TOSHIBA

Strata®

CIX™

ACD System Administrator Guide

September, 2007

Toshiba America Information Systems, Inc.
Telecommunication Systems Division

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Chapter 1 – System Administrator

Chapter 2 – Strata ACD

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.
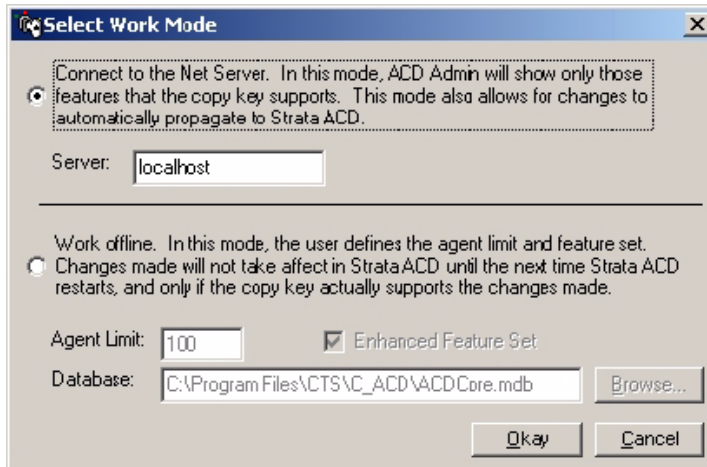
System Administrator 1

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.
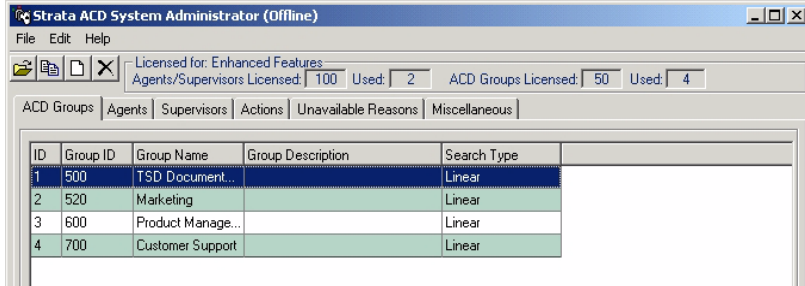
4. Click on the Strata ACD System Administrator icon on the Windows toolbar.

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:

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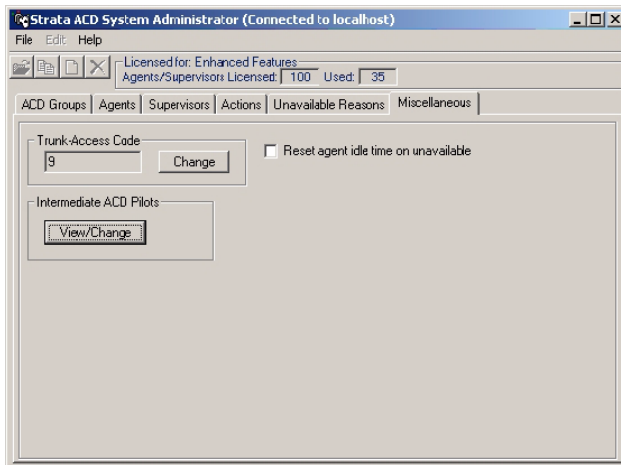
FIELD	DESCRIPTION
Trunk Access Code	The trunk access code for dialing out (e.g., 8 or 9. Field defaults to 8.
	Intermediate ACD Pilots Intermediate Pilot DNs are provided as a means for directing a call into an ACD Pilot. This simulates getting a DNIS number for MIS reporting.

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 *Strata CIX ACD Installation Guide*.)
	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.
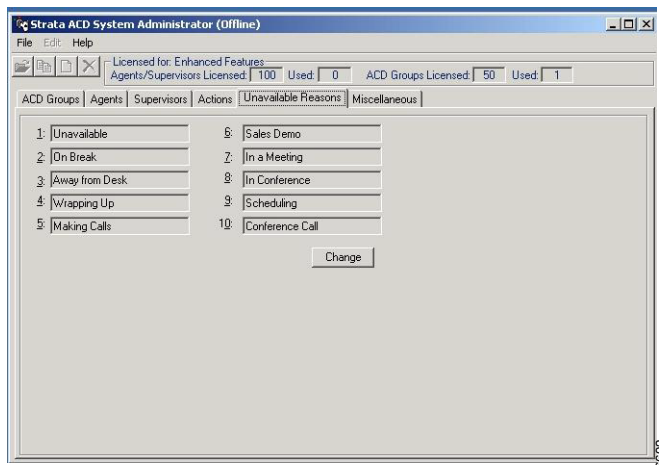
Actions Tab

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.

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 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: • Initial Announce • Periodic Announce • Overflow/ReRoute • Alarms/Notifications • Enhanced Call Management (Enhanced)

FIELD	DESCRIPTION
Type	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 • Announce with Callback (Enhanced) • Interflow (Enhanced) • Share Agents (Enhanced)
	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 preempting this call	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. When not checked, the call with the highest priority not connected to an announcement will get delivered to an available agent.

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.
App Topic	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.

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 group	Available settings: None (default), Group IDs/names of available ACD groups
	Note 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, Scripts and Parameters *(continued)*

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[1]
Periodic Announcement (wait time)	Transfer Call to IVR/ Announcement	826	G1	%G,%B,%S[1]
Initial Announcement (position + VM option)	Transfer Call to IVR/ Announcement	831	G1	%G,%B,%S,**#407,%G**[2]
Periodic Announcement (position + VM option)	Transfer Call to IVR/ Announcement	836	G1	%G,%B,%S,**#407,%G**[2]
Initial Announcement (wait time + VM option)	Transfer Call to IVR/ Announcement	841	G1	%G,%B,%S,**#407,%G**[3]
Periodic Announcement (wait time + VM option)	Transfer Call to IVR/ Announcement	846	G1	%G,%B,%S,**#407,%G**[3]
Initial Announcement (preferred agent)	Transfer Call to IVR/ Announcement	851	G1	%G,%I
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.

Table 2   Variables

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.
%O	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 Available Agents and Supervisors>.
Var.	**Call Variables Description**
%A	The call's account number.
%B	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 *(continued)*

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

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 wrap-up 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.

Table 3 Share Agent's Behavior

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 *(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 ✶ 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.

Table 4   Call Back Behavior

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).
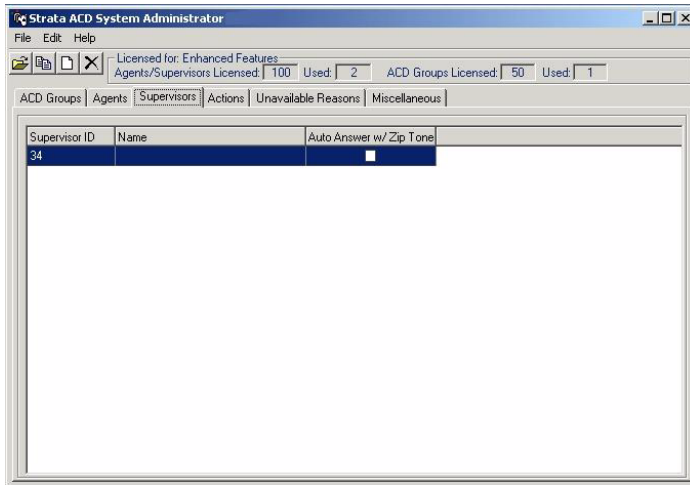
➤ **To change or add a Supervisor**

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.

4. Click OK.
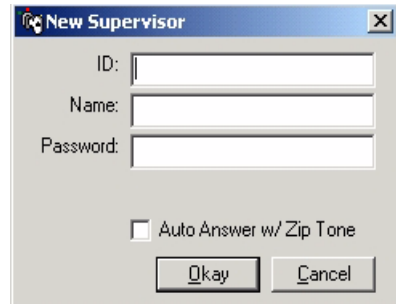
FIELD	DESCRIPTION
ID	This is a unique number; the system does not allow duplicate IDs. Digit length must be five digits or less. For Network ACD, the Node Number does not need to be inserted in front of the Supervisor ID.
Name	This name will appear on the Supervisors tab.
Password	This is optional and 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).
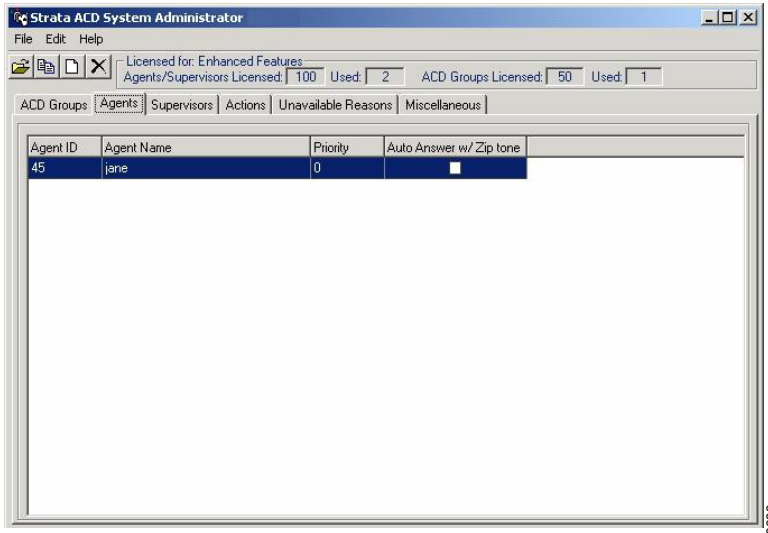
➤ **To change or add an Agent**

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.
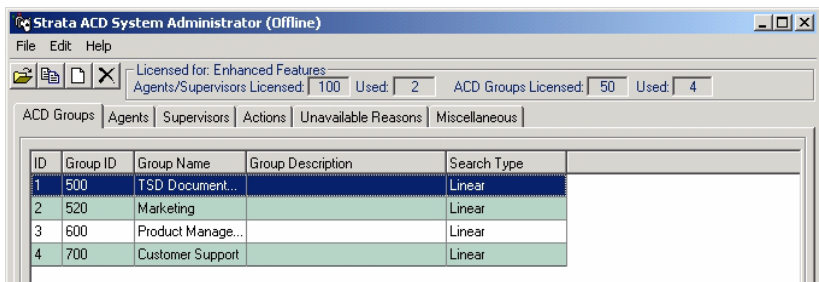
FIELD	DESCRIPTION
Agent ID	This is a unique number; the system does not allow duplicate IDs.
	Digit length must be five digits or less. For Network ACD, the Node Number does not need to be inserted in front of the Agent ID.
Name	This name will appear on the Agents tab.
Password	This is optional and can 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.

General Tab

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.

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

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

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.
	Note 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).
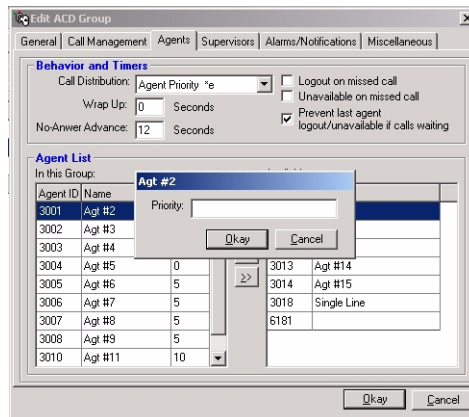
Supervisors Tab
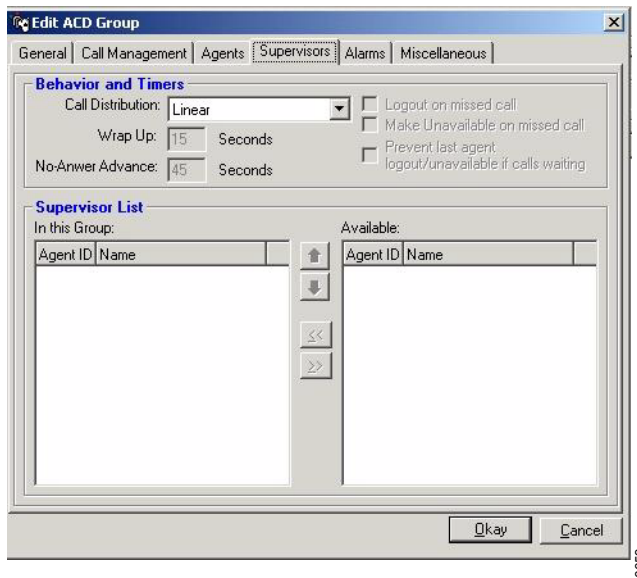
Refer to the following field table when entering or changing Supervisor information.

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.

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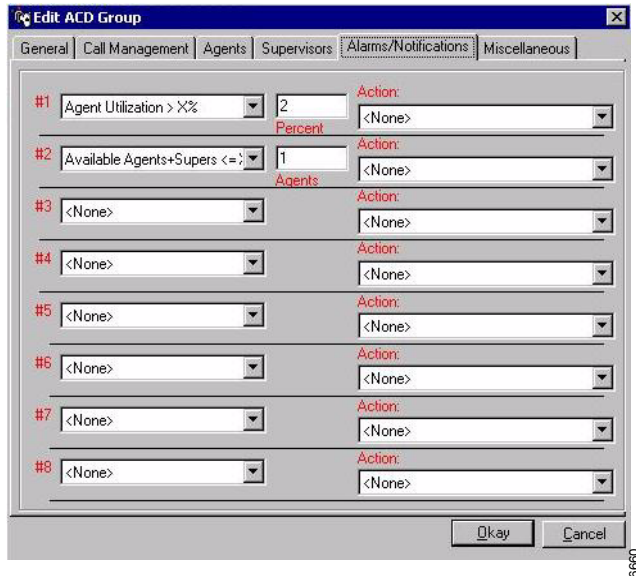
Up to eight alarms can be reported to the Supervisor for each ACD Group. These alarms are defined by choosing an alarm to be reported and then selecting the action to be performed when the alarm occurs. See Table 5 for a list of available alarms.

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

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 • Alarm Active Agents - Send Message to LCD phone. • Alarm Available Agents - Send Message to LCD phone. • Alarm Abandoned Call - Send Message to LCD phone. • Alarm Calls Waiting - Send Message to LCD phone. • Alarm Longest Wait - Send Message to LCD phone. • Alarm CW per Agent - Send Message to LCD phone. • Select Tone – none - Send Message to LCD phone. • Select Tone – Emergency Ring - Send Message to LCD phone. • Select Tone – Splash - Send Message to LCD phone. • Select Rate – Play Continuous - Send Message to LCD phone. • Select Rate – Play once - Send Message to LCD phone.

Table 5   Available Alarms

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).
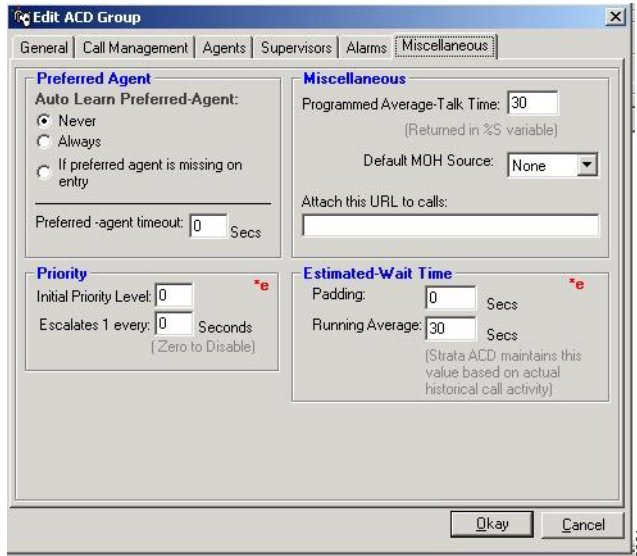
Refer to the following field descriptions.

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.

Field	Description
Preferred-agent timeout	Enter number of seconds for timeout (default = 0). Valid entries = 0~9999. 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 *Strata CIX Programming Manual* 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.

Table 6   Basic and Enhanced Default Announcements

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

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

ACD Model	Announcement Description	Ann. Suffix	Default Announcement
Enh.	Initial 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."
Enh.	Periodic Announce men (Q Position)	16	9916 – "Thank you for Holding."
		17	9917 – "There are" 'x'
		18	9918 – "callers ahead of you."
		19	9919 – "Please hold and your call will be answered as quickly as possible."
Enh.	Initial Announcement (Wait Time)	21	9921 – "Thank you for calling."
		22	9922 – "Your estimated wait time is:" 'MM:SS'
		23	9923 –"Please hold and your call will be answered as quickly as possible."
Enh.	Periodic Announcement (Wait Time)	26	9926 – "Thank you for Holding."
		27	9927 – "Your estimated wait time is:" 'MM:SS'
		28	9928 –"Please hold and your call will be answered as quickly as possible."
Enh.	Initial Announcement (Q Position + VMail Option)	31	9931 – "Thank you for calling."
		32	9932 – "There are" 'x'
		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)*

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

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

ACD Model	Announcement Description	Ann. Suffix	Default Announcement
Enh	Initial and Periodic Announcement (Position + CB option)	53[1]	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."
		57	9957 – "After the tone, please state your name, extension number, and a brief description of your problem, then press #."
		58	9958 – "If we can reach you at this number press 1, otherwise press 2."
		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[2]	9963 – "Thank you for holding."

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

ACD Model	Announcement Description	Ann. Suffix	Default Announcement
Enh	Initial and Periodic Announcement (Wait Time + CB option)	64[1]	9964 – "Thank you for holding."
		65	9965 – "Your estimated wait time is ..."
		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 #."
		69	9969 – "If we can reach you at this number press 1, otherwise press 2."
		70	9970 – "Your phone number is..."
		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[2]	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'
		97	9997 – "Please handle these calls."
Basic	Miscellaneous Prompts	—	9997 – "Seconds"
		—	9998 – "Minutes"
		—	9993 – "Calls waiting in queue equal ..."
		—	9994 – "...please handle these calls."
1. Announcement used in an Initial Announcement only.			
2. Announcement used in a Periodic Announcement only.			

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

Strata ACD

2

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). 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).

👪 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.

6295

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

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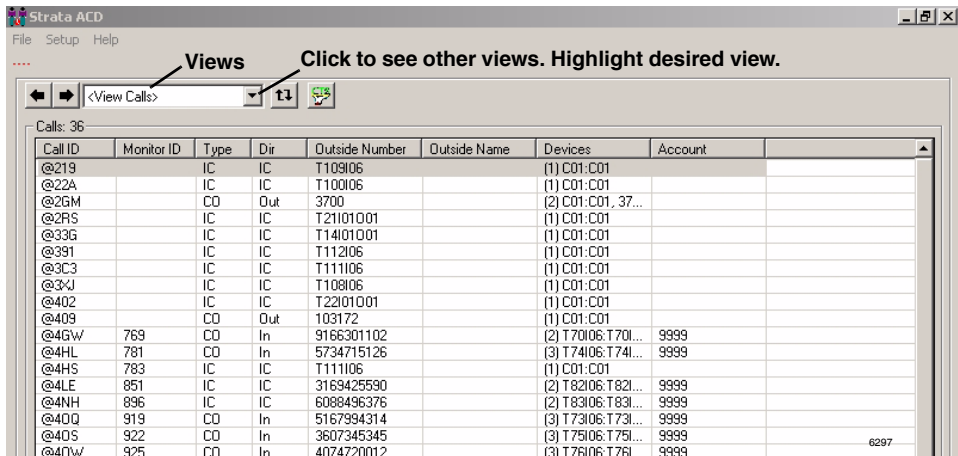
Most of the fields are self explanatory, but a few which require further explanation are described below:

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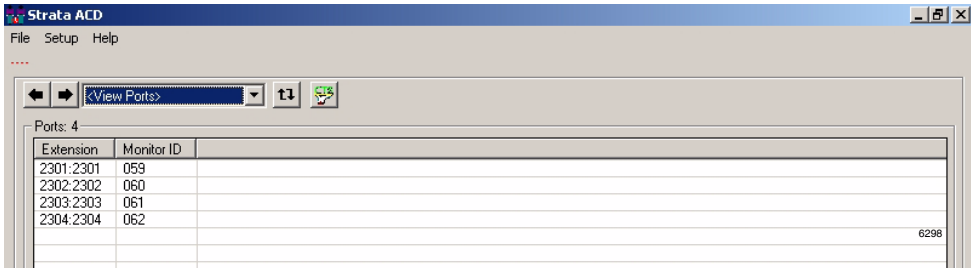
FIELD	DESCRIPTION
Extension	The number before the colon represents the Primary Directory Number of the device involved. The number after the colon is the actual extension number being used.

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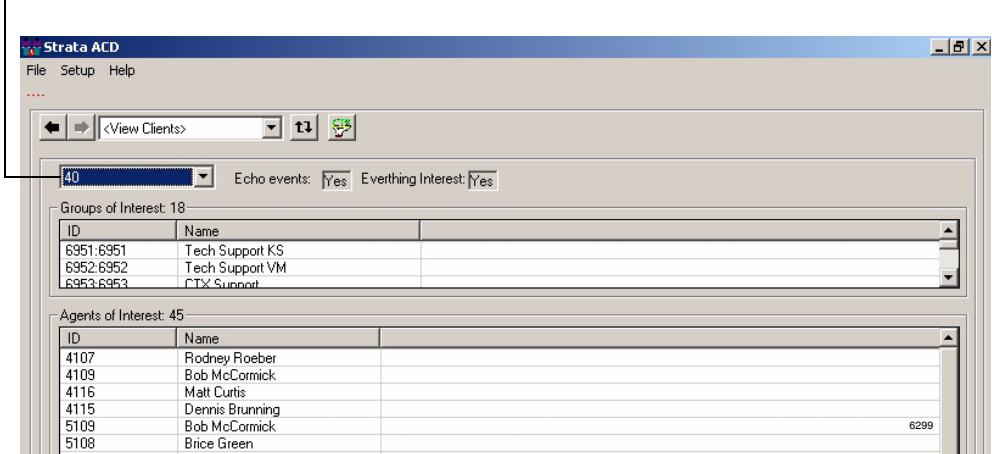
FIELD	DESCRIPTION
Echo Events	"Yes" means that data should be transmitted in two directions (between the Client and the PBX). Do not change this setting.
Everything Interest	"Yes" means that all information should be echoed. Do not change this setting.
Groups of Interest and Agents of Interest	All ACD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

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.

➤ To access the Toshiba-Keyset Interface window, double-click on the TKI icon (shown right).
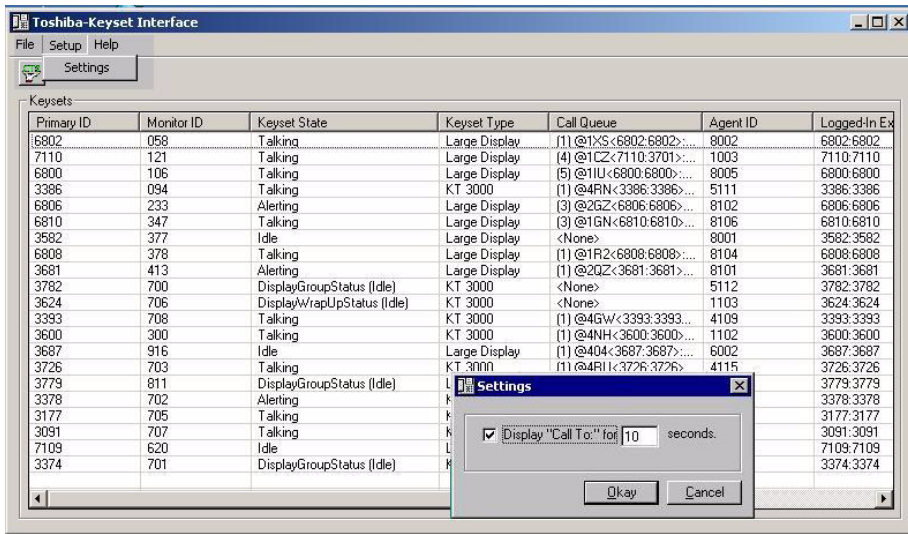
You can also configure the number of seconds (1~99 sec.) the ACD Group name displays on the LCD. This setting affects all ACD groups and if not changed, defaults to 10 seconds.

➤ **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.

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

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