X sec. (where X = seconds)	ALM LCW = %O
Wait Calls/Avail Agts + Supver > X (where X = percent)	ALM Calls/Agt High
Number of Ringing Calls > X (where X = calls)	Call Ring in %G
Longest Ringing Call > X seconds	Call Ring in %G

%Y, %X, %Q, %O, %G are parameters. See "Parameter Variables" on page 12 for definitions.

## **Miscellaneous Tab**

The Miscellaneous tab enables you to set call priorities, select a Music-on-hold (MOH) source and provide an estimated average connect time (shown below).

Preferred Agent Auto Learn Preferred-Agent: Never Always Clip preferred agent is missing on entry Preferred -agent timeout:	Miscellaneous Programmed Average-Talk Time: 30 (Returned in %S variable) Default MOH Source: None Attach this URL to calls:
Priority Initial Priority Level: 0 Escalates 1 every: 0 (Zero to Disable)	Estimated-Wait Time Padding: 0 Secs Running Average: 30 Secs (Strata ACD maintains this value based on actual historical call activity)

Refer to the following field descriptions.

FIELD	DESCRIPTION
	Preferred Agent
Auto Learn Preferred-Agent	Select one of the following: Never, Always, If preferred agent is missing on entry, Preferred-agent timeout in seconds.
	Before arriving at the ACD queue, a call may have been assigned a preferred agent (by an IVR, Intelligent Router). When that call is the highest-priority, oldest ringing call in this queue and that preferred agent is available, the call is routed to that agent instead of using the ACD queue's search options. If the preferred agent isn't available, the selected search option is used.

ACD Groups Tab

FIELD	DESCRIPTION		
Preferred-agent timeout	Enter number of seconds for timeout (default = 0). Valid entries = $0 \sim 9999$ . A timer can be set to allow a call to wait a certain number of seconds for an available preferred agent prior to going into the ACD queue. A call notification can be sent to the preferred agent's Net Phone.		
	Priority (Enhanced Models Only)		
Initial Priority Level	Define the Initial Priority Level using values from 0 to 100, with the higher number being a higher priority level. All calls delivered into this queue are assigned this level unless a Priority value is delivered with the call.		
Escalates 1 every:	To keep lower priority calls from getting stuck in queue, an escalation value can be assigned to increase the priority value by one each period (number of seconds). The call with the highest priority value is at the head of the queue.		
	Miscellaneous		
Programmed Average-Talk Time	Strata ACD maintains this value from actual historical information.		
Default MOH Source:	Defines the Music-on-hold (MOH) Source to be used by this ACD Group when calls are placed back into the queue waiting for an available Agent. The value can be from 1 to 15, see the <i>Strata CIX</i> <i>Programming Manual</i> for details for equipped MOH sources. MOH = 0 is silence.		
Attach this URL to calls:	Each ACD queue can be set up to attach a "scripting" reference (URL) to the call so that when a call arrives on an agent's telephone, the agent sees the "scripting" information and/or prompts to lead the agent through specific statements and questions.		
	Estimated Wait Time		
	Provides callers with calculated wait time using actual historical information.		
Padding	Expressed in seconds, this parameter is used to estimate the wait time given to callers when intelligent announcements are used. The number of seconds in this field is added by the system to the Running Average Talk Time.		
Running Average Talk Time	Strata ACD maintains this value based on actual historical call activity.		

## **Recording Announcements**

The announcements for Strata ACD are stored in the Voice Assistant module (see Table 6 for a list of Basic and Enhanced Default Announcements). A number of announcement types are offered as part of the package of Voice Assistant.

The installer can create custom scripts and announcements using the tools available in the Voice Assistant module.

This section defines the creation of announcements for the supplied scripts that come with the Strata ACD software. Strata ACD provides a default, pre-recorded, set of announcements which are used whenever customized announcements have not been recorded. These messages are shown in the following table and can be used as a guide for recording the customer's announcement.

To record any announcement, refer to the types of announcements chosen in the ACD Group parameters. For example, if a Simple Initial Announcement was selected, then the customized announcements to use in place of the default will be the Pilot DN + Suffix Code for Non-network ACD.

For Network ACD, this would be Node Number + Pilot DN + Suffix Code.

#### > To record this announcement

- 1. Use any phone and dial the extension number for the port(s) assigned to be used for System Administration (See Voice Assistant settings on page 7 or "View Ports" on page 43).
- 2. Enter the password 1234#. This password cannot be changed.
- 3. When prompted for the mailbox number, dial the Pilot DN, followed by the Announcement Number.
- 4. Follow the prompts for recording, listening, re-recording, etc.

#### Example for non-Network ACD:

In this example, the ACD Group is 1, the Pilot DN is 540 and the Simple Initial Announcement and Simple Periodic Announcement are selected.

- 1. Dial Voice Assistant Administration port telephone number, e.g. 211.
- 2. Follow the prompts and enter your password.
- 3. Dial 540 01 to record the first segment of the Simple Initial Announcement.
- 4. Dial 540 02 to record the second segment of the Simple Initial Announcement.

- 5. Dial 540 06 to record the first segment of the Simple Periodic Announcement.
- 6. Dial 540 07 to record the second segment of the Simple Periodic Announcement.
- 7. Follow the instructions for exiting and hang up.
- **Note** Do not record over the default announcements. This announcement is used by default and will affect all ACD Groups.

#### **Example for Network ACD:**

In this example, the ACD Group is 1, the Node Number is 11, the Pilot DN is 540 and the Simple Initial Announcement and Simple Periodic Announcement are selected.

- 1. Dial Voice Assistant Administration port telephone number, e.g. 11211 (Node 11 + Extension 211).
- 2. Follow the prompts and enter your password.
- 3. Dial 11540 01 to record the first segment of the Simple Initial Announcement.
- 4. Dial 11540 02 to record the second segment of the Simple Initial Announcement.
- 5. Dial 11540 06 to record the first segment of the Simple Periodic Announcement.
- 6. Dial 11540 07 to record the second segment of the Simple Periodic Announcement.
- 7. Follow the instructions for exiting and hang up.

**Note** Do not record over the default announcements. This announcement is used by default and will affect all ACD Groups.

ACD Announcement Ann. Default Announcement Model Description Suffix 9901 - "Thank you for calling" 01 Initial Announcement Basic 9902 - "Please hold and your call will be answered as quickly 02 (Simple) as possible" Periodic 06 9906 - "All of our Agents are busy serving other customers." Announcement Basic 9907 - "Please hold and your call will be answered as guickly 07 as possible." (Simple)

 Table 6
 Basic and Enhanced Default Announcements

ACD Model	Announcement Description	Ann. Suffix	Default Announcement
Initial Enh. Announcement (Q Position)		11	9911 – "Thank you for calling."
		12	9912 – "There are" 'x'
		13	9913 – "callers ahead of you."
	14	9914 – "Please hold and your call will be answered as quickly as possible."	
	Periodic Enh. Announce men (Q Position)	16	9916 – "Thank you for Holding."
		17	9917 – "There are" 'x'
Enh.		18	9918 – "callers ahead of you."
		19	9919 – "Please hold and your call will be answered as quickly as possible."
	Initial	21	9921 – "Thank you for calling."
Enh.	Announcement	22	9922 - "Your estimated wait time is:" 'MM:SS'
(Wait Time)	(Wait Time)	23	9923 –"Please hold and your call will be answered as quickly as possible."
	Periodic	26	9926 – "Thank you for Holding."
Enh.	Announcement	27	9927 - "Your estimated wait time is:" 'MM:SS'
	(Wait Time)	28	9928 –"Please hold and your call will be answered as quickly as possible."
	Initial Announcement (Q Position + VMail Option)	31	9931 – "Thank you for calling."
		32	9932 – "There are" 'x'
Enh.		33	9933 – "callers ahead of you."
· · ·		34	9934 – "To go to Mail press 1. To wait in queue press any other key."

#### Table 6 Basic and Enhanced Default Announcements (continued)

Table 6	Basic and Enhanced Default Announcements	(continued)	)
---------	--	-------------	---

ACD Model	Announcement Description	Ann. Suffix	Default Announcement
		36	9936 – "Thank you for Holding."
	Periodic Announcement	37	9937 – "There are" 'x'
Enh.	(Q Position +	38	9938 – "callers ahead of you."
	VMail Option)	39	9939 – "To go to Vmail press 1. To wait in queue press any other key."
	Initial	41	9941 – "Thank you for calling."
Enh.	Announcement	42	9942 - "Your estimated wait time is:" 'MM:SS'
	(Wait Time + Vmail Option)	43	9943 – "To go to voice mail press 1. To wait in queue press any other key."
	Periodic	46	9946 – "Thank you for Holding."
Enh.	Announcement	47	9947 - "Your estimated wait time is:" 'MM:SS'
	(Wait Time + Vmail Option)	48	9948 – "To go to voice mail press 1. To wait in queue press any other key."
	Initial	51	9951 – "Thank you for calling."
Enh.	Announcement (Preferred Agent)	52	9952 – "If you have a preferred Agent please enter the Agent's ID then press pound. Otherwise just press pound.
	Miscellaneous		9975 – "This ia a call back from"
Enh	Announcements		9976 - "Press 1 to accept the call back now."
	for all Call Back		9999 – "Otherwise press *"
	options		9977 – "Please wait while I place the call to"

ACD Model	Announcement Description	Ann. Suffix	Default Announcement
		53 <sup>1</sup>	9953 – "Thank you for calling."
		54	9954 – "There are"
		55	9955 – "callers ahead of you."
		56	9956 – "If you would like us to wait in line for you and call you back when your turn comes up, press 1. Press any other key to wait for the next available agent."
	Initial and	57	9957 – "After the tone, please state your name, extension number, and a brief description of your problem, then press #."
Enh	Periodic Announcement (Position + CB	58	9958 – "If we can reach you at this number press 1, otherwise press 2."
	option)	59	9959 – "Your phone number is"
		60	9960 – "Thank, you, an agent will call back as soon as possible."
		61	9961 – "Please hold and your call will be answered as quickly as possible."
		62	9962 – "Using keys on your phone, enter area code and phone number where we can reach you, press # when finished."
		63 <sup>2</sup>	9963 – "Thank you for holding."

#### Table 6 Basic and Enhanced Default Announcements (continued)

#### System Administrator

Recording Announcements

ACD Model	Announcement Description	Ann. Suffix	Default Announcement
		64 <sup>1</sup>	9964 – "Thank you for holding."
		65	9965 - "Your estimated wait time is"
	Initial and Periodic	67	9967 – "If you would like us to wait in line for you and call you back when your turn comes up, press 1. Press any other key to wait for the next available agent.""
		68	9968 – "After the tone, please state your name, extension number, and brief description of your problem, then press #."
Enh		69	9969 – "If we can reach you at this number press 1, otherwise press 2."
	Announcement (Wait Time +	70	9970 – "Your phone number is"
	CB option)	71	9971 – "Thank, you, an agent will call back as soon as possible."
		72	9972 – "Please hold and your call will be answered as quickly as possible."
		73	9973 – "Using keys on your phone, enter area code and phone number where we can reach you, press # when finished."
		74 <sup>2</sup>	9974 – "Thank you for holding."
Basic	Overflow	91	9991 - "Please hold while your call is transferred"
Basic	Overhead Page	96	9996 – "Calls waiting in queue equal" 'x'
Dasic	Overnead i age	97	9997 – "Please handle these calls."
		—	9997 – "Seconds"
Basic	Miscellaneous	—	9998 – "Minutes"
Dasio	Prompts	_	9993 – "Calls waiting in queue equal"
		—	9994 - "please handle these calls."
1. Annou	ncement used in an	Initial Ar	nouncement only.
2. Annou	ncement used in a l	Periodic A	Announcement only.

#### Table 6 Basic and Enhanced Default Announcements (continued)

Note Changing one type of announcement (Initial), automatically changes the other (Periodic).

# Strata ACD

This chapter explains how to access the status views for Strata ACD groups, calls, ports, clients and events. Instructions for initially setting up the views are included.

Also included are instructions for accessing the Toshiba-Keyset Interface (TKI) and MIS Server windows.

## Views and Events Log

Your PC should be set up so that the following ACD views can be accessed by clicking on the icon (as shown at the top of the page 40). If the icon is not visible and you can't open the view from Start > Programs > OAISYS, then perform the following to set up the Strata ACD views:

## Set Up ACD Views

- 1. Access current services: Open the Net Server. Click on the Services tab.
- 2. Make Strata ACD visible: Right click on the Strata ACD item in the Net Server Service tree and choose Show Service.
- 3. Ensure the Module is operational: Log in (default user/password is admin/ admin). The Strata ACD views window appears (shown on the next page).

For additional help on setting up Strata ACD or other ACD modules, refer to the *Strata CIX ACD Installation Guide* on the Strata ACD CD-ROM.

## **View Groups**

To access the Strata ACD views, double-click on the Strata ACD icon (shown right).

		w Groups>	🔽 ti 🧧		SYS Net	Client	Logon			
		ACD Grou	ips				-			
	CTX Support	-	G	roup Prop	erties					
	– Calls Queue	d 1				- Calls Not Qu	ieued: 2			
		ority Inception		ACD State		Call ID	Monitor ID	Priority	Inception	
	8		01:59:31 PM	AlertingACD		@4NH	896	17	05/23/2002 01:41:5	57 PM
						@40S	922	14	05/23/2002 01:48:3	31 PM
						_				
	•				•	•				
	Agents: 7—									
	ID	Name	Logged In	Extension	Monitor ID	State			Call Queue	Ca
	1101	Ron Barlow	Yes	3177:3177	705	Non-ACD (	Call (W:1 s)		(1) @4QU:Talking	2
t	1102	Nestor Chacon	Yes	3600:3600	300	ACD Call (6	6953:6953)		(1) @4NH:Talking	14
	<b>1</b> 1103	Nghia Pham	Yes	3624:3624	706	ACD Call (6	(953:6953)		(1) @40S:Talking	17
	4105	Gwen North	No			N/A			<no calls=""></no>	0
	🖸 5105	Gwen North	No			N/A			<no calls=""></no>	0
	🕂 5101	Jeff Vogler	Yes	3779:3779	811	Ready			<no calls=""></no>	0
	4101	Jeff Vogler	No			N/A			<no calls=""></no>	0
	so									
rvi										_
rvi										_
rvi										
rvi										

😫 ACD

From the View Groups window, you can see call traffic for each ACD group.

Most of the items and fields are self-explanatory or have been previously described in Chapter 1 - System Administration.

**Note** The "Monitor ID" is a reference number that can be used to search for specific items in the log files.

#### **View Group Properties**

1. From the ACD View Groups window, click the Group Properties button. The following two windows provide a summary of the data set from the Strata ACD System Administrator application.

🖷, Group 'CTX Suppo	rt' Properties	×
ID: Description: Search Algorithm (A);	CTX WinAdmin and License S	Initial Announcement Time: 00:00:12 Action: [Initial Announcement (simple)
Search Algorithm (S): No Answer Advance: Wrap-up:	00:00:40	Periodic Announcement Time: 00:01:00 Max: 0 Action: Periodic Announcement (position)
Missed Call Action: Music On Hold Enable Type:	None	Overflow Time: 00:10:00 Action: CTX Transfer to Overflow #1
		<< <u>Previous</u> <u>Next&gt;&gt;&gt;</u> <u>O</u> kay

2. To view the second Group Properties window, click Next.

🗟, Group 'CTX Support' Properties		×
Simple Schedule (Not Used) Start: Stop: Stop: Sunday Vednesday Saturday Monday Thursday Tuesday Friday Last Agent Log Out/Unavailable Allowed always Allowed only if no queued calls	Talk Time           Call Count:           Total:           23.09.04           Average:           00:12:05           Est. Average:           00:00:30	
	<< Previous Next >> Dext >>	
	6	3296

## **View Calls**

Enables you to view all ACD calls in the telephone system.

> To see View Calls, Ports or Clients, select the desired view from the Views drop down window.

itrata ACD Setup H								_ 8
		/iews		Click to see	other view	s. Highlight	desired view.	
■ <b>  ●</b>   <v< th=""><th>/iew Calls&gt;</th><th></th><th>• tì</th><th>₽</th><th></th><th></th><th></th><th></th></v<>	/iew Calls>		• tì	₽				
Calls: 36								
Call ID	Monitor ID	Туре	Dir	Outside Number	Outside Name	Devices	Account	<u> </u>
@219		IC	IC	T109I06		(1) C01:C01		
@22A		IC	IC	T100I06		(1) C01:C01		
@2GM		CO	Out	3700		(2) C01:C01, 37		
@2RS		IC	IC	T21I01001		(1) C01:C01		
@336		IC	IC	T14I01001		(1) C01:C01		
@391		IC	IC	T112I06		(1) C01:C01		
@3C3		IC	IC	T111106		(1) C01:C01		
@3KJ		IC	IC	T108I06		(1) C01:C01		
@402		IC	IC	T22I01001		(1) C01:C01		
@409		CO	Out	103172		(1) C01:C01		
@4GW	769	CO	In	9166301102		(2) T70106:T701	9999	
@4HL	781	CO	In	5734715126		(3) T74I06:T74I	9999	
@4HS	783	IC	IC	T111106		(1) C01:C01		
@4LE	851	IC	IC	3169425590		(2) T82106:T821	9999	
@4NH	896	IC	IC	6088496376		(2) T83I06:T83I	9999	
@400	919	CO	In	5167994314		(3) T73I06:T73I	9999	
@40S	922	CO	In	3607345345		(3) T75I06:T75I	9999	6297
@40W	925	CO	In	4074720012		(3) T76I06:T76I	9999	6297

Most of the fields are self explanatory, but a few which require further explanation are described below:

FIELD	DESCRIPTION
Call ID	The ACD system automatically assigns an ID number with an "@" mark at the beginning.
Outside Number	If Caller ID is available, the telephone number displays; otherwise, the trunk number displays.
Devices	All of the devices involved in handling the call are listed. The number of involved devices appears in parentheses.

### **View Ports**

This view enables you to see the Voice Assistant ports.

🚰 Strata ACD		
File Setup Hel	P	
Ports: 4	w Ports>	• 11 B
Extension	Monitor ID	
2301:2301	059	
2302:2302	060	
2303:2303	061	
2304:2304	062	
		6298

FIELD	DESCRIPTION
Extension	The number before the colon represents the Primary Directory Number of the device involved. The number after the colon is the actual extension number being used.

## **View Clients**

This window enables you to view the ID numbers and names of all ACD Groups and Agents.

Handle Number associated with the TCP/IP number. Assigned at the time of connection for ID purposes.

rata ACD		
Setup Help		
View Cli	ents> 💽 🚹 🛒	
40	Echo events: Yes Everthir	n Interest: Man
,		g morest. [LBS
Groups of Interes	st 18	
ID	Name	
10	INdille	
6951:6951		
	Tech Support KS	Image: state stat state state s
6951:6951		
6951:6951 6952:6952 6953:6953	Tech Support KS Tech Support VM CTX Support	
6951:6951 6952:6952	Tech Support KS Tech Support VM CTX Support	
6951:6951 6952:6952 6953:6953	Tech Support KS Tech Support VM CTX Support	
6951:6951 6952:6952 6953:6953 Agents of Interes	Tech Support KS Tech Support VM CTX Sunnort It 45 Name	
6951:6951 6952:6952 6953:6953 Agents of Interes	Tech Support KS Tech Support VM CTX Support	
6951:6951 6952:6952 6953:6953 Agents of Interes ID 4107	Tech Support KS Tech Support VM CTX Sunport t: 45 Name Rodney Roeber	
6951:6951 6952:6952 6953:6953 Agents of Interes ID 4107 4109	Tech Support KS Tech Support VM TTX Support tt 45 Name Rodney Roeber Bob McCormick	

FIELD	DESCRIPTION
Echo Events	"Yes" means that data should be transmitted in two directions (between the Client and the PBX). Do not change this setting.
Everything Interest	"Yes" means that all information should be echoed. Do not change this setting.
Groups of Interest and Agents of Interest	All ACD Groups and Agents are listed by ID number.

## **Strata ACD Events**

This window provides a log file of ACD events.

▶ From the Strata ACD window, select Setup menu > Show Activity.

Strata ACD Events	DGRPN=ACD Grp #11 500,E,3900.3900,3900.390 DGRPN=ACD Grp #11
Exit Display Clear	
6092 14:07:20.8] RX: CF.LVL20AI,SETCALLINF0X.,0,Success,@6F0ACDGRP,3900.3900	
6093 14:07:20.9] RX: AE,LVL2DAI, RAWCMD.,001,CALLINFO.,810,@6F0,ACDGRP=3900.3900[CalledIDNum=3900]	
6094 14:07:20.9] RX: CF.LVL20AI.SETCALLINF0X_0.Success,@6F0.ACDGRPN.ACD Grp #1	
6095 14:07:20.9] RX: AE.LVL20AI, RAWCMD001.CALLINF0810.@6F0.ACDGRP=3900.3900ICaledIDNum=3900IACDGRPN=ACD G	irp #11
6096 14:07:20.9] RX: CF,LVL20AJ,RAWCMD,,244,CF,_MS,3470,0,1,891,@6F0	
6097 14:07:20.9] TX: LVL20AI,RAWCMD,INSC,7012,@6F0	
56098 14:07:20.9] RX: AE,LVL20AI, RAWCMD,.001.CALLINF0.,891,@6F0,ACDGRP-3900:3900[CaledIDNum-3900]ACDGRPN-ACD G	irp #11
6099 14:07:20.9] RX: CF.LVL20AJ.RAWCMD245.CFM0.7011.0	
6100 14:07:21.1] RX: AE,LVL20AI, RAWCMD, 001, hTVF, 803, @6F0,3025:3025,T10103003;T10103003,0	
i6101 14:07:21.1] RX: AE,LVL2DAI, RAWCMD, 001, hTVF, 891, @6F0,3025.3025,T10103D03:T10103D03,0	
6102 14:07:21.1] RX: AE,LVL20AI, RAWCMD.,001,DI.,810,@6F0.3900.3025:3025,A.	
6103 14:07:21.1] RX: AE LVL20AL RAWCMD.,001.01,891,@6F0.3900.3900.3025:3025.A.	1911011010
6104 14:07:21.1] RX: AE,LVL2DAI, RAWCMD,.001.DE.,803,@6F0,3025.3025.JL110103003;T10103003,JL.T10103003,3500,E,3900.390	0,3900:390
6105 14:07:21.1] Call @6F0 changing from state AlertingACD to state AlertingVAPort	
6105 14:07:21.1] Call '@6F0' lock set to False	
6107 14:07:21.1] State 'AlertingACD' terminated	3 1935 10
6108 14:07:21.1] RX: AE,LVL2DAI, RAWCMD.,001,CALLINFO.,803,@6F0,ACDGRP-3900.3900[CalledIDNum=3500]ACDGRPN-ACD_G	
56109 14:07:21.1] RX: AE LVL2DAI, RAWCMD, 001.DE, 891 (26F0,3025;3025,1,11003003;11003003)[,11003003;3500,E,3900;390	
6110 14:07:21.1] RX: AE LVL20AL RAWCMD_001_CALLINF0_891_@6F0_ACDGRP=3900_3900[CatedDNum=3500[ACDGRPN=ACD_G	ind #1
6111 14/07.21.1] RX: CF.LVI.204/RAWCND, 246.CF.InSC.7012.0.@6F0.2.11003003.T1003003.C.3025.3025.A	-
36112 14:07.21.3] RX: AE LVL2DAI, RAWCMD.,001 ES.,803 (@6F0,3025:3025, J, T10103003, T10103003, 3500, E, 3900,	L.,
50113 14:07:21.3] Call @EPD changing from state AlertingVAPort to state ConnectedToVAPort	
16114 14:07:21:3] State 'Alerting'APort' terminated	
66115 14:07:21.3] RX: AE LVL2DAI, RAWCMD.,001,CALLINFO.,803,@6F0.ACDGRP=3900.3900[CaledIDN##78500]ACDGRPN=ACD G 66116 14:07:21.5] RX: AE LVL2DAI, RAWCMD.,001.ES.,891,@6F0.3025:3025.J.110103003.110103003,.3500.E.3900.3900.3900.3900.	
6116 14:07:21.5] HX: AE LVL2DAI, RAWCMD, 001,ES, 891,@eP0,3025;3025,1,11003003;110103003,3500,E,3500,8500,3500, 66117 14:07:21.5] HX: AE LVL2DAI, RAWCMD, 001,CALLINFO891,@eF0,ACDGRP=3900;3900;CalediDNum=3500[ACDGRPN=ACD G	
	npen 🚬
	· · //

## **Toshiba-Keyset Interface**

This window shows all of the telephone devices involved in ACD calls and provides information about the telephone state, type of telephone (keyset), the dialed number, the Agent ID, and the extension numbers involved with the calls.

🖫 ткі

To access the Toshiba-Keyset Interface window, double-click on the TKI icon (shown right).

Keyset State Talking Talking Talking Alerting	Keyset Type Large Display Large Display Large Display	Call Queue (1) @1XS<6802:6802>: (4) @1CZ<7110:3701>:	Agent ID 8002 1003	Logged-In E: 6802:6802
Talking Talking Talking Talking	Large Display Large Display	(1)@1XS<6802:6802>:	8002	
Talking Talking Talking	Large Display			6802:6802
Talking Talking		[4] @1CZ 110:3701 :		
Talking	Large Display			7110:7110
			8005	6800:6800
	KT 3000	(1) @4RN<3386:3386>	5111	3386:3386
	Large Display	(3) @2GZ<6806:6806>	8102	6806:6806
Talking	Large Display	(3) @1GN<6810:6810>	8106	6810:6810
Idle	Large Display	<none></none>	8001	3582:3582
				6808:6808
				3681:3681
				3782:3782
				3624:3624
				3393:3393
Talking	KT 3000	(1) @4NH<3600:3600>	1102	3600:3600
Idle	Large Display	(1) @404<3687:3687>:	6002	3687:3687
Talking	KT 3000	(1) @4BH<3726:3726>	4115	3726:3726
DisplayGroupStatus (Idle)	1 Settings		×	3779:3779
Alerting	k			3378:3378
Talking	k [		1000	3177:3177
Talking	k 🔽 Display	"Call To:" for 10 secon	ids.	3091:3091
Idle	L L			7109:7109
DisplayGroupStatus (Idle)	N			3374:3374
	Talking Alerting DisplayGroupStatus (Idle) DisplayWrapUpStatus (Idle) Talking Talking DisplayGroupStatus (Idle) Alerting Talking Talking Idle	Talking     Large Display       Alerting     Large Display       DisplayGroupStatus (Idle)     KT 3000       DisplayWrapUpStatus (Idle)     KT 3000       Talking     KT 3000       Talking     KT 3000       Idle     Large Display       Talking     KT 3000       Idle     Large Display       Talking     KT 3000       Idle     KT 3000       Idle     Large Display       Talking     K       Idle     Large Display	Talking         Large Display         (1) @1R2.6808.68083           Alerting         Large Display         (1) @2Q2.3661.36813           DisplayGroupStatus (Idle)         KT 3000         «None>           Talking         KT 3000         «None>           Talking         KT 3000         (1) @4G94.3393.3393           Talking         KT 3000         (1) @4G94.3393.3393           Talking         KT 3000         (1) @4G94.3393.3393           Talking         KT 3010         (1) @4G94.3597.36875           Talking         KT 3010         (1) @4G14.3597.36875           DisplayGroupStatus (Idle)         Large Display         (1) @4G44.3597.36875           DisplayGroupStatus (Idle)         Large Display         (1) @4G44.3597.36875           DisplayGroupStatus (Idle)         Large Display         (1) @4G41.43276.3726.           Jaiking         Large Display         Call To:" for 10         secon           Idle         Large         Large Display         Call To:" for 10         secon	Talking         Large Display         [1] @1P2(c6006.6008)         8104           Alerting         Large Display         (1) @2Q2(c3681.3681)         8101           DisplayGroupStatus (Idle)         KT 3000 <none>         5112           DisplayMapUpStatus (Idle)         KT 3000         <none>         1103           Talking         KT 3000         (None&gt;         1103           Talking         KT 3000         (1) @40w(3393.3393         4109           Talking         KT 3000         (1) @40w(3397.3687)         6002           Talking         KT 3000         (1) @40w(3397.3687)         6002           Talking         KT 3000         (1) @40w(3397.3687)         6002           Talking         KT 3000         (1) @40w(3397.3726.3726).         4115           DisplayGroupStatus (Idle)         L         Settings         ¥           Talking         K         Settings         ¥           Talking         K         Talking         10         seconds.</none></none>

You can also configure the number of seconds (1~99 sec.) the ACD Group name displays on the LCD. This setting affects all ACD groups and if not changed, defaults to 10 seconds.

#### ► To change the display time

- 1. Highlight a Keyset Type on the Toshiba-Keyset Interface window.
- 2. Click Setup > Settings. A Settings window displays (shown above) and you can type in the number of seconds required.
- 3. Click OK.

## **MIS Server**

This window shows which Management Information Services (MIS) servers are in use, their TCP/IP number, and provides a history of events.

MIS

➤ To access the MIS Server window, double-click on the MIS icon (shown right).

HIS Serv	/er					_ 0
=ile Test I	Help					
😴 😴	тср	/IP Number				
	/					
Handle	Description /	Connection Date/Time	Events Received	Events Transmitted	Last Transmission Date/Time	
11	159.119.120.52	05/22/2002 11:52:52 AM	1	77217	05/23/2002 02:13:07 PM	
12	159.119.120.52	05/22/2002 11:53:25 AM	6319	83371	05/23/2002 02:13:07 PM	

6300

This page is intentionally left blank.

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