Contact Center Administrator Manual

Release Version 4.66

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Preface

Objectives

This guide describes how to use the Contact Center Administration application, the Contact Center Call Control Scripts Administration application, the Contact Center Graphical Call Control Script Administration application and the Wallboard Administration application. It describes how to configure the system to route calls. It is intended for contact center administrators.

For hands-on information on the Contact Center Administration, the Contact Center Call Control Scripts Administration, the Contact Center Graphical Call Control Script Administration and the Wallboard Administration applications, please refer to the On-Line help. For a description of many of the Contact Center concepts and terms used in this document, refer to the Glossary.

Documentation Overview

The followings documents are available for the Contact Center system:

- Contact Center Administrator Guide
- Context Sensitive On Line Help
- SuperVisor User Manual
- Contact Center Agent User Manual
- Contact Center Installation and Getting Started Guide
- Integration with CRM Applications Reference Guide.

Document Conventions

The following conventions are used in this guide:

- Data-entry fields, hypertext links, control buttons, keywords, and other items within the system management interface are in a **boldface** font.
- Information that you enter in data fields are in a `data_entry` font.

Disclaimer

Table of Contents

CHAPTER 1

Introduction

1.1 ShoreTel Contact Center Server Software

The ShoreTel Converged Conference Solution is an advanced routing system that handles contacts according to defined business rules. ShoreWare Contact Center Director provides an easy-to-use, point-and-click interface for server management.

The main features of the ShoreTel Contact Center Server software include:

- **Enhanced Routing Methods** that use Intelligent Routing Numbers (IRN) as entry points to the routing system. At different times of the day, an IRN can be assigned to different destinations, such as a Service, Call Control Script, or external extension in the ShoreTel system. The ShoreTel Contact Center Solution offers many call routing methods.
- **Call Control Scripts (CCS)**, together with the Interactive Voice Response (IVR), collect callers' information and provide information to callers through recorded voice files. A Call Control Script defines the actions applied to a call. The IRN can send arriving calls or calls waiting in a queue to a Call Control Script.
- **Dynamic Updating** of a Call Profile during the processing of a call. Each call that enters the system via an IRN is assigned a call profile. A call profile is a list of fields and attributes associated with the call. The numbers and content in the call profile change dynamically as the call is routed through the system. The information in the call profile is used to collect caller information and to route the call to its most skilled service or agent. Each ShoreTel Contact Center Solution installation provides customizable fields, which can be defined and assigned dynamically to the call profile. Changes to the call profile are made in the Call Control Scripts and/or by the IRN that initially receives the call.

1.1.1 Contact Center Director

Contact Center Director is the administrative software that allows you to configure the entities of the Contact Center and set the system parameters. Contact Center Director provides a single, complete interface for system administration.

Contact Center Director is installed on the Contact Center Server and access is controlled by a lock device and passwords. To access Contact Center Director, a server or full supervisor lock device must be installed on the Contact Center Server.

Contact Center Director can be used by supervisors with the proper access levels. You define supervisors and their access to Contact Center Director from the Supervisors entities page. Multiple administrators and supervisors with different rights can be configured in Contact Center Director, and each account requires a lock device for access.

1.1.2 Entities

The concept of entities is essential in Contact Center management. An entity defines a group of configuration parameters and business rules that determine how calls are routed, reported and managed. In Contact Center Director, configuration parameters are grouped according to the entities concept. Some entities include all parameters for configuring agents, groups, services, and system options. Through entities, you can set essential configuration options and define the business rules to apply to Contact Center calls.

1.1.3 Services

The ShoreTel Contact Center Solution offers the contact center administrator a variety of call routing methods, including Route by ANI, Best Fit, Agents Skills, and others. These routing options are defined as services. A service defines how a call is processed. Every incoming call to the contact center is assigned to a specific service, such as sales of specific products, banking services, or travel agency services.

1.2 Logical Call Flow in the Contact Center

The following is a typical scenario for processing a call:

1. The system receives a message from the ShoreTel system about a new call with optional ANI information. The system decides on a target IRN for the call.
2. The server uses the IRN entity definitions to:
   - Assign the call profile initial values, including Call Priority and ANI.
   - Define the next destination for the call, such as a target service or Call Control Script, based on shifts and the default destination.
3. When the destination is a service, the call enters the service, where it may receive a mandatory announcement. Then the server starts the procedure of matching an agent with the call.
   - If there is one available agent in the group providing the required service, the call is immediately routed to that agent.
   - If there is more than one available agent in the group providing the required service, the system uses the service's Agent Search Criteria to select the appropriate agent for the call.
   - If there is no available agent in the group, the call is queued to wait for an agent to become available. In the queue, the call can transfer to the service's music source, the first or second announcement, or a Call Control Script. When an agent becomes available, the server uses the agent's Call Answer Strategy to decide which call to route to the agent. The Call Control Script can modify the behavior of the routing and call flow, or provide callers with alternate service choices such as callbacks or self-service.
   - In the queue, a call can overflow to other groups, making a larger number of agents available to take the call.
   - In the queue, a call can interflow to another extension for service.

CHAPTER 2

ShoreTel Integration

2.1 Overview

The ShoreTel system and the ShoreTel Contact Center solutions are connected via a software interface over the IP network. The interface, which conforms to the industry-standard Telephone Application Programming Interface (TAPI), allows the system and application to exchange call control information. It also allows interaction with audio play files and can respond to callers' keypad inputs.

The ShoreTel system interfaces to the Contact Center are:

- **Destinations:** Dialable extensions in the ShoreTel system configured as route points that deliver calls to the contact center IRNs.
- **IVR Ports:** An interface between callers and IVR scripts configured as route points in the ShoreTel system. IVR ports provide caller interactions and connecting callers to music or announcements while the caller is in the queue.
- **Agents:** Normal extensions in the ShoreTel system used by agent in the contact center. Agent extensions are monitored by the contact center to make routing decisions, and for reporting.
- **Trunks:** Normal trunks in the ShoreTel system monitored by the contact center to provide reporting.

Integrating the ShoreTel Contact Center Solution with a ShoreTel system requires ShoreTel 5.1 or later. This chapter assumes that you have successfully installed:

- ShoreWare Distributed Server software
- ShoreWare Contact Center Server software

To support the Contact Center, you must also configure all of the Contact Center agents as users and confirm that you have properly configured the system's trunks. Setting up the ShoreTel system for ShoreTel Contact Center solutions requires familiarity with ShoreTel system requirements and administration. For more information, please review the *ShoreTel Contact Center Solution Installation Guide* and the *ShoreTel Administration Guide*.

2.2 Licensing

The licensed features and capacities of the ShoreTel Contact Center Solution are encoded in the lock devices supplied with the Contact Center or Enterprise Contact Center Solution.

There are three types of lock devices:

- **Server with Contact Center:** Required to run the server software and includes configuration information about the product you have, such as the number of agents and any additional features you purchased. Contact Center optional features are licensed on a per-system basis:

- — Wall Board Support
- — Desktop Wall Board Access
- — Formula Editor
- — Work Force Management Connector

- **Server with Enterprise Contact Center:** Optional features are licensed on a per agent basis and require a license for every agent that will be logged into a group that supports those features:
  - — Wall Board Support
  - — Desktop Wall Board Access
  - — Formula Editor
  - — Work Force Management Connector
  - — Email
  - — Chat
  - — Outbound Calling
- **Full Supervisor:** Required to access supervisor applications. Provides access to Agent Manager, Reporting, and the Wall Board Director. Requires a separate license.
- **Monitor Supervisor:** Required to access supervisor applications. Provides access to Agent Manager. Requires a separate license.

The number of permitted Agents is encoded in the server lock device. You need enough agent licenses to equal the amount of agents that will be logged into the contact center at any one time.

IVR ports are separately licensed in the Enterprise Contact Center. The number of IVR ports is encoded in the server lock device. You need an IVR port license for every IVR port configured in the system, which totals enough licenses to match the maximum number of calls connected to the system at any one time. Calls are connected to IVR ports whenever calls are waiting in a queue or being serviced by a call control script or an announcer.

You can view the Contact Center license information from the Lock Device Viewer.

To view license information:

Step 1 From the ShoreTel Contact Center Shortcuts Folder, as shown in Figure 2-1, double-click the Lock Device Viewer icon.

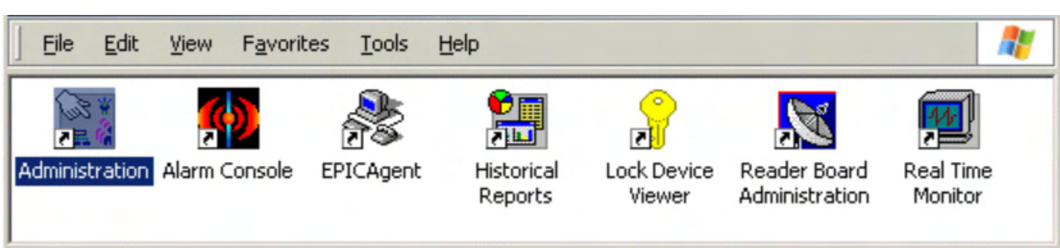

Figure 2-1 **ShoreTel Contact Center Shortcuts Folder**

Step 2 The Lock Device Viewer appears.

When you purchase a contact center, you also receive a license for a ShoreWare Distributed Server. Apply the license on the Contact Center Director's License page by adding 1 to the number of Distributed Servers licensed for your ShoreTel system.

Configuring ShoreTel

There are three basic steps you must perform to link the contact center to the ShoreTel system. These steps are described generally below. For detailed information, see the *ShoreTel Contact Center Solution Installation Guide* and the *ShoreTel Administration Guide*.

To configure the ShoreTel system for the Contact Center you must:

Step 1 Add the Distributed Server to the ShoreTel system and configure it for the Contact Center.

Step 2 Create and configure destination route points to correspond to the Contact Center IRNs.

Step 3 Create and configure destination route points to correspond to the Contact Center IVRs.

Adding the ShoreTel Distributed Server

Add the ShoreTel Distributed Server to the ShoreTel system using Contact Center Director. When adding the Distributed Server, note the following:

- Add the Distributed Server to the site where the contact center server is located.
- Do not change the pre-set voice mail extensions.
- Do not enable or configure the Simplified Message Desk Interface (SMDI).
- Do not configure any users for voice mail on this server.

Creating Destination Route Points

Route points for destinations (IRNs) are configured from the Route Point pages in Contact Center Director. You should create one destination route point for each way a caller can enter the contact center, such as a route point for each of your organization's 800-numbers, along with the DID, a second for transfer from auto-attendant, and a third for internal callers.

To configure the destination route points, the following parameters must be set on the **Route Point** edit page. Contact Center Solution uses Route Point parameters not listed in below do not change the default values of these parameters.

- **Name**: Enter the destination name of the route point. For example, Sales 800 Number.
- **Extension:** Enter the extension number or dialed number for the route point.
- **Backup Extension**: Enter the backup destination or extension of the route point. Calls are sent to this destination if the route point does not answer after the specified number of rings (for example, the server is unavailable or there is a network problem). This allows you to configure backup call routing in case of failures.

- **DID/DNIS**: Configure DID or DNIS to match the inbound DID or DNIS number if the contact center is to be reached directly from the trunks.
- **User Group**: Select the user group for the route point to assign appropriate call permissions. To allow the contact center to make outbound calls, the route point needs access to trunk groups, and must have an approved class of service for making the desired types of outbound calls.
- **Route Point Server:** Select the Distributed Server where the Contact Center Server software is installed.
- **Mailbox (server):** Do not enable a mailbox. Leave the check box unselected.
- **Accept Broadcast Messages:** Since the route point is not configured for voice mail, Accept Broadcast Messages is not available.
- **Include in Dial by Name**: Check this box only if you want callers to reach the contact center destination by entering the destination name at the auto-attendant prompt.
- **Make Number Private:** It is recommended that you check this so the number remains private. Leave it unchecked if the number is public for internal callers, so it is available in ShoreTel Call Manager.
- **Call Stack Depth**: Set the Call Stack Depth to 100.
- **Recorded Name**: Since the route point is not configured for voice mail, Record Name is not available.
- **Call Handling Mode Selection:** Schedules are not used with the route point acting as a contact center destination. Accept the default setting, On-Hours.
- **Schedule**: Do not configure a schedule for the route point. The default will be the On-Hours schedule, which directs calls to the contact center all the time. If you have Contact Center Solution, you can create a call handling schedule by configuring the route point schedule. For more information, see Section on page 23.
- **Call Forward**: These buttons specify when calls are forwarded. The conditions are Always, No Answer/Busy, and Never. Accept the default setting, No Answer/Busy. The No Answer/Busy condition forwards calls to the No Answer Destination after the specified number of rings, or to the Busy Destination immediately if the call stack is full.
- **Busy Destination**: When the No Answer/Busy call forward condition is selected, calls are forwarded to this extension immediately if the first route point call stack is full. Enter an extension configured for handling contact center calls when route point call stack or IRN is full. You can forward calls to an external number (access code required).
- **No Answer Destination**: When the No Answer/Busy call forward condition is selected, calls are forwarded to this extension after the specified number of rings. You can also forward calls to an external number (access code required). This condition should only exist if the server is unreachable. In this case, enter an extension configured for handling contact center calls when the server is unavailable.
- **No Answer Number of Rings**: When the No Answer/Busy call forward condition is selected, this specifies how many times the phone rings before the call is forwarded to the No Answer Destination, or it specifies the duration until the backup policy is implemented. Accept the default for this setting.

2.2.1 Creating IVR Route Points

Route points for IVRs are also configured in Contact Center Director and should have the setting and destinations as the IRNs. The main difference between route point configuration of IVRs and IRNs is that IVRs are configured with a call stack of 1. There can only be one IVR route point per caller connected to the system, so you must configure a route point for each IVR port required. In other words, there must be an IVR route point available for every individual caller in the ShoreTel Contact Center queue.

IVR ports are licensed separately in Enterprise Contact Center. Make sure you have enough IVR licenses to support your Enterprise Contact Center.

C H A P T E R 3

ShoreTel Contact Center Entities

3.1 Overview

Entities are the management points of the ShoreTel Contact Center system. Entities provide the access for administrators and supervisors to define business rules, reporting views, staff responsibilities, and other aspects of the Contact Center.

There are five general categories of entities in the Contact Center:

- Routing entities
- Reporting entities
- Multimedia entities
- Management entities
- Supervisors

Figure 3-1 shows some of the relationships between the Contact Center entities.

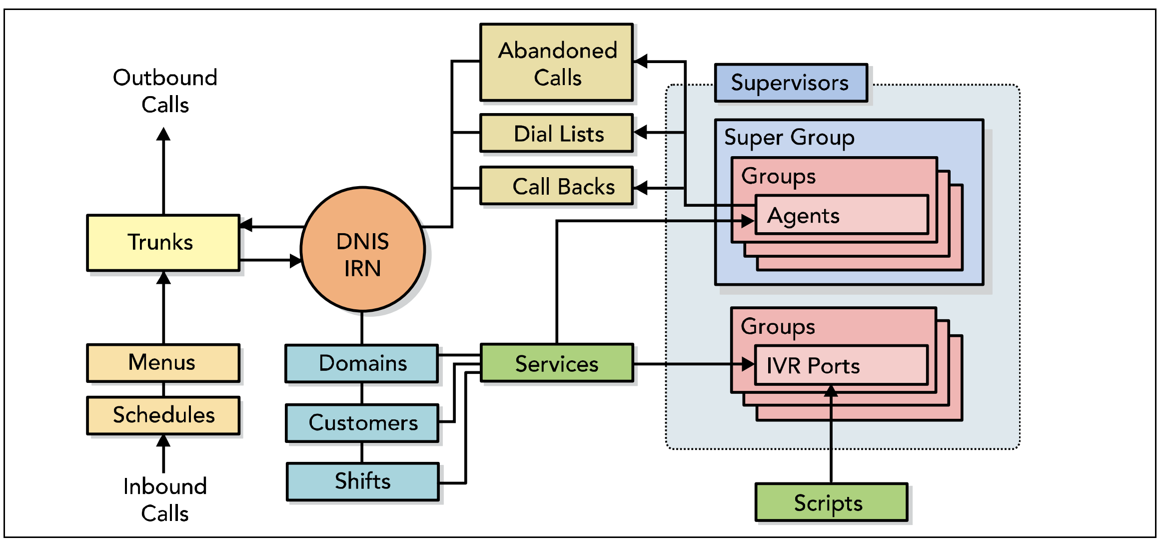

Figure 3-1 **Contact Center Entities**

3.2 Routing Entities

Routing entities are managed by the system administrator. ShoreTel's Contact Center solutions can create reports on many of the routing entities' activities.

- **Agents:** Agents handle contacts routed to them by the ShoreTel Contact Center Solution. Each agent must be equipped with a telephone, and begins work by logging on to the system. An agent can be a member of multiple groups, and may log in or out of all groups simultaneously or one group at a time.

- **Groups:** Agents can be organized into groups, which are specialized units that receive and place calls. Groups are typically sets of agents that can deliver the same service to incoming calls. A group is a destination of the service entity in ShoreTel Contact Center Solution. Calls sent to the group are presented to the most appropriate agent according to the specified routing policy.
- **Services:** Services define how incoming calls to the contact center are processed. Services are analogous to a waiting room where calls are managed until they can be answered or otherwise handled. Every incoming call is assigned to a specific service or destination, with defined announcements, overflow and interflow settings, callback settings, and other business roles.
- **IRN:** Intelligent Routing Nodes are dial numbers used as entry points to the routing system. Each IRN is defined with rules for routing the incoming call to various destinations, including services, call control scripts, and devices. IRNs are reached from the ShoreTel system by dialing the extension number assigned to the route point that corresponds to the IRN.
- **Domains:** Domains enable calls to be handled according to their geographical location. Domains are defined by the leading digits (such as the area code or area code plus a prefix) in the caller ID. The system can generate reports according to domains to show how many calls have been received from a particular geographical area or domain.
- **Customers:** The customer list and the customer routing feature of the IRN work together to identify the caller and route the call according to the caller's identity. The customer list contains the customer ID, number, priority, and preferred destination for each specific customer.
- **Dial Lists:** The dial lists are sets of telephone numbers that are used for outbound calls. You can define rules for dial lists in the Contact Center Director. A dial list can be a separate list from a database or from the existing customer database.
- **IVR Ports:** The IVR port is used by the ShoreTel system to perform an IVR action on a call or play music-on-hold. The IVR ports are part of the system's numbering plan.
- **IVR Groups:** IVR groups are set collections of IVR ports (IVR ports are used by the ShoreTel system to perform an IVR action on a call).

3.3 Reporting Entities

Reporting entities are used to monitor different points of the system and to generate reports.

- **Trunks:** A trunk is a channel of conversation between the Public Service Telephone Network (PSTN) and the ShoreTel System. These lines carry all of the ACD calls, as well as external non-ACD calls, to and from the system.
- **Super Groups:** A super group is a collection of agent groups aggregated for statistical and reporting purposes. Super groups may contain several agent groups, providing a way to divide an organization into departments and analyze the performance of each department independently. Super groups can contain several agent groups, and an agent group can belong to more than one super group.

- **DNIS:** A DNIS service is a series of digits that identifies the number that the caller dialed to the contact center. Each DNIS number must correspond to a contact center entry point or IRN and be configured with the same number as the IRN dial number. If you want to gather statistics on the IRN, the IRN must also be defined as a DNIS.
- **IVR Applications:** The IVR application is used by the ShoreTel system to perform interactive tasks with the caller. Each application is composed of actions forming a script to execute a procedure.

3.4 Multimedia Entities

The multimedia entities provide the ability to handle Email routing from contacts.

Multimedia entities are only available in Enterprise Contact Center.

- **Email Accounts:** The Mail Accounts feature allows contacts to reach agents via Email. Agents can work with standard Email programs such as Outlook or Outlook Express. Email Accounts are configured for each type of inquiry. Emails received in these accounts are placed in a queue where an agent can download a predetermined number of Emails. Mailboxes can be assigned to a specific computer or agent.

3.5 Management Entities

The management entities available through the System configuration window provide tools to manage the operations of the routing entities. A routing entity can use one or more management entities to determine its actions.

- **Shifts:** You can configure the day types, shifts, and working and non-working days for the contact center. The day types and shifts are used by the ShoreTel Contact Center Server to route calls to different destinations according to the day and the time. The MIS uses the working and non-working days information to calculate the daily average for Contact Center Reports.
- **Call Profiles:** The call profile consists of dynamic information that is attached to each call in the system. This information is used to route the call and supply its history. The call profile is updated as the call moves through the system. Each field in the call profile is either mandatory or optional. Mandatory fields are predefined and exist in any ShoreTel Contact Center Solution installation. They cannot be removed or changed by the user. Optional fields—also called user fields—are defined by the administrator in a specific ShoreTel Contact Center Solution installation.
- **Skills:** Routing entities can use a set of skills to route calls to the most appropriate destinations. These skills are defined from the management entity. Once defined, you can assign multiple skill levels to call destinations.
- **Wrap-Up Codes:** Agents enter the wrap-up code when they have finished handling a call. In most cases, wrap-up codes are internal codes that provide information for evaluating calls for statistical reporting, including types of call (request or complaint), level of required action (urgent, regular, or low), and status of the deal (closed or needs recall).
- **Interfaces:** To automate your contact center operation, you can integrate ShoreTel Contact Center Solution with your Customer Relationship Management (CRM) software or other business applications. This allows the contact center to be more closely tied to your customer information and to improve your customer service.

- **Incomplete destination**: When a call enters the system with no valid routing destination, the ShoreTel Contact Center Server routes it to the incomplete call destination.
- **Internet**: You can control the chat session settings for agents, including the maximum number of chat calls, details about the transcripts sent to callers, and Email parameters such as concurrent Email connections and the number of Emails an agent can request.
- **Management:** You can control the licensing definitions for the lock device to set the current number of agents, including agents handling incoming and outbound calls and using chat options.

3.5.1 Settings and Options

Settings and options can be configured for the various management entities.

3.5.1.1 Group Thresholds

The threshold values for a group are assigned to fields displayed in the Agent Manager software. You can control the view in real-time reports to indicate “yellow” warning conditions or “red” alert levels for the number of agents logged in, calls waiting, wait time, and idle state.

3.5.1.2 MIS

MIS reporting attributes can be set in the MIS tab of the System configuration window:

- **Historical report intervals:** Intervals are the time periods that are monitored for historical statistical data purposes. Intervals are determined for each group in the system in ShoreWare Contact Center Director.
- **Target Service Factor calculation:** Target Service Factor is the percentage of calls answered within the Target Average Speed of Answer (ASA), out of all the calls that are routed to the group. This factor indicates how well the group is providing the level of service defined for it, based on the Target ASA. Abandoned and overflowed calls are considered as answered after the Target ASA.
- **Display colors:** You can set the display colors for the different agent states. See the *ShoreWare Supervisor Applications Guide* for details.

3.5.1.3 Miscellaneous

The following miscellaneous system settings can be set in the Misc. tab of the System configuration window:

- **Priorities**: You can set default priorities for internal and external calls.
- **Global music setting:** You can choose where to connect a caller while he or she is waiting in the queue between announcements.
- **Setting lengths**: You can define lengths for the Agent ID and wrap-up code.
- **Languages**: You can change the language settings for IVR announcements.

3.5.1.4 Outbound

You can control the dialing parameters of outbound calls, including area codes, default callback service, and number of attempts.

3.6 Supervisors

In the contact center, a supervisor is assigned responsibility for the performance and operation of selected Contact Center groups. Supervisor privileges and the groups that supervisors are responsible for are assigned in Contact Center Director.

You must have full supervisor rights and a lock device in order to access the management options on the Supervisors configuration page.

C H A P T E R 4

The Administration Application

4.1 Overview of the Administration Application

4.1.1 The Administration Application Main Screen

The Contact Center Administration application main screen appears when you log into the Center Administration application.

The window includes a menu bar with various options and a toolbar displaying icons that the user can click to activate some of the main menu options. The rest of the window is a work area where entity screens are configured and displayed.

4.1.2 Contact Center Administration Application Menu Bar

4.1.2.1 The Main Menu

The Contact Center Administration Application Menu Bar contains the following items:

- **Entities:** Define or modify the attributes of Contact Center objects. It is also used for terminating all the open Supervisor applications
- **Tools:** Provides options for activating the CCS Administration application and the GCCS Administration application.
- **Sort:** Provides options for sorting by name or number
- **Window:** Arrange open windows and toggle between open application windows
- **Help:** Obtain context-sensitive on-line help about the Contact Center Administration application.

Figure 4-1 Contact Center Administration Application Toolbar

4.1.2.2 The Entities Menu

Each entity can also be selected by clicking the corresponding icon in the toolbar. Button numbers refer to an icon in Figure 4-1.

The Entities menu provides the following options:

- **Agents (1):** Opens a window for configuring agents.

- **Groups** (2): Opens a window for configuring groups.
- **Trunks** (3): Opens a window for configuring trunk groups and trunks.
- **Super Groups** (4): Opens a window for configuring super groups.
- **Supervisors** (5): Opens a window for configuring supervisors.
- **Services** (6): Opens a window for configuring services.
- **IRN** (7): Opens a window for configuring the IRN.
- **Domains** (8): Opens a window for configuring Domains. ***This button is only available in Enterprise Contact Center.***
- **Customers** (9): Opens a window for configuring customer details. ***This button is only available in Enterprise Contact Center.***
- **DNIS** (10): Opens a window for configuring DNIS.
- **Dial Lists** (11): Opens a window for configuring Dial Lists. ***This button is only available in Enterprise Contact Center.***
- **IVR Groups** (12): Opens a window for configuring IVR Groups. ***This button is only available in Enterprise Contact Center.***
- **IVR Applications** (13): Opens a window for configuring IVR Applications. ***This button is only available in Enterprise Contact Center.***
- **Mail Accounts** (14): Opens a window for configuring Mail Accounts. ***This button is only available in Enterprise Contact Center.***
- **System** (15): Opens a window for configuring system parameters.
- **Logout and Exit:** Exits the Contact Center Administration application and all other open Supervisor applications.
- **Exit:** Exits the Contact Center Administration application

4.1.2.3 The Sort Menu

The sort menu contains two options:

- **Sort by name:** Sort the currently active list by name
- **Sort by number:** Sort the currently active list by number

4.1.2.4 The Tools Menu

The Tools menu contains the following options.

- **CCS:** Opens the CCS Administration application.
- **Graphical CCS:** Opens the Graphical CCS Administration application.

4.1.2.5 The Windows Menu

The Window menu lists all currently open windows and allows you to organize them. To switch the focus from one window to another, click the window you want to see.

- **Tile:** The windows are displayed in a tile format, one next to the other.
- **Cascade:** The windows are cascaded one on top of the other.
- **Windows list:** List of all open windows. Select the required window to switch to it.

4.1.2.6 The Help Menu

The Help menu provides access to the online help, as well as information about the Contact Center Administration Application.

- **Index:** Opens the index of the online help for the Contact Center Administration, enabling a topic search using keywords.
- **Context:** Opens the online help for the current application only.
- **About:** Displays information about the Contact Center Administration application.

4.1.2.7 Quick Search

You can use Quick Search to locate specific entries in long lists. Click the Quick Search banner and select a field to define your search. As you type the cursor moves to the first entry in the list that fits the prefix entered. You cannot enter a character that does not match any entry.

4.2 Configuring Agent

The Agent configuration screens allow administrators to add and remove agents, to set their properties, and to assign them to, or remove them from, groups. The Agent configuration screens consist of three tabs:

- Configuring Agent Details
- Configuring Agent Groups
- Configuring Agent Skills – ***This tab is only available in Enterprise Contact Center.***

To open the Agent Configuration screen:

Step 1 Click the Agents button in the Toolbar of the main application window

Step 2 Click the Agents tab below the agents / agent COS scrollable list.

The Agent Configuration screens contain.

- **Agent List:** A scrollable list displaying the Name and Number of all the agents in the system. Use the four navigational buttons below the list to move up or down the list, return to the beginning or jump to the end of the list.

  Clicking the right mouse button on any agent in the list provides options for sorting the list by Name or Number
- **New:** Click this button to activate a wizard to add a new agent to the list
- **Delete:** Click this button to delete an agent from the agent list
- **Tabs Area:** This area, at the right of the agent list, contains three tabs to configure the selected agent Details, Groups, and Skills

4.2.1 Configuring Agent Details

Use the Details tab of the Agent Configuration window to configure the details of agents in the system.

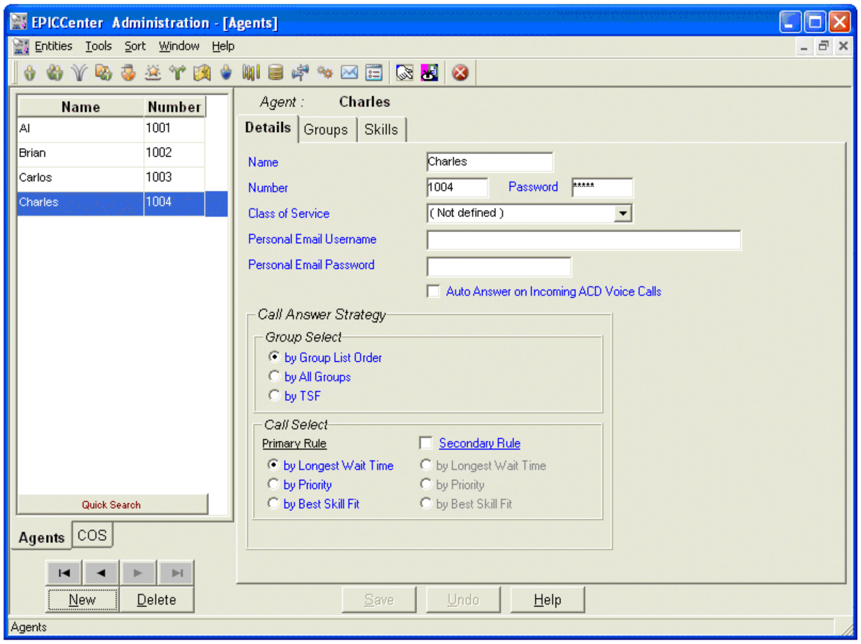

Figure 4-2 The Agent Details Configuration Screen

To open the Agent Details configuration screen:

Step 1 Click the Agents button in the Toolbar of the main application window.

Step 2 Click the Agents tab below the agents / agent COS scrollable list.

Step 3 Click the Details tab in the tabs area. The Agent Details configuration tab is displayed.

The Details tab displays the details for the currently selected agent in the Agents list. It contains the following options:

- **Name:** The name of the selected agent.
- **Number:** The identification number of the selected agent.
- **Password:** Used by the agent, along with the agent number, to logon to the system.
- **Class of service:** The class of service to which the agent belongs. The class of service determines what operations are allowed or denied for this agent. For example: the COS may deny the agent from being able to pick up calls from the queue
- **Auto Answer on Incoming ACD Voice Calls:** When this check box is checked, the system will answer automatically, for the agent, on incoming ACD Voice calls.

  There is no alarming tone to warn the agent on the incoming call.
- **Personal Email User Parameters (User Name & Password):** This parameter is used by the system to route email contacts to the agent's email account. It is used only in cases where the OMS (Organization Mail Server) uses the personal addressing mode (see Section 4.18.12 on page 106).

  This option is only available in Enterprise Contact Center.

- **Call answer strategy:** Use this area to define the method by which the next contact is routed to the agent when the agent becomes available. The strategy contains two stages.

  1. Determining the set of calls to be considered for routing, and
  2. Selecting, from the set, a single call to route to the agent. This stage include two levels, If, by the primary level two calls with equal priority to the agent are found, then the secondary rule decides which of the two will be the next call

  — *Group Select:* Click the appropriate option to define the criteria for selecting the set of calls:

  ▷ By scanning groups in the order they appear in the agent's group list.

  ▷ By all groups without any priority.

  ▷ By TSF (The Target Service Factor). The TSF measures how well the group provides the level of service, via the Target ASA (Average Speed of Answer). Using this criterion, the next call will be routed to an agent from the group with the lower TSF, enabling that group to improve its TSF by balancing the load between groups

  — ***Call Select***

  ▷ *Primary Rule:* Click the appropriate option to specify one of the following the criteria for selecting a single call to route to the agent:

  ❋ Answer the call that has been waiting the longest.

  ❋ Answer the call with the highest priority.

  ❋ Answer the call whose requirements are best suited to the agent (that is, best skill fit).

  ▷ *Secondary Rule:* Click the appropriate radio button for a single agent to either:

  ❋ Answer the call with the highest priority.

  ❋ Answer the call, whose requirements are best suited to the agent (the best skill fit).

4.2.2 Configuring the Agent Groups

Any agent can work in up to 16 groups simultaneously. There are two different ways for agents to login to groups.

The first method is to assign to an agent a list of his primary groups. Using the Agent application, the agent can then login into all these groups in one button click.

The second method is to use the specific login/logout buttons on the Agent to login/logout to/from a specific group.

The Groups tab of the Agents Configuration screen is used to edit the Primary Groups assignment for agents in the system.

To open the Agent Groups configuration screen:

Step 1 Click the Agents button in the Toolbar of the main application window.

Step 2 Click the Agents tab below the agents / agent COS scrollable list.

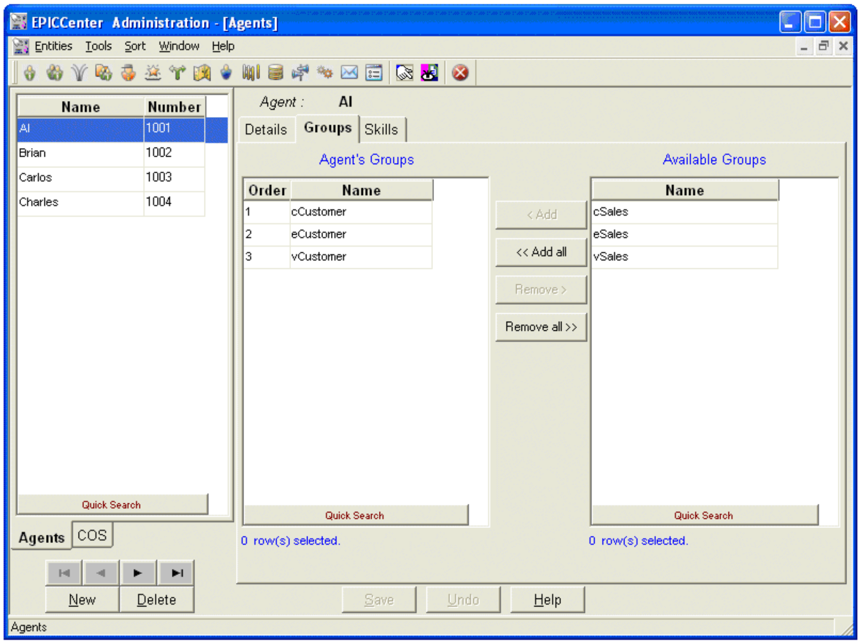

Figure 4-3 Agent Groups Configuration Screen

Step 3 Click the Groups tab in the tabs area. The Agent Groups configuration tab is displayed.

The Groups tab displays the current group configuration for the selected agent in the Agent list. It contains the following options:

- **Agent Groups:** This area displays the order and name of all the currently assigned groups for the agent. The assignment configuration can be edited as required.

  For agents who are assigned a Call Answer Strategy of "by group list order," the list order defines the group from which the agent will pick the next call. The first group has priority over the second group when routing agent calls. For this reason, the Sort/Order option cannot be used for this list. (For a full description, refer to Call Answer Strategy in Configuring Agents Details.)

- **Available Groups:** Name of all the available (unassigned) groups in the system.

To assign a group/groups to the selected agent, Select the required group / groups in the Available Groups list, and drag it into the Agent Groups list (or click the Add button). To add all groups click the Add All button.

To un-assign a group from the selected agent, Click the group / groups to be removed from the Agent Groups list, and drag it into the Available Groups list. To remove all groups click the Remove All button.

To change the order of the groups, Click the group to be moved and drag it to the required position in the list.

4.2.3 Configuring Agents Skills

This tab is only available in Enterprise Contact Center.

Use the Skills tab of the Agents Configuration window to edit the skills assignment for agents in the system. If an agent is assigned a Call Answer Strategy of "by best skill fit," the system tries to match the skill of an agent with the specific requirements of a call (although, if only one agent is free, the call goes to that agent, regardless of skills). If many agents are available, the system attempts to match the call requirements with agent skills, but it will not refuse a call because the necessary skills are not available. Agents whose skills are frequently required can be defined as groups to facilitate the calls process.

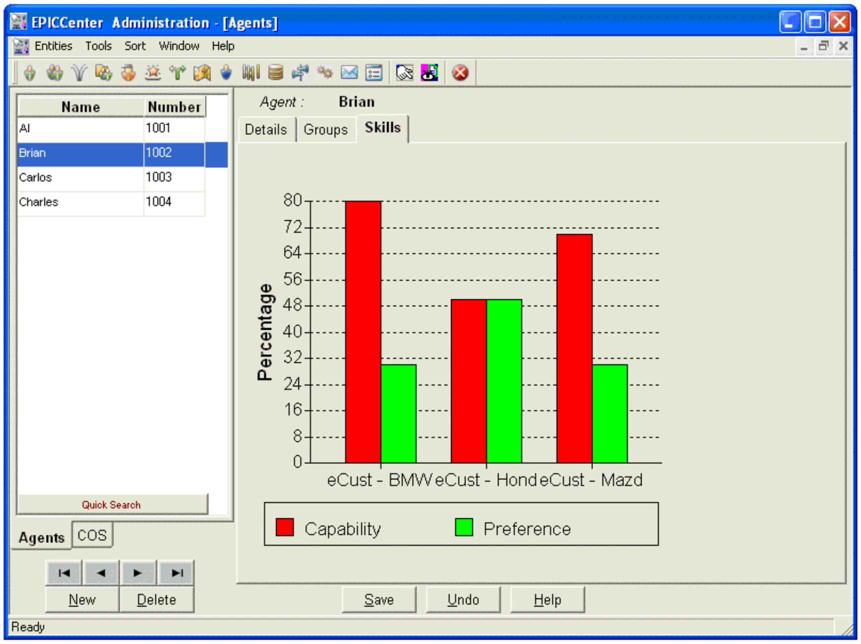

Figure 4-4 **Agents Skills Configuration Screen**

To open the Agent Skills configuration screen:

Step 1 Click the Agents button in the Toolbar of the main application window.

Step 2 Click the Agents tab below the agents / agent COS scrollable list.

Step 3 Click the Skills tab in the tabs area. The Agents Skills configuration tab is displayed.

The Skills tab displays the current skills configuration for the selected agent in the Agents list. The agent's skills are displayed as columns in a histogram, showing the preference and capability percentages for each skill that the agent has.

Skills should first be defined in the System Configuration window in the Skills tab.

An agent's skill is measured by two parameters, preference and capability. The capability is defined by the supervisor assessment of an agent's ability to perform the skill. Preference is defined according to the percentage at which the supervisor would like the agent to be available to answer a call for that skill. The decision for assigning a call depends on both the preference and capability percentages.

To add a skill to the selected agent, Right–click within the skill area; select *Add Skill>Skill Name*. Choose the *Capability Level (1-100)* and the *Preference Level (1-100)*.

To edit a skill to the selected agent, Right-click the column of the skill to be edited. Choose the *Capability Level (1-100)* and the *Preference Level (1-100)*.

To delete a skill assigned to the selected agent, Right-click the column of the skill to be deleted, and select Delete Skill from the shortcut menu. The columns for the skill are removed from the histogram on the Skills tab.

4.3 Configuring the Agents' Class Of Service (COS)

The Agent COS configuration screens allow administrators to add or remove Agent COS and to assign / de-assign agents to / from Agent COS. The COS property defines what operations an agent can do (for example, whether the agent can or cannot changes a toolbar layout). The Agent COS configuration screens consist of two tabs:

- Configuring Agent COS Details
- Configuring Agent COS Agents

To open the Agent COS configuration screen:

Step 1 Click the Agents button in the Toolbar of the main application window

Step 2 Click the COS tab below the agents / agent COS scrollable list

The Agent COS Configuration screens contain.

- **Agent COS List:** A scrollable list displaying the Name of all the agent COS in the system. Use the four navigational buttons below the list to move up or down the list, return to the beginning or jump to the end of the list.
- **New:** Click this button to activate a wizard to add a new agent COS to the list
- **Delete:** Click this button to enable an agent COS to be deleted from the agent COS list
- **Tabs Area:** This area, at the right of the agent COS list, contains two tabs that enable the configuration of the selected agent's COS Details and Agents

4.3.1 Configuring Agent COS Details

The COS property of an agent defines what operations an agent can do (for example, whether the agent can or cannot changes a toolbar layout).

Use the Details tab of the Agent COS Configuration window to set or reset the available features to the selected COS.

To open the Agent COS Details configuration screen:

Step 1 Click the Agents button in the Toolbar of the main application window.

Step 2 Click the COS tab below the agents / agent COS scrollable list.

Step 3 Click the Details tab in the tabs area. The Agents COS Details configuration tab is displayed.

The Details tab contains the following options:

- **Name:** The name of the selected Agent's Class Of Service.
- **ACD Functions:** A set of ACD functions that may be enabled or disabled by the COS
  - — ***Pickup From ACD Calls Queue:*** When selected, this check box allows agents who belong to the selected COS to use the Queue calls window to pick up calls waiting in their queue by double-clicking the call.
  - — ***Initiate Specific Login/Logout:*** When selected, this check box allows agents who belong to the selected COS to use the specific login/logout buttons to

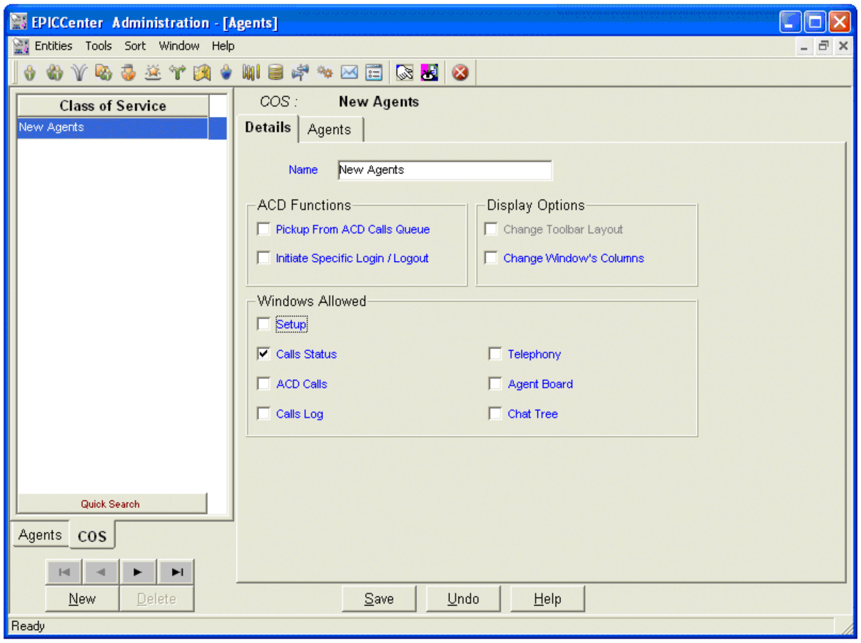

Figure 4-5 Agent COS Details Configuration Screen

login/logout to/from a single group. The specific group may or may not be part of the agent's primary groups list.

- **Display Options:** This set of options gives/denies the agent the ability to design a personalized workspace (toolbar, windows, and so on).
  - — *Change Toolbar Layout:* When selected, this check box allows an agent to add/ remove buttons to/from the toolbar.
  - — *Change Window's Columns:* When selected, this check box allows the agent to add/ remove columns to/from the different windows with which the agent works.
- **Windows Allowed:** This set of options gives/denies the agent the permission to use each of the windows with which the agent works.
  - — *Setup:* When selected, this check box allows the agent to use the setup window.

    If Setup is not checked, the 'Change Toolbar Layout' Checkbox will be grayed out.
  - — *Call Status:* When selected, this check box allows the agent to use the call status window. This window displays each active call at the agent extension (active means a call on hold, a ringing call, a call the agent is talking, and so on)
  - — *Queue Calls:* If checked, enables the agent to use the ACD calls window. This window displays all calls currently waiting in queues that are relevant to the agent. The agent may double-click a call to answer it
  - — *Calls Log:* When selected, this check box allows the agent to use the calls log window. This window displays all calls that were handled by the agent during the current shift (since last primary login) and gives the agent the ability to add log information on each call
  - — *Telephone Manager:* When selected, this check box allows the agent to use the telephone manager option

— *Desktop Wall Board:* When selected, this check box allows the agent to use the desktop wall board. ***This option is only available in Enterprise Contact Center.***

— *Agent Chat:* When selected, this check box allows the agent to use the chat tree. ***This option is only available in Enterprise Contact Center.***

4.3.2 Configuring Agent COS Agents

Any agent can be assigned to a single Agent COS.

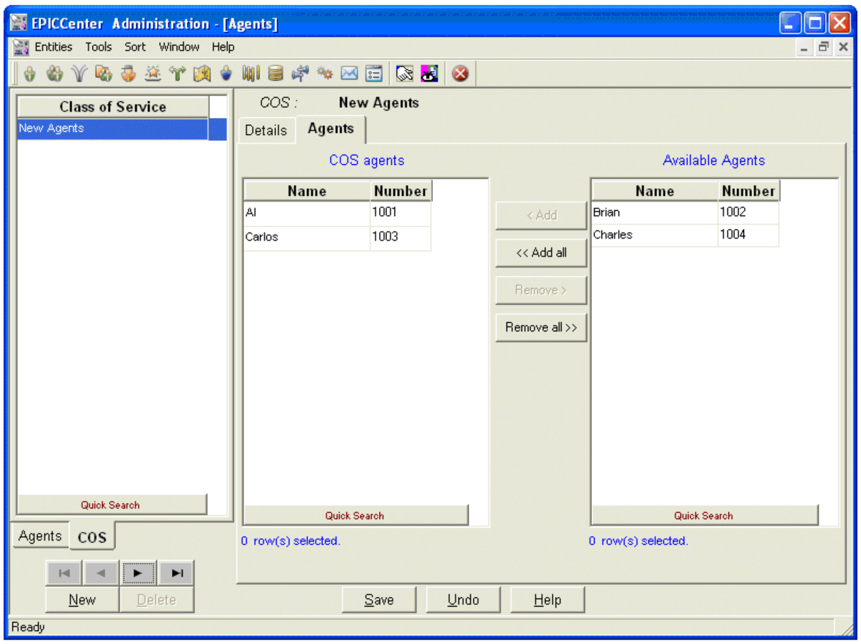

Figure 4-6 Agent COS Agents Configuration Screen

To open the Agent COS Agents configuration screen:

Step 1 Click the Agents button in the Toolbar of the main application window.

Step 2 Click the COS tab below the agents / agent COS scrollable list.

Step 3 Click the Agents tab in the tabs area. The Agents COS Agents configuration tab is displayed.

The Agents tab displays the agents assigned to the selected Agent COS in the Agent COS list. It contains the following options:

- **COS Agents:** Name of all the assigned agents in to the selected Agent COS.
- **Available agents:** Name of all the available (unassigned) agents in the system.

To assign an agent/agents to the selected Agent COS, Select the required agent / agents in the Available agents list, and drag the selection into the COS Agent list (or click the Add button). To add all agents click the Add All button.

To un-assign an agent / agents from the selected Agent COS, Click the agent / agents to be removed from the COS Agents list, and drag the selection into the Available agents list. To remove all agents click the Remove All button.

4.4 Configuring Groups

The Groups configuration screens allow administrators to add and remove groups, to set their properties, and to assign / de-assign agents to / from groups. The Groups configuration screens consist of four tabs:

- Configuring Group Details
- Configuring Group Agents
- Configuring Group Thresholds
- Configuring Group Staffing. ***This tab is only available in Enterprise Contact Center.***

To open the Group Configuration screen, Click the Groups button in the Toolbar of the main application window

The Groups Configuration screens contain.

- **Groups List:** A scrollable list displaying the Name and Number of all the groups in the system. Use the four navigational buttons below the list to move up or down the list, return to the beginning or jump to the end of the list..

  Clicking the right mouse button on any group in the list provides options for sorting the list by Name or Number

- **New:** Click this button to activate a wizard to add a new group to the list
- **Delete:** Click this button to delete a group from the groups list
- **Tabs Area:** This area, at the right of the agents list, contains four tabs that enable the configuration of the selected group Details, Agents, and Skills

4.4.1 Configuring Group Details

Use the Details tab of the Groups Configuration window to configure the details of groups in the system.

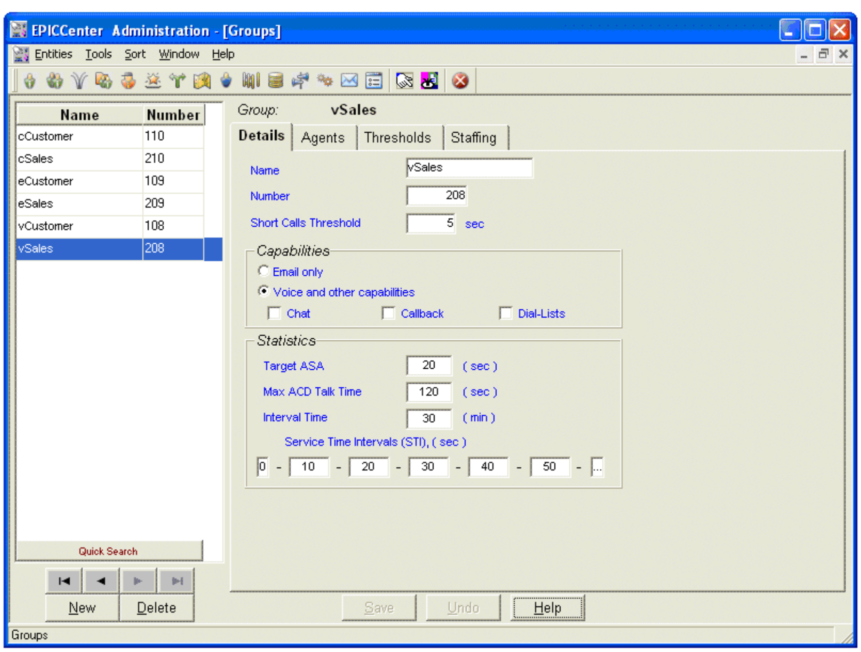

Figure 4-7 **Group Details Configuration Screen**

To open the Group Details configuration screen:

Step 1 Click the Groups button in the Toolbar of the main application window.

Step 2 Click the Details tab in the tabs area. The Groups Details configuration tab is displayed.

The Details tab displays the following options:

- **Name**: A unique name for the group.
- **Number**: A unique number for the group.

  The Group Number is a virtual DN used by the Director to identify the group. This DN must be unique throughout the PBX numbering plan
- **Capabilities area**: Use this area to set the type of contacts, such as e-mail, chat, etc., that the group can handle.

  Any enabled capability, requires a proper license in order to login to this group. Any agent who logs into this group will decrease the available licenses of this capability by one. The number of licenses of each capability may be view in the system There is no way to view the number of currently uses licenses of each capability

  — *E-Mail only:* Clicking this option allows the group to receive e-mail contacts only. To define the group for e-mail, check the E mail Only checkbox. ***This option is only available in Enterprise Contact Center.***

  A group that only handles e-mail calls may now be an e-mail IRN destination only

  — *Other capabilities:* Clicking this option disables the E-Mail option and allows usage of Chat, Callback, and Dial-Lists.

  ▷ *Chat:* Select Chat if the group is capable of handling chat calls. If this checkbox is selected, each agent that logs into this group requires a license for handling chat calls.

  ▷ *Callback:* Select Callback if the group is capable of handling outbound callback calls. If this checkbox is selected, each agent that logs into this group requires a license for handling outbound callback calls

  ▷ *Dial list:* Select Dial list if the group is capable of handling outbound Dial list calls. If this checkbox is selected, each agent that logs into this group requires a license for handling outbound Dial list calls.

  This option is only available in Enterprise Contact Center.
- **Statistical parameters area**: The Statistical section of the Group Details window enables you to configure various time interval parameters that are relevant to the monitoring of calls in the Contact Center system for the selected group:

  — *Short Call threshold:* A number representing the number of seconds after which a call must end, designated as a short call in the Contact Center Reports

  — *Target ASA:* Target Average Speed of Answer. The amount of time (in seconds) that should elapse between the moment a call is received to when it is answered. This parameter is used to calculate the group's Target Service Factor (TSF)

  — *Max ACD Call Time:* A number representing the number of seconds that a call must exceed to be counted as a long call.

— *Interval Time:* Determines the time period that will be monitored in the real-time reports for the group. If this field is set to ten minutes, for example, the real-time report for that group will show statistical information relevant to the last ten minutes.

— *Service Time Intervals:* This parameter determines the time intervals in which calls are monitored. The calls can be viewed in STI histogram reports that show the number of calls answered, abandoned and waiting in each given interval.

4.4.2 Configuring Groups' Agents

Use the Agents tab of the Groups Configuration window to edit agent assignments for groups in the system.

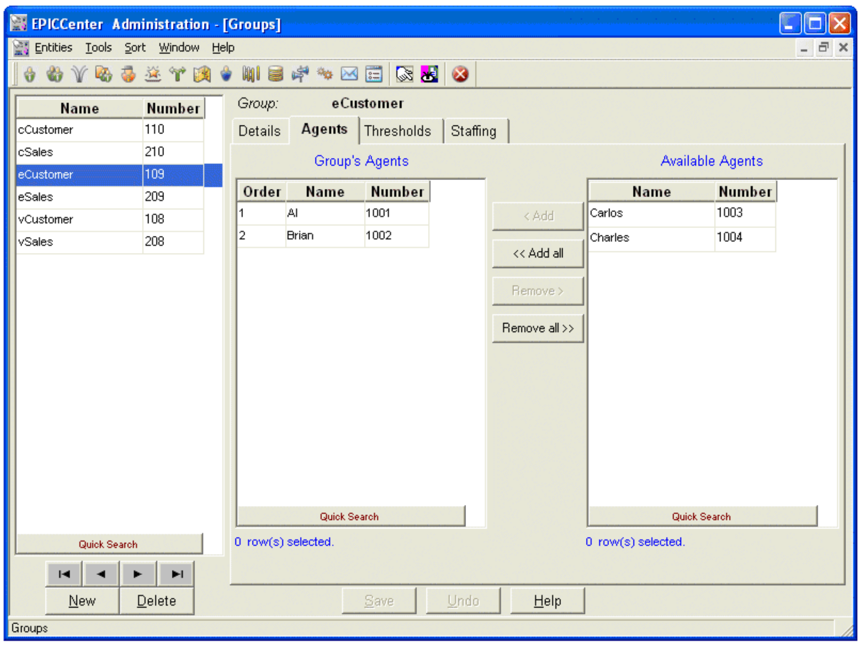

Figure 4-8 Group Agents Configuration Screen

To open the Groups Agents configuration screen:

Step 1 Click the Groups button in the Toolbar of the main application window.

Step 2 Click the Agents tab in the tabs area. The Groups Agents configuration tab is displayed.

The Agents tab displays the following options:

- **Group agents:** A scrollable list of agents who belong to the group.

  Since the order of groups in the list may affect the routing consider the order of the list carefully (see Agent Search Criteria in Configuring Services Details)

- **Available agents:** A scrollable list displaying all the agents in the system not assigned to this group

To assign an agent / agents to the selected group, Select the required agent / agents in the Available Agents list, and drag the selection into the Group agents list (or click the Add button). To add all agents click the Add All button.

To un-assign an agent / agents from the selected group, Select the required agent / agents to be removed from the Group agent list, and drag the selection into the Available agents list. To remove all agents click the Remove All button.

To change the order of the groups, Click the agent to be moved and drag it into the required position in the list.

4.4.3 Configuring Group Thresholds

Threshold values are assigned to fields that are shown in the real-time reports. Each field that has a threshold value attached to it may appear in the reports in three different background colors, depending on the field's current numerical value and its thresholds:

- **White:** (Default background color) indicates that the value shown is in the normal zone (no alarm range).
- **Yellow:** Indicates that the value is in a low warning level zone (slightly too high or too low).
- **Red:** Indicates that the value is in a high warning level zone (unacceptably high or low).

You may change the actual color displayed on the screen (see Section 4.18.3 on page 93). In that case the "Yellow level" thresholds may be viewed on screen in another color.

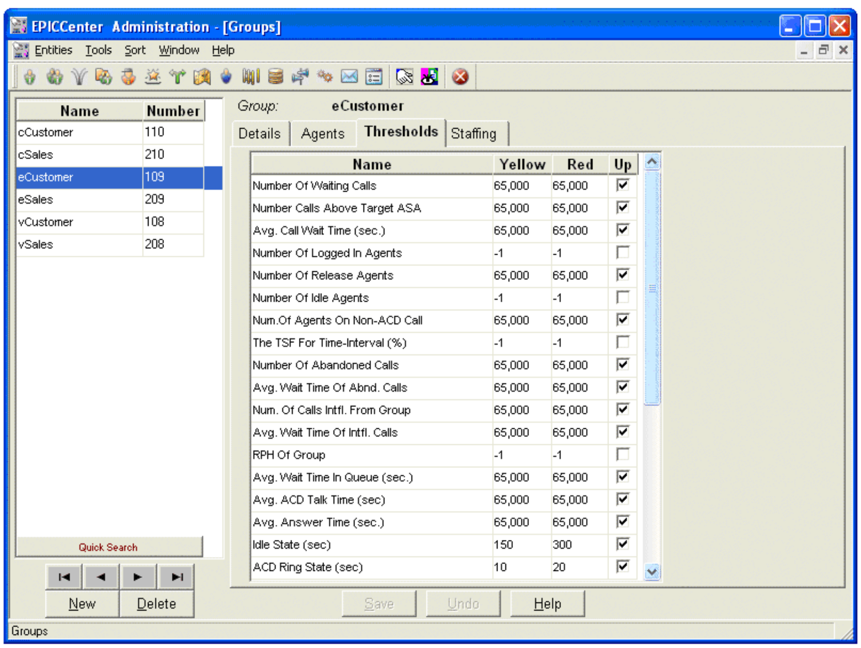

Figure 4-9 Group Thresholds Configuration Screen

To open the Group Threshold configuration screen:

Step 1 Click the Groups button in the Toolbar of the main application window.

Step 2 Click the Threshold tab in the tabs area. The Group Threshold configuration tab is displayed.

The Threshold tab displays the following options per each field:

- **Name:** Name of the event field for which the threshold is specified.

- **Yellow**: This number defines the border between the Normal and low Warning zones. If the field's value for which the threshold is defined goes beyond this value (or below, depending on the 'Up' value), it indicates that the threshold has been exceeded.
- **Red:** This number defines the border between the low and high Warning zones. If the field for which the threshold is defined goes beyond this value (or below, depending on the 'Up' value), it indicates that the threshold has been exceeded.
- **Up:** If the "UP" box is unmarked, this indicates that high values are preferred. The normal range starts with infinity, and yellow > red, for example, 1.

If the "UP" box is marked, this indicates that low values are preferred. The normal range starts with 0, and yellow < red.

The is a list of fields that may have threshold values assigned to them:

- **Number Of Waiting Calls**: Number of calls currently in the queue.
- **Number Calls Above Target ASA:** Number of calls currently in the queue waiting above Target ASA seconds.
- **Avg. Call Wait Time (sec.):** Average wait time in queue of currently queued calls.
- **Number Of Logged In Agents:** Number of agents currently logged in to the group.
- **Number Of Release Agents:** Number of agents currently logged in to the group and in Release state.
- **Number Of Idle Agents:** Number of agents currently logged in to the group and in Idle state.
- **Num. Of Agents On Non-ACD Call:** Number of agents currently logged in to the group and busy with non-ACD calls.
- **The TSF For Time-Interval (%):** Target Service Factor for the specified time interval.
- **Number Of Abandoned Calls:** Number of abandoned calls. (An abandoned call is a call during which the caller hangs up before being serviced.)
- **Avg. Wait Time Of Abnd. Calls**: Average time an abandoned call waited in the queue. (An abandoned call is a call during which the caller hangs up before being answered.)
- **Num. Of Calls Intfl. From Group**: Number of interflowed calls in the group.
- **Avg. Wait Time Of Intfl. Calls**: Average time an interflowed call waited in the queue.
- **RPH Of Group**: Rate Per Hour is the average number of calls answered by the group per hour.
- **Avg. Wait Time In Queue (sec.):** The average time a delayed call waited in the queue.
- **Avg. ACD Talk Time (sec):** The average time an agent talks on an ACD call.
- **Avg. Answer Time (sec.):** The average time an agent is in Busy Out State (that is, when the agent did not answer a routed call within a prescribed time).
- **Idle State (sec):** The time the agent is in the Idle state.
- **ACD Ring State (sec):** The time that an ACD call rings an agent's extension.
- **ACD Talk State (sec):** The time when no calls are being handled and the agent is free to receive calls.
- **Wrap Up State (sec):** The time the agent is in the wrap-up state.
- **NACD Inc State (sec):** The time the agent is busy with an incoming non-ACD call.
- **NACD Out State (sec):** The time the agent is busy with an outgoing non-ACD call.
- **Release State (sec):** The time the agent is in the Release state.
- **NACD Out + Rls State (sec):** The time the agent is busy with an outgoing non-ACD call while the station is in Release state.

- **NACD Inc + Rls State (sec):** The time the agent is busy with an incoming non-ACD call while the station is in Release state.
- **Busy + Release State (sec):** The time an incoming call rings the agent's telephone.
- **Busy State (sec):** The time the agent is in the Busy state. ACD calls are not routed to an agent in this state.
- **Busy ACD Other Grp State (sec):** The time the agent is busy with an ACD call from another group.
- **O-ACD Rsrvd State (sec):** The time the agent is reserved during preparations for an outbound ACD call.
- **O-ACD Talk State (sec):** The time the agent is busy talking on an outbound ACD call.

4.4.4 Configuring Group Staffing

This tab is only available in Enterprise Contact Center.

The Staffing tab enables you to define the number of agents required by a group on a daily basis. Once these numbers are defined, they become the default settings. A calendar is then generated for each group displaying the number of staff members required by the group for each day of the week. The numbers can easily be modified, and changes take effect from the date of modification onwards. The parameters defined here are used for the staffing real-time and historical reports that measure the actual vs. required staffing.

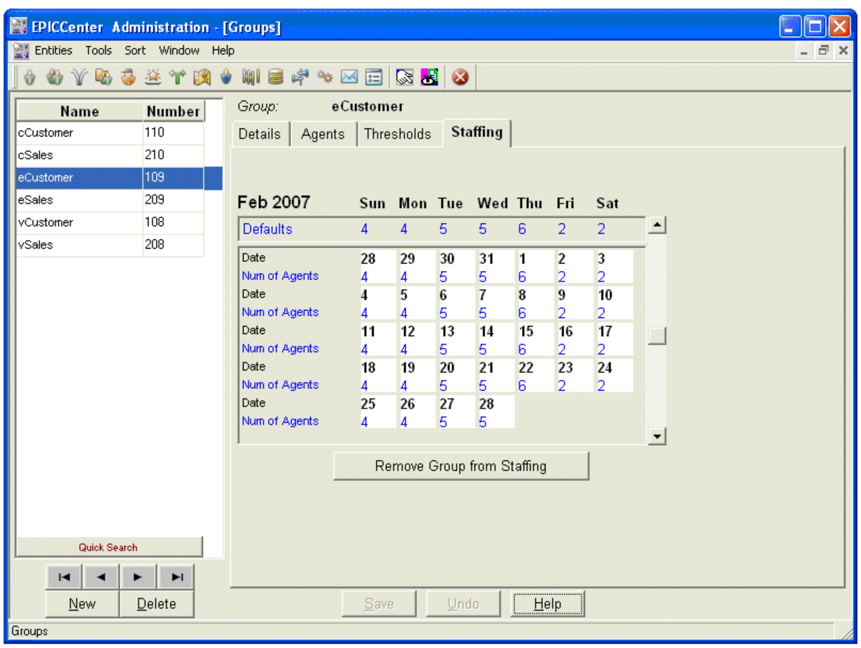

Figure 4-10 Group Staffing Configuration Screen

To open the Groups Staffing configuration screen:

Step 1 Click the Groups button in the Toolbar of the main application window.

Step 2 Click the Staffing tab in the tabs area. The Groups Staffing configuration tab is displayed.

The Staffing tab displays the Group list with the group's name and number and a calendar with the staffing configuration for the selected group in the Groups list. If no configuration has been defined, you can define the staffing for each group.

- **Add Group to Staffing:** If no configuration has been defined for the selected group, click the Add Group to Staffing button to define the staffing requirements.

  The Add Group to Staffing dialog box is opened where you can define the numbers required for each weekday.
- **Calendar**: The calendar displays the default staffing numbers for the current month. You can scroll through the calendar to view previous or future months. You may edit the staffing numbers directly on the calendar. Changes take effect from the next day at midnight or system initialization. Specific days, such as Christmas, can be edited individually.

To define staffing requirements for a selected group:

Step 1 Click the Add Group to Staffing button.

The Add Group to Staffing window opens.

Step 2 Enter the default number of staff required for each day of the week.

Step 3 Click OK.

A calendar for the current month is generated displaying the date in black and the default number of required staff in blue.

If you have not defined the staffing requirements for a group, you will be asked to do so when you initially select the group.

To remove the staffing information for a selected group, Click the Remove Group from Staffing button.

To edit a default number in the calendar, Click the number in the Defaults panel at the top of the calendar and edit as required.

Any changes to the staffing information take effect from the point of modification onwards from the next day at midnight.

To edit the staffing number for a specific day, such as Christmas, Click the day that you want to edit and change the number.

4.5 Configuring Trunks / Trunk Groups

Use the 'Trunk Groups' entity to report on trunks. (Defined trunk groups do not have to be identical to trunk group settings in the PBX.) One can assign all trunks in the system to a single trunk group, or not assign trunks to trunk groups at all (if there is no need to receive trunk reports). In some environments incoming trunks must be defined; others do not have this requirement.

The Trunks / Trunk Groups configuration screen allow administrators to add and remove Trunks / Trunk groups, to set their properties, and to assign / de-assign trunks to / from trunk groups.

The Trunks / Trunk Groups configuration screens consist of three tabs:

- Configuring Trunk Group Details
- Configuring Trunk Group Trunks
- Configuring Trunk Details

To open the Trunks / Trunk Groups configuration screen, Click the Trunks / Trunk Groups button in the Toolbar of the main application window

The Trunks / Trunk Groups Configuration screens contain:

- **Trunks / Trunk Groups List**: A scrollable list displaying the Name and Number of all the trunk groups in the system or the Name, Number and the owning trunk group of al the trunks in the system. To choose the list to display, use the two tabs below the scrollable list.

  Use the four navigational buttons below the list to move up or down the list, return to the beginning or jump to the end of the list..

  Clicking the mouse button on any group in the list provides options for sorting the list by Name or Number
- **New**: Click this button to activate a wizard to add a new Trunks / Trunk Group to the list
- **Delete**: Click this button to delete a Trunks / Trunk group from the Trunks / Trunk Groups list
- **Tabs Area**: This area, at the right of the Trunks / Trunk Groups list, contains three tabs that enable the configuration of the selected Trunk Group Details, Trunk Group trunks, and Trunk details.

4.5.1 Configuring Trunk Group Details

To configure trunk group details:

Step 1 Click the Trunk Groups tab below the Trunks list.

Step 2 Select the trunk group to be configured from the list.

Step 3 Click the Details tab at the top of the Trunks Configuration window.

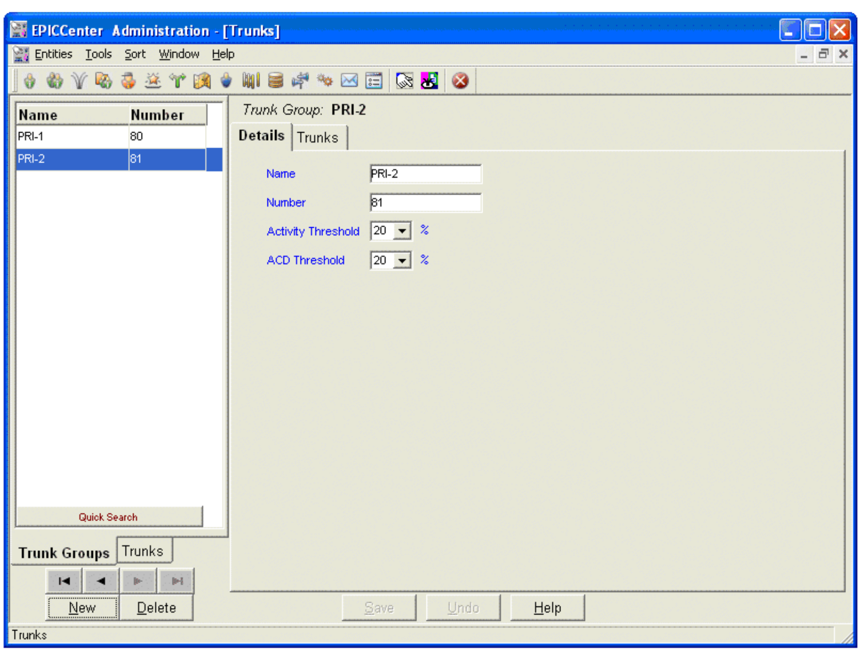

Figure 4-11 Trunk Groups Details Configuration Screen

The Details tab opens, displaying the following information, which may be edited:

- **Name**: The name of the selected trunk group.
- **Number**: The identification number of the selected trunk group. This number must be unique in the PBX numbering plan but not must be the same as defined in the PBX.
- **Activity Threshold**: The percentage of time that a trunk in the trunk group should be active.

  If a trunk's activity falls below this predefined threshold, compared to the average activity per trunk in the trunk group, the system adds a record to the Trunk Exception Log report.
- **ACD Threshold**: If a trunk's ACD activity falls below this predefined threshold, compared to the average ACD activity per trunk in the trunk group, the system adds a record to the Trunk Exception Log report.

4.5.2 Configuring the Trunk Details

The Details page of the Trunks Configuration screen enables you to configure the Details of trunks in the system.

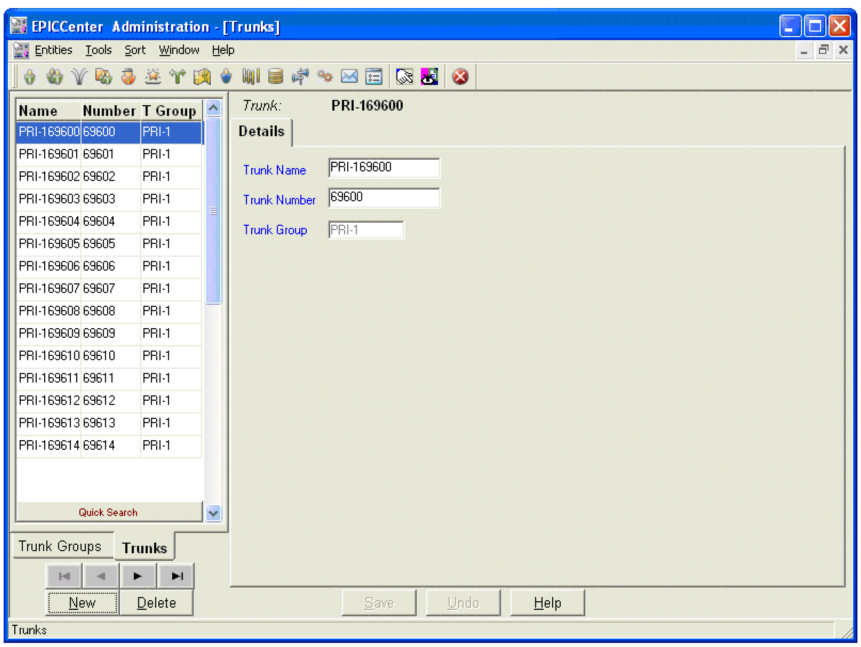

Figure 4-12 Trunks Details Configuration Screen

To configure trunk details:

Step 1 Click the Trunks tab below the Trunks list.

Step 2 Select the trunk to be configured from the list.

Step 3 Click the Details tab at the top of the Trunk Configuration window.

The Details tab opens, displaying the following information, which may be edited:

- **Name**: The name of the selected trunk

- **Number**: The dial number of the trunk in the PBX numbering plan.
- **Trunk Group:** The name of the trunk group to which the selected trunk is assigned. This field cannot be edited. In order to change this assignment, use the Trunk Group's Trunks configuration screen to unassign the trunk from its current trunk group and to re-assign it to the new trunk group.

4.5.3 Configuring the Trunk Groups Trunks

Use the Trunks tab of the Trunks Configuration window to configure the assignment of trunks to trunk groups in the system.

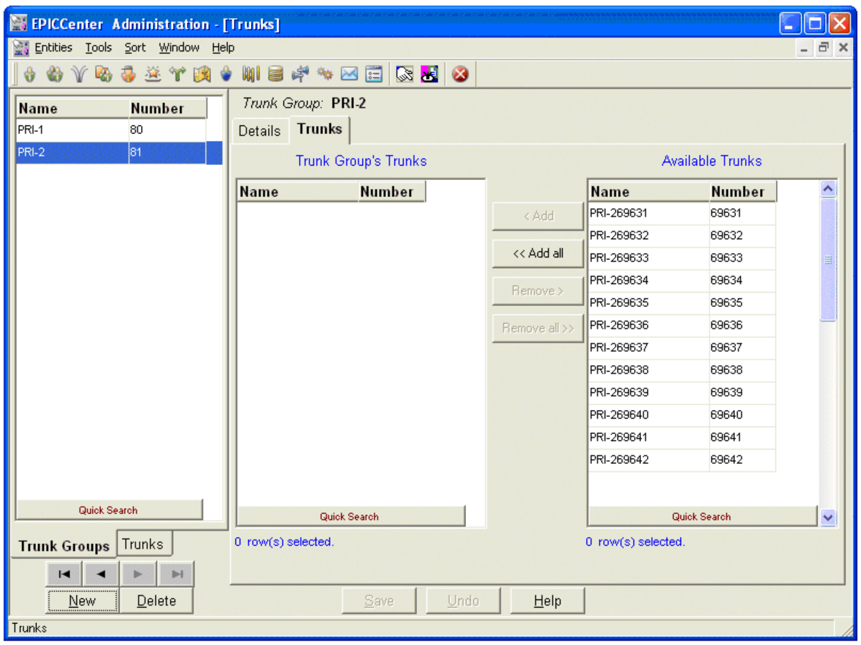

Figure 4-13 Trunks Group Trunks Configuration Screen

To open the Trunks tab:

Step 1 Click the Trunk Groups tab on the lower left of the page.

Step 2 Click the Trunks tab at the top of the Trunks Configuration window.

The Trunks tab displays the current configuration for the selected trunk group. It contains the following two lists:

- **Trunk Group's Trunks:** This area displays the name and number of all the currently assigned trunks for the selected trunk group. The assignment configuration can be edited, if required.
- **Available Trunks**: A scrollable list displaying the name and number of all the available trunks in the system that has not yet been assigned to a group.

To assign trunks to the selected trunk group, perform one of the following:

- Select the required trunk/trunks, using either the <Shift> or <Ctrl> key, from the Available Trunks list, and click Add to add your selection to the Trunk Group's Trunks list.

- Click Add all to move all the trunks in the Available Trunks list to the Trunk Group's Trunks list.

To remove a trunk from the selected trunk group, perform one of the following:

- Select the required trunk/trunks, using either the <Shift> or <Ctrl> key, from the Trunk Group's Trunks list, and click the Remove button (or drag your selection into the Available Trunks list).
- Click Remove all to remove all the trunks listed in the Trunk Group's Trunks list.

4.6 Configuring Super Groups

A Super Group allows the supervisor to view a number of ACD groups as a single statistical entity. It provides a way to split the organization into departments and to analyze the performance of each department.

Use the Super Groups Configuration window to configure the details and groups for each super group in the system. You can also add new super groups and delete existing super groups from the system.

To open the Super Groups Configuration window, Click the Super Groups icon in the toolbar.

The Super Groups Configuration window contains:

- **Super Groups List:** A scrollable list displaying the name of all super groups in the system. Use the four navigational buttons below the list to move up or down the list, return to the beginning or jump to the end of the list.
- **New:** Click New to activate a wizard to add a new super group to the list.
- **Delete:** Click Delete to delete a super group from the list.
- **Tabs Area:** The area at the right of the groups list contains two tabs where you can configure the Details and Groups for the currently selected super group.

4.6.1 Configuring Super Group Details

Use the Details tab of the Super Group Configuration window to configure the names of the super groups in the system

To open the details tab

Step 1 Click the Super Groups button in the Toolbar of the main application window.

Step 2 Click the Details tab in the tabs area. The Super Group Details configuration tab is displayed.

The Details tab displays the current configuration for the selected super group. It contains:

- **Name:** The name of the selected super group.

4.6.2 Configuring Super Group Groups

Use the Groups tab of the Super Groups Configuration window to assign or de-assign the Groups to or from super groups.

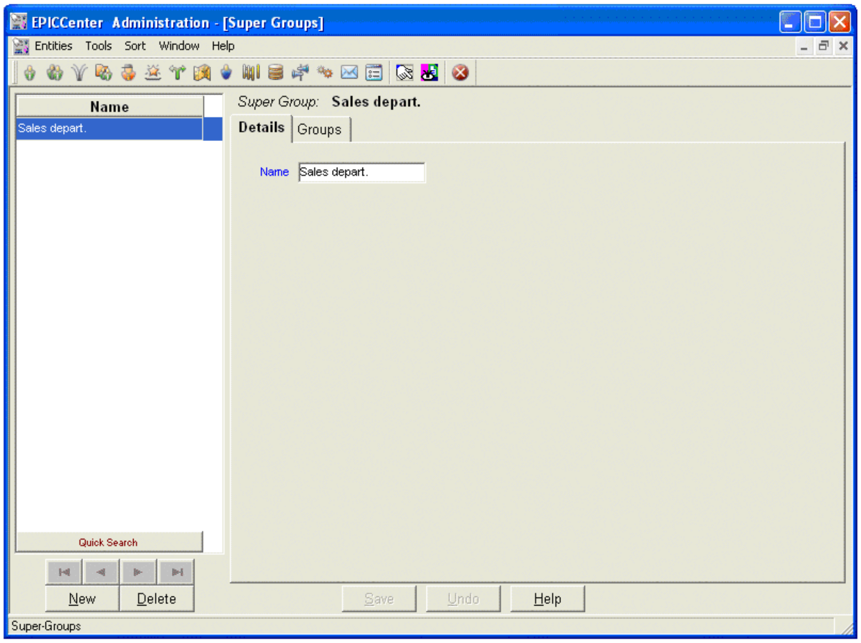

Figure 4-14 Super Group Details Configuration Screen

To open the Groups tab, Click the Groups tab at the top of the Super Groups Configuration window.

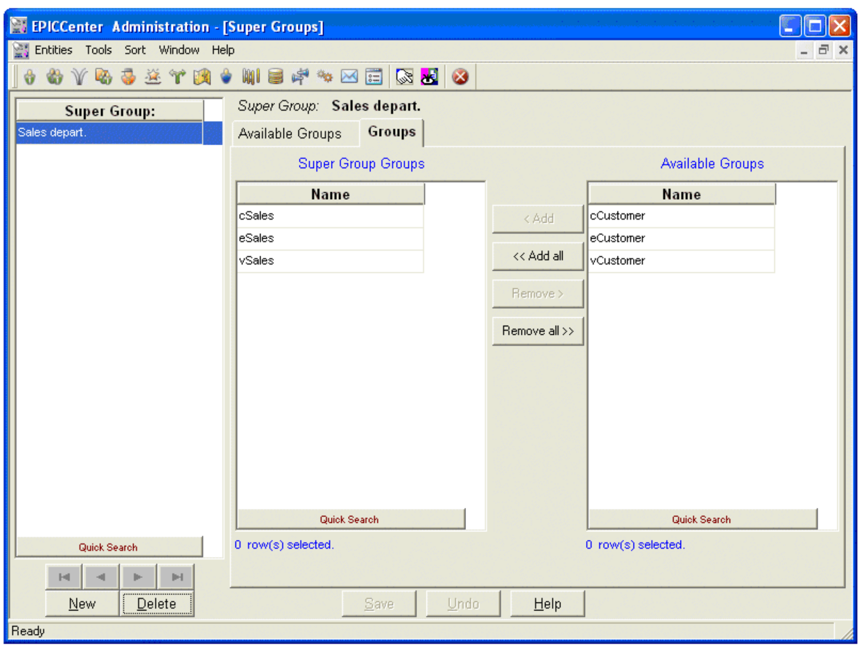

Figure 4-15 Super Group Groups Configuration Screen

The Groups tab displays the current groups assignment for the selected super group in the Super Groups list. It contains the following two lists:

- **Super Group Groups**: This area displays the name and of all the groups currently assigned to the selected super group. The assignment configuration can be edited.

- **Available Groups:** A scrollable list displaying the name of all the groups available for assignment in the system.

To assign a group / groups to the selected super group, perform one of the following:

- Select the required group / groups, using either the <Shift> or <Ctrl> key, from the Available Groups list, and click Add to add your selection to the Super Group's Groups list.
- Click Add all to move all the groups in the Available Groups list to the Super Group's Groups list.

To remove a group from the selected super group, perform one of the following:

- Select the required group / groups, using either the <Shift> or <Ctrl> key, from the Super Group's Groups list, and click the Remove button (or drag your selection into the Available Groups list).
- Click Remove all to remove all the groups listed in the Super Group's Groups list.

4.7 Configuring Supervisors

A supervisor in the contact center is responsible for the management of one or more agent groups (one agent group can also be managed by several supervisors).

Use the Supervisor Configuration window to configure the settings, privileges, groups, and super groups for a supervisor in the system. You can also add new supervisors and delete existing supervisors from the system.

To open the Supervisors Configuration window, Click the Supervisors icon in the toolbar.

The Supervisor Configuration window contains:

- **Supervisor List:** A scrollable list displaying the names of all the supervisors in the system. Use the four navigational buttons below the list to move up or down the list, return to the beginning or jump to the end of the list..
- **New:** Click New to activate a wizard to add a new supervisor to the list.
- **Delete:** Click Delete to remove a supervisor from the list.
- **Tabs Area:** The area at the right of the groups list contains three tabs where you can configure the Details, Groups and Super Groups for the currently selected supervisor.

4.7.1 Configuring Supervisor Details

The Details page of the Supervisors Configuration screen enables you to configure the Details of the supervisors in the system.

To open the Details page, Click the Details tab at the top of the Supervisor Configuration dialog box.

The Details page of the Supervisors Configuration dialog box displays the current details of the selected supervisor in the Supervisors List, which you can edit, as required.

- **Name:** The name of the selected supervisor.
- **Password:** The password that the supervisor must type when logging in to the system.

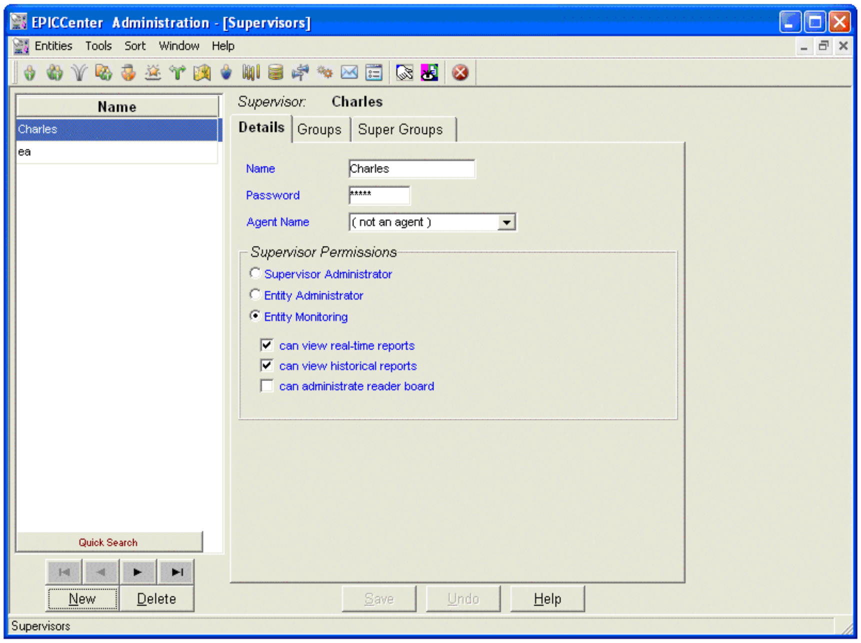

Figure 4-16 Supervisor Details Configuration Screen

- **Agent ID**: The agent ID for the supervisor. This Agent ID is used when the supervisor activates the Agent application, thus bypassing the Agent logon procedure.
- **Access Level:** This area displays a list of privileges that may be assigned/un-assigned to a supervisor. Click one of the following radio buttons to assign a supervisor's access level:
  - — ***Supervisor Administrator:*** This supervisor may access and modify all the system entities.
  - — ***Entity Administrator:*** This supervisor may access and modify all the system entities except for supervisor details.
  - — ***Entity Monitoring:*** This supervisor is has limited access to Supervisor and Wall Board Administration. To configure a Supervisor with Entity Monitoring level access, the following check boxes must be configured according to the functionality that you want to assign to the supervisor:
    - ▷ *Can View Real-Time Reports:* The supervisor may view and update data in the Real-Time Monitoring Application.
    - ▷ *Can View Historical Reports:* The supervisor may view and update data in the Historical Reports Application.
    - ▷ *Can Administrate Wall Board:* The supervisor may modify Wall Board scenarios.

4.7.2 Configuring Supervisor Groups

The Groups tab of the Supervisors Configuration window is available only if the selected supervisor has "Entity Monitoring" access level authority. It allows a supervisor with "Supervisor Administrator" access level to edit the Group assignment for supervisors with "Entity Monitoring" access authority.

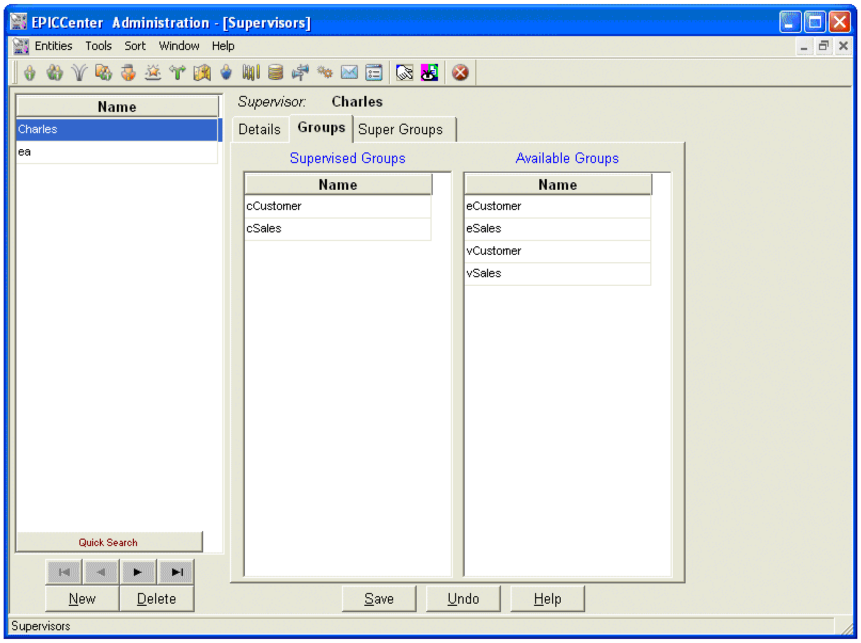

Figure 4-17 Supervisor Groups Configuration Screen

To open the Groups tab, Click the Groups tab at the top of the Supervisor Configuration window.

The Groups tab displays the current groups assignment for the selected supervisor in the Supervisors list. It contains the following two lists:

- **Supervised Groups:** This area displays the name of all the groups currently assigned to the selected supervisor. The assignment configuration can be edited, if required.
- **Available Groups:** A scrollable list displaying the name of all the groups available for assignment in the system.

To assign a group to the selected supervisor:

Step 1 Click the required group in the Available Groups list and drag it into the Supervised Groups list.

Step 2 A dialog box appears where you can assign privileges (that is, to allow the group to be used in real-time and/or historical reports).

Step 3 Click the check boxes to assign the privileges as required.

Step 4 Click OK.

The group is added to the Supervised Groups list.

To un-assign a group from the selected supervisor:

Step 1 Click the group to be removed from the Supervised Groups list.

Step 2 Drag it into the Available Groups list.

To modify the privileges assigned to a group:

Step 1 Double-click the group in the Supervised Groups list.

Step 2 A dialog box appears where you can assign privileges (that is, to allow the group to be used in real-time and/or historical reports).

Step 3 Click the check boxes to modify the privileges as required.

Step 4 Click OK.

4.7.3 Configuring Supervisor Super Groups

The Super Groups tab of the Supervisors Configuration window is available only if the selected supervisor has "Entity Monitoring" access level authority. It allows the supervisor with "Supervisor Administrator" access level to edit the Super Groups assignment for supervisors with "Entity Monitoring" access authority.

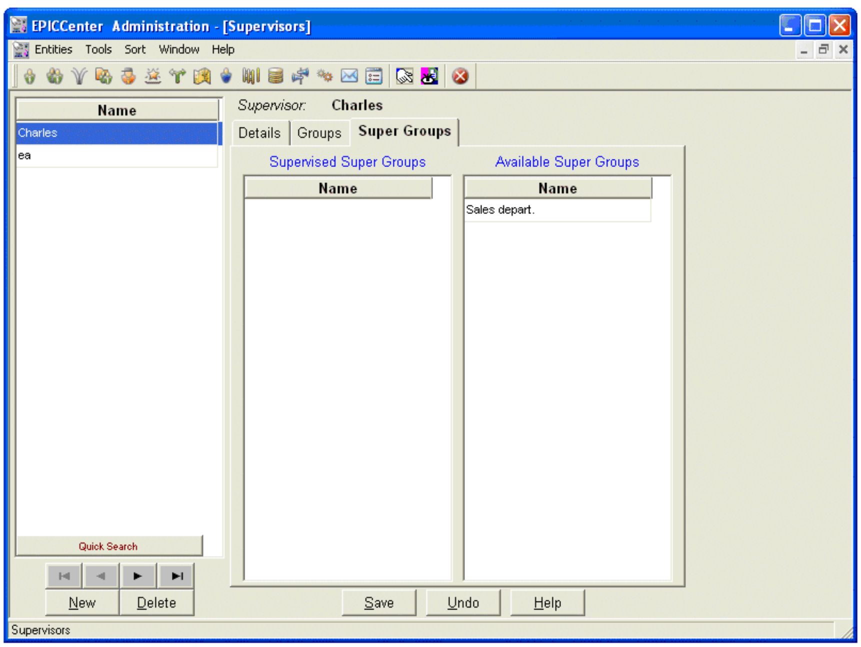

Figure 4-18 Supervisor Groups Configuration Screen

To open the Super Groups tab, Click the Super Groups tab at the top of the Supervisor Configuration window.

The Super Groups tab displays the current super groups assignment for the selected supervisor in the Supervisor list. It contains the following two lists:

- **Supervised Super Groups:** This area displays the name of the super groups currently assigned to the selected supervisor. The assignment configuration can be edited, if required.
- **Available Super Groups:** A scrollable list displaying the name of the all the super groups available for assignment in the system.

To assign a super group to the selected supervisor:

Step 1 Click the required super group in the Available Super Groups list and drag it into the Supervised Super Groups list.

Step 2 A dialog box appears where you can assign privileges (that is, to allow the super group to be used in real-time and/or historical reports).

Step 3 Click the check boxes to assign the privileges as required.

Step 4 Click OK.

The super group is added to the Supervised Super Groups list.

To un-assign a group from the selected supervisor:

Step 1 Click the super group to be removed from the Supervised Super Groups list.

Step 2 Drag it into the Available Super Groups list.

To modify the privileges assigned to a group:

Step 1 Double-click the super group in the Supervised Super Groups list.

Step 2 A dialog box appears where you can assign privileges (that is, to allow the super group to be used in real-time and/or historical reports).

Step 3 Click the check boxes to modify the privileges as required.

Step 4 Click OK.

4.8 Configuring Services

Every contact in the contact center is assigned to a specific service, such as sales or customer service. This service defines how the call is processed.

Use the Services Configuration window to configure the services to which calls can be assigned. In addition, new services can be added and deleted from the system.

To open the Services Configuration window, Click the Services icon in the toolbar.

The Services Configuration window comprises:

- **Services List**: A scrollable list displaying the name of all the current services in the system. Use the four navigational buttons below the list to move up or down the list, return to the beginning or jump to the end of the list.
- **New:** Click New to activate a wizard to add a new service to the list.
- **Delete:** Click this button to delete a service from the list.
- **Tabs Area:** The area to the right of the Services list contains tabs that enable the configuration of the following parameters for the currently selected service:

  Details, Announcers Plan, Destination, Overflow, Interflow, No Agents, Callbacks, and Abandoned.

4.8.1 Configuring Service Details

Use the Details tab of the Service Configuration window to configure the service's agent search criteria, the service's enabled medias, the service's music source, wrap-up time and forced released time.

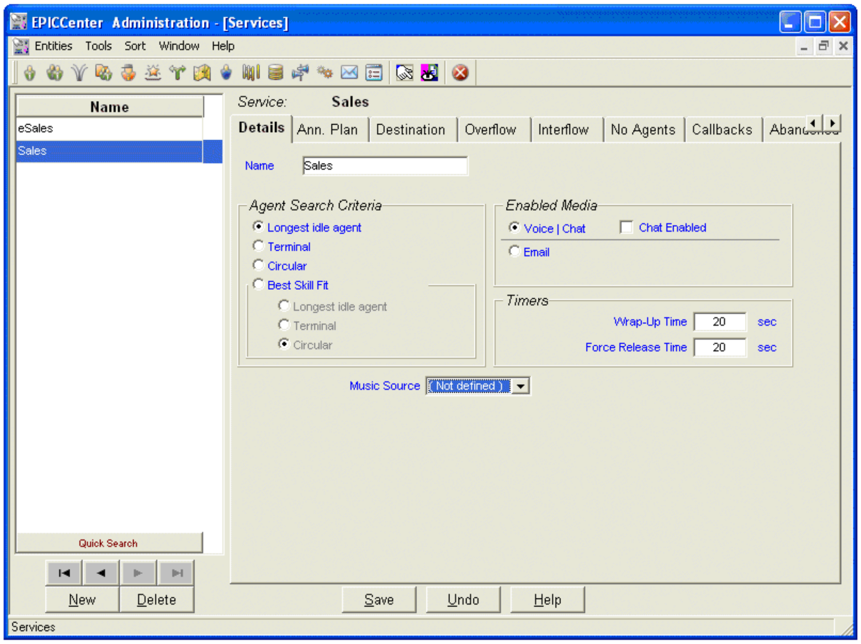

Figure 4-19 Services Details Configuration Screen

To open the Details tab, Click the Details tab at the top of the Services Configuration window.

The Details tab comprises:

- **Name**: The name of the selected service.
- **Agent Search Criteria:** The Agent Search Criteria defines the method by which an available agent is selected for a call that enters the service. This method is used whenever a call enters the service and there is more than one available agent to handle the call. If only one agent is available at that time, that agent will get the call. The followings options are available
  - — *Longest Idle Agent:* The call will be assigned to the agent who is idle the longest.
  - — *Terminal:* The call will be assigned to the first available agent in the list of agents for the group, i.e., an agent that appears higher in the list is preferable to agents lower in the list. Thus agents can be listed according to the order of their ability. The order is defined in Configuring Groups Agents.
  - — *Circular:* The system searches the group's agent list, starting from the last agent to receive a call, for the next available agent. This method attempts to distribute calls equally between agents in the group.
  - — *Best skill fit:* The service will look for the agents whose skills best fit the requirements of the call. In case where two agents with the same skill fit are found, the service uses one of the following methods to decide which agent will receive the call:

- ▷ *Longest Idle:* The call will be assigned to the agent, among all the agents with the same skill fit, who is idle the longest.
- ▷ *Terminal:* The call will be assigned to the first available agent, among all the agents with the same skill fit, in the list of agents for the group, For example, an agent who appears higher in the list is preferable to agents lower in the list. Thus agents can be listed according to the order of their ability. The order is defined in Configuring Groups Agents
- ▷ *Circular:* The system searches the group's agent list, among all the agents with the same skill fit, starting from the last agent to receive a call, for the next available agent. This method attempts to distribute calls equally between agents in the group

This option is only available in Enterprise Contact Center.

- **Enabled Media:** The types of media, in addition to voice, that the service may handle. A service cannot be used to route Voice/Chat calls and email contacts at the same time. If the Voice/Chat option is selected, the service may use to route that only
- **Music Source:** The system connects a call waiting in queue to a music source. Select the port at which music is provided for calls from the drop-down list. The options are Device (where applicable) or CCS. If no music is specified, the system default will be used.
  - — *Device:* A device in the PBX that may be used to play music to the caller. This device must be defined as a music device in the Configuring the PBX CTI Link parameters.
  - — *CCS:* In this mode the call is connected to an IVR port and performs the actions indicated in the selected CC Script.
- **Wrap-Up Time:** The time (in seconds) that an agent is in wrap-up mode after the completion of a call. The agent's extension is 'Idle' but the Contact Center keeps the agent free to complete any work pertaining to the previous call (i.e. "After Call Paper Work").
- **Forced Release Time:** The time (in seconds) that a call can ring on an agent extension. If the agent doesn't answer the call within this time, the call will be re routed to another destination (back to queue or to another available agent) and the agent will be forced released. If left undefined, the system uses the default forced released time defined in the Configuring System Miscellaneous Parameters screen

4.8.2 Configuring Service Announcers

Use the Announcers tab of the Service Configuration window to configure parameters for announcers that are used for the service. Announcers are voice messages or recordings that are played to the caller while the caller is waiting in the queue.

To open the Announcers tab, Click the Announcers tab at the top of the Services Configuration window.

The Announcers tab comprises:

- **Mandatory:** Click this check box so that all callers entering the service will hear a mandatory announcement, regardless of the availability of agents.

  The announcer must be defined before clicking the check box.

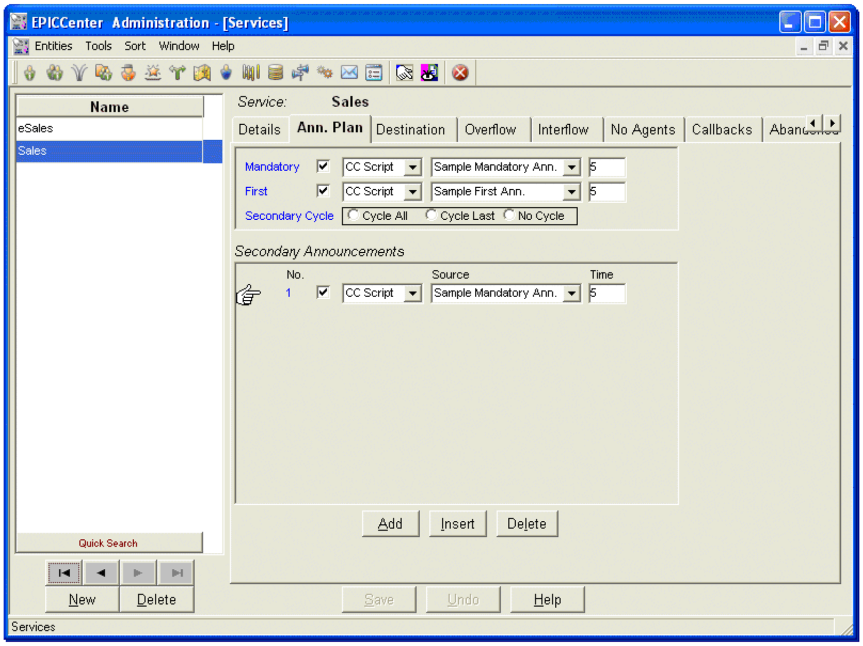

Figure 4-20 Services Announcers Plan Configuration Screen

An announcer is defined by two fields: A destination Call Control (CC) Script for the mandatory announcement, and the length of time (in seconds) that the caller hears music before the next announcer.

- **First**: Click this check box so an announcement will be heard only once when a caller first enters the wait queue for service.

  The announcer must be defined before clicking the check box.

  An announcer is defined by two fields: A destination Call Control (CC) Script for the mandatory first announcement, and the length of time (in seconds) that the caller hears music before the next announcer.

- **Secondary Announcers:** Use this area to define the following details (for up to 20 secondary announcements), that are played according to "Secondary Cycle" settings while the caller is waiting in the queue:

  — *No.*: The sequential number of the announcement.

  The announcer must be defined before clicking the check box.

  — *Source*: The CC script used for the announcement.

  — *Time:* The length of time (in seconds) that the caller hears music before the next secondary announcer.

- **Secondary Cycle**: Once you have defined secondary announcements, click one of the following options

  — *Cycle All:* To play all secondary announcements over and over.

  — *Cycle Last:* To play the last secondary announcement over and over.

  — *No Cycle*: To play the secondary announcements only once.

- **Add**: Click Add to add a row at the end of the Secondary Announcers list to add the details of an additional secondary announcement.

- **Insert**: Click Insert to insert a new row in the Secondary Announcers list according to the position of the hand pointer in the list. In this row enter the details of an additional secondary announcement.
- **Delete:** Click Delete to delete the last (or a selected) announcement from the Secondary Announcers list.

In some environments, the music source is a special device(s) in the PBX. In those environments, this music device(s) must be defined in the PBX CTI Link of the System configuration screen (see Configuring the PBX CTI Link parameters). In those cases, the administration will not let you define time for music unless at least one music device is defined.

4.8.3 Configuring Service Destination

Use the Destination tab of the Service Configuration window to configure the service routing destinations in the system. Different destinations can be defined for different times of the day (called shifts).

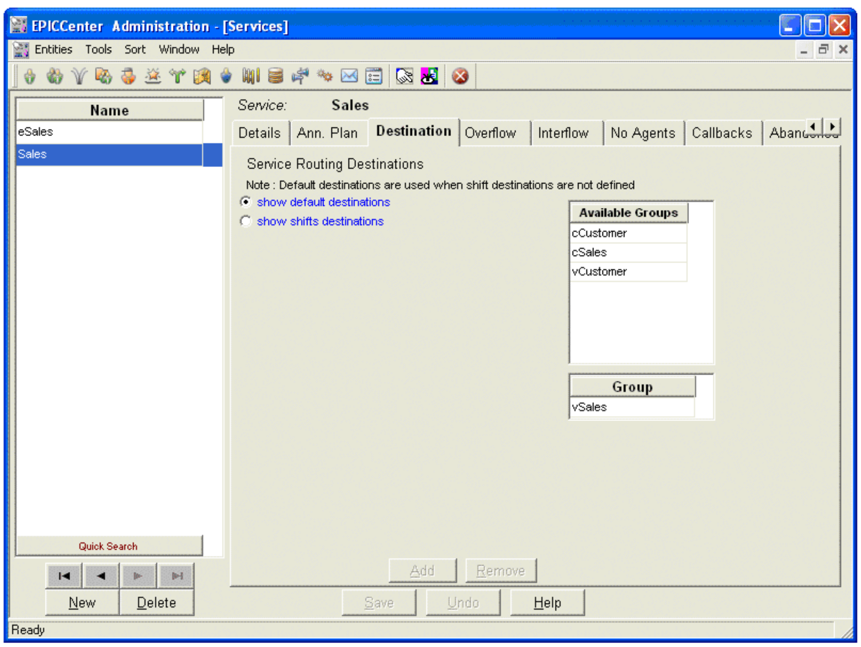

Figure 4-21 Services Destination Configuration Screen

To open the Destination tab, Click the Destination tab at the top of the Service Configuration window.

The Destination tab comprises:

- **Show Default Destination:** Click this radio button to display the default destination for the selected service. The default destination is activated whenever there is no shift destination that is valid for the service.

  The Available Groups list is a scrollable list displaying all the available groups.

  The Group window shows which group has already been assigned to the service.

- **Show Shift Destination:** Click this radio button to display the shift destinations that were defined for the service. ***This option is only available in Enterprise Contact Center.***

In the Shift Destination mode—if Show Shifts Destination is selected—the Shifts list appears, displaying a list of all the shifts that have a destination group specified for service. The Available Groups list (which lists the groups that may serve as the service destination for the selected shift) and the destination group box for the selected shift are also displayed

To assign another group to the Default Destination Groups:

Step 1 Check the Show Default Destination check box.

Step 2 Remove the currently defined group by dragging it to the Available Groups list.

Step 3 Add a new group to the Default Destination Group by dragging it from this list into the Default Destination Group.

To add a shift to a service:

Step 1 Check the Show Shifts Destination check box.

Step 2 Click Add.

Step 3 The Add Shifts dialog box opens.

Step 4 Select the required shift and click OK. The shift information appears in the shifts list. A destination group appears in the Groups box by default.

To change the default destination for a shift:

Step 1 Check the Show Shifts Destination check box.

Step 2 Select the required shift from the shifts list.

Step 3 Drag the currently assigned group from the Groups into the Available Groups list.

Step 4 Select the required group from the Available Groups list and drag it to the Groups list box.

To remove a destination for a shift:

Step 1 Check the Show Shifts Destination check box.

Step 2 Select the required shift from the shifts list.

Step 3 Click Remove.

4.8.4 Configuring Service Overflow

Use the Overflow tab of the Service Configuration window to configure the overflow parameters for the service. Calls that overflow after a certain amount of time actually expand the number of groups for which they are waiting. There may be different overflow destinations in different overflow intervals, (For example, call may be overflowed to groups x, y, and z after 20 seconds and to groups a, b, and c after 40 seconds. In this example, there are two intervals: 20 and 40 seconds.) Groups are the only additional destinations to which a call can overflow. Different overflow destinations can be defined for different times during the day (shifts).

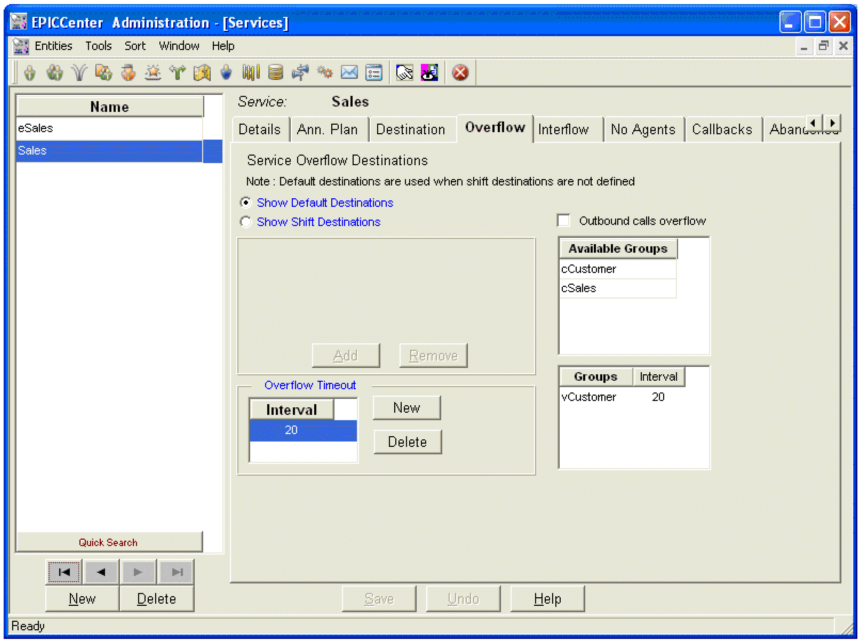

Figure 4-22 Service Overflow Configuration Screen

To open the Overflow tab, Click the Overflow tab at the top of the Service Configuration window.

The Overflow tab comprises:

- **Outbound calls overflow:** When this checkbox is checked, any outbound call that is waiting in the service's group destination will adhere to the overflow rules. Otherwise, the overflow rule will apply only for inbound calls.
- **Service Overflow Destinations:** This area contains the following two options:
  - — *Show Default Destination:* Click to display the default overflow destination for the service. The default overflow destination is used if no "overflow destination per shift" is valid for the current day and time.

    In "Default Destination" mode (that is, if Show default destination is selected), the Available Groups list, Overflow Timeout Intervals list, and the Overflow Destination Groups list appears. The Available Groups list displays a list of available overflow groups that may serve as a service overflow destination. The Overflow Timeout Intervals list displays the list of overflow timeouts. The Overflow Destination Groups list displaying the currently assigned overflow groups for the service in the selected overflow timeout interval.
  - — *Show Shift Destination:* Click to show the shift overflow destinations that were defined for the service. ***This option is only available in Enterprise Contact Center.***

    In "Shifts Destination" mode (that is, if Show shifts destination is selected), the Shifts list appears, displaying a list of all the shifts whose service overflow destination differs from the default overflow destination for the service. The Available Groups list (which lists the groups that may serve as the service overflow destination for the selected shift), and the destination overflow group for the selected shift is also displayed.

- **Overflow Timeout**: Use this area to define the intervals (amount of time in seconds) after which a call will overflow (be put in the queue for other groups). There may be many intervals. For each interval, many overflow groups may be defined.

To add an overflow destination for the default overflow destination:

Step 1 Check the Show Default Destinations check box.

Step 2 Select the overflow timeout interval from the intervals list.

Step 3 Drag the required group from the Available Groups list into the Groups list.

To remove a group from the overflow destinations for the default overflow destination:

Step 1 Check the Show Default Destinations check box.

Step 2 Drag the required group from the Groups list to the Available Groups list.

To add an Overflow Timeout interval:

Step 1 Click the New button to the right of the Overflow Timeout intervals.

Step 2 In the dialog box that opens, enter the required timeout (in seconds).

The overflow timeout intervals may be used either in the Default destination or in the Shift Destination.

To remove an Overflow Timeout interval:

Step 1 Select the overflow timeout interval from the intervals list.

Step 2 Click the Delete button to the right of the intervals list.

Deleting the interval will delete all the groups assigned to this interval in the default destination as well as in the shifts destinations.

To add an overflow destination for a shift other than the default destination:

Step 1 Check the Show Shifts Destination check box.

Step 2 If the shift is not already used, click the Add button below the shifts list. Select the required shift from the list of shifts that appears, and click OK

Step 3 Select the overflow interval to which the new overflow destination is to be added

Step 4 Drag the required overflow group from the Available Groups list to the destination Group.

To remove a group from the overflow destination list for a shift other than the default destination:

Step 1 Check the Show Shifts Destination check box.

Step 2 Select the required shift from the Shifts list.

Step 3 Drag the required overflow group from the Groups list to the Available Group.

To remove a shift from the overflow destination for a shift:

Step 1 Check the Show Shifts Destination check box

Step 2 Select the shift from the Shifts list and click Remove.

4.8.5 Configuring Service Interflow

Interflow calls are those calls that are waiting for a service and are not handled within a specified amount of time. Interflow calls are no longer part of the ACD domain. If the interflow destination is an IRN or service, the call enters the interflow IRN/service as a new ACD call.

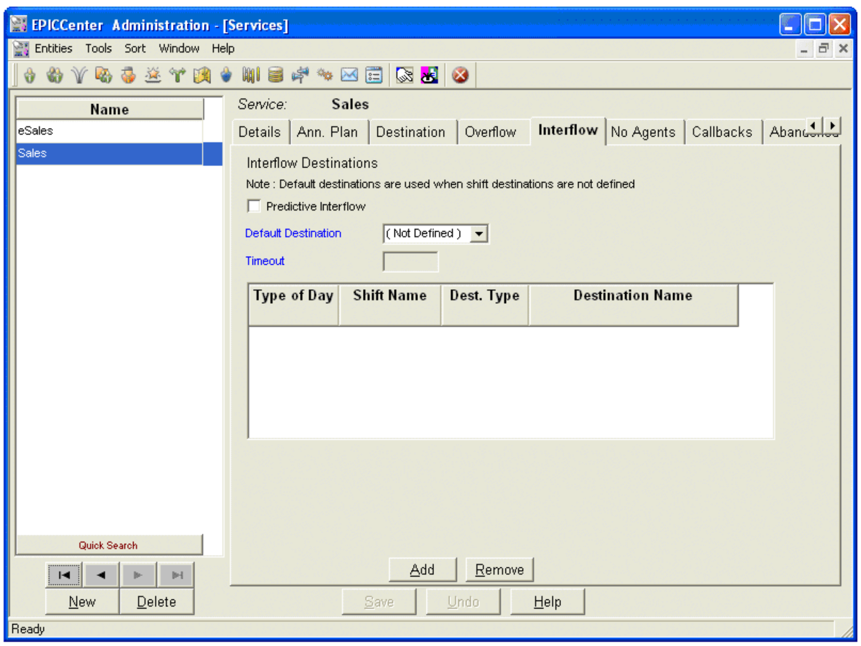

Figure 4-23 Services Interflow Configuration Screen

To open the Interflow tab, Click the Interflow tab at the top of the Service Configuration window.

The Interflow tab comprises:

- **Predictive Interflow:** If checked, any call that enters the service and, according to the expected wait time, is about to wait more than the 'Interflow Timeout' seconds, will immediately go to the interflow destination without actually waiting. ***This option is only available in Enterprise Contact Center.***
- **Default destination:** From this drop-down list, you can select the default interflow destination (Device, Call Control Script, IRN, or Service). This destination is used as interflow destination when there is no "shift destination" for the current day and time.

  For IRN, Service, or Call Control Script, a drop-down list appears from which you can select the IRN, Service, or Call Control Script for the default destination. For Device, an edit box appears in which you set the device's DN.

- **Interflow Timeout:** Use this area to define the interflow timeout, that is, how long (in seconds) a call waits for a service, after which a call interflows.
- **Shifts List:** A list of all the shifts for which an interflow destination other then the default is defined. For a shift with an interflow destination other than the default interflow destination four fields are displayed:
  - — The type of day for which the shift belongs.
  - — The shift name.
  - — The type of the interflow destination for that shift (IRN, Service, Call Control Script, or device).
  - — The destination name (in case of IRN, Service, or Call Control Script) or DN (in case of device).

  This option is only available in Enterprise Contact Center.

To add an interflow destination for a shift other than the default destination:

Step 1 Click Add.

Step 2 Select the required shift from the list of shifts that appears and click OK.

Step 3 Select interflow destination.

To change an interflow destination for a shift:

Step 1 Select the required shift from the Shifts list.

Step 2 Select a different interflow destination.

To remove an interflow destination for a shift, Select the shift from the Shifts list and click Remove.

4.8.6 Configuring Service No Agents

Use the No Agents tab of the Service Configuration window to configure the default destinations as well as the destination per shift, when no agents are logged in.

When a call is routed to a no agent logged in destination, the MIS counts it as a 'deflected due to no agents login' call. If the No Agent login destination routes the call back to group (through IRN) the call is counted as a new coming call.

To open the No Agents tab, Click the No Agents tab at the top of the Services Configuration window.

The No Agents tab comprises:

- **Use Overflow Destination (first interval as default):** If checked, any call that enters the service when no agent logged in will try first to immediately overflow to the first interval overflow groups. If there are logged in agents in these groups the call will enter their queue and will not route the service's No Agent Login destination. If the first interval overflow groups have no logged in agent, only then the call will route to the no agent logged in destination of the service.
- **Default Destination:** From this drop-down list, you can select the required default destination (Device, Call Control Script, or IRN) when no agent is logged in.

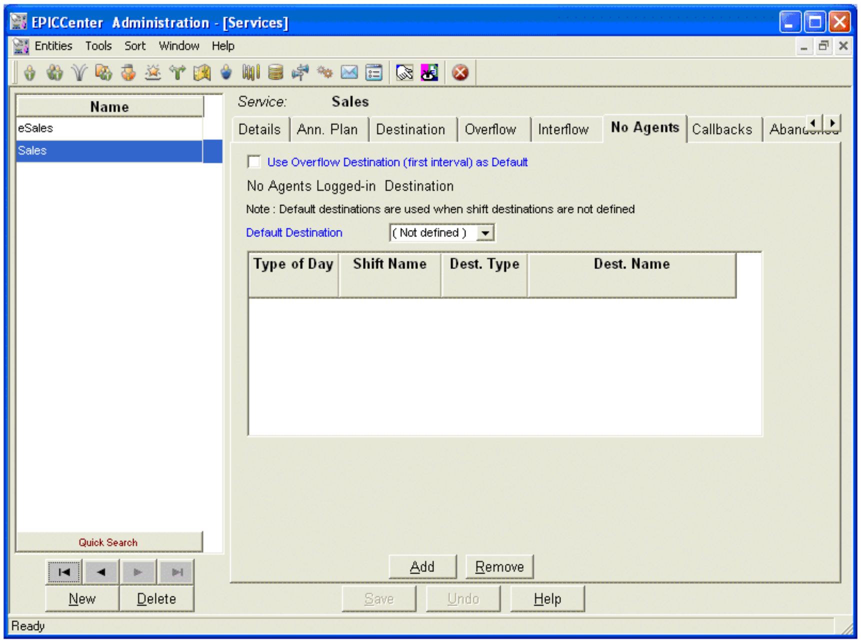

Figure 4-24 Services No Agents Configuration Screen

For IRN, or Call Control Script, a drop-down list appears from which you can select the IRN, or Call Control Script for the default destination. For device, a dialog box appears in which you set the device's DN.

- **Shifts List:** A list of all the shifts for which a No Agents Login destination other then the default is defined. For a shift with a no-agent login destination other than the default no-agent login destination, four fields are displayed:
  - — The type of day to which the shift belongs.
  - — The shift name.
  - — The type of the no agent login destination for that shift (IRN, Call Control Script, or device).
  - — The destination name (in case of IRN, or Call Control Script) or DN (in case of device).

  This option is only available in Enterprise Contact Center.

To add a no-agent destination for a shift other than the default destination:

Step 1 Click Add.

Step 2 Select the required shift from the list of shifts that appears and click OK.

Step 3 Select no-agent destination.

To change a no-agent destination for a shift:

Step 1 Select the required shift from the Shifts list.

Step 2 Select a different no-agent destination.

To remove a no-agent destination for a shift, Select the shift from the Shifts list and click Remove.

4.8.7 Configuring Service Callbacks

Callback calls is the means the Contact Center supplies to cope with peak loads. In such case, all is needed is to route the inbound call to a script that contains the ‘Collect CB’ action. This action asks the caller to dial the CB parameters (generally the number the system should dial in order to return to the customer and the desired time frame to make this CB call). The service entity, provided that it is defined to return call back calls, will make the call according the parameters defined in this tab.

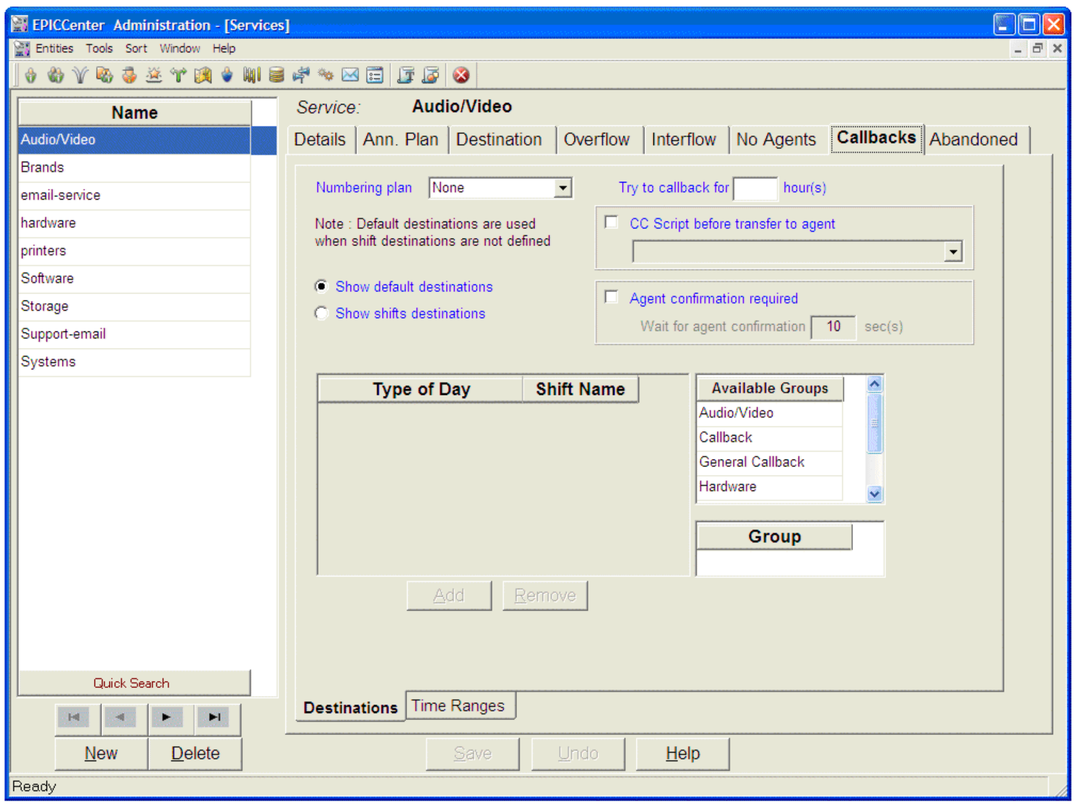

Figure 4-25 Services Callbacks Configuration Screen

To open the Callback tab, Click the Callback tab at the top of the Service Configuration screen.

The Callback tab displays two tabs containing the following options:

- **The Destination tab**
  - *Show Default Destinations:* Click this option to display the default destination for the service’s callback calls. The default destination is used if no “Callback destination per shift” is valid for the current day and time.

    In “Default Destination” mode (that is, if Show default destination is selected), the Available Groups list appears, displaying a list of available groups that may serve as a service callback destination, and the currently assigned groups for the service.

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— ***Show Shifts Destinations:*** Click this option to show the shift destinations that were defined for the service for callback calls.

In Shifts Destination mode (that is, If Show shifts destination is selected), the Shifts list appears, displaying a list of all the shifts whose service callback destination differs from the default callback destination for the service. The Available Groups list (which lists the groups that may serve as the service destination for the selected shift), and the destination Callback Group for the selected shift will also be displayed.

The call back feature is an option in Lite systems. In this configuration, the shifts destination is not available.

— ***Numbering Plan:*** When selected, the system will validate the number left by the customer for callback. If the number is not valid, the system will ask the customer to type it again.

The currently supported options are:

▷ *None:* No validity check is done. Any number will be accepted.

▷ *North American:* The system will make sure that the number is in the format of NPX-NXX-XXXX, where:

- N – must be a digit between 2 to 9
- P – must be a digit between 0 to 8
- X – may be any digit.

— ***Script Before Transfer to Agent:*** Check the box if you would like to play a script before transferring the call to an agent.

— ***Try to callback for hour(s):*** This field allows the administrator to set limits between the time that the callback was supposed to be dialed and the time it is actually dialed.

— ***Agent confirmation Required:*** Check this check box to make the callback work in a preview mode. In this mode, whenever an agent is reserved for this type of a call, a window pops up to the agent displaying the call's parameters and asking him whether to accept or reject the call. Only if the agent accept the call, the call would be transferred to him.

— ***Wait for agent confirmation (sec):*** If 'Agent confirmation mode' is selected, the system will wait this amount of time for the agent to confirm the call. If within this amount of time, the agent will neither accept nor reject the call, the system will behave as if the agent rejected the call. In this case, the system will force release the agent.

- **The Time Ranges Tab:** This tab is used to define limited time ranges. The service will generate call back calls only within these time ranges. If no time range is defined, the system assumes a 24 hour time range.

— ***Specified Time Range:*** Check the box if the callback should be made within a specified time frame. When checked, the From and To area becomes active.

— ***The From and To Time Ranges Area:*** Click the Add button and select the hours, minutes, and seconds, either manually or using the arrows. To remove a time range select it and click Remove.

To assign a group to the callback group for the service:

Step 1 Check the Show Default Destination check box.

Step 2 Drag the required group from the Available Groups list into the destination Groups.

To remove a group from the callback group for the service:

Step 1 Check the Show Default Destination check box.

Step 2 Drag the required group from destination Groups into the Available Groups list.

To add a Callback destination for a shift other than the default destination:

Step 1 Check the Show Shifts Destination check box.

Step 2 Click Add.

Step 3 Select the required shift from the list of shifts that appears, and click OK.

Step 4 Drag the required Callback group from the Available Groups list to the destination Group.

To change a callback destination for a shift:

Step 1 Check the Show Shifts Destination check box.

Step 2 Select the required shift from the Shifts list.

Step 3 Drag the required Callback group from the Available Groups list to the destination Group (or vice versa).

To remove a Callback destination for a shift:

Step 1 Check the Show Shifts Destination check box

Step 2 Select the shift from the Shifts list and click Remove.

4.8.8 Configuring Service Automatic Callbacks to Abandoned Callers

An Abandoned call is one where the caller disconnected before being handled by an agent. One of the service capabilities is to automatically generate a call back call to the abandoned caller.

The Abandoned tab of the Services Configuration window enables you to define how the system routes callback calls as a consequence of abandoned calls.

To open the Abandoned tab, Click the Abandoned tab at the top of the Service Configuration window.

The Abandoned tab displays two tabs with the following options:

- **The Destination tab**
  - *Enable Abandoned Calls:* If you check this box, the system automatically calls back a caller who hangs up.
  - *Callback if call abandoned after sec from entering IRN:* This parameter enables the administrator to filter abandoned calls that were hung up by the caller after

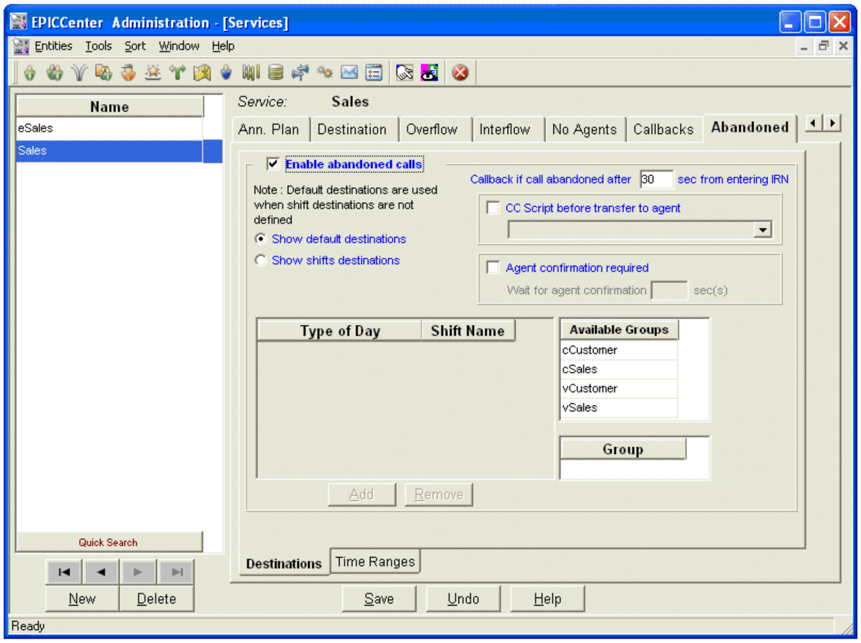

Figure 4-26 Services Automatic Callbacks to Abandoned Configuration Screen

a relatively short time. In many cases, this is a sign that a wrong number has been and the opening message caused the caller to hangs up. In such cases, a callback is NOT required.

— *Script Before Transfer to Agent:* Check this box if you would like to play a script before transferring the call to an agent.

— *Agent confirmation Required:* Check this check box to make the callback as a consequence of abandoned work in a preview mode. In this mode, whenever an agent is reserved for this type of a call, a window pops up to the agent displaying the call's parameters and asking him whether to accept or reject the call. Only if the agent accept the call, the call would be transferred to him.

— *Wait for agent confirmation (sec):* If Agent confirmation mode' is selected, the system will wait this amount of time for the agent to confirm the call. If within this amount of time, the agent will neither accept nor reject the call, the system will behave as if the agent rejected the call. In this case, the system will force release the agent.

— *Show Default Destination:* Click this option to display the default destination for the service's callback calls as consequence of abandoned calls.

The default destination is used if no “Abandoned call destination per shift” is valid for the current day and time.

In “Default Destination” mode (that is, if Show default destination is selected), the Available Groups list appears, displaying a list of available groups that may serve as an Abandoned callback destination for the service, and the currently assigned abandoned callback destination group for the service.

To assign another group to the Abandoned callback for the service drag the required group from the Available Groups list into the Groups list.

— *Show Shifts Destination:* Click this option to show the shift destinations that were defined for the service for abandoned callback calls.

In Shifts Destination mode (that is, If Show shifts destination is selected), the Shifts list appears, displaying a list of all the shifts whose service abandoned callback destination differs from the default abandoned callback destination for the service. The Available Groups list (which lists the groups that may serve as the service destination for the selected shift), and the destination Callback Group for the selected shift will also be displayed.

The Abandoned feature is an option in Lite systems. In this configuration, the shifts destination is not available.

- **The Time Ranges Tab:** This tab is used to define limited time ranges. The service will generate call back calls only within these time ranges. If no time range is defined, the system assumes a 24 hour time range.
  - — ***Specified Time Range:*** Check the box if the callback should be made within a specified time frame. When checked, the From and To area becomes active.
  - — ***The From and To Time Ranges Area:*** Click the Add button and select the hours, minutes, and seconds manually or using the arrows. To remove a time range select it and click Remove.

To add an Abandoned callback destination for a shift other than the default destination:

Step 1 Check the Show Shifts Destination check box.

Step 2 Click Add.

Step 3 Select the required shift from the list of shifts that appears, and click OK.

Step 4 Drag the required abandoned callback group from the Available Groups list to the destination group.

To change an Abandoned callback destination for a shift:

Step 1 Check the Show Shifts Destination check box.

Step 2 Select the required shift from the Shifts list.

Step 3 Drag the required abandoned callback group from the Available Groups list to the destination group (or vice versa).

To remove an abandoned callback destination for a shift:

Step 1 Check the Show Shifts Destination check box

Step 2 Select the shift from the Shifts list and click Remove.

4.9 Configuring IRN

IRN (Intelligent Routing Numbers) are used as entry points to the routing system. Each IRN can be used to define rules for routing the incoming contact to various destinations, including services. These rules can also update call profile fields, including the contact's priority and define the skills required by the contact.

Attached to each contact in the system, the call profile consists of dynamic information used to route the contact and provide relevant history. Information is updated as the contact moves through the system. For example, ANI information is recorded when the call enters from the PSTN, and the caller may add more information via IVR menus. Each field in the call profile is either mandatory (predefined by the Contact Center), or optional (also known as a user field, defined by the system administrator during setup). These fields may be different on each installation.

For each IRN in the system, you can configure the agent skills that may be required by customer contacts. The value assigned to a skill is a combination of the agent's capability and preference.

Use the IRN Configuration window to configure the details, call profile, skills, and destination of IRNs in the system. You can also add new IRNs and delete existing ones from the system.

To open the IRN Configuration window, Click the IRN icon in the toolbar.

The IRN Configuration window comprises:

- **IRN List**: A scrollable list displaying, for each IRN currently configured in the system:
  - — Dial number that defines the entry to the IRN used to route the incoming voice and chat contacts or a name if the IRN is used to route email contacts.
  - — Destination type of the incoming contact.
  - — Destination (that is, Service, Call Control Script, or device) that will handle the incoming contact.
  - — Use the four navigational buttons below the list to move up or down the list, return to the beginning or jump to the end of the list.
- **New**: Click New to activate a wizard to add a new IRN to the list.
- **Delete**: Clicking this button deletes the last (or a selected) IRN from the list.
- **Tabs Area**: The area to the right of the IRN list contains a number of tabs that enable the configuration of the following parameters for the currently selected IRN: Details, Call Profile, Skills and Destination

4.9.1 Configuring IRN Details

To open the Details tab, Click the Details tab at the top of the IRN Configuration window.

The Details tab comprises:

- **IRN**: The dial number of the selected IRN (if this IRN is used to route voice and/or chat contacts).
- **Email Account**: When checked this IRN will route email contacts and not Voice or Chat contacts. In this case, the IRN is represented by an email account, which must be selected from the emails accounts list box.
- **Route directly to Default Destination**: Route the call to the IRN destination, as defined in the IRN Destination tab. If this option is selected, the other two options, Domain Routing and Customer Routing, are disabled
- **Domain Routing**: ***This option is only available in Enterprise Contact Center.***
  - — **Route by ANI Domain**: If this option is selected, the system will try to match the call's CID (Caller ID, or ANI) to one of the ANI domains defined in the system. If such match is found, then the system will apply the domain's routing rules for this call if one of the conditions below is true:

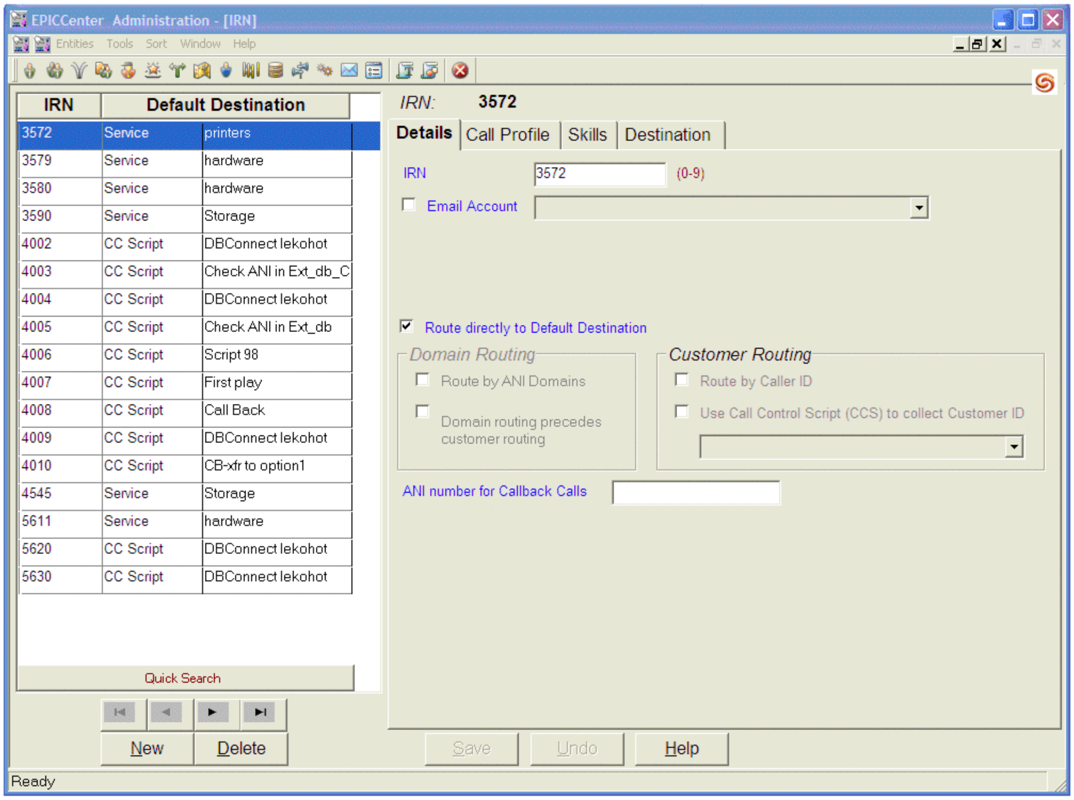

Figure 4-27 IRN Details Configuration Screen

- ▷ Customer routing is disabled ('Route by Caller ID' is not checked)
- ▷ Customer routing is enabled ('Route by Caller' is checked) and the 'Domain Routing Precedes Customer Routing' check box is also checked,
- ▷ Customer routing is enabled ('Route by Caller ID' is checked) and the 'Domain Routing Precedes Customer Routing' check box is not checked but there is no customer match.

— **Domain Routing Precedes Customer Routing:** Domain routing is preferred over customer routing. If both Domain Routing and Customer routing are selected, this checkbox sets the precedence between them. Customer routing rules will apply when this option is checked and the call's CID is both part of an ANI domain and a Customer. ANI domain routing rules will apply if not checked.

- **Customer Routing:** ***This option is only available in Enterprise Contact Center.***

— ***Route by Caller ID:*** If this option is selected, the system will try to match the call's CID (Caller ID, or ANI) to one of the Customers defined in the system. If such match is found, then the system will apply the customers routing rules for this call in the following conditions:

- ▷ When domain routing is disabled ('Route by ANI Domain' is not checked)
- ▷ When domain routing is enabled ('Route by ANI Domain' is checked) and the 'Domain Routing Precedes Customer Routing' check box is not checked,

  ▷ When domain routing is enabled (Route by ANI Domain is checked) and the Domain Routing Precedes Customer Routing check box is also checked but there is no domain match.

— *Use Call Control Script for calls w/out ID:* Click this check box to route calls that enter the selected IRN, according to the contents of the Caller ID field in the call profile, even when there is no ANI.

  A Call Control Script should be defined before checking this option. This script should fill the Caller ID field in the call profile with a valid customer. If the script is completed without this option, the call will be routed according to the normal IRN routing rules. Otherwise, the system searches the customer list by the caller ID. If the customer is found, the system uses the customer's settings to route the call. If the customer is not found, the call is routed by the IRN routing rules.

- **ANI number for Callback calls:** Type in a number that should appear as the caller id for any callback call that the system will generate for this IRN. The IRN for callback call is the IRN through which the call that requested the callback was entered. There is no validity check on this number.

4.9.2 Configuring the IRN Call Profile

The Call Profile tab of the IRN Configuration window enables you to set the initial values in the call profile fields of calls that enter the IRN. In this page, you can define both mandatory fields and user fields. Mandatory fields include compulsory call profile information, such as call priority. User fields contain optional call profile information that is used for further call processing. In the Contact Center Administration environment, the only available field to set is the 'Language' mandatory field. This field is used by the system to determine the language in which the announcements are made.

To define new user fields, see Configuring the System Call profile.

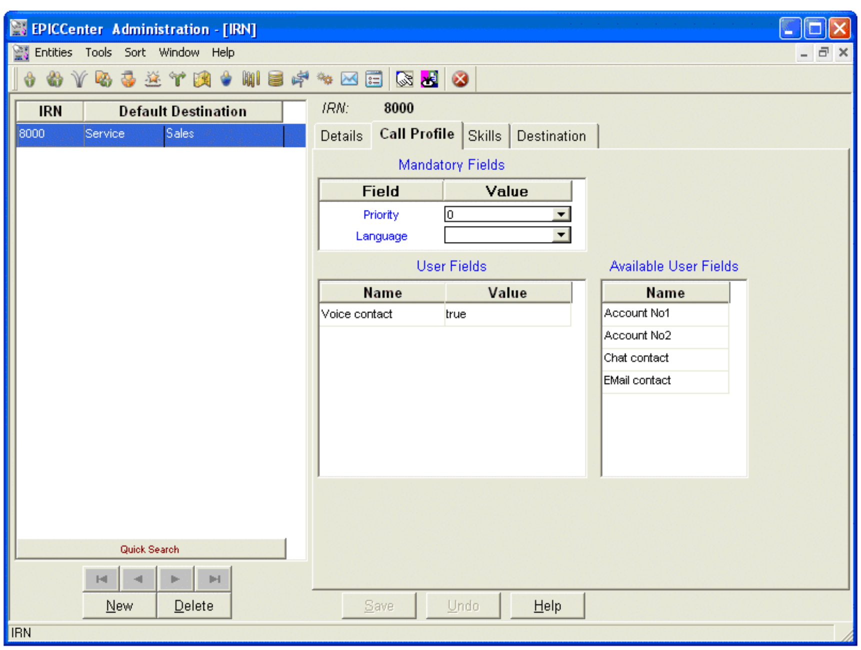

Figure 4-28 IRN Call Profile Configuration Screen

To open the Call Profile tab, click the Call Profile tab at the top of the IRN Configuration window.

The Call Profile tab comprises:

- **Mandatory Fields:** A list of the currently defined mandatory fields for the selected IRN call profile.

  To edit the mandatory call profile fields for the selected IRN select the field to be edited and choose the required Value (that is, the required service) from the drop-down list.

- **User Fields:** A list of the currently defined user fields for the IRN call profile. ***This option is only available in Enterprise Contact Center.***

  — *To edit the optional call profile user fields for the selected IRN:* select the name of the field to be edited and enter the required value in the appropriate field.

- **Available User:** A list of all the available user fields. Add new user fields to the User Fields list by dragging them from this list into the User Fields list. ***This option is only available in Enterprise Contact Center.***

4.9.3 Configuring IRN Skills

The Skills tab configures the agent skills required for handling calls entering this IRN. An agent's skill is measured by two factors: capability and preference. The value assigned to a skill is a combination of these factors measured as a percentage.

To open the Skills tab, Click the Skills tab at the top of the IRN Configuration window.

The Skills tab comprises:

- **Skills:** The name and value of the currently required skills for the selected IRN.
- **Available Skills:** The available skills in the system. Add new skills to the Skills list by dragging them from this list into the Skills list.

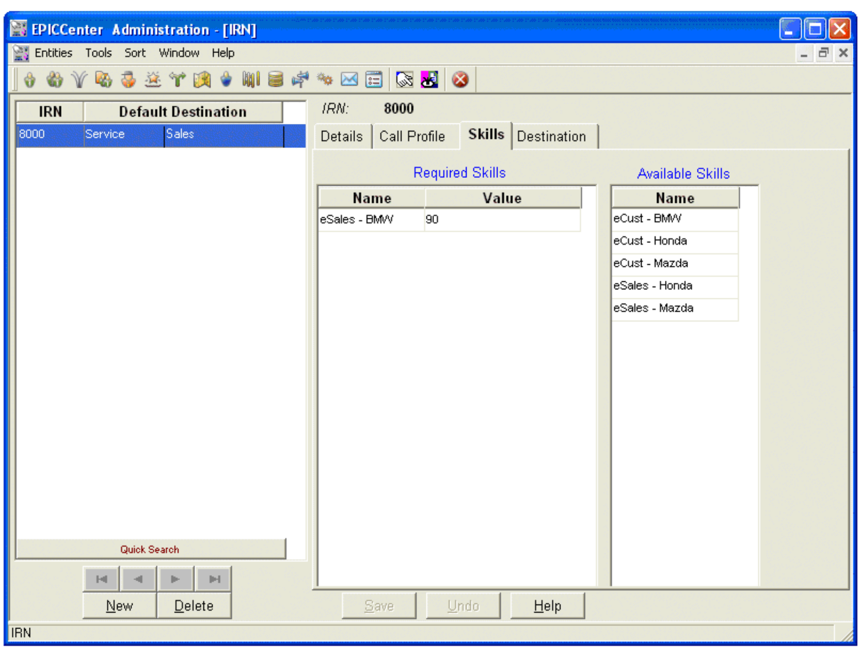

Figure 4-29 **IRN Skills Configuration Screen**

To edit the value of a skill for the selected IRN, Select the skill to be edited and enter the required value in the appropriate field.

4.9.4 IRN Destination

Use the Destination tab of the IRN Configuration window to configure the default destinations and the shift destination for the IRNs in the system.

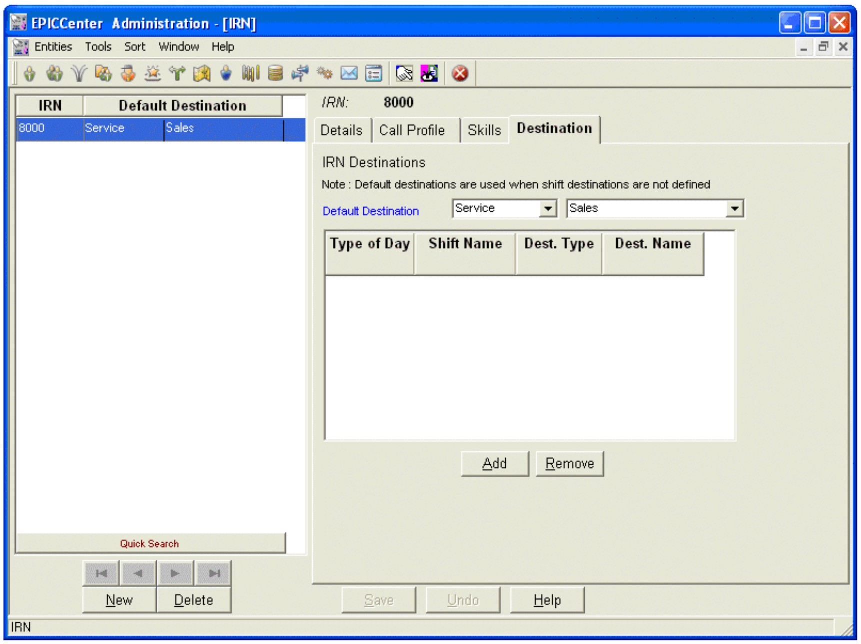

Figure 4-30 IRN Destination Configuration Screen

To open the Destination tab, Click the Destination tab at the top of the IRN Configuration window.

The Destination tab comprises:

- **Default Destination**: From this drop-down list, select the required default destination (Device if Voice/Chat IRN or email address if Email IRN, Call Control Script, or Service).

  From the drop-down list, select the device number, service, or Call Control Script for the default destination.

- **Shift List**: A list of all the currently defined shifts for the IRN. For a shift with an IRN destination other than the default destination, four fields are displayed:

  — Type of day for which the shift belongs.
  — Shift name.
  — Type of the destination for that shift (Device, Call Control Script, or Service).
  — Destination name (in case of Service or Call Control Script) or Dial Number (in case of Device).

To add a destination for a shift other than the default destination:

Step 1 Click Add.

Step 2 Select the required shift from the list of shifts that appears, and click OK.

Step 3 Select destination.

To change a destination for a shift:

Step 1 Select the required shift from the Shift list.

Step 2 Select a different destination.

To remove a destination for a shift, Select the shift from the Shift list and click Remove

4.10 Configuring Domains

Domains enable calls to be routed according to their geographical location (source). Incoming calls CID (ANI) contain a number prefixes, such as the area code, that represent the location from which the call was made. You can also generate reports according to domains and provide specific information regarding a geographical location (for example, how many calls were received from a particular town or city).

An ANI prefix is a series of digits that represents part of a dial number (e.g., an area code). The asterisk represents all following digits. For example, any number that starts with '212' is said to be have ANI prefix of 212 (212-561-7080 and 212-5678 both start with the ANI prefix of 212). A number can only belong to a single ANI prefix at any one time. Thus, if both 212 and 2124 have been defined as prefixes, the number 212-404-1234 belongs only to the second prefix.

To open the Domain Configuration window, Click the Domain button in the toolbar.

The Domain Configuration window comprises:

- **Domain / ANI Prefixes List:** A scrollable list displaying the Name of all the Domains in the system. Below the list, there are two tabs for Domains and ANI Prefixes. When the Domains tab is selected, the list displays all the domains in the system, and when the ANI Prefixes tab is selected, the list displays all the ANI prefixes in the system
  - ***Domains:*** A scrollable list displaying the name of each Domain currently configured in the system.

    Use the four navigational buttons below the list to move up or down the list, return to the beginning or jump to the end of the list..
  - ***ANI Prefixes:*** A scrollable list displaying the ANI Prefix alongside the name of the Domain that the ANI prefix belongs to.

    Use the four navigational buttons below the list to move up or down the list, return to the beginning or jump to the end of the list..
- **New:** Click New to activate a wizard to add new Domain or ANI prefix to the list.
- **Delete:** Click Delete to delete the last (or a selected) Domain or ANI prefix from the list. (Select an item in the list using the pointer.)
- **Tabs Area:** If the selected tab is Domains, the area to the right of the Scrollable list includes a number of tabs where you can configure the following parameters for the currently selected Domain:
  - Configuring Domain Details
  - Configuring Domain Call Profile
  - Configuring Domain Skills

— Configuring Domain Destination

If the selected tab is ANI Prefixes, the area to the right of the Scrollable list includes a single tab where you can configure the ANI prefix and to change the domain to which it belongs,

4.10.1 Configuring Domain Details

To open the Details tab, Click the Details tab at the top of the Domain Configuration window.

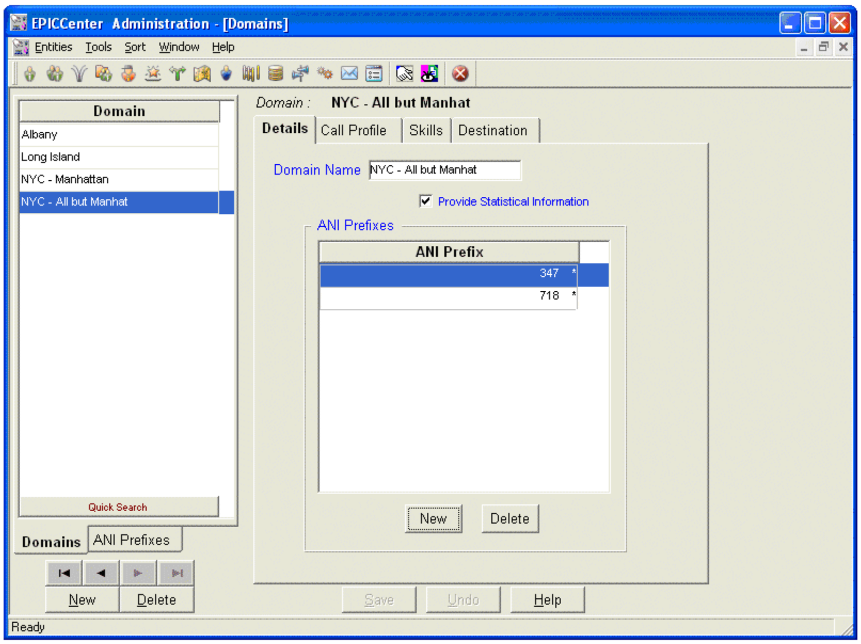

Figure 4-31 ANI Domains Details Configuration Screen

The Details tab comprises:

- **Domain Name**: A name for the domain
- **Provide Statistical Information**: In order to save DB space, you can set a Domain for routing purposes only without having compiling data for reports. If statistical information on this domain is required, this check box must be checked.
- **ANI Prefixes/Email Accounts list**: This area displays the list of ANI Prefixes that belongs to the domain.

To add a new Domain to the list:

Step 1 Click ‘Domains’ below the scrollable list to display the domain list.

Step 2 Click New below the Domain list.

The New Domain Wizard opens.

Step 3 Enter the new Domain Name and click Finish

The new Domain appears in the list in alphabetical order.

To delete a Domain from the domain list:

Step 1 Click Domain below the scrollable list to display the domain list.

Step 2 Select the domain to be deleted and click the Delete button below the scrollable domain list.

The New Domain Wizard opens.

Deleting a Domain deletes all of its statistics.

4.10.2 Configuring ANI Prefix Details

To open the Details tab:

Step 1 Click the ANI Prefixes tab below the scrollable list to display the ANI Prefixes list.

Step 2 Click the Details tab at the top of the Domain Configuration window.

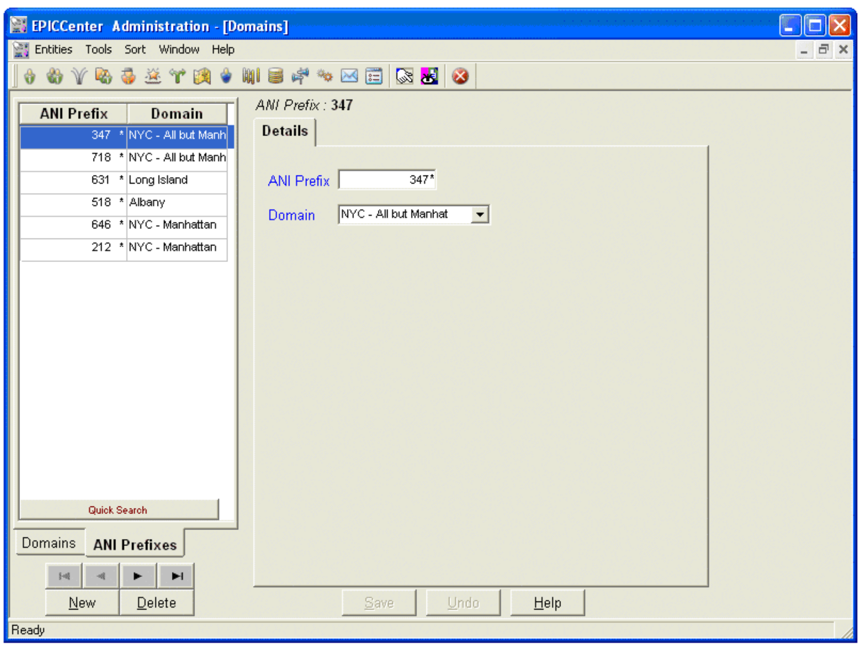

Figure 4-32 ANI Prefixes Details Configuration Screen

The Details tab comprises:

- **ANI Prefix:** An ANI prefix is a series of digits that represents part of a dial number (e.g., an area code). The asterisk represents all following digits. For example, any number that starts with '212' is said to be have ANI prefix of 212 (212-561-7080 and 212-5678 both start with the ANI prefix of 212). A number can only belong to a single ANI prefix at any one time. Thus, if both 212 and 2124 have been defined as prefixes, the number 212-404-1234 belongs only to the second prefix.
- **Domain**: The domain to which the selected ANI prefix is belongs.

To add a new ANI Prefixes to the system:

Step 1 Click 'ANI Prefix' below the scrollable list to display the ANI Prefixes list.

Step 2 Click New below the ANI Prefix list. Enter a prefix and assign it to a domain.

Step 3 The ANI Prefix for the new Domain will appear in the ANI Prefixes list.

To remove an ANI Prefix from the system:

Step 1 Click 'ANI Prefix' below the scrollable list to display the ANI Prefixes list.

Step 2 Select the ANI prefix to be deleted and click the Delete button below the ANI Prefix list.

Step 3 The deleted ANI Prefix will disappear from the ANI Prefixes list.

4.10.3 Configuring Domain Call Profile

This tab is only available in Enterprise Contact Center.

The Call Profile tab of the Domain Configuration window enables you to set the initial values, in the call profile fields, of calls that routed by the domain routing rules. In this page, you can define both mandatory fields and user fields. Mandatory fields include compulsory call profile information, such as call priority. User fields contain optional call profile information that is used for further call processing. To define new user fields, see Configuring the System Call Profile

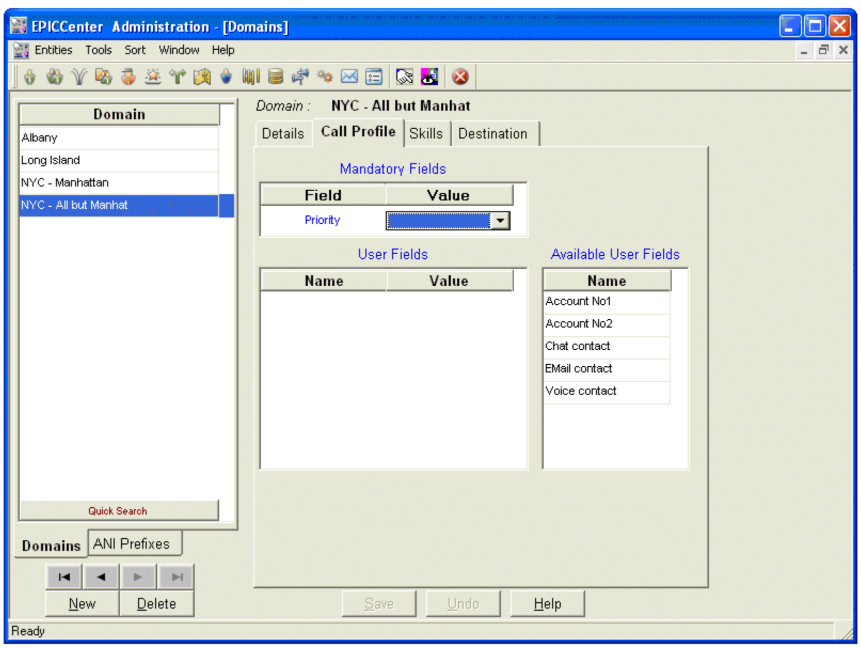

Figure 4-33 ANI Domains Call Profile Configuration Screen

To open the Call Profile tab:

Step 1 1. Click the Domains tab below the scrollable list to display the Domain list.

Step 2 2. Click the Call Profile tab at the top of the Domain Configuration window.

The Call Profile tab comprises:

- **Mandatory Fields:** A list of the currently-defined mandatory fields for the selected Domains call profile.

  To edit the mandatory call profile fields for the selected Domain select the field to be edited and the required value from the drop-down list

- **User Fields:** A list of the currently defined user fields for the Domain call profile.

  To edit the optional call profile user fields for the selected Domain select the name of the field to be edited and enter the required value in the appropriate field

- **Available User:** A list of all the available user fields. Add new user fields to the user fields list by from this list into the User Fields list

4.10.4 Configuring Domain Skills

This tab is only available in Enterprise Contact Center.

Use the Skills tab of the Domain Configuration window to configure agent skills required to handle incoming calls. (An agent's skill is measured by two factors: capability and preference.) The value assigned to a skill is the minimum agent capability grade (percent) for the selected skill. See Configuring System Skills.

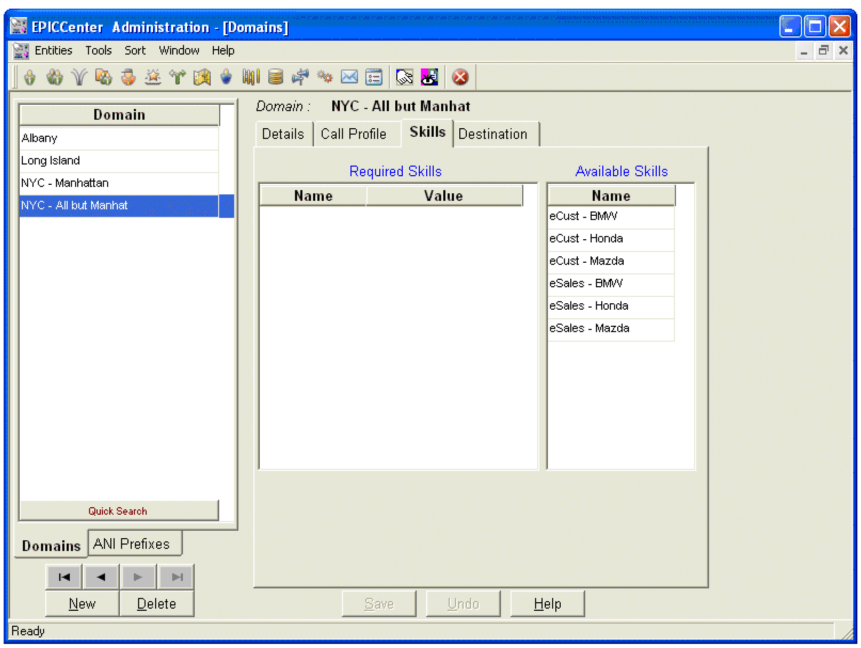

Figure 4-34 ANI Domains Skills Configuration Screen

To open the Skills tab, Click the Skills tab at the top of the Domain Configuration window.

The Skills tab comprises:

- **Skills:** The name and value of the required skills for the selected Domain.

  To edit the value of a skill for the selected Domain select the skill to be edited and enter the required value in the appropriate field.

- **Available Skills:** The available skills in the system. Add new skills to the Skills list by dragging them from this list into the Skills list.

4.10.5 Configuring Domain Destination

Use the Destination tab of the Domain Configuration window to configure the default destinations and the shift destination for the Domains in the system.

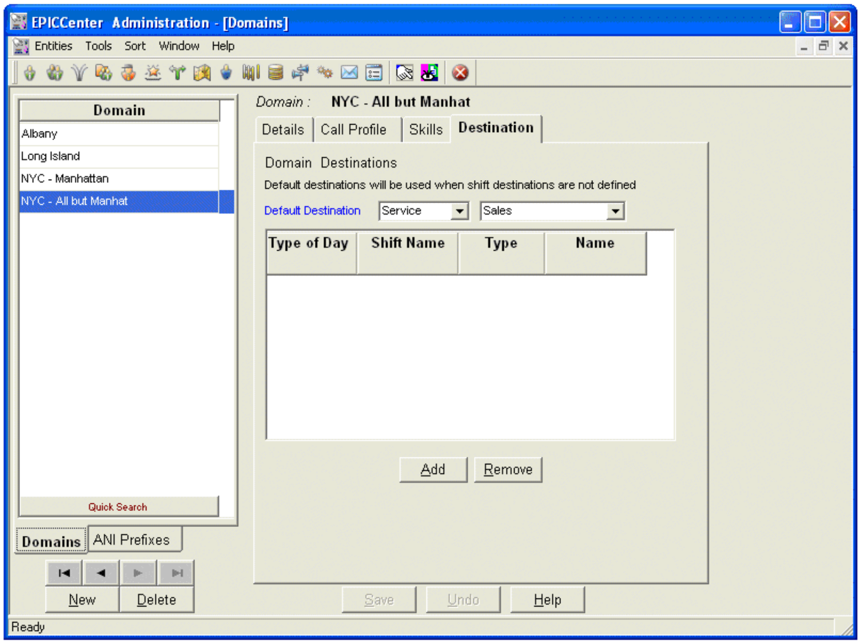

Figure 4-35 ANI Domains Destination Configuration Screen

To open the Destination tab, Click the Destination tab at the top of the Domain Configuration window.

The Destination tab comprises:

- **Default Destination:** Select the required default destination (Service, CC Script or Device) from this drop-down list.
- **Shifts List**: A list of all the currently defined shifts for the Domain. For a shift with an Domain destination other than the default destination, four fields are displayed:
  - — Type of day to which the shift belongs.
  - — Shift name: Type of the destination for that shift (Service, CC Script or Device).
  - — Destination name (for Service or CC Script) or DN (for Device). For details on defining shifts, see Configuring the System Working Times.

  This tab is only available in Enterprise Contact Center.

To add a destination for a shift other than the default destination:

Step 1 Click Add.

Step 2 Select the required shift from the list of shifts that appears and click OK.

Step 3 Select the destination.

To change a destination for a shift:

Step 1 Select the required shift from the Shift list.

Step 2 Select a different destination.

To remove a destination for a shift, Select the shift from the Shifts list and click Remove.

4.11 Configuring Customers

These features are only available in Enterprise Contact Center.

The customer list is used by IRNs that uses customer routing (i.e., the Route by caller ID is checked). In such a case, the system tries to identify the caller in the customer list and, if found, will route the call to the customer's preferred service. For example, if a call enters an IRN with the 'Route by Caller ID' check box checked, the system searches the ANI in the customer list. If no ANI is attached to the call, and the 'Use Call Control Script for calls w/out' check box is checked, the system routes the call to a Call Control Script, which fills in the customer ID in the call profile field, named 'Customer Number'. The system then uses the caller ID to search the customer list. If the customer is found, the system attaches the customer's priority and skills definitions to the call and routes the call to the preferred service.

To open the Customer Configuration Window, Click Customers icon in the toolbar.

The Customer Configuration comprises:

- **Customer List:** A scrollable list displaying the name of each customer currently configured in the system.

  Use the four navigational buttons below the list to move up or down the list, return to the beginning or jump to the end of the list.
- **New:** Click New to activate a wizard to add a new customer to the list.
- **Delete:** Click Delete to delete the last (or a selected) customer from the list.
- **Tabs Area:** The area to the right of the Customer list contains two tabs to configure details and skills for the currently selected customer.

To add a new customer to the list:

Step 1 Click New below the customer list.

The New Customer Wizard opens.

Step 2 Enter a Name, Customer ID and Initial Caller ID for the new customer in the appropriate fields. When the new customer is defined, new Caller IDs can be added to the customer's Call IDs list.

Step 3 Click Finish.

The newly defined customer appears in the customer list.

4.11.1 Configuring Customer Details

To open the Detail tab, Click the Detail tab at the top of the Customer Configuration window.

The Detail tab comprises:

- **Name:** The name of the selected customer.

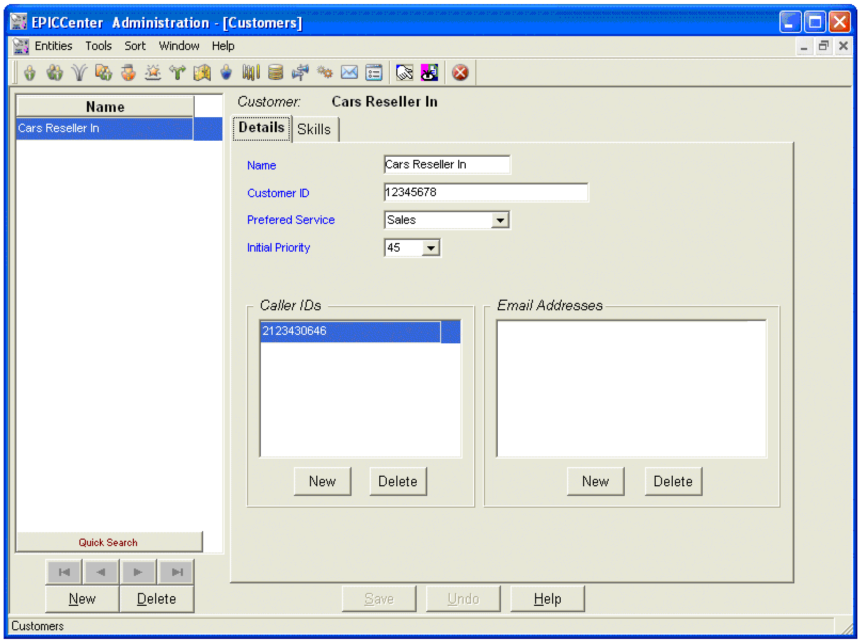

Figure 4-36 Customers Details Configuration Screen

- **Customer ID:** A unique number that is used to identify the customer. The system, when there is no ANI, uses the contents of the call profile 'Customer Number' field to search the customer list.
- **Preferred Service:** A drop-down list from which you can select the preferred service to which calls from the selected customer will be routed.
- **Initial Priority:** A drop-down list from which you can select the initial priority of calls from the selected customer.
- **Caller IDs:** A customer in the system may have one or more CID when he dials in (For example, a cellular and home phone number). This list defines all possible CIDs for the selected customer. When a customer dials into the system, the system compares its CID to the numbers in this list and, if found, the customer is identified.

4.11.2 Configuring Customer Skills

The Skills tab of the Customer Configuration window enables you to configure the skills required by calls from the selected customer.

To open the Skills tab, Click the Skills tab at the top of the Customer Configuration window.

The Skills tab comprises:

- **Customer Skill:** The skill name and skill level required by calls from the selected customer.

  To edit the skill level of a selected skill select the skill to be edited and enter the required level in the appropriate field.
- **Available Skills:** The names of the available skills in the system. Add new skills to the Customer Skill list by dragging them from this list into the Customer Skill list.

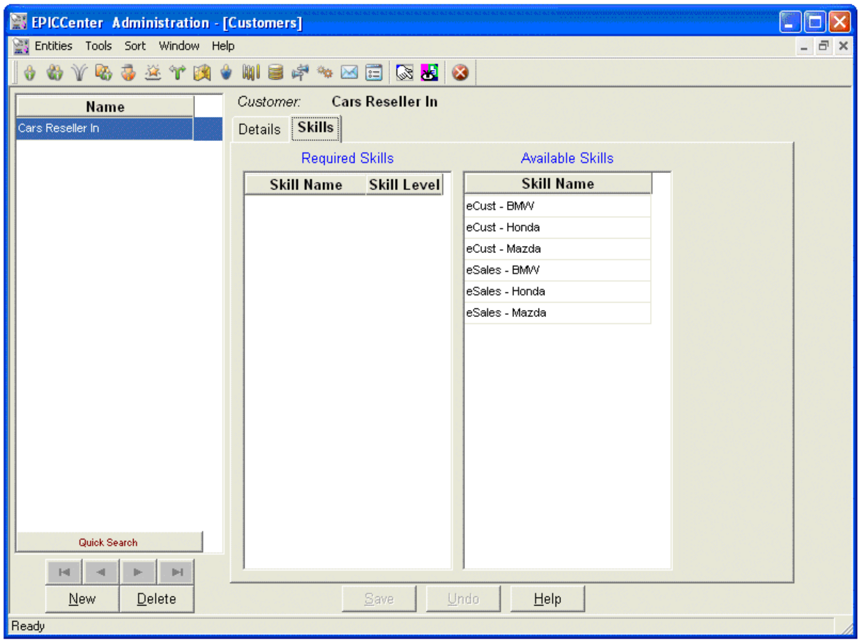

Figure 4-37 Customers Skills Configuration Screen

4.12 Configuring DNIS Numbers

The DNIS entity is a statistical entity that is used to collect statistics on contact center activity that are routed through specific entry points dialed by customers. Use the DNIS Configuration window to configure the details of the DNIS call numbers. A DNIS number is a series of digits that identifies to the contact center the number that the caller dialed.

To open the DNIS Configuration window, Click the DNIS icon in the toolbar.

Deleting a DNIS number removes all of its statistics. The DNIS number is the same as the IRN Dial Number. In the case where statistics should be gathered on the IRN, the IRN should also be defined as a DNIS.

The DNIS Configuration window comprises:

- **DNIS List:** A scrollable list displaying the name and number of every DNIS in the system. Use the four navigational buttons below the list to move up or down the list, return to the beginning or jump to the end of the list.
- **New:** Click New to activate a wizard to add a new DNIS to the list.

  The number of DNIS items allowed in the system is defined in the system menu.
- **Delete:** Click Delete to delete a DNIS from the list.
- **Tabs Area:** The area to the right of the DNIS Numbers list contains the Details tab

To add a new DNIS to the list:

Step 1 Click New below the DNIS list.

The New DNIS Wizard opens.

Step 2 Enter the Name and select the DNIS type (voice/chat or email). Select the relevant IRN from a list for a voice/chat DNIS. Select the relevant email account from the list for an email DNIS. Click Finish.

The newly defined DNIS appears in the DNIS list.

To delete a DNIS from the DNIS list, Select the DNIS to be removed from the list and click Delete

4.12.1 Configuring DNIS Number Details

To open the Details tab, Click the Details tab at the top of the DNIS Configuration window.

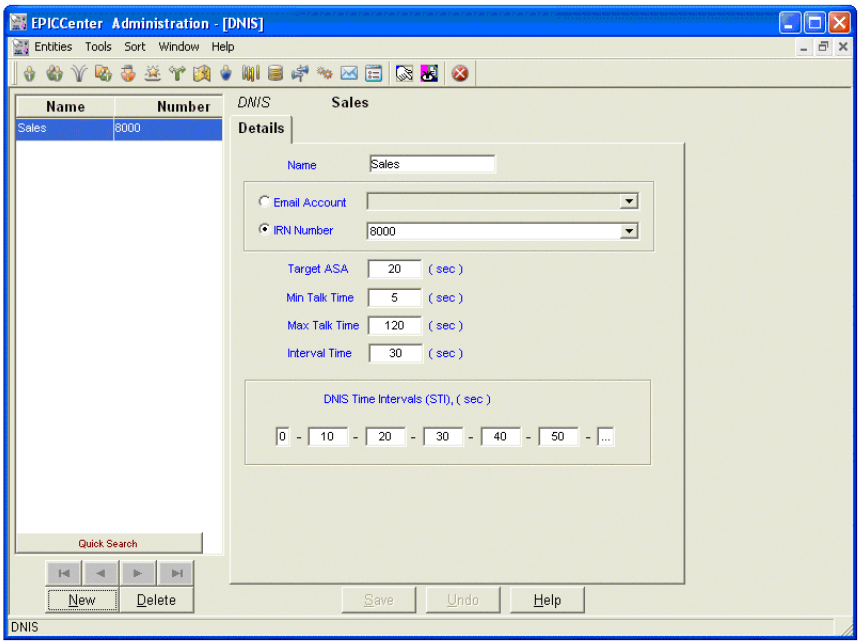

Figure 4-38 **DNIS Details Configuration Screen**

The Details tab comprises:

- **Name**: The name of the selected DNIS.
- **Email Account**: Check this box if the DNIS number represents an entry point for email contacts. In this case select the email account represented by this DNIS number
- **IRN Number**: Check this box if the DNIS number represents an entry point for Voice or Chat contacts. In this case select the IRN number represented by this DNIS number
- **Target ASA**: Target Average Speed of Answer. The amount of time (in seconds, in case of a Voice or Chat DNIS, or in hh:mm in case of an email DNIS) during which the call should be answered from the time it is received. This parameter is used to calculate the DNIS Target Service Factor (TSF)
- **Min Talk Time**: The amount of time (in seconds, in case of a Voice or Chat DNIS, or in hh:mm in case of an email DNIS) in which a call must end in order to be counted as a too short call in the Contact Center Reports

- **Max Talk Time:** The number of time (in seconds, in case of a Voice or Chat DNIS, or in hh:mm in case of an email DNIS) in which a call must exceeded in order to be counted as a too long call in the Contact Center Reports
- **Interval Time:** Determines the time period that will be monitored in the real-time reports for the DNIS. If this field is set to ten minutes, for example, the real-time report for that DNIS will show statistical information relevant to the last ten minutes.
- **DNIS Time Intervals:** This parameter determines the time intervals in which calls are monitored. The calls can be viewed in STI histogram reports that show the number of calls answered, abandoned and waiting in each given interval.

4.13 Configuring Dial Lists

These features are only available in Enterprise Contact Center.

Dial lists are sets of telephone numbers that are automatically dialed and routed to agents. The dial list rules define the source for the set of telephone numbers (Input), and the dates and times when the dial list is active (Scheduling). The dial list also enables the system to save every call result into an external database (Output).

Currently, dial lists should be in the form of a table in an SQL database.

To open the Dial List Configuration window, Click the Dial Lists icon in the toolbar.

The Dial List Configuration window comprises:

- **Dial Lists List:** A scrollable list displaying, for each dial list currently configured in the system:
  - — A unique dial list name.
  - — A valid service name.
- **New:** Click New to activate a two-page wizard to add a new dial list to the list.
  - — ***To add a new dial list to the list,*** Click New next to the list of Dial Lists. When you have completed this page, click Next. The New Dial List Wizard opens. See Section 4.13.1 on page 73 for field descriptions.
- **Delete:** Click Delete to delete the last (or a selected) dial list from the list.
- **Tabs Area:** The area to the right of the Dial Lists list contains a number of tabs that enable the configuration of the following parameters for the currently selected dial list: Details, Input, Output, Scheduling, Call Profile, and Skills
- **Import Definitions…:** The Import Definitions opens a window that contains the following options:
  - — ***Submit now:*** Press the Submit Now button to start a process of importing new dialing records from the external database. All the records that will be fetched by the input query and are not fetched already would be fetched.
  - — ***Automatic Import Enabled:*** Check this check box to tell the system to import new records periodically. Set the Every hours/minutes to set the cycle time for the import process.
- **Current Status:** Opens a window displaying the current status of the dial list (active or not) as well as a pie chart displaying the current status of the dial list:
  - — How many calls failed (red),

— How many calls succeeded (green).
— How many calls are active (if dial list state is active) or stopped (if the dial list status is stopped). This is the number of dialing records to dial that are still pending.
— The total of the above three categories is the number of dialing records to dial (those who were dialed already and those that are still pending).

- **Terminate Restart:** When pressed while the dial list is active, a message displays the following warning:

  "Terminate action will erase all the accumulated data relevant to this Dial List."

  Click OK to continue, or Cancel.

4.13.1 Configuring Dial List Details

This tab is only available in Enterprise Contact Center.

The Details tab of the Dial Lists Configuration window enables you to configure the various parameters for the dial lists.

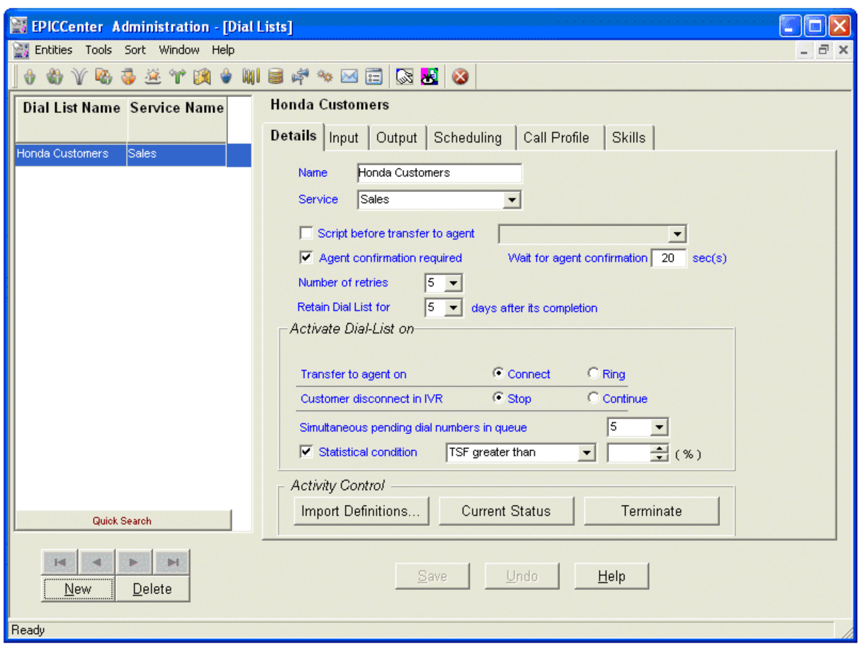

Figure 4-39 Dial Lists Details Configuration Screen

To open the Details tab, Click the Details tab at the top of the Dial List Configuration window.

The Details tab comprises:

- **Name:** The unique name of the dial list.
- **Service:** Select a service name from the drop-down list. The calls will be routed to the agents according to service routing rules.

  The selected service may also be used in other dial lists.
- **Script before transfer to agent:** Check this box to define a script that is run before the call is transferred to an agent. Select a script from the drop-down list provided.

The script will not affect the way the call is routed. Therefore, changing the service required for example will not change the service destination for the call. In addition, actions like Transfer will not work. The call will be routed to the Dial list service destination.

- **Agent confirmation required**: Check this check box to make the Dial List work in a preview mode. In this mode, whenever an agent is reserved for the dial list call, a window pops up to the agent displaying the call's parameters and asking him whether to accept or reject the call. Only if the agent accepts the call, the call would be transferred to him.
- **Wait for agent confirmation (sec)**: If 'Agent confirmation mode' is selected, the system will wait this amount of time for the agent to confirm the call. If within this amount of time, the agent will neither accept nor reject the call, the system will behave as if the agent rejected the call. In this case, the system will force release the agent.
- **Number of retries**: Enter the number of times that the system should attempt to re-call the telephone number.

  The maximum number of times the system will dial this customer is one more this number.
- **Retain Dial List for…**: Enter the number of days that the dial list should be retained in the database before it is released.
- **Transfer to agent on**: Check one of the following options for the appropriate transfer mode
  - — *Connect:* The transfer to agent is automatically connected when the call is answered.
  - — *Ring:* The transfer to agent call is automatically connected when the line rings.
- **Customer disconnect**: This section defines the system treatments for calls that the customer hangs up before the call was transferred to the agent:
  - — *Stop:* When the customer disconnects the call, continue with the next customer.
  - — *Continue:* When the customer disconnects, call later.
- **Simultaneous pending dial numbers in queue**: Enter a number to define the maximum number of dial list calls that should be waiting in the queue simultaneously.
- **Statistical condition**: A call is activated whenever the selected statistical condition is true. Select one of the following conditions and enter a value in the field.
  - — *TSF Greater Than:* The percentage of the TSF (the level of service) is greater than the specified number.
  - — *Queued Calls Less Than:* The number of calls waiting in the queue is less than the specified number.
  - — *Avg. Wait Time Less Than:* The average wait time of a call in the queue (in seconds) is less than the specified number.
- **Import Definitions…**: The Import Definitions opens a window that contains the following options:
  - — *Submit now:* Press the Submit Now button to start a process of importing new dialing records from the external database. All the records that will be fetched by the input query and are not fetched already would be fetched.

— *Automatic Import Enabled:* Check this check box to tell the system to import new records periodically. Set the Every hours/minutes to set the cycle time for the import process.

- **Current Status:** Opens a window displaying the current status of the dial list (active or not) as well as a pie chart displaying the current status of the dial list:

  — How many calls failed (red),
  — How many calls succeeded (green).
  — How many calls are active (if dial list state is active) or stopped (if the dial list status is stopped). This is the number of dialing records to dial that are still pending.

  The total of the above three categories is the number of dialing records to dial (those who were dialed already and those that are still pending).

- **Terminate Restart**: When pressed while the dial list is active, a message displays the following warning:

  "Terminate action will erase all the accumulated data relevant to this Dial List."

  Click OK to continue, or Cancel.

4.13.2 Configuring Dial List Input

This tab is only available in Enterprise Contact Center.

The Input tab of the Dial Lists Configuration window contains the parameters required by the dial list to query the external database and fetch the set of dial numbers to be dialed.

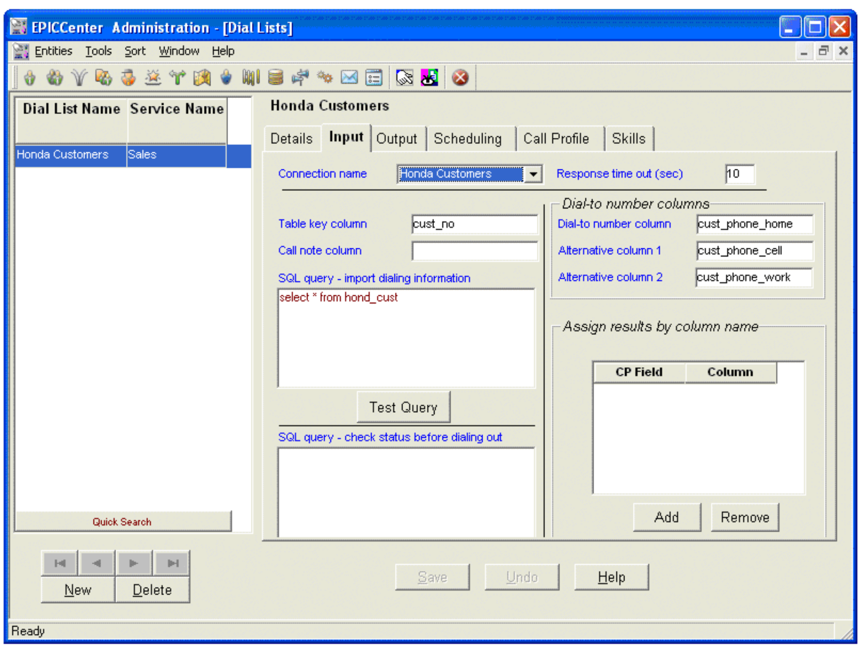

Figure 4-40 Dial Lists Input Configuration Screen

To open the Input tab, Click the Input tab at the top of the Dial Lists Configuration window.

The Input tab comprises:

- **Connection Name**: Select the unique name of the connection that describes the database containing the specific dial list from the drop-down list.

  The connection should have been previously defined using the interface tab in the system menu item.
- **Response Time Out (sec):** Enter the number (in seconds) in which the selected database is expected to respond to queries. If the response time exceeds this number, an alarm is sent to the supervisor about a potential database problem.
- **Table Key Column**: The name of the column which is the index of the table that describes the dial list.
- **Call Note Column**: An agent may add a note to the call when handling dial lists calls,. This parameter defines in which column this note should reside. When the dial list is reloaded the system fetches the previously added note to this record.
- **SQL Query – Import Dialing Information:** This SQL query is used to get all the necessary information for the dial list from the database.
- **Test Query:** Click to perform a validity check of the query.
- **Dial-To Number Columns.**: Use this section to tell the dial list in what columns in the input table the numbers to dial are located:
  - — ***Dial-to Number Column:*** The name of the column from which the main dial number is taken.
  - — ***Alternative Number 1:*** The name of the column from which the first alternative dial-number is taken. The dial list will dial to this number if the main number was busy or did not answer.
  - — ***Alternative Number 2:*** The name of the column from which the second alternative dial-number is taken. . The dial list will dial to this number if the first alternative number was busy or did not answer.
- **Assign results by column name.**: Use this section to map DB columns to CP fields. When dial list records are fetched, the contents of the DB columns are copied into the call profile fields of the dialed calls.
  - — ***CP Field:*** The call profile field that will be updated by the SQL Query.
  - — ***Column:*** The name of the column in the database that will update the call profile field.
  - — ***Add:*** Click the Add button in order to add a link between a CP field to a DB column. Select the CP field to be updated from the CP fields list that appears.

    Each call profile field selected must have a column assigned to it.
  - — ***Remove:*** Click to remove the selected call profile field from the updated field list.
- ***SQL Query –*** Check status before dialing out: This field is optional.

  Since the query to extract the dial list information is done before the dialing process starts, it may happen that when a dial list call is about to be dialed a telephone number is no longer be valid for the list. This query verifies that dial numbers in the dial list are still valid. The query is performed before a specific number is dialed.

4.13.3 Configuring Dial List Output

This tab is only available in Enterprise Contact Center.

The Output tab of the Dial List Configuration window contains the parameters required by the dial list to store the call results in the external database. This may be used to log the results of the dial list in the external database.

Results are kept in the Contact Center database and used by the outbound historical reports for a limited period of time (defined in the Details page of the Dial List configuration).

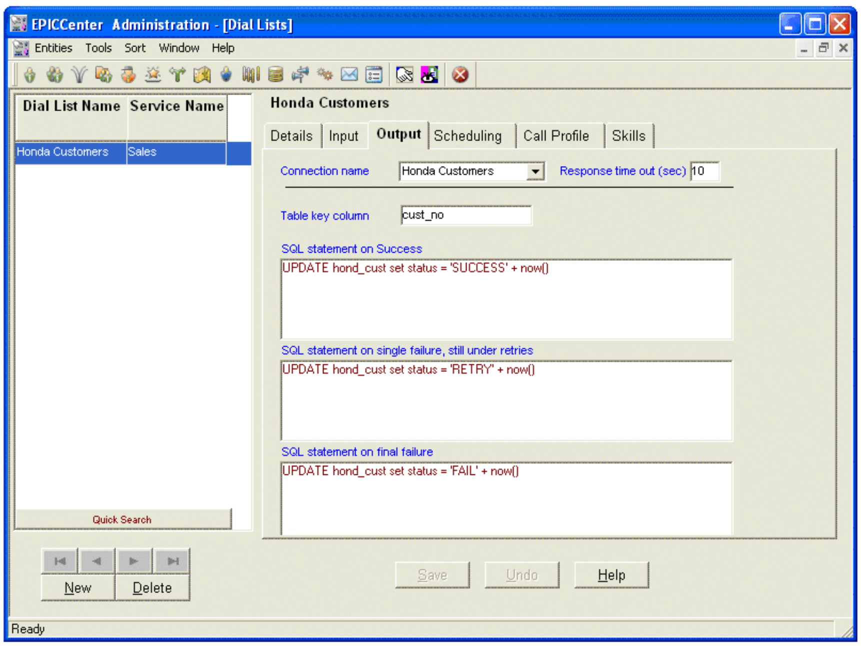

Figure 4-41 Dial Lists Output Configuration Screen

To open the Output tab, Click the Output tab at the top of the Dial Lists Configuration window.

The Output tab comprises:

- **Connection Name:** Select the unique name of the connection that describes the database that will contain the dial list results from the drop-down list. This connection may be the same one used for the input.

  The connection should have been previously defined using the interface tab in the system menu item.

- **Response Time Out (sec):** Enter the number (in seconds) in which the selected database is expected to respond to queries. If the response time exceeds this number, an alarm is sent to the supervisor about a potential database problem.

- **Table Key Column**: The name of the column, which is the index of the table that describes the dial list.

- **SQL Statement on Success**: The SQL Statement used to update the database when there is a successful call.
- **SQL Statement on Single Failure, Still Under Retries**: The SQL Statement used to update the database upon failure (busy, no answer, and so on), while retries are still in effect.
- **SQL Statement on Final Failure:** The SQL Statement used to update the database when there is a failure after the last retry.

4.13.4 Configuring Dial List Scheduling

This tab is only available in Enterprise Contact Center.

The Scheduling tab of the Dial Lists Configuration window contains the parameters that defines the dates and times the dial list will be active.

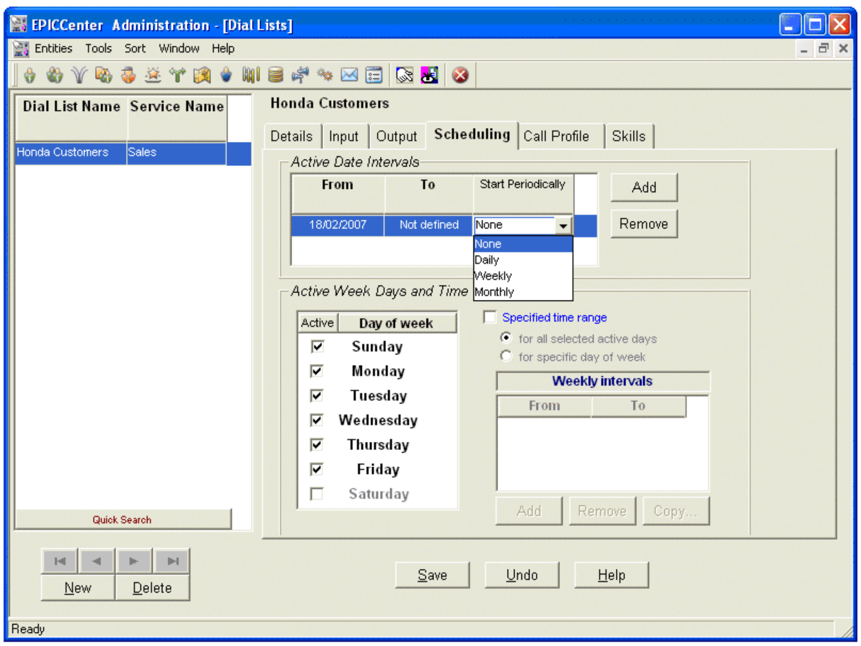

Figure 4-42 Dial Lists Scheduling Configuration Screen

To open the Scheduling tab, Click the Scheduling tab at the top of the Dial Lists Configuration window.

The Scheduling tab comprises:

- **Active Date Intervals:** The date ranges on which the dial list becomes active.
  - — *From:* Double click From to display a calendar. Select a start date for the current interval.
  - — *To:* Double click To display a calendar. Select an expiration date for the current interval. The value 00/00/00/00 means that there is no expiration.
  - — *Start Periodically:* If any value other than 'None' is selected, the system will periodically restart the dial list (i.e., will re-read the numbers to dial from the external database) with the defined date interval. For example, if the date interval is between Aug 1st to Aug 31st and the period is weekly, the system will restart the dial list every week within August.

The following values are possible: None, Daily, Weekly, and Monthly.

— *Add:* Click Add to add date interval.

— *Remove:* Click Remove to remove the selected date range from the list.

- **Active Week Days and Time Intervals:** Check the various boxes to indicate which days the dial list should be active.
- **Specified Time Range:** Check this box if you would like to specify time ranges. Time ranges may be applied to all the active days of the week or to a specific day of the week. A time range means that the dial list will be active in the selected day of the week only within the defined time ranges. When checked, the following area becomes active.

  — *For All Selected Active Days:* Click this option if the time ranges applied to all the active days in the week.

  — *For Specific Day of Week:* Click this option to define a time range for a specific day of the week.

  — *From:* Enter the start time for the time range.

  — *To:* Enter the end time for the time range.

  — *Add:* Click Add to add time ranges.

  — *Remove:* Click Remove to remove the selected time range from the list.

4.14 Configuring Dial Lists Call Profile

These features are only available in Enterprise Contact Center.

The Call Profile tab of the Dial List Configuration window enables you to configure initial values of call profile fields for calls generated by the Dial Lists.

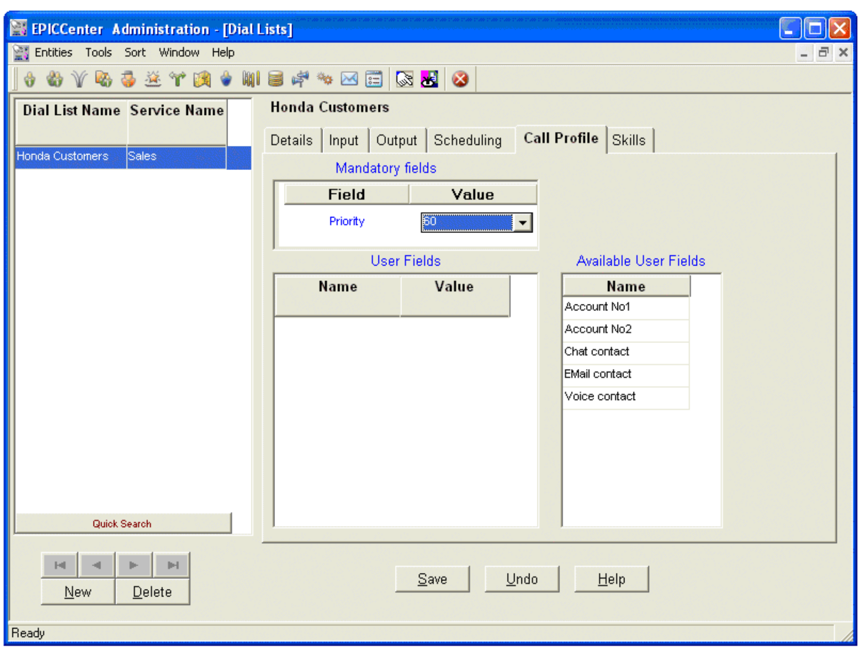

Figure 4-43 Dial Lists Call Profile Configuration Screen

To open the Call Profile tab, Click the Call Profile tab at the top of the Dial List Configuration window.

The Call Profile tab comprises:

- **Mandatory Fields:** A list of the currently defined mandatory fields for the selected Dial List call profile.

  To edit the mandatory call profile fields for the selected Dial List select the field to be edited and the required Value from the appropriate drop-down list.
- **User Fields:** A list of the currently defined user fields for the Dial List call profile.

  To edit the optional call profile user fields for the selected Dial List select the name of the field to be edited and enter the required Value in the appropriate field.
- **Available User:** A list of all the available user fields. Add new user fields to the User Fields list by dragging them from this list into the User Fields list.

4.14.1 Configuring Dial List Skills

This tab is only available in Enterprise Contact Center.

The Skills tab of the Dial Lists Configuration window enables you to configure initial values of skills parameters for calls generated by the dial lists.

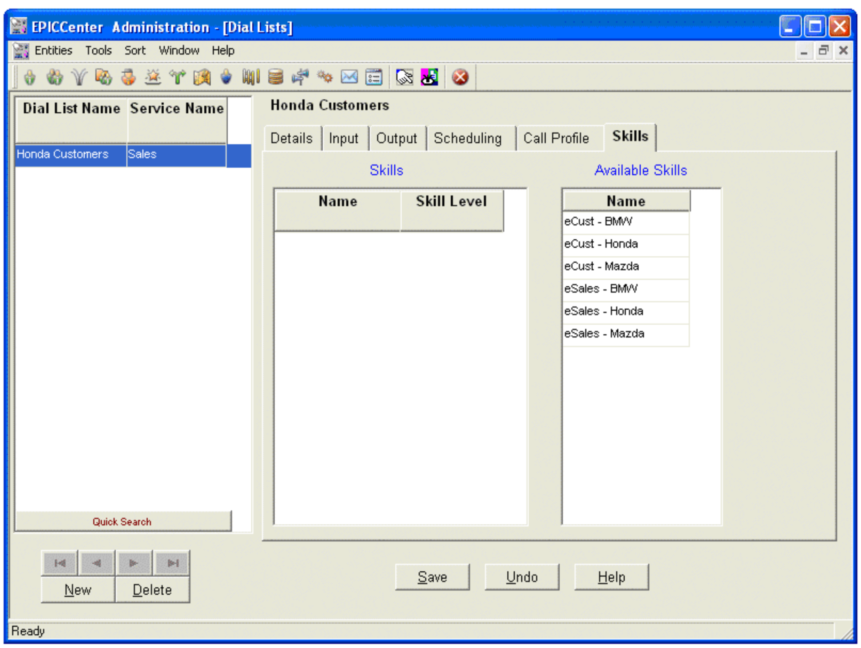

Figure 4-44 Dial Lists Skills Configuration Screen

To open the Skills tab, Click the Skills tab at the top of the Dial Lists Configuration window.

The Skills tab comprises:

- **Skills:** The name and value of the currently required skills for the selected Dial List.
- **Available Skills:** The available skills in the system. Add new skills to the Skills list by dragging them from this list into the Skills list.

To edit the value of a skill for the selected Dial List, Select the skill to be edited and enter the required value in the appropriate field

4.15 Configuring IVR Groups

These features are only available in Enterprise Contact Center.

An IVR port is used by the Contact Center to perform an IVR action on a call. The IVR ports are part of the PABX numbering plan. An IVR Group (a number of IVR ports) is a statistical entity that is used to measure the IVR port performance. There is no limit on how to define them. In one system all IVR ports can be part of a single IVR Ports Group, while in another the IVR ports may be grouped according to some physical parameter (for example, all the ports on the same distributed IVR server may be grouped to an IVR Ports Group).

To open the IVR Groups Configuration window, Click the IVR Groups icon in the Toolbar of the main application dialog box.

The Dial Lists Configuration window comprises:

- IVR Ports Groups List: A scrollable list displaying, for each IVR, Ports Group currently configured in the system:
- New: Clicking New to activates a wizard to add a new IVR Group to the list.
- Delete: Clicking Delete to remove an IVR Group from the list.
- Tabs Area: This area, to the right of the IVR ports Groups list, contains two tabs that enable the configuration of the selected IVR Ports Group Details and IVR Ports

To add a new IVR Group to the list:

Step 1 Click New below the IVR Group list.

The New IVR Group Wizard opens.

Step 2 Enter the Name of the new IVR Group, as requested by the wizard, and click Finish.

The newly defined IVR Ports Group will appear in the IVR Ports Group list.

Click the arrow on the right side of the Finish button to add additional names

To delete an IVR Group from the IVR Group list, Select the IVR Group to be removed from the list and click Delete.

4.15.1 Configuring IVR Groups Details

This tab is only available in Enterprise Contact Center.

Use the Details tab of the IVR Groups Configuration window to configure the names of the IVR Groups in the system.

To open the IVR Ports tab, Click the Details tab at the top of the IVR Ports Groups Configuration window.

The Details tab comprises:

- **Name:** The name of the selected IVR group.

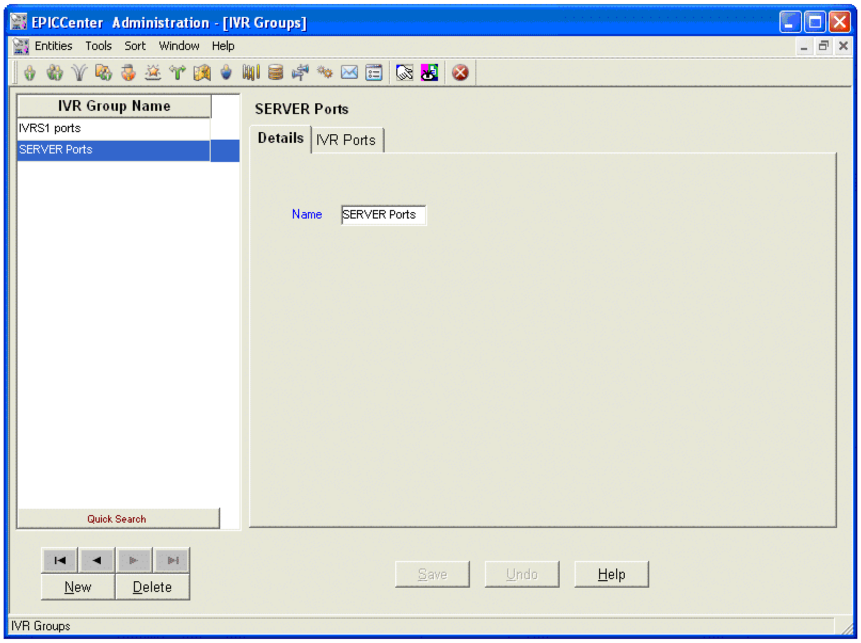

Figure 4-45 IVR Groups Details Configuration Screen

4.15.2 Configuring IVR Ports for IVR Ports Groups

This tab is only available in Enterprise Contact Center.

The IVR Ports Configuration window of the IVR Groups displays the list of IVR ports assigned to the selected IVR Group and a list of the currently available ports. The list of IVR ports in the system is defined in the Configuring System IVR Ports.

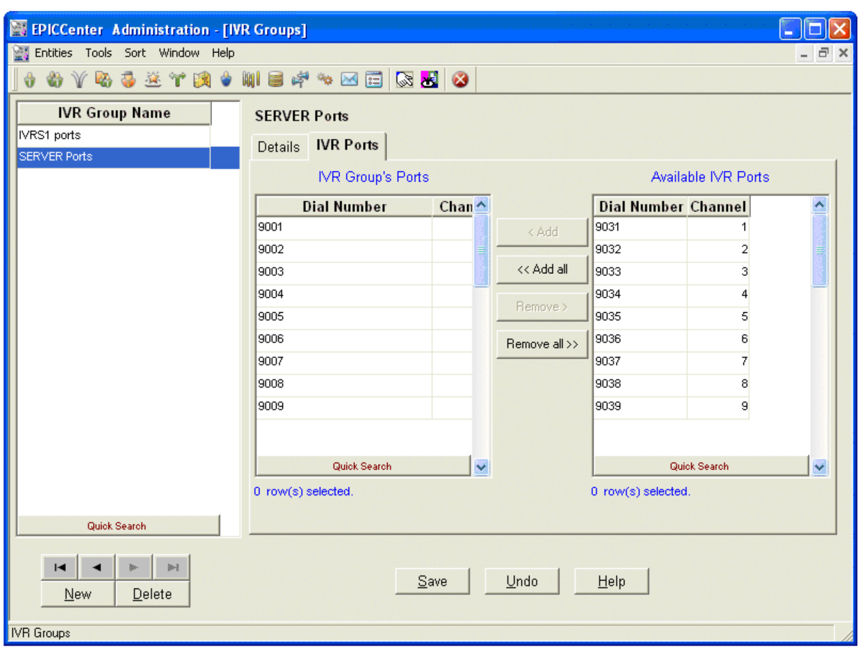

Figure 4-46 IVR Groups IVR Ports Configuration Screen

To open the IVR Ports tab, Click the IVR Ports tab at the top of the IVR Ports Groups Configuration window.

The IVR Ports Configuration window comprises:

- **IVR Group Ports:** This area displays the Number, Channel, and Outbound check box of all currently assigned numbers, and channels to the IVR Groups.
- **Available IVR Ports:** This area displays the Number, Channel, and Outbound check box of all available assigned numbers, and channels to the IVR Groups.

To assign an IVR Port/Ports to the selected IVR Ports Group, Select the required IVR Port/ Ports in the Available IVR Ports list and drag it into the IVR Group Ports list (or click the Add button). To add all ports click Add All.

To un-assign an IVR Port/Ports from the selected IVR Ports Group, Select the IVR Port/ Ports to be removed from the IVR Group's Ports list and drag the selection into the Available IVR Ports list (or click Remove). To remove all IVR Ports click Remove All

4.16 Configuring IVR Applications

These features are only available in Enterprise Contact Center.

The IVR application is used by the Contact Center to perform interactive tasks with the caller. Each individual application is composed of different actions to form a script that executes a procedure.

An IVR application may use a single script or multiple scripts in a single application

To open the IVR Application Configuration window, Click the IVR Application icon in the Toolbar of the main application dialog box.

The IVR Application Configuration window comprises:

- **IVR Applications List:** A scrollable list displaying the name of each IVR Application currently configured in the system:

  Use the four navigational buttons below the list to move up or down the list, return to the beginning or jump to the end of the list.
- **New:** Clicking New to activate a wizard to add a new IVR Application to the list.
- **Delete:** Clicking Delete to remove an IVR Application from the list.
- **Tabs Area:** This area, at the right of the IVR Application list, contains one tab that enables the configuration of the selected IVR Application Details.

To add a new IVR Application to the list:

Step 1 Click New (below the IVR Applications list).

The New IVR Application Wizard opens.

Step 2 Enter the Name, Min handling time, Max handling time, and interval time (explained in the Configuring the IVR Application Detail) of the new IVR Application, as requested by the wizard and click Finish.

The newly defined IVR Application will appear in the IVR Applications list.

Click the arrow on the right side of Finish to add additional applications.

To delete an IVR Application from the IVR Applications list, Select the IVR Application to be removed from the list and click Delete.

4.16.1 Configuring IVR Application Details

This tab is only available in Enterprise Contact Center.

Use the Details tab of the IVR Application Configuration window to configure information about the IVR Applications in the system.

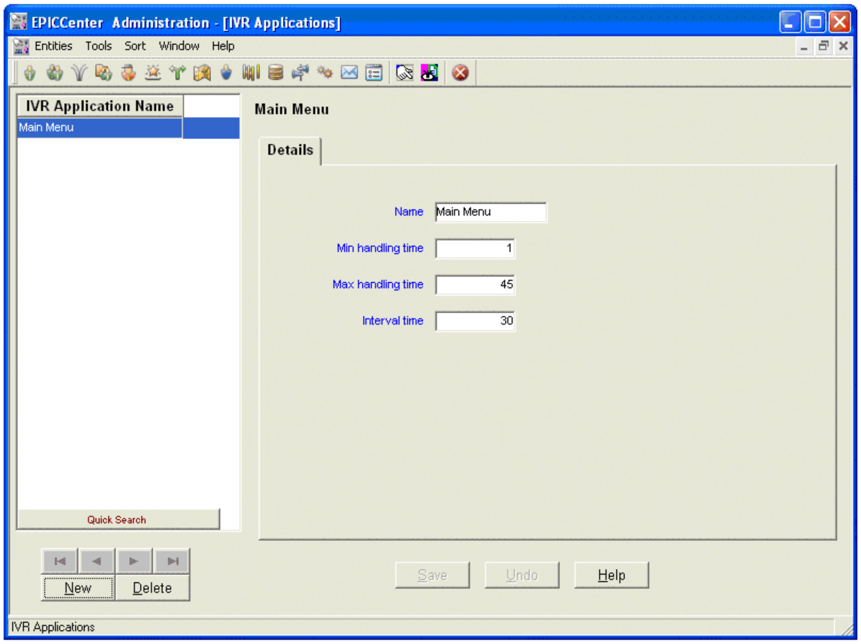

Figure 4-47 IVR Applications Details Configuration Screen

To open the Details tab, Click the Details tab at the top of the IVR Application Configuration window.

The IVR Application Details Configuration window comprises:

- **Name**: The name of the IVR application.
- **Minimum Handling Time**: A figure representing the number of seconds in which a call must end in order to be counted as a too short call.
- **Maximum Handling Time**: A figure representing the number of seconds that a call must exceed in order to be counted as a too long call.
- **Interval Time**: The interval time refers to the size of the sliding interval used for calculations. If this field is set to ten minutes, the real-time report for that group will show statistical information relevant to the last ten minutes.

4.17 Configuring Mail Accounts

These features are only available in Enterprise Contact Center.

A Mail Account is a destination for emails in the system. It may be assigned to IRN and becomes an entry point for emails routing, The Mail accounts configuration screen enables the administrator to define the parameters that are required by the system to manage those accounts on the Organization Mail Server (OMS).

The Mail Accounts configuration screens allow administrators to add and remove Mail Accounts, and to set their properties.

To open the Mail Accounts configuration screen, Click Mail Accounts in the Toolbar of the main application window

The Mail Accounts Configuration screen comprises:

- Mail Accounts List: A scrollable list displaying the Name and mail account address of all the Mail Accounts in the system. Use the four navigational buttons below the list to move up or down the list, return to the beginning or jump to the end of the list..

  Click any group in the list so sort by Name or Number
- New: Click this button to activate a wizard to add new Mail Account to the list
- Delete: Click this button to delete a Mail Account from the Mail Accounts list
- Tabs Area: This area, at the right of the groups list, contains four tabs that enable the configuration of the selected Mail Account's Details, Incoming, and Outgoing.

4.17.1 Configuring Mail Account Details

This tab is only available in Enterprise Contact Center.

Use the Details tab of the Mail Account Configuration window to configure information about the Mail Accounts in the system.

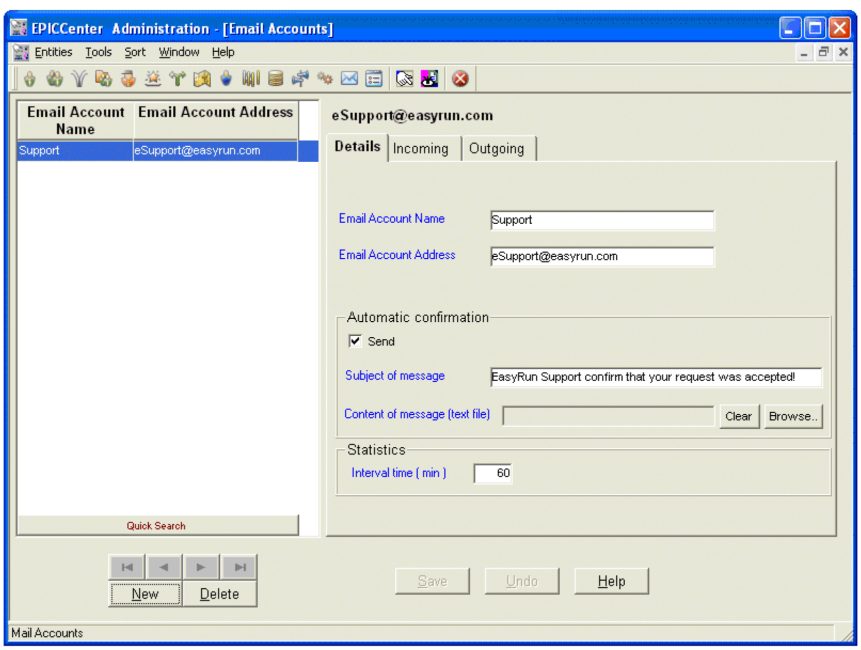

Figure 4-48 Mail Accounts Details Configuration Screen

To open the Details tab, Click the Details tab at the top of the Mail Accounts Configuration window.

The Mail Accounts Details Configuration window comprises:

- **Name:** The Name of the selected mail account
- **Mail Account address:** The email address of the mail account.
  - — ***Automatic Confirmation:*** This section details the required parameters in order to send an automatic confirmation for every email that entered the system through this mail account
  - — ***Send:*** If checked, the system will send an automatic response email to the sender.
  - — ***Subject of the message:*** This text will appear as the subject of the returned automatic confirmation.
  - — ***Content of message (text file):*** Use this edit box to define a full path and file name of a text file that contains text to be included in the automatic response email. Press Clear to clear this edit box and Browse to look for a file.

    The path of the file should be in the root directory of the drive where is installed on the server. The browse dialog box displays the directories and files that are located under the directory where is installed.
- **Statistics:**
  - — ***Interval time:*** Determines the time period that will be monitored in the real-time reports for the Mail Account. If this field is set to ten minutes, for example, the real-time report for that Mail account will show statistical information relevant to the last ten minutes.

4.17.2 Configuring Mail Account Incoming Parameters

This tab is only available in Enterprise Contact Center.

The Incoming tab displays the parameters that are required in order to download email from the selected mail account on the OMS:

To open the Incoming tab, Click the Incoming tab at the top of the Mail Account Configuration window.

The Mail Account Incoming Configuration window comprises:

- **Mail Server:** The mail server IP address or name.
- **Authentication:** The parameters that are required to login to the select mail account on the OMS in order to download mails (POP3)
  - — ***User Name:*** The mail account name.
  - — ***Password:*** The password that the user must type when logging in to the mail account.
- **Incoming Mail Protocol:** The protocol that sets the rules for receiving incoming mail. The currently only valid option is POP3
- **Port:** This parameter is used to connect to the OMS. This is the default setting in most mail servers. If there is a connection problem, please verify the valid port with your mail server administrator and change this value accordingly.

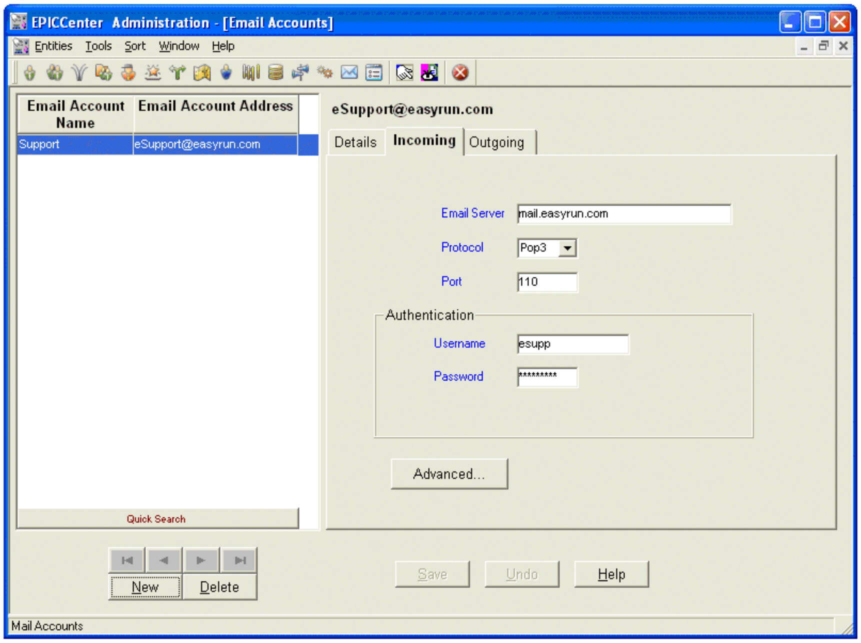

Figure 4-49 Mail Account Incoming Configuration Screen

- **Advanced:** Click Advanced to view the Mail Account – Receive – Advanced dialog box.
  - — *Cache Messages:* Defines how many messages at a time can be cached in the system. If this number is exceeded the system will not poll or download further emails from the OMS. The cache is used by the system defend itself from spam.
  - — *Messages to Download at a Time:* Defines how many emails to download at a time from the selected mail account.
  - — *Poll Interval:* Define how often the system polls the selected email account for further emails. This parameter may affect the OMS performance since (MISSING TEXT).
  - — *Max download transfer time (sec):* The maximum time the system waits for a single email to be downloaded from the OMS to the cache. In some cases it may take more then this time to download a single email. It depends on the mail message size. In those cases all that should be done is to enlarge the timeout or use the OMS management tools to delete this email.

4.17.3 Configuring Mail Account Outgoing Parameters

This tab is only available in Enterprise Contact Center.

The Outgoing tab displays the parameters that are required in order to send email through the selected mail account on the OMS:

To open the Outgoing tab, Click the Outgoing tab at the top of the Mail Accounts Configuration window.

The Mail Accounts Outgoing Configuration window comprises:

- **Mail Server:** The mail server IP address or name.

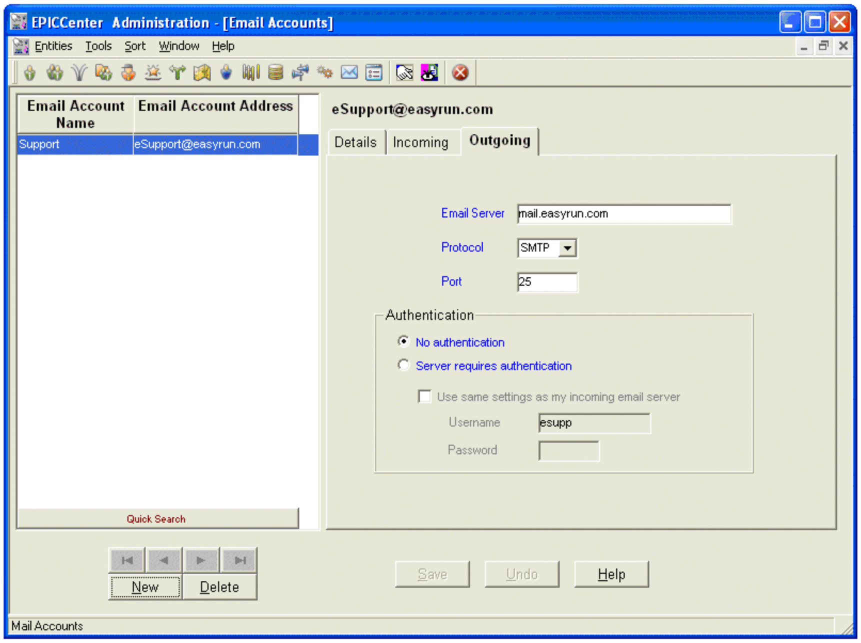

Figure 4-50 Mail Accounts Outgoing Configuration Screen

- **Authentication:** The parameters that are required to login to the selected mail account on the OMS in order to send email (SMTP). If the outgoing mail requires authentication (the 'Server requires authentication' checkbox is checked), then there are two options.
  1. Use the same authentication parameters as in the incoming connection. In this case, the User Name and Password parameters are disabled
  2. If the server requires a different account name to send emails fill the correct user name and password.

  — *User Name*: If the server requires different user parameters to send email fill in the name of the mail account.

  — *Password:* If the server requires different user parameters to send email, fill the mail account password
- **Incoming Mail Protocol:** The protocol that sets the rules for receiving incoming mail. The currently only valid option is POP3
- **Port:** This parameter is used to connect to the OMS. This is the default setting in most mail servers. If there is a connection problem, please verify the valid port with your mail server administrator and change this value accordingly.

4.18 Configuring General System Parameters

The System Configuration window allows a supervisor, who has been assigned supervisor administrator access level, to configure various definitions and parameters that affect the behavior of the entire system.

To open the System Configuration window, Click the System icon in the toolbar.

The System Configuration window comprises:

- **Working Times:** The working hours of the contact center.
- **Call Profile:** Dynamic information that is attached to each call in the system. ***This option is only available in Enterprise Contact Center.***
- **PBX CTI Link:** Use this configuration screen to set the parameters that will be used to connect to the telephony system (PBX). The content of this configuration screen varies according to the PBX type.
- **MIS:** General MIS information.
- **Misc:** Miscellaneous parameters for handling calls.
- **IVR Ports:** The assignment of IVR port to a device in the telephony system .It is also used to define Distributed IVR servers.
- **Skills:** The assignment of skills to agents in the system. ***This option is only available in Enterprise Contact Center.***
- **Incomplete:** The incomplete routing destinations in the system.
- **Wrap-ups:** The wrap-up codes for each group in the system.
- **Outbound:** System wide parameters that are used by the outbound capabilities (callbacks and returning to abandoned callers).
- **Internet:** Used for configuring system parameters for utilizing internet capabilities (Chat and Email). ***This option is only available in Enterprise Contact Center.***
- **Management:** Management is used to view the licenses that are available for this system in addition to configure an automatic DB backup.
- **Interfaces:** The Interfaces tab is used to configure interfaces to external applications (for example: organizational DBs, WFM and CRMs. ***This option is only available in Enterprise Contact Center.***

4.18.1 Configuring System Working Times

The Working Times tab of the System Configuration window enables you to configure the day types, shifts, working, and non-working days for the contact center.

The day types and shifts are used by the system to route calls to different destinations according to the day and the time. The working/non working days information is used by the application for calculating the daily average for historical reports by intervals that span more than one day. In this case, the average is calculated by dividing the total sum by the number of working days in the report period. It is also used by the historical reports scheduler if set not to print reports in non working days. The working/non working days also affect scheduled reports. When scheduling a report, there is an option to decide whether the report will be generated in non working days.

Configuring system-working times involves defining different day types (for example, Christmas Eve), which are configured as working or non-working days. Each day type can be assigned a color so it can be easily viewed in the calendar. Up to 40 shifts can be defined. The shifts are assigned to a specific type of day. A shift is defined by a name and its start time. The system translates the current date to a type of day, and then translates the current time to the shift that belongs to the selected type of day. The Start Time is marked as the starting time of the shift.

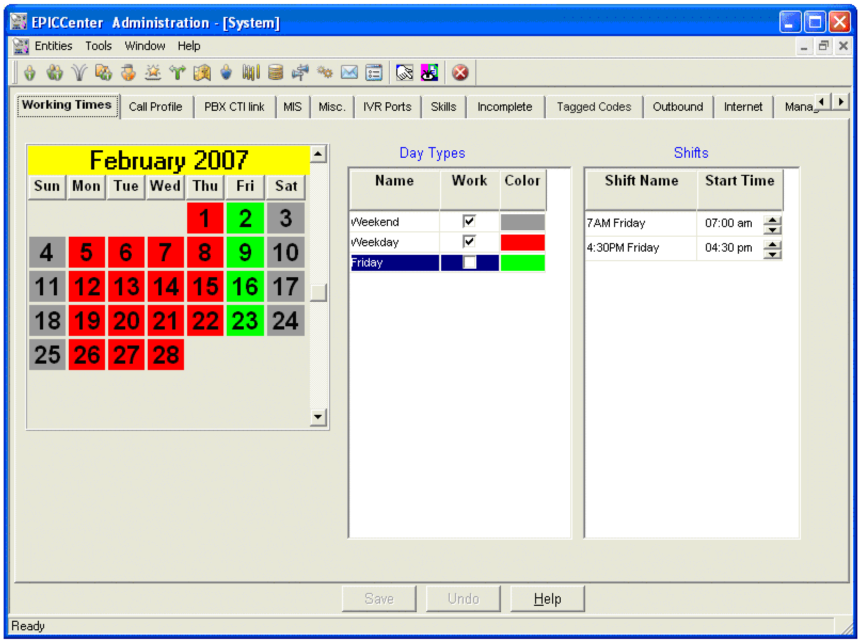

Figure 4-51 System Working Times Configuration Screen

To open the Working Times tab, Click the Working Times tab at the top of the System Configuration window.

The Working Times tab contains the following two areas:

- **Calendar:** This area displays the calendar for the current working month. Days are color-coded according to their type.
- **System Defined Shifts:**
  - — *Left Column:* A list displaying each currently-defined day type, its color-coding, and an indication of whether or not it is a working day.
  - — *Right Column:* A list displaying the currently defined shifts for the selected day type. For each new shift a name and start time are displayed.

    In this area you can add a new shift, edit the start time of a shift, and/or delete a shift from the list.

To scroll to the previous/next month, In the calendar, click the arrow at the top/bottom of the scroll bar.

To jump to the previous/next year, In the calendar, click the scroll bar above/below the scroll box.

To mark a specific day of the week as a day type, for a certain period of time:

Step 1 Click the day at the top of the calendar.

A dialog box appears for that day.

Step 2 From the Set As drop-down list, select the type of day you want to assign to the selected day of the week.

Step 3 Click the appropriate option in the For Which Period area, to set the day for the current month, current year, or the entire calendar.

Step 4 Click Ok to accept the changes and overwrite any previous settings.

To mark a specific day of the month (that is, date) as a day type, for a certain period of time:

Step 1 Click the particular date in the calendar.

A dialog box appears for that date.

Step 2 From the Set As drop-down list, select the type of day you want to assign to the selected day of the month.

Step 3 Click Ok to accept the changes and overwrite any previous settings.

To Define a New Type of Day:

Step 1 Right-click anywhere in the left column of the System Defined shifts area and click New.

The New Type of Day dialog box appears.

Step 2 Enter a name for the new day type in the Name field.

Step 3 Define a color for the new day type by adjusting the Red, Green, or Blue scroll bars.

Step 4 Define the new day type as a working/non-working day by selecting the Working Day check box.

Step 5 Click Ok to save the new day type configuration

To Edit the Color and/or Working Definition of a Type of Day:

Step 1 Right-click the day type to be edited in the left column of the System Defined shifts area and click Edit.

The Edit Type of Day dialog box appears.

Step 2 Define the required color for the day type by adjusting the Red, Green or Blue scroll bars.

Step 3 Define the day type as a working/non-working day by selecting the Working Day check box.

Step 4 Click OK to save the new configuration.

To Delete a Day Type, Right-click the day type to be deleted in the left column of the System Defined shifts area and click Delete.

You cannot remove a day type that is currently being used in the calendar. If you want to remove this specific type of date or day, then you must first un-assign it before removing it.

To Add a New Shift, Right-click anywhere in the right column of the System Defined shifts area and click New.

A line appears enabling you to enter a name and start time for the new shift.

To Edit the Start Time of a Shift, Select the information to be edited and type in the new shift name or start time as required.

To Delete a Shift, Right-click the shift to be deleted and click Delete.

4.18.2 Configuring the System Call Profile

This tab is only available in Enterprise Contact Center.

Attached to each call in the system, the call profile consists of dynamic information used to route the call and provide relevant history. Information is updated as the call moves through the system. For example, ANI information is recorded when the call enters from the PSTN; and the caller may add more information via IVR menus. Each field in the call profile is either mandatory (predefined by the system), or optional (also known as a user field, defined by the system administrator during setup). These fields may be different on each installation.

Use the Call Profile tab of the System Configuration window to configure the optional fields of the call profile.

This list is empty unless new user fields have been defined for the call profile.

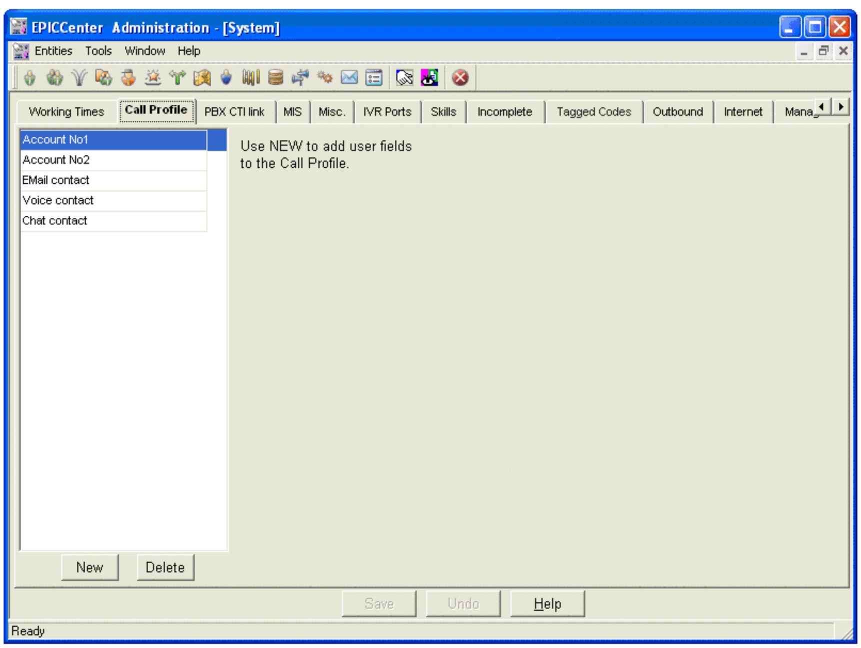

Figure 4-52 System Call Profile Configuration Screen

To open the Call Profile tab, Click the Call Profile tab at the top of the System Configuration window.

The Call Profile tab comprises:

- **User Fields List:** A list of all currently defined user fields for the call profile. Click any of these fields to edit them.

- **New:** Click New to add a new row to the User Fields list, enabling a new field to be defined and added to the call profile.
- **Delete:** Click Delete to delete a selected user field from the list.

4.18.3 Configuring MIS Parameters

Use the MIS tab of the System Configuration window to define general information that is used to calculate and display information, such as the historical reports interval, company name, and how to calculate the TSF (Target Service Factor).

The TSF indicates how well the group provides the defined level of service, according to the Target ASA (Average Speed of Answer).

In this tab, you can also specify which colors are used to display different agent states in the Real-Time Monitoring application.

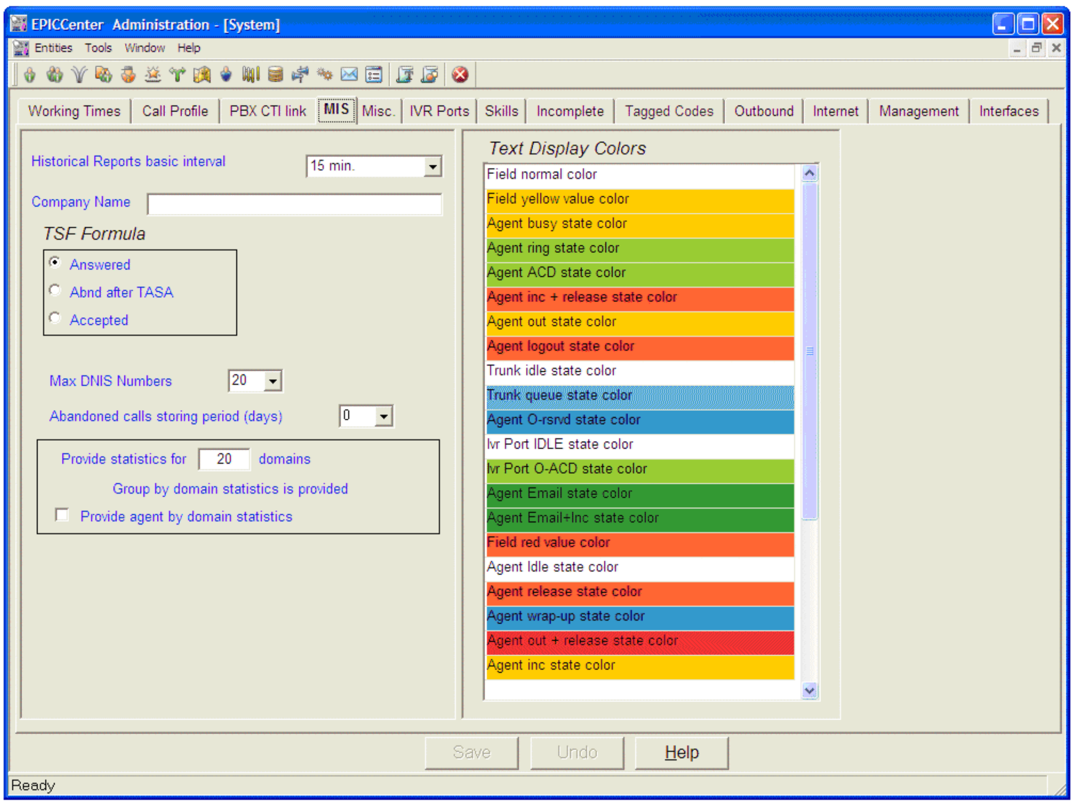

Figure 4-53 System MIS Configuration Screen

To open the MIS tab, Click the MIS tab at the top of the System Configuration window.

The MIS tab comprises:

- **Historical reports basic interval:** The interval that presents data in Historical Reports. The options are 15 minutes, 30 minutes, or 1 hour.

  The basic interval determines the resolution of historical reports. A smaller interval gives historical reports a higher resolution. The interval also determines the amount of disk space needed for the user database. Smaller intervals require more disk space to store the information. For larger intervals, less disk space is needed.

- **Company name:** The name of the company to appear at the bottom of the historical reports.
- **TSF Formula:** Click the appropriate option to define how the TSF is calculated:
  - — *Answered:* The percentage of calls answered within the Target ASA, out of calls routed and answered by the group.
  - — *Abnd after TASA:* The percentage of calls answered within the Target ASA, out of calls routed and answered by the group, and calls routed to the group and abandoned after the Target ASA.
  - — *Accepted:* The percentage of calls answered within the Target ASA, out of all the calls that are routed to the group. These include Abandoned, Interflowed, and Answered by Another Group (calls that are considered to be answered) after the Target ASA.
- **Maximum number of DNIS numbers:** The system must allocate memory to gather statistics on DNIS numbers according to this parameter. This should reflect the actual number of DNIS numbers that the system will use.
- **Abandoned calls storing period (days):** This report gives a list of any abandoned calls, provided that the call was accompanied with ANI. It is used by the contact center to give a call back to these callers. These parameters define how long a record in this report is saved.
- **Provide statistics for domains:** Enter the number of domains for which you want statistics. ***This option is only available in Enterprise Contact Center.***

  Choose this number carefully, since higher numbers require more system memory.
- **Provide agent by domain statistics:** Check this box to receive statistics for agents by domain. ***This option is only available in Enterprise Contact Center.***

  Enabling this information takes up considerable database space.
- **Text Display Colors:** A color-coded list displaying the different agent states and numerical value levels in the Real-Time Monitoring application.

To change the color for a particular agent state:

Step 1 Scroll through the list.

Step 2 Double-click the required state.

Step 3 In the Colors dialog box that appears, select the required color for the state, click Apply and OK.

4.18.4 Configuring System Miscellaneous Parameters

Use the Misc tab of the System Configuration window to define parameters for handling incoming calls, including setting call priorities, defining destinations for calls on hold and setting the Lingual IVR announcement settings.

To open the Misc tab, Click the Misc tab at the top of the System Configuration window.

The Misc tab comprises:

- **Services Settings**
  - — *Forced Released Timeout:* How long (in seconds) an agent station can ring before forcing release.

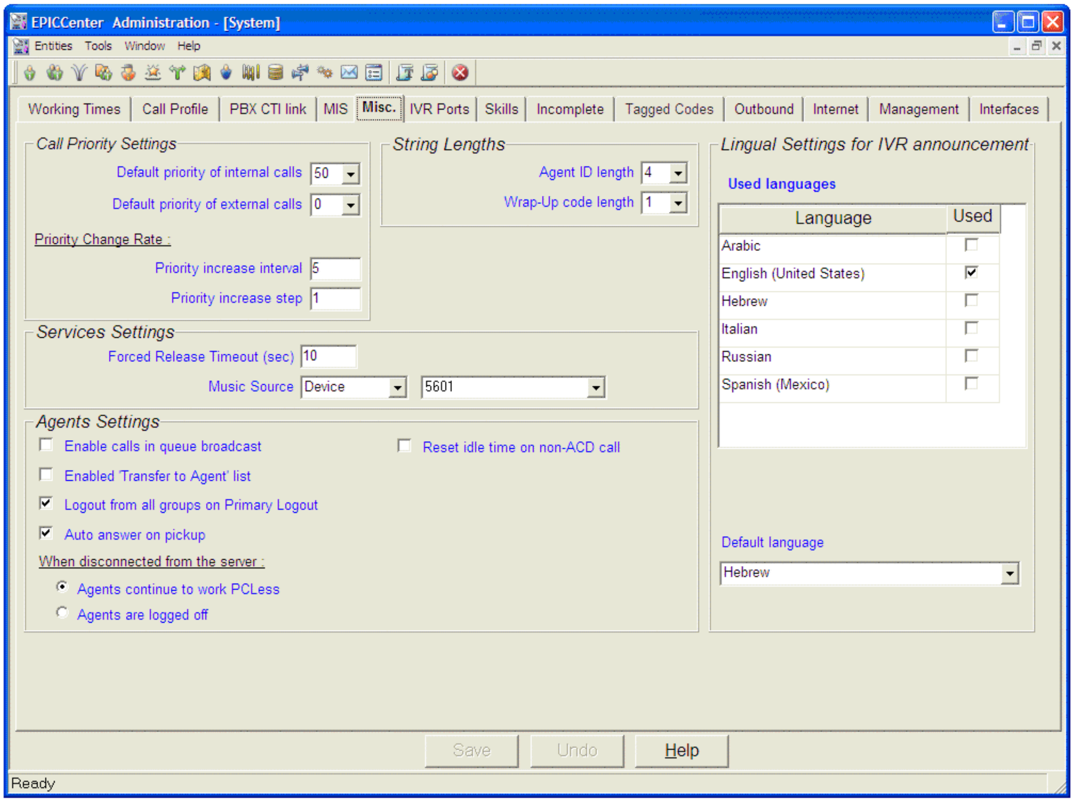

Figure 4-54 System Misc. Configuration Screen

- — *Music Source:* Defines where to connect a caller while waiting in queue between announcements.

  On this drop-down list, select the music source type. The Device option may be used with the Coral, Cochav, and Meridian PBXs. For all other PBXs, the CC Script option must be used. If the device option is used, the device must also be defined as a music source in the system PBX CTI Link tab. If the CC script option is used, select the script that plays the music file from the list box that appears.

  This is used by any service when the music source is not defined.

- Call Priority Settings: *This option is only available in Enterprise Contact Center.*
  - — *Default priorities:* This area contains two drop-down lists where you set:

    The default priority for internal calls, and the default priority for external calls (calls that are entering through trunks). This parameter can be overridden by setting a different initial priority for the IRN that is used to route the calls.

  - — *Priority Change Rate:* This area contains two edit boxes where you define:
    - ▷ How often the priority is increased (the priority increase interval).
    - ▷ The step by which the priority is increased. For example, if the interval is ten seconds and the step is five, the priority is increased by five every ten seconds.

      This option is only available in Enterprise Contact Center.

- String Lengths: This area contains two drop-down lists where you set:

The maximum agent ID length (default is four characters), and the wrap codes length (default is two digits).

- **Lingual Settings for IVR Announcements:** This area contains two types of fields where you can set:
  - — The supported languages by the IVR. Check any required language.
  - — The default language, which is used for calls when the 'Language' call profile field is not set to any supported language.
- **Agent Settings**
  - — ***Enable calls in queue broadcast:*** The ACD calls window in the agent toolbar displays the currently queued contacts. The agent, by double clicking a call, can pick up a call. The queued calls information is distributed by the server using broadcast messages to the agent. Checking this checkbox enables this broadcast.
  - — ***Enable the 'transfer to agent' list:*** The transfer by agent ID ACD operation in the agent toolbar enables an agent to transfer a call to another agent without giving the agent's extension (which may vary on every login of this agent); instead, the operation asks for the agent ID. The system gives an option to pick the agent from a list of currently logged in agents. This list is distributed from the server using broadcast messages to the agent. Checking this checkbox enables this broadcasts.
  - — ***Logout from all groups on Primary logout.:*** Checking this checkbox will cause to the system to log out an agent who presses the primary logout button from all the groups he currently logged into. Otherwise, the system will log him out only from his primary groups.
  - — ***Auto answer on pickup:*** Check this checkbox so the system will automatically answer a call that is transferred to the agent according to a pick up request. If this checkbox is not checked, the agent will have to manually answer the picked up call
  - — ***Reset idle time on non-ACD call:*** The way the idle time of an agent is measured, affect the way the system route calls to agents if the 'by longest idle' search criteria is defined for a service. When checked, the system will reset the idle time for the agent after non ACD call.
  - — ***When disconnected from the server:*** This option defines what will happens when an disconnect from the server is due to a networking problem:
  - — ***Agents continue to work PCLess:*** In this mode, the system will continue to route calls to the agent although its toolbar will not be updated. When the networking problem is solved, the toolbar, if still uploaded, will reconnect automatically.
  - — ***Agents are logged off:*** In this mode, the system will not route any further calls to the agent. In order to continue, the agent must logon again, whether through new agent application, or through the telephone as a PCLess.

4.18.5 Configuring System IVR Ports

IVR ports are devices in the PBX (thus they have dial numbers). These ports are controlled by the system. When a call is connected to an IVR port, the system can interactively handle the caller (giving the caller voice prompts and get the caller input).

IVR ports are TAPI Wave based, where there are no physical connections between the PBX port and the system. In this environment, cards and channels are irrelevant. Nevertheless, since the IVR supports both types, the configuration screen looks the same. For TAPI Wave based IVR ports define a single card to each server, and, for each such card, define all TAPI ports on each server. The channel numbers should be just assigned sequentially.

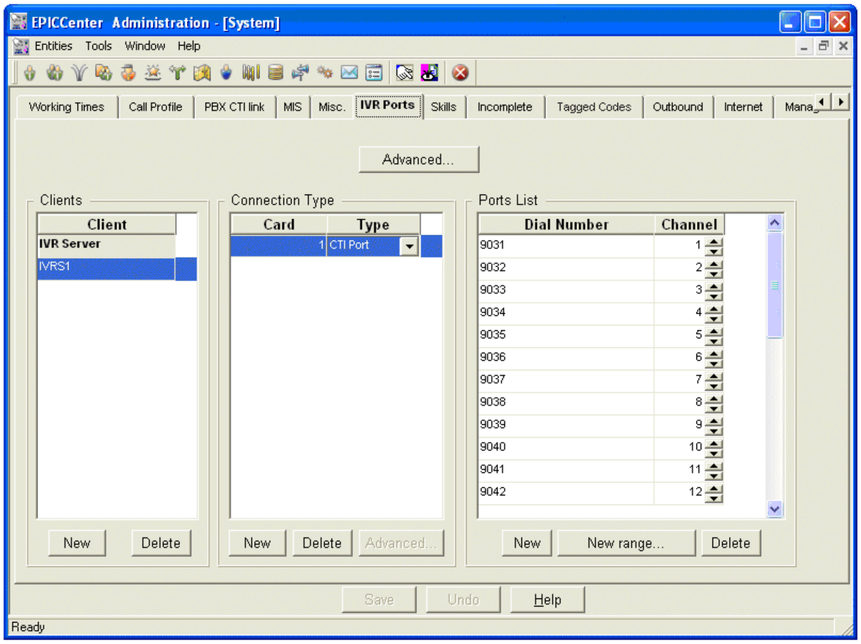

Figure 4-55 System IVR Ports Configuration Screen

To open the IVR Ports tab, Click the IVR Ports tab at the top of the System Configuration window.

The IVR Ports tab comprises.

- **Clients:** A list of all IVR servers. (One is always defined.)

  The name 'IVR Server' is used to define the IVR ports on the Contact Center server.
- **Connection Type:** A list of IVR cards for the selected IVR server.
- **Ports List:** This is a list of the IVR ports for the selected IVR card.
- **Advanced:** Clicking this button opens a configuration screen to define parameters used for Tone Detection. The Tone Detection is used by the Outbound application to decide whether the remote side is ringing, busy, answering machine and so forth.

  Advanced parameters must be set by a telephony engineer. Contact your vendor to adjust them.

To add a distributed IVR server, Click New (below the Clients list). The name given to the distributed server must be the networked computer name.

To Delete a distributed IVR server, Select the server to delete, then click Delete (below the Clients list)

To add an IVR port card to an IVR server:

Step 1 Select the IVR server from the Clients list

Step 2 Click New (bellow the Connection Type list). Give a name to the card and choose the card type for the list (LS type is for Dialogic™ analog Loop Start extensions, Digital E&M type is for digital trunks using the E&M protocol, and CTI port type is used for IP PBX TAPI Wave ports).

To Delete an IVR ports card from an IVR server:

Step 1 Select the IVR server from the Clients list

Step 2 Select the card to remove and click Delete (below the Connection Type list).

To set advanced properties for Digital trunks IVR ports, Advanced parameters must be set by a telephony engineer. Contact your vendor to adjust them.

To add an IVR port to an IVR card:

Step 1 Select the IVR card from the Connection Type list.

Step 2 Click New (below the Ports list). Assign the dial number and the channel number to this port as explained above.

To Define a range of IVR ports to an IVR card:

Step 1 Select the IVR card from the Connection Type list.

Step 2 Click New Range (below the Ports list). Assign the first and last dial numbers and the increment step. The system will add as many ports as possible within the limits of the DN range and the defined increment step. For example, if the first DN is 1000, the last is 1060, and the increment step is two, the ports 1000, 1002, 10041060 will be added to the card. The channel will be assigned sequentially.

To Delete an IVR port from an IVR card:

Step 1 Select the IVR card from the Connection Type list

Step 2 Select the port to remove and click Delete (below the Ports list).

If the Redundancy feature (using the Double Take solution) is installed, the ports on the Target computer must be defined as if the Target computer is a Distributed IVR server.

4.18.6 Configuring System Skills

Skills are used to route calls to the best-fit agent.

Calls will not wait in the queue while there are available agents, even if the agent's skills do not fit the call requirements. The result is that the Best Skill Fit is used only when more than one agent is available to receive a call.

There are a number of ways to set the skills required by a call. For example, In the IRN Skills tab, the administrator can assign a required value for each skill that is required by calls that enter the routing system through this IRN. The same can be done by setting values to skills in the Domain Skills tab, the Customer Skill tab, the Dial List Skills tab and by various CCS actions that can set a value to a call profile field.

The skills of an agent are set in the Agent Skills tab. For an agent, two numbers are defined for each skill, the value (which describes the ability of the agent to answer calls that require this skill) and the preference (the lower the value, the lower the priority given by the call center's management to usage of this agent for this skill).

In order to match a call with an available agent, the system does the following:

For each skill defined in the system, the system subtracts the product of the Skill value and preference of the agent for this skill from the Skill value required by the call. If the outcome is negative, it is considered zero. The system summarizes all the above. The lower the number is, the better the match.

For example: Assume that a call requires skill named CARS with a value of 75%. Agent A has a 50% skill value and 100% skill preference. Agent B has a 75% skill value and 75% skill preference. The system calculates it as follows:

Agent A = 75 – 50*100/100 = 25

Agent B = 75 – 75*75/100 = 18.75

So the call will be routed to Agent B.

Use the Skills tab of the System Configuration window to configure the skills that may be assigned to agents and calls in the system.

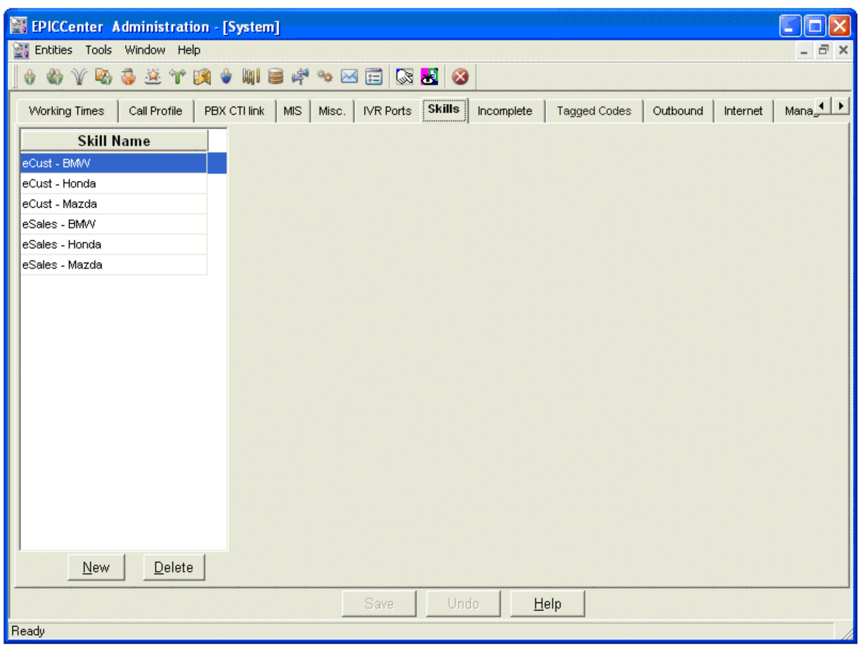

Figure 4-56 System Skills Configuration Screen

To open the Skills tab, Click the Skills tab at the top of the System Configuration window.

The Skills tab displays a scrollable list of the currently defined system skills and the following two buttons:

- **New:** Click New to add a new empty row to the Skills list where you can define a new skill name.
- **Delete:** Click Delete to delete a selected row from the Skills list.

4.18.7 Configuring System Incomplete Destinations

When a call enters the system with no valid routing destination, the system routes it to the incomplete call destination. For example, if a call enters IRN with a Call Control Script as a destination, but the script has not set a value for the service required mandatory call profile field, this leaves the IRN without a destination. In this case, the system uses the Incomplete Destination for that call.

Since Email contacts can interflow only to email account, the incomplete destination for Email is separated to a different tab. This screen therefore has two tabs, one for Voice/Chat contacts and the other is for Email contacts. It is exactly the same but the fact that the destination for email contacts may be only email address. The system automatically identifies the media type and according to it, send the contact to the proper destination.

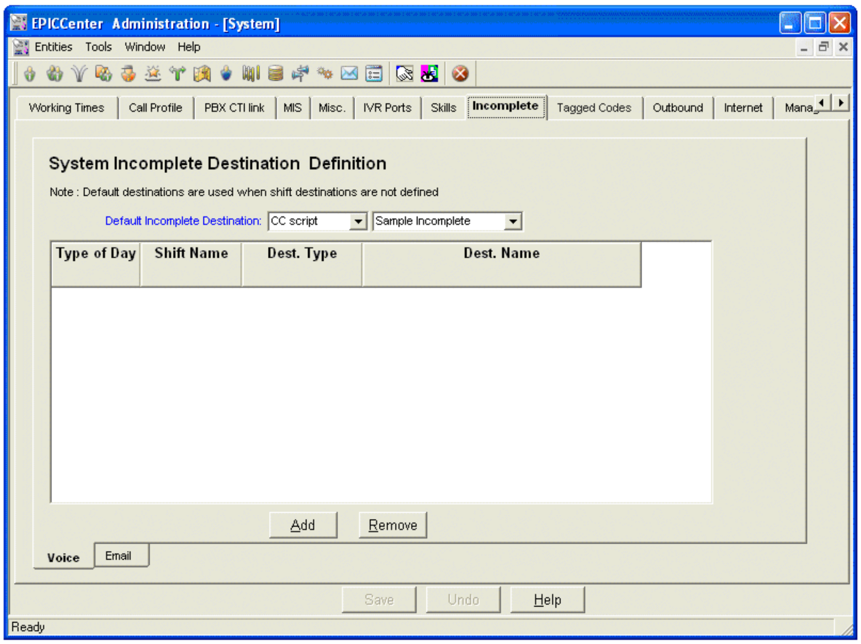

Figure 4-57 System Incomplete Destination Configuration Screen

To open the Incomplete tab, Click the Incomplete tab at the top of the System Configuration window.

The Incomplete tab comprises:

- **Default Incomplete Destination:** Select the required default incomplete destination (Device, Call Control Script, IRN, or Service) to be used when shift destinations are not defined from this drop-down list.

  If a device was selected, fill the device's DN in the edit box that opens. Otherwise, select the IRN, Service or Call Control Script for the default destination from the drop-down list.

- **Shifts List**: A list of all the shifts with an incomplete destination other than the default destination. For each such shift, four fields are displayed: ***This option is only available in Enterprise Contact Center.***

  The type of day for which the shift belongs, the shift name, the type of the destination for that shift (IRN, Call Control Script, or device), and the destination (IRN, or Call Control Script) or DN (device).

- **Add:** Click New to add a new shift destination to the list. ***This option is only available in Enterprise Contact Center.***
- **Remove:** Select a shift destination to remove and click Remove to delete a shift destination from the list. ***This option is only available in Enterprise Contact Center.***

4.18.8 Configuring System Tagged Codes

Wrap-up codes are internal codes that are used to label a call. They can indicate the service received by the call and/or identify the customer who received the service. Wrap-up codes are used primarily for statistical reporting. Agents enter the wrap-up code when they have finished handling a call.

Release Codes are used by the system to classify the time the agent spent in released state by the release reason. In the system there are two pre-defined released codes that are always available. The first is 'No Code' and the second is 'Forced Released'.

Use the Tagged Codes page of the System Configuration screen to configure the wrap-up and release codes for the system.

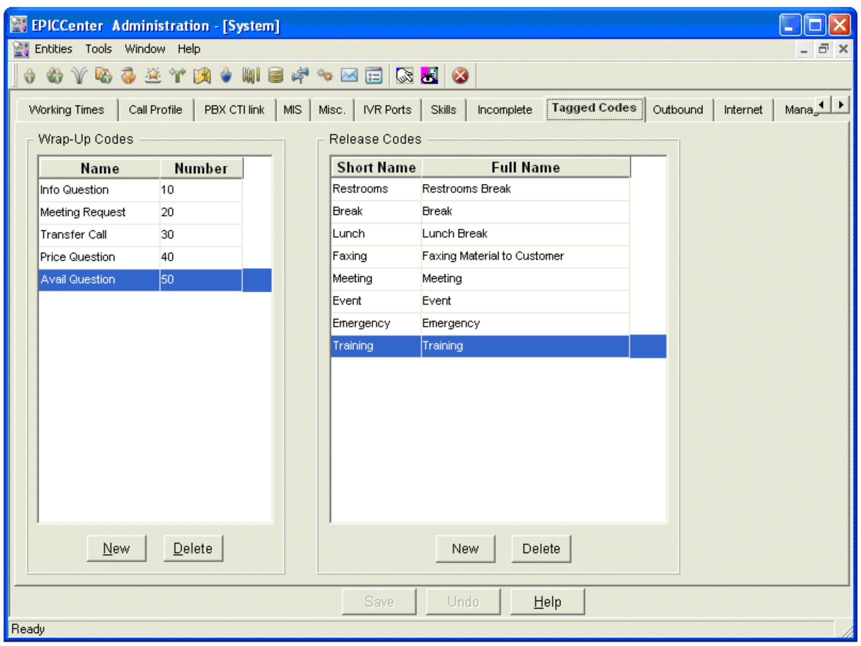

Figure 4-58 System Tagged Codes Configuration Screen

To open the Tagged Codes page, Click the Tagged Codes tab at the top of the System Configuration screen.

The Tagged Codes page of the System Configuration screen comprises:

- **Wrap-Up codes list:** A list displaying the Name of the wrap-up code (usually the subject of the call) and the Number to be dialed by the agent at the end of the call.
  - — *New:* Clicking this button adds a new row to the list. Enter the Name and Number for a new wrap-up code.
  - — *Delete:* Clicking this button deletes the last (or a selected) row from the Wrap-Up codes list.

- **Release codes list:** A list displaying the Short Name (used in the Real Time Application) and the long Name (Used in the Historical Reports) of the release codes.
  — *New:* Clicking this button adds a new row to the list. Enter the Short Name and Long Name of the new release code.
  — *Delete:* Clicking this button deletes the last (or a selected) row from the Release codes list.

4.18.9 Configuring System Outbound Parameters

Use the Outbound tab of the System Configuration window to define parameters for handling outbound calls.

The system generates outbound calls according to the following sequence:

1. The system first waits for an agent that will handle the call and reserves the agent for this call.
2. The system then waits for an IVR port to become available. As soon as the IVR port becomes available, the IVR starts to dial the outbound number.
3. According to the settings for abandoned and callback calls, or as defined by the dial list, the system transfers the call from the IVR to the agent when the remote side is ringing or answered.
4. If, while reserved, the agent starts a telephony activity (generates a call or receives a non-ACD or a consultation call) the outbound call for which the agent was reserved will search other available agent or will enter the queue.

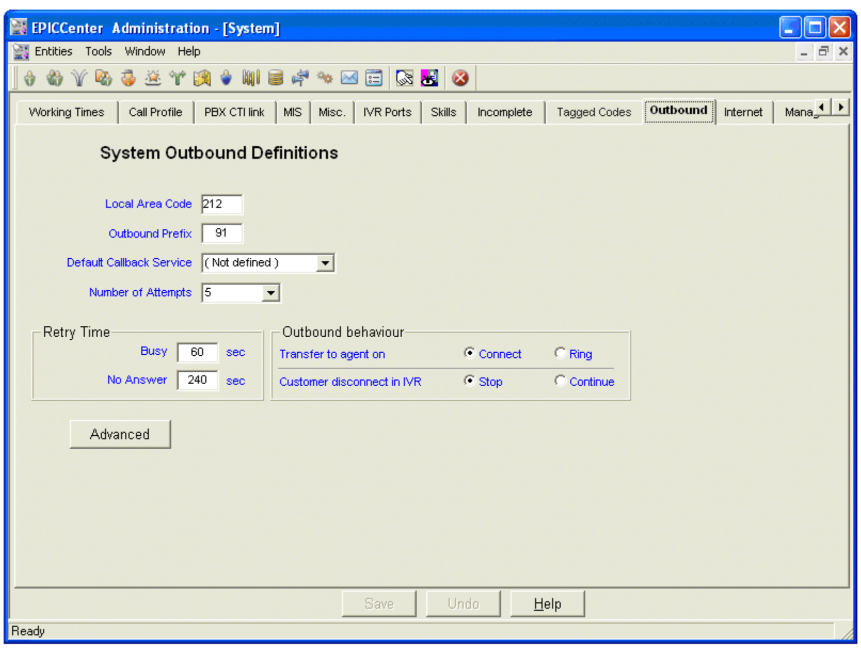

Figure 4-59 System Outbound Configuration Screen

To open the Outbound tab, Click the Outbound tab at the top of the System Configuration window.

The Outbound tab comprises:

- System Outbound Definitions
  - — *Local Area Code:* Use the local area code, the system knows to eliminate it from the CID of abandoned calls, or from the numbers to dial from callback and dial list calls.
  - — *Default Callback Service:* From the drop-down list, choose the service to be used for callback purposes.

    This parameter is used for calls that have left details for a callback in a stage where no service is defined for this call.
  - — *Outbound Prefix:* The digits to dial for an outside line.
  - — *Number of Attempts:* The number of times the system attempts to make the call.
- Retry Time
  - — *Busy:* The amount of time (in seconds) the system should wait before re-trying after a busy signal.
  - — *No Answer:* The amount of time (in seconds) the system should wait before re-trying after no answer has been received.
- **Outbound behavior:** This section specifies how exactly an outbound will behave. There are a number of possible differentiations.
  - — *Transfer to Agent On:* Check one of the following options for the appropriate transfer mode. There are differences between the PBX types and different types of trunks.
    - ▷ *Connect:* The IVR transfers the call to the agent as soon as the customer answers the call.
    - ▷ *Ring:* The IVR transfer the call to the agent as soon as the customer's telephone starts to ring.
  - — *Customer Disconnect in IVR:* Defines system behavior when the customer hangs up while talking with the IVR.
    - ▷ *Stop:* When the customer disconnects the call, this number will not be redialed and this number will be signed in DB as failed.
    - ▷ *Continue:* When the customer disconnects the call, the system will retry the call later until the number of retries is fulfilled.

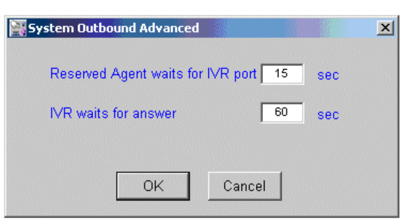

Figure 4-60 System Advanced Outbound Configuration Screen

- **Advanced Button:** Click this button to open the System Outbound Advanced window, which contains the following two fields:
  - — *Reserved Agent Wait for IVR Port:* The system reserves an agent for the call, and then waits for an IVR port to become available. If the time defined by this parameter expires and there is still no free IVR port, the agent will become available for another activity and the outbound call will wait for the next retry.

    Enter the number of seconds for which an agent should be reserved for an outbound call when an IVR port is not available.
  - — *IVR Wait for Answer:* Enter the number of seconds for which an IVR should wait for an answer.

    If 'Transfer to agent on connect' is defined and this timeout expires, the system will drop the call and wait for the 'No answer retry time' for the next retry.

4.18.10 Configuring System Internet Parameters for Chat Contacts

This tab is only available in Enterprise Contact Center.

Use the Internet tab of the System Configuration window to define various parameters for handling chat contacts.

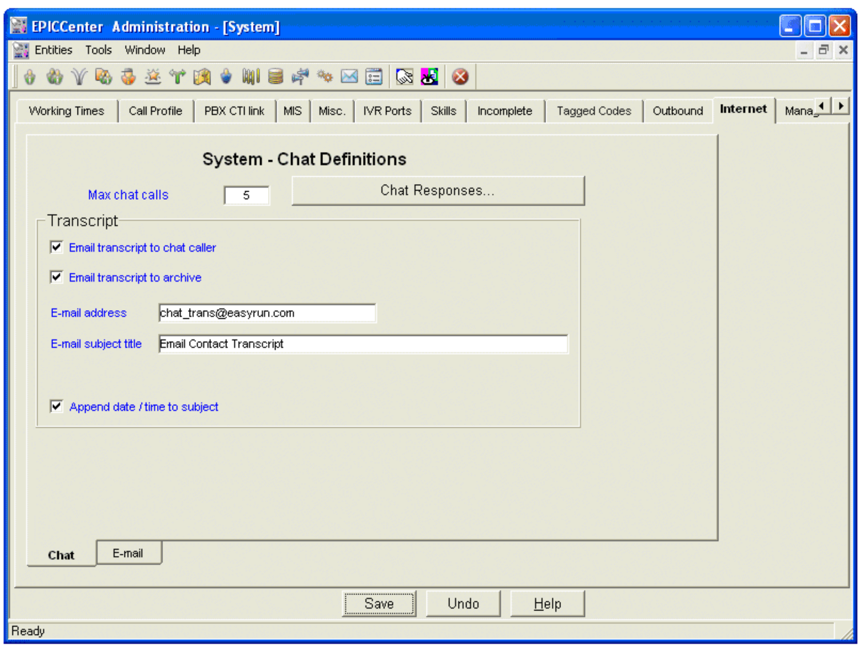

Figure 4-61 System Internet Parameters for Chat Configuration Screen

To open the Internet-Chat tab, Click the Internet tab at the top of the System Configuration window and then click the chat tab below.

The Internet - Chat tab comprises:

- **Max chat calls:** The maximum number of concurrent chat calls.
- **Transcript:** This area contains two check boxes and a field in which you may enter an email address.

— *Send Transcript to Chat Caller:* Check this box to send a transcript of the call to the caller on completion.

— *Save Transcript:* Check this box to save the calls transcript locally.

— *Email Address:* Specify the address to which all transcripts should be sent.

— *Email subject title:* The contents of this field will be used as the subject line for emails containing the transcript

- **Chat Responses:** Click to open the Chat Responses window where you can define shortcuts for responses to be used by the agent in chat sessions.

4.18.11 Configuring Internet Chat Responses

This tab is only available in Enterprise Contact Center.

Use the Chat Responses window to define shortcuts for responses to be used by the agent in chat sessions.

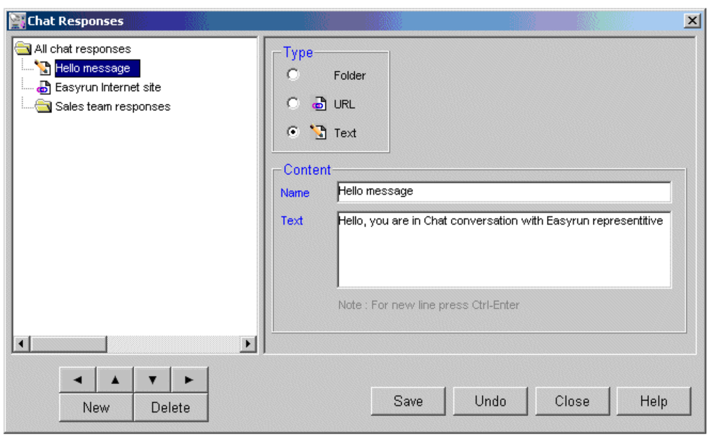

Figure 4-62 System Internet Chat Responses Configuration Screen

To open the Chat Responses window, Click Chat Responses in the Internet tab of the System Configuration window.

The Chat Responses window comprises:

- **Chat Responses Tree Area:** An Explorer type tree details the responses defined in the system. Use the four navigational buttons below the list to move up or down the list, return to the beginning or jump to the end of the list.
- **New:** Click New to activate a wizard to add a new Chat Response to the tree.
- **Delete:** Click Delete to delete an item.
- **Type:** Once you have defined a folder or chat response, the Type area becomes active. Here you can select the appropriate option to define a Folder, File URL or Text:

— *Folder:* Enter a name for the new folder.

Folders on the same level require unique names.

— *URL:* Enter a name and a URL address. The name will appear in the agent's responses list. When selected by the agent during the chat call this URL will be pushed to the caller.

This text will not be checked for validity or existence, so extra care should be taken to enter the correct characters.

— *Text:* Enter a name and the type the message in the Text area. When selected by the agent during the chat call this message will be displayed on the caller's computer.

- **Content**: The Content area displays the name and relevant parameters for the selected Type.

To add a new Item, Click New. The New Chat Response Item window opens. Here you can select the item type and define the appropriate parameters.

To edit an item, Select the required item from the Chat Responses tree and change the details in the Type and Contents areas.

4.18.12 Configuring System Internet Parameters for Email Contacts

This tab is only available in Enterprise Contact Center.

Use the Internet tab of the System Configuration window to define various parameters for handling email contacts.

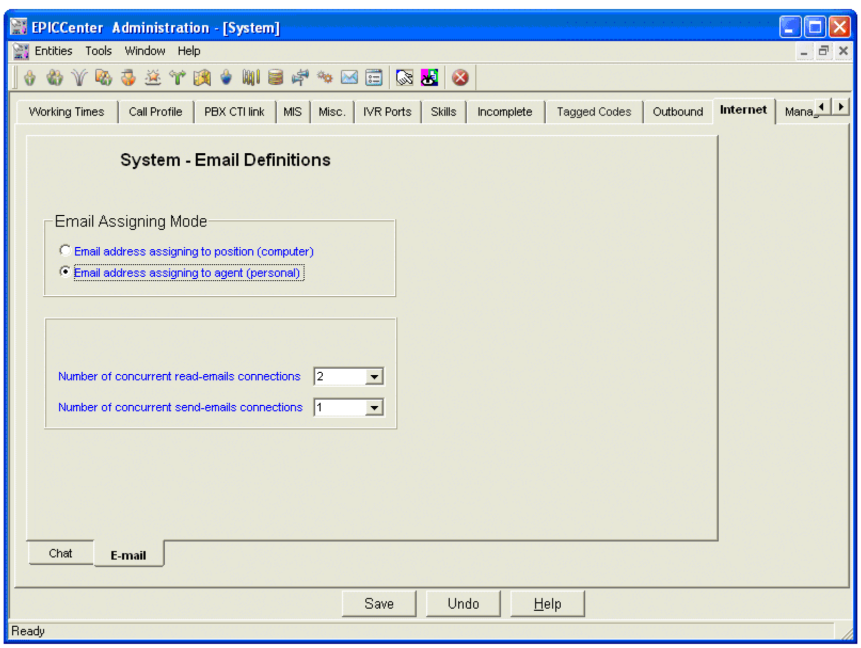

Figure 4-63 System Internet Parameters for Email Configuration Screen

To open the Internet-Mail tab, Click the Internet tab at the top of the System Configuration window and then click the Mail tab below.

The Internet – Mail tab comprises:

- **Email Assigning Mode**: The email assigning mode is set according to site needs and the way email clients, such as Outlook, are configured. In sites where free seating is important, the personal assigning mode is preferred, but it is possible only if the site mail configuration supports it. In order to work in personal assigning mode, an agent must log into a computer with a user name that matches the email client configuration. If they do not match, only the computer assigning mode is available.

— *Email address assigning to position (computer):* In this mode, when the agent logs on, the system uses the email address as entered by the agent in the logon dialog box. The system ignores the email address defined in the agent's details administration screen. This mode enables free seating of email agents.

— *Email address assigning to agent (personal):* In this mode, when the agent logs on, the system uses the email address as defined in the agent's details administration screen. The system ignores the email address in the logon dialog box. This mode enables free seating of email agents.

- **Number of concurrent read-email connections**: There may be an OMS limitation regarding the maximum number of simultaneous connections (POP3) permitted by the OMS administrator at any one time. This parameter is designed to protect the OMS from overload. It is defined by the administrator of the OMS.
- **Number of concurrent send-email connections:** There may be an OMS limitation regarding the maximum number of simultaneous connections (SMTP) permitted by the OMS administrator at any one time. This parameter is designed to protect the OMS from overload. It is defined by the administrator of the OMS.

4.18.13 Viewing Licensing Information

Use the Licensing tab in the Management tab of the System Configuration window to view licensing parameters that are coded in the server's lock device.

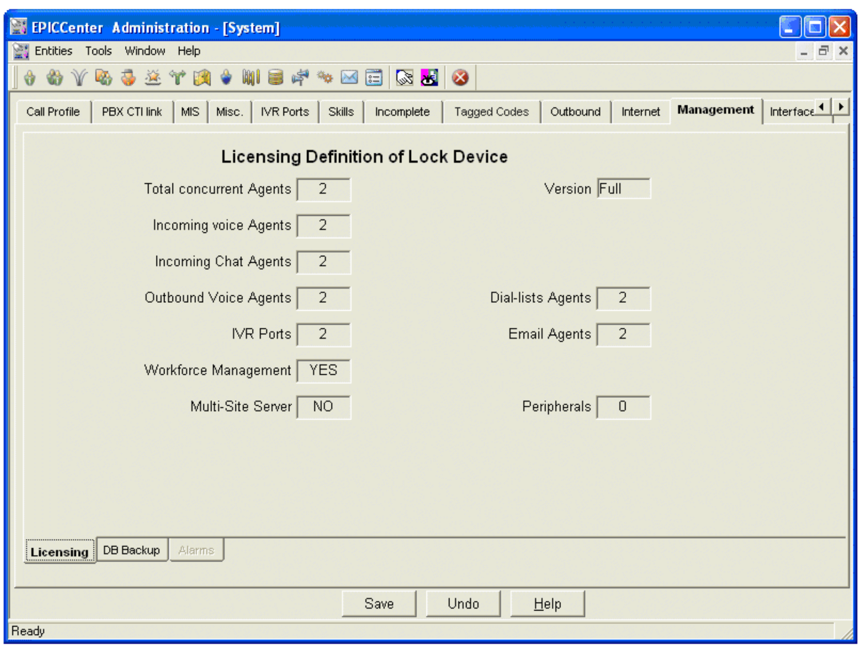

Figure 4-64 System Licensing Screen

To open the Management tab:

Step 1 Click the Management tab at the top of the System Configuration window.

Step 2 At the bottom of the screen, click the Licensing tab.

The following parameters are extracted from the lock device attached to the server. A complete list of all the server's lock device parameters may be obtained by clicking the License Viewer icon in the Contact Center program group on the server.

The Licensing tab comprises:

- **Version:** The solution type that installed. Will display 'Full' in case of Contact Center or 'Lite' in case of Lite
- **Total concurrent agents:** Maximum number of agents (of all types) who may be logged in to the system concurrently.
- **Incoming voice agents:** Maximum number of agents (who login to a group that requires a license to handle incoming voice calls) that may be logged in to the system concurrently.
- **Incoming chat agents:** Maximum number of agents (who login to a group that requires a license to handle incoming chat contacts) that may be logged in to the system concurrently.
- **Outbound voice agents:** Maximum number of agents (who login to a group that requires a license to handle outbound voice calls) that may be logged in to the system concurrently.
- **Dial lists agents:** Maximum number of agents (who login to a group that requires a license to handle outbound dial lists calls) that may be logged in to the system concurrently.
- **Email agents:** Maximum number of agents (who login to a group that requires a license to handle incoming mail contacts) that may be logged in to the system concurrently.
- **IVR Ports:** Maximum number of IVR ports supported by the system.
- **Workforce Management:** Indicates if the system is able/unable to send information to an external Workforce Management system.
- **Multi-site Server:** Indicates if the server is a networking server, that is, a server that receives information from several peripheral Contact Center servers.
- **Peripherals:** Maximum number of peripheral servers connected to the multi-site server.

4.18.14 Configuring DB Backup Parameters

There are three methods of backup: daily, weekly and monthly. They can be combined for best results. For each method you may specify the number of generations to be stored. For example, if you choose "3," the system stores backup files from today, yesterday, and the day before. All previous backup file generations before that point will be erased.

To restore date from a backup file set, please refer to the technical explanation in Restore From Backup.

It is best to set the backup start time during a quiet period of the working day. Avoid setting the time for midnight because many system background procedures are automatically carried out at this time.

To open the Backup tab:

Step 1 Click the Management tab at the top of the System Configuration window.

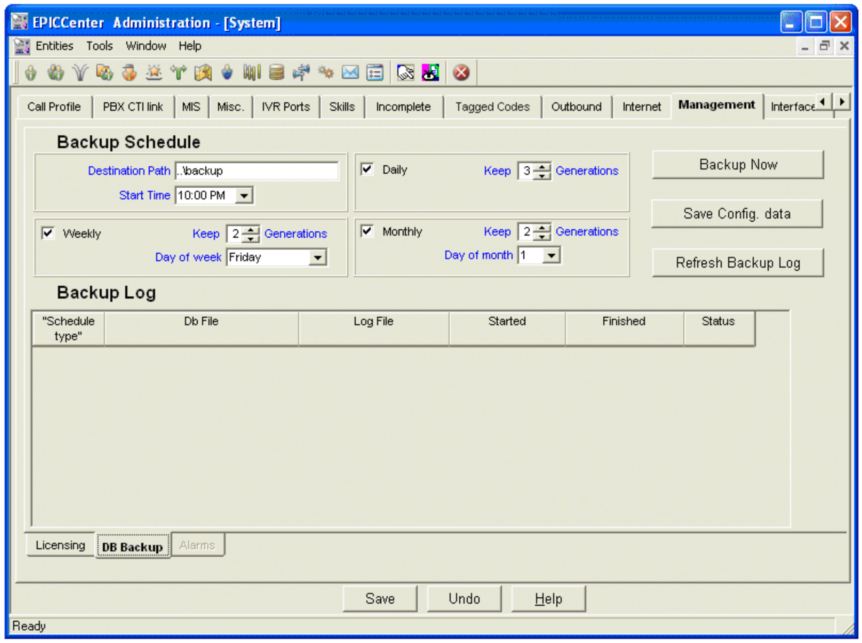

Figure 4-65 System Database Backup Configuration Screen

Step 2 At the bottom of the screen, click the DB Backup tab.

The Backup tab comprises:

- **Backup Schedule:** Set the following parameters to define database backup policies and scheduling
  - — *Destination Path:* The network location where the backup files are stored. The path is related to the server root directory.

    Use a complete pathname, and avoid using a mapped drive (such a drive is as mapped in the server).
  - — *Start Time:* From the drop-down list, select a start time for the backup process.
  - — *Daily:* Check this box to set the backup on a daily basis.
  - — *Keep:* Set the number of daily backup generations to be kept.
  - — *Weekly:* Check this box to set the backup on a weekly basis.
  - — *Keep:* Set the number of weekly backup generations to be kept.
  - — *Day of the Week:* Set the day of the week to start the backup.
  - — *Monthly:* Check this box to set the backup on a monthly basis.
  - — *Keep:*Set the number of monthly backup generations to be kept.
  - — *Day of the Month:* Set the day of the month to start the backup.
- **Backup now:** Click this button to start the system backup procedure immediately.

  This action gives you a yes or no option as to whether to continue the procedure since backup puts a heavy load on the system.
- **Save Config Data:** Create a database that contains only the administrative tables without the statistical tables data.

This action gives you a yes or no option as to whether to continue the procedure since backup puts a heavy load on the system.

- **Backup Log:** Historical log of all the backup files that are kept in the system.

4.18.15 Restore from Backup

To restore a backed-up database:

Step 1 The Contact Center Administration Server should not be active during the process.

Step 2 Copy the.\DB\clr_db directory for backup purposes.

Step 3 In the above directory, delete the following files if they exist:

- ecc.db
- ecc_ext_1.db
- ecc.log

The above files are protected, so the deletion must be acknowledged.

Step 4 Locate the backup set that you want to restore. The set consists of three files: ecc*.db, ecc_ext_1*.db, and log*.txt.

For example:

- eccnow08_01_2002_18_25.db
- eccnow08_01_2002_18_25.log
- ecc_ext_1_now08_01_2002_18_25.db

This is a backup set was created on January 8, 2002 at 6:25 pm using the “backup now” option.

Step 5 Verify that this is a valid backup set. This is verified via the following line in the backup log (log*.txt):

BACKUP STATUS: BACKUP_OK

Step 6 If the ecc.db ,ecc_ext_1.db and ecc.log files exist in your ..\DB directory, delete them, since they are probably a bad set of database files (the reason the restore is performed). If you want to preserve the files for future use, you may do so by copying them to another destination.

Step 7 Copy the two database files (ecc*.db and ecc_ext_1*.db) into .\DB directory.

Step 8 Rename ecc*.db to ecc.db.

Step 9 Rename ecc_ext_1*.db to ecc_ext_1.db.

Step 10 Activate the DBCHECK.BAT in .\bin. A window similar to the following one appears, closes, then reopens and minimizes.

Step 11 Restore the minimized window by right-clicking the SQL icon in the lower right of the screen. After restoring it, click SHUTDOWN. The window closes and the database is ready to be used.

Step 12 If "Now accepting requests" does not appear in the restored window, or there is an error message displayed, please contact your dealer in order to solve the problem.

Step 13 Use the ACTIVATE icon in the Contact Center Administration program group to bring up the system. The system starts with the restored database as the active one. The restored database may undergo an upgrade process, that takes a few minutes, if required (for example, if the restored database has a version label prior to the installed version).

4.18.16 Configuring External DB Connections

Use the Interface tab of the System Configuration window to define various parameters for external interfaces. The Interface tab contains four tabs, DB Connections, WFM (Workforce Management) , Loggers, and CRMs.

An external DB connection is used by the system to access databases that contain information that affects call routing. It is used by CCS actions, by Dial lists, and other functions. This configuration screen contains everything required by the system to connect to the external DB. Queries are defined by features that use the external DB. The system assumes that the external DB may be accessed using an ODBC

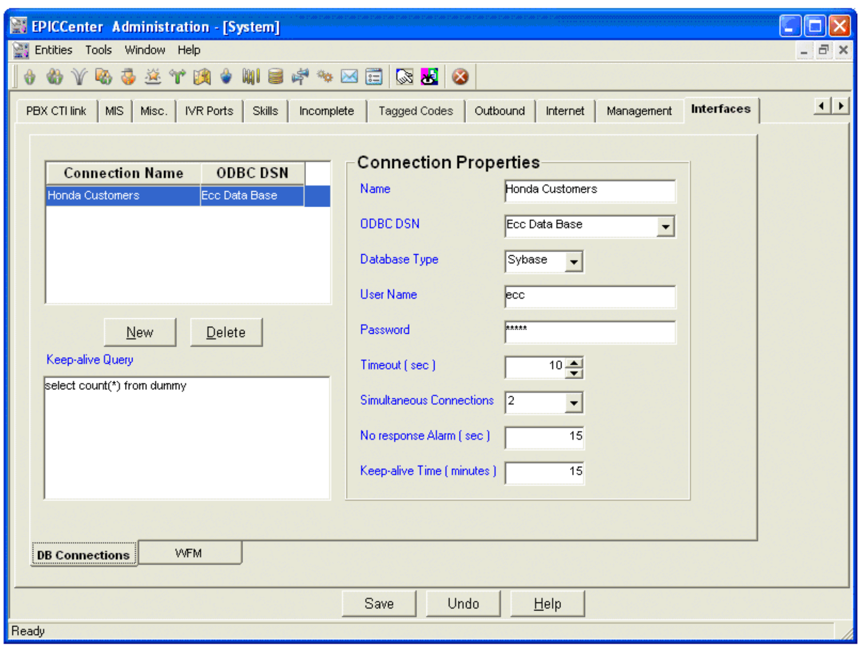

Figure 4-66 System External Database Connections Configuration Screen

To open the DB Connections tab:

Step 1 Click the Interfaces tab at the top of the System Configuration window.

Step 2 At the bottom of the screen, click the DB Connections tab.

The DB Connections tab displays the following fields:

- **Connections list:** A list of external databases. Any connection in the list is characterized by a user-defined name for this connection and by its ODBC DSN.
- **New:** Click this button to add a new connection to the list.

- **Delete:** Click this button to delete the last (or the selected) connection from the list
- **Name:** A user-defined name for this connection.
- **ODBC DSN:** The DSN (Data Source Name) of the database that the user wants to connect to. Obtain the DSN from your database administrator.
- **Database Type:** There are some queries to the external database that use non standard SQL. (For example, when the dial list fetches the records to dial from the external database, it limits the number of fetched records. The option to limit the number of fetched records is non standard in SQL). In these cases the system must know the proper syntax. This parameter is selected automatically when selecting the DSN.
- **User Name:** The User ID is required to connect to this database (supplied by the database administrator).
- **Password:** The password is required to connect to this database (supplied by the database administrator).
- **Timeout (sec):** If a connect request to the external database does not respond, the system will enter a state of timeout. The timeout is programmed as an action within the script.
- **Simultaneous Connections:** Define the maximum number of simultaneous connections allowed to connect to this database.
- **No response alarm (sec):** Define (in seconds) the amount of time the system waits for a response from the database before issuing an alarm.
- **Keep-alive Time (minutes):** Define (in minutes) the frequency that a connection will be kept alive by issuing dummy queries to the database. The Keep alive query field enables the administrator to receive a valid query for this DB
- **Keep-alive query:** This query is activated every Keep-alive Time.

4.18.17 Configuring the Interface to a WFM Application

Use the Interface tab of the System Configuration window to define various parameters for external interfaces. The Interface tab contains four tabs, DB Connections, WFM (Workforce Management) , Loggers, and CRMs.

The system supports historical reports based on the WFM interface, i.e., the system generates an historical report and exports it to a file every cycle time. The historical report that is exported and the export file format reflect WFM application requirements. The currently supported WFM applications are Blue Pumpkins.

To open the WFM tab:

Step 1 Click the Interfaces tab at the top of the System Configuration window.

Step 2 At the bottom of the screen, click the WFM tab.

The WFM tab comprises:

- **Scheduled report is enabled:** Check this box to enable the generation of scheduled reports for Workforce Management.
- **Workforce Management system:** Select, from the drop-down list, the Workforce Management System to which you want to send the reports.

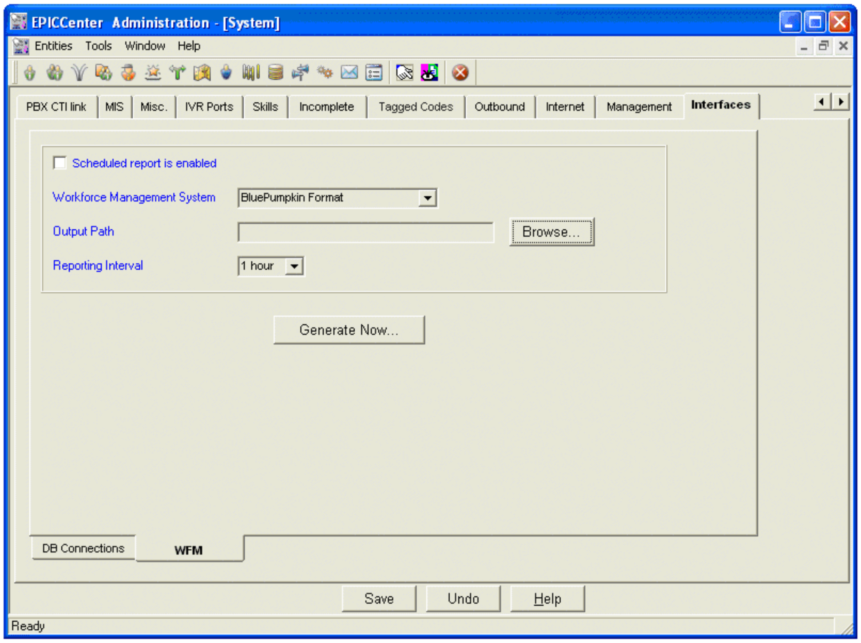

Figure 4-67 System Work Force Management Configuration Screen

- **Output path:** Displays the path under which you may store the generated, scheduled reports. The output path is relative to the server
- **Browse:** Click this button to view the directory structure and select the destination.

  The administrator chooses the path where the generated reports will be saved in this dialog box. The path is related to the server.
- **Reporting Interval:** Select, from the drop-down list, the time lapse (in minutes) between generated reports.
- **Generate Now:** Click this button to generate a report now. A dialog box is opened where the reports parameters may be entered.

4.18.18 Configuring the Interface to a Call Logger Application

Use the Interface tab of the System Configuration window to define various parameters for external interfaces. The Interface tab contains four tabs: DB Connections, WFM (Workforce Management), Loggers, and CRMs.

The currently supported Call logger applications are Nice-CLS and Verint Intellink.

The Verint Intellink supports analog devices in all platforms (IP & Legacy) but IP phones are not supported in all the platforms. Please check compatibility with ShoreTel Inc. representative.

To open the Call Logger tab:

Step 1 Click the Interfaces tab at the top of the System Configuration window.

Step 2 At the bottom of the screen, click the Call Logger tab.

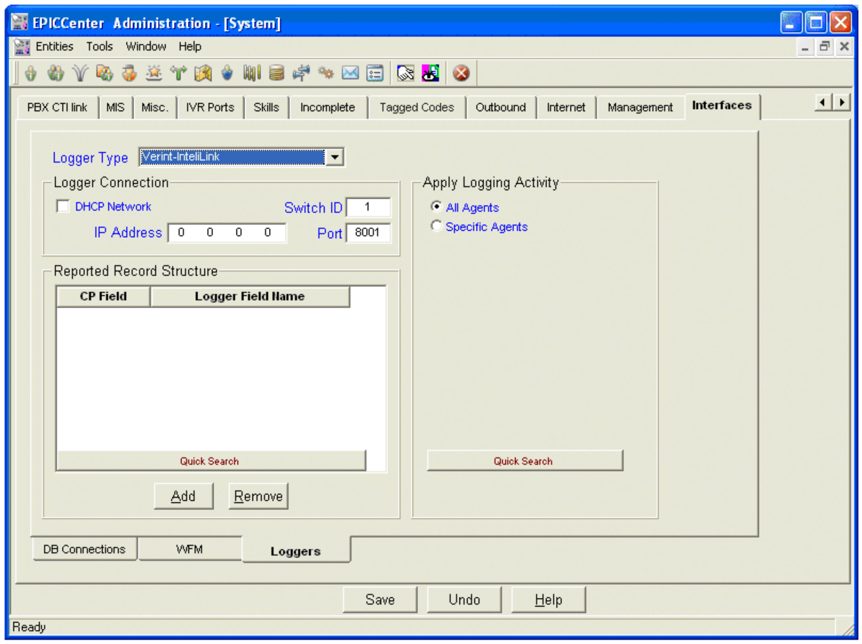

Figure 4-68 System Call Loggers Configuration Screen

The Call Logger tab comprises:

- **Logger type:** Select from the drop down list the Call Logger application name. The currently supported are Nice-CLS and Verint Intellink.
- **Logger Connection:** Set the TCP/IP connection parameters to connect to the logger application
  - — *DHCP:* If this checkbox is checked, the logging system server's name should be filled in. Otherwise, the logging system server's IP address should be filled in.
  - — *Port:* Fill in the TCP port used by the logging system server to connect to the Contact Center. The defaults are 8001 for Verint Intellink and 2050 for Nice-CLS.
  - — *Switch Id:* Relevant to Verint systems only. The default value is 1. In order to find the correct switch id, open the Verint Intellink Configuration Utility. On the left side, appears the following tree:

    [-] Intellink
        {-] Intellink API [Switch1]
            [-] Intellink API
            [-] Devices
            [-] Channel Mapping.

    The [Switch1] means Switch id is 1.
- **Report Record Structure:** This list maps each CP field to one of logger application's field names.

  In Nice-CLS, the fields names are hard coded and given by the system where as in Verint Intellink, those names should be typed by the user

  When the system sends an event to the logger, it copies the content of the relevant CP field to the logger's field so the logger can add the data to its database.

- *Add:* Click Add to add a mapping between one of the system's CP fields to one of the logger's fields.
- *Remove:* Click Remove to remove the last (or the selected) mapping between one of the system's CP fields to one of the logger's fields.

- **Apply logging activity:** This section defines for which agents the system will send notifications to the logging system
  - *All agents:* When this option is selected, the system will notify the logging system about any event on any agent.
  - *Specific Agents:* When this option is selected, the system will notify the logging system only for agents that are defined by the following rules:
    - *Agents at specific devices:* This option should be used when the logging system is limited to specific devices. When an agent logs in to one of the monitored devices, the system will send notifications to the logging system. In this case, the list below the combo box is changed to a list of devices. Click New to add a monitored device to the list. Click Remove to remove the last (or selected) device from the list
    - *Specific agent:* This option is used when the logging system is not limited to specific devices but it has fewer licenses then the number of simultaneously logged in agents. In this case, the list bellow is changed to a list of agents (Name and Number). Click Add to add an agent to the list. Click Remove to remove the last (or selected) agent from the list

4.18.19 Configuring the Interface to a CRM Application

Use the Interface tab of the System Configuration window to define various parameters for external interfaces. The Interface tab contains four tabs: DB Connections, WFM (Workforce Management), Loggers, and CRMs.

The currently supported CRM application is SAP.

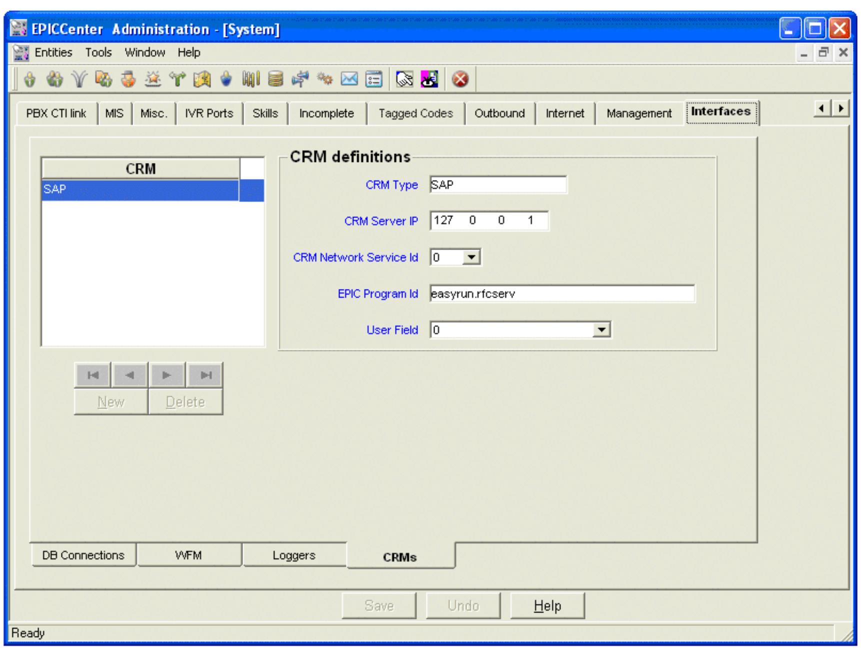

Figure 4-69 System CRM Configuration Screen

To open the CRMs tab:

Step 1 Click the Interfaces tab at the top of the System Configuration window.

Step 2 At the bottom of the screen, click the CRMs tab.

The CRMs tab comprises:

- **CRM applications list:** Select from the list the CRM manufacturer name. The currently supported CRM manufacturer is SAP. When selected, the configuration screen will change according to the selection
- **CRM Type:** The name of the selected CRM from the CRM application list
- **CRM server IP:** The IP address of the SAP server
- **CRM server network ID:** The service ID to initiate connection to the SAP application. The server network ID identifies which IP port is used by the SAP application to wait for incoming connections.
- **Program ID:** The SAP interface is implemented using the RFC protocol. In this mode, the SAP server uses function calls supplied by the system to answer to the SAP client CTI request. In order to do so, the SAP server needs to know the system. The SAP administrator allocates a name and the same name must be defined in this parameter.
- **User Fields:** The Call Profile Field which identifies a Business ID. This field will be inserted into the Business ID field of the Call Attached Data.

CHAPTER 5

CCS and GCSS Administration Application

5.1 Overview

The CCS/GCCS Administrations are tools that are used to define and maintain Call Control Scripts.

Call Control Scripts can be used to define the way the system handles ACD calls. The scripts are used to process calls, present information to callers, prompt them for input, collect input digits, query the organization database, etc.

A script contains a set of actions that are performed on a call. Specific scripts can be created containing a variety of actions, selected from the set of actions available in Contact Center CCS/GCCS Administration. Scripts can be linked together to build flexible applications.

Scripts are activated in various stages of the contact processing, such as:

- Incoming call entry point – IRN. An IRN defines the rules by which each incoming contact should be routed. The script can supply the caller an option menu that routes the call depending on the caller's selection. The script can affect routing and change parameters (to be used later in handling the call) of an incoming in a flexible way, using requirements collected from the caller and other call parameters.
- Activation of one script / different scripts on a Queued call. While the call is queued scripts can be combined. Scripts can offer different options, such as announcements to the caller, enable the caller to receive information, offer a call back initiated by the system at a later time, and more.
- On Interflow
- When there are no agents logged in to the system.
- When the customer answers an outbound call
- On Incomplete Call scenario - the call has reached a situation where it has no valid destination.

The actions of a Call Control Script can change the Call Profile of the processed call. The CP can be used to affect the routing of the call, by, for example changing or setting the service or priority required by the call, adding information about the caller in user-defined fields, etc. The caller can change the call profile when the script defines actions that require caller input, such as a menu. In this way, the caller can contribute to the routing process.

5.2 Using CCS Administration

5.2.1 The CCS Administration Screen.

The Contact Center CCS Administration window contains the following areas:

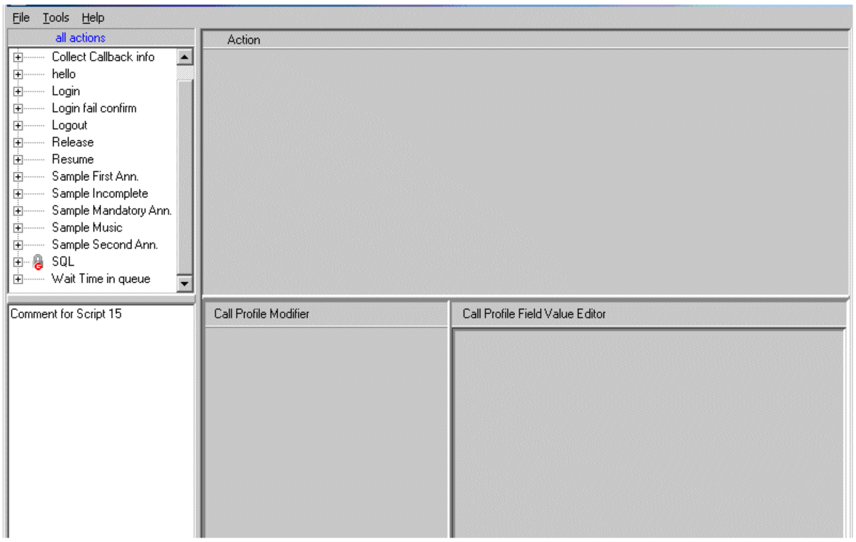

Figure 5-1 CCS Administration Main Window

- **Menu Bar:** The menu bar at the top of the window provides options for adding scripts, saving changes and setting options.
- **Scripts:** This area at the top left of the window lists all the currently defined scripts in the application. From this area scripts and their actions can be viewed and modified.
- **Description:** This area at the bottom left of the window provides a description of the selected script or action. This can be used to explain the purpose and the text of an announcement or the reason for a selected script or action. The description can be edited, if required, and can contain a maximum of 2,048 characters.
- **Action:** The area at the right of the window can be used to configure the parameters for the currently selected script action.
- **Call Profile Modifier:** The Call Profile Modifier is active whenever an action allows changes to the Call Profile. (Not all the actions allow the Call Profile to be changed).
- **Call Profile Field Value Editor:** The area on the right side of the Call Profile Modifier is activated in order to define a value for a specific field in the Call Profile.

The Contact Center CCS Administration window can be resized in order to display required information by dragging its borders widthwise and/or lengthwise. Any changes to the window size configuration will be automatically saved and displayed when the window is next opened.

The Scripts, Comment and Action areas can be reduced and enlarged by dragging the lines that separate them up or down and left or right. The line between the Call Profile fields cannot be moved.

5.2.2 The CCS Administration Menu Bar

The CCS Administration menu bar contains three items:

- **File**: This menu provides the following sub menus:
  - — ***New Script:*** Adds a new script to the Script list.
  - — ***Save:*** Saves any changes made in the application.
  - — ***Reload and Sort:*** Updates and sorts the Scripts, either in chronological or alphabetical order
  - — ***Exit:*** Closes the application.

    If changes are not saved before trying to exit the application a warning message will pop-up.
- **Tools**: This menu provides the Options sub menu.
- **Help**: This menu enables access to the context sensitive Help topic and provides information about the current version

5.2.3 The Contact Center CCS Administration Options Dialog Box

The Options dialog box offers the followings options:

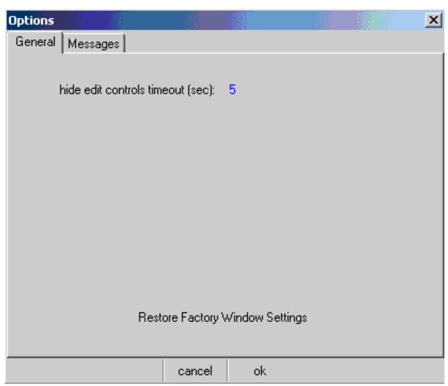

Figure 5-2 CCS Administration General Options

- **Define the timeout period for which an edit field is active on the window.** The CCS Administration activates input fields when the mouse is passed over them and deactivates them after this timeout.

  It is suggested to set this value to a high number.
- **Manage the predefined chat responses list.** Chat messages can be added, modified or deleted. The chat responses are used in actions that are relevant to chat contacts, such as 'Send Message.' This action may be used in a script used as an announcer for chat contacts.
- **Restore the Dialog's window location and size to the default values.**

To open the CCS Administration Options dialog box, Select Options from the Tools menu in the CCS Administration menu bar.

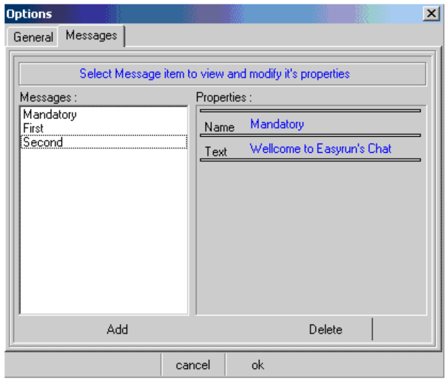

Figure 5-3 CCS Administration Messages Options

To define the timeout period for which an edit field is active on the window:

Step 1 Click the General tab in the dialog box.

Step 2 Put the mouse pointer on top of the current timeout value.

Step 3 Enter the length of time that a field in the application will remain active for editing.

To manage the predefined chat messages, Click the Messages tab in the dialog box.

This feature is only available in Enterprise Contact Center.

To add a new message:

Step 1 Click Add.

Step 2 Select the recently created message from the Messages window.

Step 3 Enter the name of the message in the properties pane.

Step 4 Enter the message text on the properties pane.

The new message is automatically saved.

To modify an existing message:

Step 1 Select the message you want to modify.

Step 2 Enter the name of the message on the properties pane.

Step 3 Enter the message text on the properties pane.

The new message is automatically saved.

To delete an existing message:

Step 1 Select the message you want to modify.

Step 2 Click Delete

Deleted messages cannot be recovered.

Canceling the Dialog does not affect the modifications performed on the Messages tab

5.2.4 Viewing and Modifying Scripts

The Contact Center CCS Administration window displays a list of existing scripts. It is possible to modify the list of scripts by adding or deleting scripts. Expanding a script displays the list of actions that are currently defined for it. Unless otherwise defined by the action, actions are executed sequentially according to their order in the script.

A maximum number of 500 scripts are allowed in this application. Up to 100 actions can be defined for each script.

There are several ‘protected scripts’ that are supplied with the system and cannot be edited or deleted.

A script is a list of actions executed sequentially until the list is exhausted or an action causes a branch to another script. The actions can be used to affect the destination of a call, gather information from the caller, present information to the caller or to make logical decisions that affect the call routing based on the information gathered from the user or the company’s supporting systems. Some of these actions are telephony (for example: Transfer) and some obtain information from the organization’s database (for example: SQL Query) and others require IVR (Interactive Voice Response). When the system executes IVR actions such as Give Menu, Get Digits, and Play File, the call is automatically transferred to an available IVR port.

The parameters of an action, for a script, can be defined by selecting the action in the Scripts area. The action will be displayed and can be edited in the Action area.

From the Contact Center CCS Administration window, the following procedures may be executed on a script or action:

To add a new script to the list, perform one of the following:

- Right-click the script list area and select New Script.
- Select the New Script option from the File menu.

A new script item will be added at the end of the list.

To move (change the order of) scripts in the list, Select the script to be moved, and drag and drop it to the required position in the list. In the popup menu that opens select the Move option.

To copy scripts in the list, Select the script to copy, and drag and drop it to the end of the list. In the popup menu that opens select the Copy option.

To delete a script from the list, Right-click the script to be deleted and select Delete Script from the pop-up menu.

A script that is referenced somewhere else in this application, or in any of the other Contact Center Administration applications, cannot be deleted. An error message will appear to inform the user of other areas in which the script is used. The script must be deleted from all areas before it can be deleted from this list.

To rename a script, Click the right mouse button on the script to be renamed, select Rename from the pop-up menu and type the required name.

A script name may contain up to 31 characters.

To open a script's pop-up menu, Click the right mouse button on the script.

To see the actions currently defined for a script, Double-click the script or click the plus (+) sign to the left of the script name. The list of actions defined for the script will be displayed.

To collapse a script menu (hide the actions defined for a script), Click the minus (-) sign alongside the script.

To add an action to be the first action in a script, Right-click the required script and select Insert Action from the pop-up menu.

The Actions menu pops up, enabling the required action to be selected for the script. The action will be inserted directly beneath the script name as the first action.

To insert an action at a specific position in the list of actions, Right-click the action after which you want to insert a new action and select Insert Action from the pop-up menu.

The Actions menu pops up, enabling the required action to be selected for the script. The action will be inserted after the selected action.

To change the order of actions in the list, Select the action to be moved, and drag and drop it to the required position in the list. In the popup menu that opens select the Move option.

To move an action to another script, Select the action to be moved, and drag and drop it into the required place in the required script. In the popup menu that opens select the Move option.

To copy an action to another script, Select the action to be copied, and drag and drop it into the required place in the required script. In the popup menu that opens select the Copy option.

To view/edit the definition of an action, Select the required action.

To delete an action from a script, Click the action to be removed with the right mouse button and select the Delete Action option from the pop-up menu.

The Delete Action option is only active after you select an action. While you are performing any procedure on a script or action, an arrow appears alongside the selected script or action. In addition, any changes to a script or action are indicated by a red dot alongside it. When you save the changes, the dot disappears.

5.2.5 Browsing for Wave files

Many scripts uses voice prompts files (*.wav). In order to be played, the files should be accessed by the server (or by the distributed IVR server that contains the IVR port allocated for the call). During the process of building scripts, the full path for the wav file as seen by the computer that plays the file may not be available since the administrator who defines scripts seldom works on the server (or on the distributed server). Therefore, a special 'file browse dialog' is supplied. In this dialog box, the administrator sees the directory tree as viewed by the server. The viewable part pf the directory tree starts in the IVR folder on the server. When a file is chosen, the system makes sure to store the path in such a way that the file will be accessible by the system.

The IVR also includes multilingual support. Instead of writing a different script for every supported language, the administrator can write a single script so that the caller will hear the announcements in the required language.

To enable multi-language scripting follow the three steps below:

Step 1 Attach a mandatory CP field - 'Language' to every call (this can be done in the IRN's CP configuration screen in the Contact Center Administration

Step 2 Use the 'Match multi lingual file' option in the 'file browse dialog'.

Step 3 Make sure that any file used is available in each of the required languages and located under the correct language folder under the server's IVR folder.

The list of supported languages is available in the System miscellaneous configuration screen in the Contact Center Administration.

5.3 Using GCCS Administration

5.3.1 The GCCS Administration Screen

The Contact Center GCCS Administration window contains the following areas:

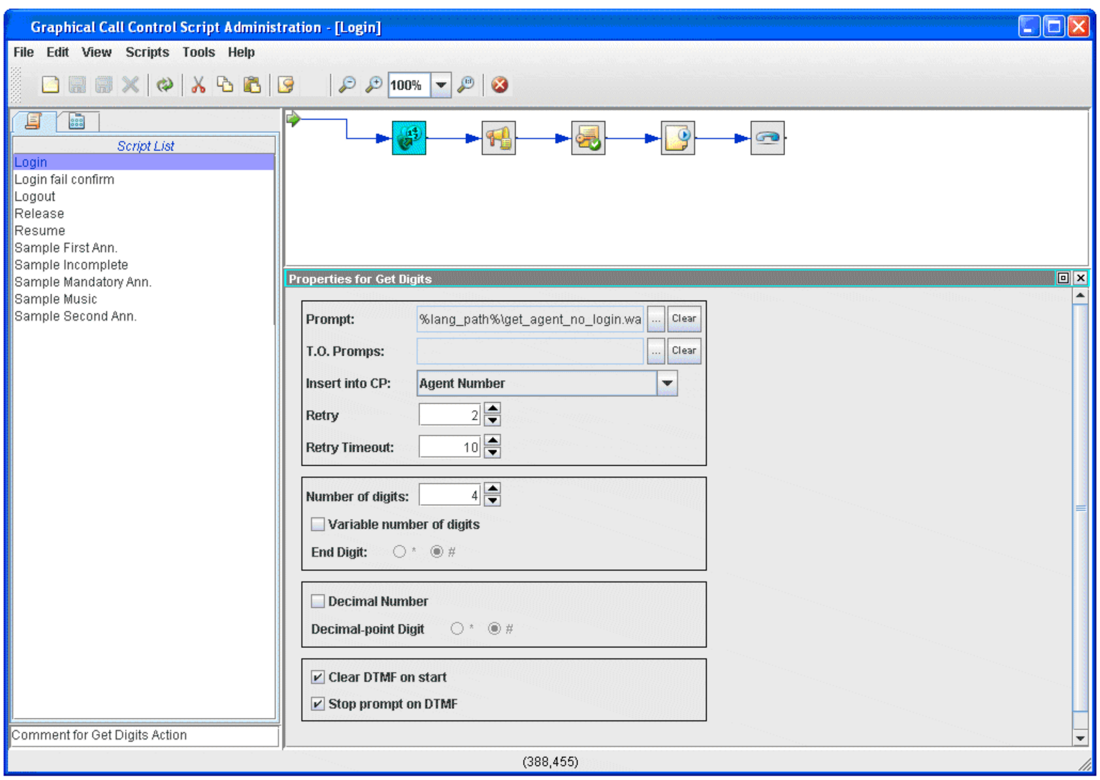

Figure 5-4 **GCCS Administration Main Menu**

- **Menu Bar**: The menu bar at the top of the window provides options for adding scripts, saving changes and setting options.
- **Tool Bar**: The tool bar at the top of the window, just below the menu bar, provides icons that the user can click to activate some of the main menu options.
- **Scripts list / Actions palette**: This area at the top left of the window, lists all the currently defined scripts in the application, or lists the actions palette from which

actions are dragged and dropped into the script area (the displayed list changes according to the tab selected).

- **Description:** This area at the bottom left of the window provides a description of the selected script. This can be used to explain the purpose and the text of an announcement or the reason for a selected script. The description can be edited, if required, and can contain a maximum of 2,048 characters.
- **Script flow pane:** The area at the right of the window is used to display a chart that dts the flow of the script

The Contact Center GCCS Administration window can be resized in order to display required by dragging its borders widthwise and/or lengthwise. Any changes to the window size configuration will be automatically saved and displayed when the window is next opened.

The Comment and Script Action areas can be reduced and enlarged by dragging the lines that separate them up or down and left or right.

5.3.2 The GCCS Administration Menu Bar

The GCCS Administration menu bar contains the following items:

- **File**: This menu provides the following sub menus:
  - — ***New CFS:*** Adds a new script to the Script list.
  - — ***Save:*** Saves any changes made in the current script.
  - — ***Save All:*** Saves all changes made in the scripts.
  - — ***Delete CFS:*** Deletes the script from the script list.
  - — ***Reload and Sort:*** Reloads all scripts from the database, sorting them chronologically or alphabetically.
  - — ***Print:*** Prints the current script.
  - — ***Exit:*** Closes the application.
    If changes are not saved before trying to exit the application a warning message will pop-up.
- **Edit**: This menu provides the following sub menus:
  - — ***Cut:*** Cuts the selected action(s), properties and arrows to be pasted in another script.
  - — ***Copy:*** Copies the selected action(s), properties and arrows to be pasted in another script.
  - — ***Paste:*** Pastes the selected action(s), properties and arrows copied from another script.
- **View**: This menu provides the following sub menus:
  - — ***Zoom In:*** The Zoom In allows you to zoom into the script at various increments.
  - — ***Zoom Out:*** The Zoom Out allows you to zoom out from the script at various increments.
  - — ***Zoom 100%:*** The Zoom 100% allows you to return to the 100% screen.
- **Scripts**: Lists all the configured scripts in the application.
- **Help**: This menu enables access to the context sensitive Online Help and provides information about the current version of the application.

5.3.3 The GCCS Administration Tool Bar

The GCCS standard tool bar uses icon shortcuts to streamline access. Button numbers refer to figure x.x.

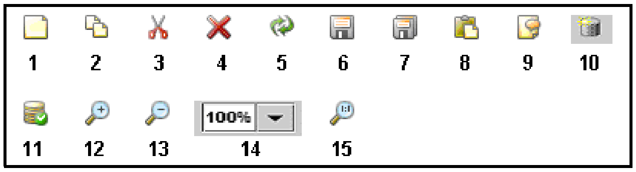

Figure 5-5 GCCS Administrtaion Toolbar icons

- **New Script (1):** Adds a new script to the Script list.
- **Copy (2):** Copies the selected action(s) and properties to be pasted in another script.
- **Cut (3):** Cuts the selected action(s) and properties to be pasted in another script.
- **Delete (4):** Deletes the script from the script list.
- **Reload Current Script (5):** Reload the current script from the database. The script is loaded as it was saved. This way one can undo all changes since last save.
- **Save to Database (6):** Saves any changes made in the current script to the database.
- **Save All to Database (7):** Saves all changes made in the scripts to the database.
- **Paste (8):** Pastes the selected action(s) and properties into another script.
- **Setup Dialog (9):** Creates pre-defined messages for chat scripts and shows characteristics of the voice file.
- **Database Test Query (10, 11):** Sends a test query to a database.
- **Zoom In (12):** Allows you to zoom into the page at various increments.
- **Zoom Out (13):** Allow you to zoom out from the page at various increments.
- **Select Zoom (14):** Allows you to “zoom in” to get a close-up view of your page or “zoom out” to see more of the page at a reduced size.
  - — *To use:* Click the arrow next to the Select Zoom box, then Click the zoom setting you want.
- **Original Size (15):** Restores you to the 100% screen.

5.3.4 The Contact Center GCCS Administration Options Dialog Box

The Setup dialog box offers the option to manage the predefined chat responses list. Chat messages can be added, modified or deleted. Chat responses are used in actions that are relevant to chat contacts, such as ‘Send Message’. This action may be used in a script used as an announcer for chat contacts.

To open the GCCS Administration Options dialog box, perform one of the following:

- Select Setup Dialog from the Tools menu in the GCCS Administration menu bar.
- Click the Setup Dialog icon in the GCCS Administration tool bar.

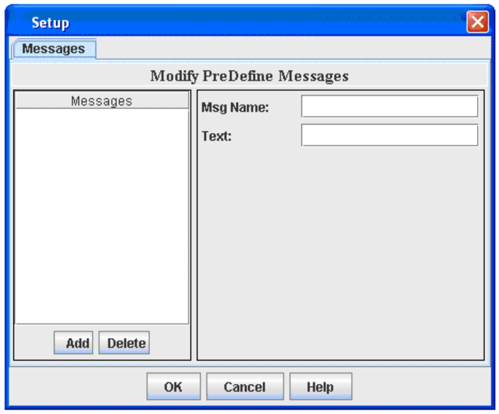

Figure 5-6 GCCS Administration Messages Options

To add a new message:

Step 1 Click Add.

Step 2 Select the recently created message from the Messages window.

Step 3 Enter the name of the message in the properties pane.

Step 4 Enter the message text on the properties pane.

The new message is automatically saved.

To modify an existing message:

Step 1 Select the message you want to modify.

Step 2 Enter the name of the message on the properties pane.

Step 3 Enter the message text on the properties pane.

The new message is automatically saved.

To delete an existing message:

Step 1 Select the message you want to modify.

Step 2 Click Delete

Deleted messages cannot be recovered.

Canceling the Dialog does not affect the modifications performed on the Messages tab

5.3.5 Viewing and Modifying Scripts

The Contact Center GCCS Administration window displays a list of all existing scripts. It is possible to modify the list of scripts by adding or deleting scripts. Selecting a script in the list displays the script's flow in the Script flow area. The script actions are executed according to the flow shown in the chart. It always begins with the action and continues along the path described in the flow and affected by various yes/no conditions or multiple choice junctions that determine the course of the script.

A maximum number of 500 scripts are allowed in this application. Up to 100 actions can be defined for each script.

There are several 'protected scripts' that are supplied with the system and cannot be edited or deleted.

The script's actions can be used to affect the destination of a call, gather information from the caller, present information to the caller or to make logical decisions that affect the call routing based on the information gathered from the user or the company's supporting systems. Some of these actions are telephony (for example: Transfer) and some obtain information from the organization's database (for example: SQL Query) and others require IVR (Interactive Voice Response). When the system executes IVR actions, such as Give Menu, Get Digits, or Play File, the call is automatically transferred to an available IVR port.

The parameters of an action for a script can be defined by selecting the action in the Scripts area. The action will be displayed and can be edited in the Action area.

From the Contact Center CCS Administration window the following procedures may be executed on a script or action:

To add a new script to the list, perform one of the following:

- Click the New Script icon from the toolbar.
- Select the New CFS option from the File menu.

  A new script item will be added at the end of the list.

To copy scripts in the list, On the Script Flow Chart Pane, Click an action.

To copy more than one action:

Step 1 click and drag the mouse to select part, or all, of the script.

Step 2 Select the Copy option from the Edit menu or click the Copy icon from the toolbar.

In order to paste the copied part of the script in the new script, Select the Paste option from the Edit menu or click the Paste icon from the toolbar

To delete a script from the list, perform one of the following:

- Click the Delete icon from the toolbar.
- Select the Delete CFS option from the File menu.

  A new script item will be added at the end of the list.

To rename a script, Click the script to be renamed and type a name.

A script name may contain up to 31 characters.

To insert an action at a specific position in the list of actions:

Step 1 Select the Palette tab

Step 2 Choose the desired action.

Step 3 Either double-click that action or drag and drop the action into the Script Flow Chart Pane. Locate the action.

Step 4 Connect the action to the exit point of the action that should precede the new action.

When saving a script, all 'not connected' actions are removed automatically.

5.3.6 Main Differences Between Using CCS and GCCS

Besides the operational differences between the two applications (one is a textual based and the other is a graphical), there are few conceptual differences:

In CCS Administration, a script is a list of actions performed one by one, unless one of the actions 'branch' to a different script (some actions in the CCS Administration can branch to a different script like Give Menu). In GCCS Administration actions have exit points (some actions have only one exit point but some have several exit points) and the call will continue the action that is connected to the exit point selected according to the action results (for example, the Give Menu action in the GCCS Administration has an exit point for each possible digit input and additional exit point for timeout. If the customer presses the '1' digit, the script will continue to the action that is connected to the '1' exit point).

In CCS Administration some actions can change the call's call profile; actions in GCCS Administration do not affect the call's call profile. In order to change the call profile of the call, a 'Change Call Profile' action should be added.

5.4 CCS/GCCS Available Actions

5.4.1 Configuring the Announce Action

This feature is only available in Enterprise Contact Center.

The Announce action announces numerical values to the caller (for example: "Your customer number is 2763"). Numerical values are defined in the Call Profile fields. The announcement is in the call's language.

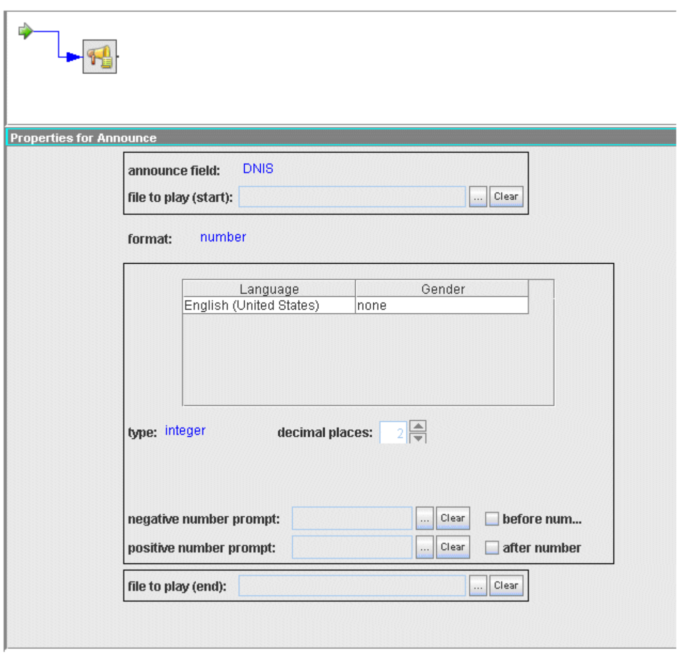

Figure 5-7 **GCCS Administration Announce Action**

To add an Announce action to a script, Click the right mouse button on the required script, position the cursor on the Insert Action option and select Announce from the Actions menu.

The Action area displays the following fields for configuring the Announce script action:

- **Announce Field**: Select the field that you want to announce from the drop-down list.
- **File to Play**: Select the recording that precedes the number announcement.
- **Format**: Select, from the drop-down list, the numerical format. You may choose from number, digit by digit, sequential, date, money or time. The formats have different characteristics and therefore the window changes accordingly.
- **Number**: In this format, the system will announce the contents of the announced field as a number (integer or decimal).

  — ***Languages Gender table:*** This table is used to define, for each supported language, the gender in which the numbers will be announced
  — ***Type:*** Choose from decimal or integer.
  — ***Decimal:*** Places: This field is active only if decimal is selected in the 'type' field. It defines how many digits to the right of the decimal point are to be announced.
  — ***Negative Number Prompt:*** Select the file that plays the recording denoting a negative numerical prompt.
  — ***Before Number:*** Check this box if the 'Negative Number prompt' file should be played before the number
  — ***Positive Number Prompt:*** Select the file that plays the recording denoting a positive numerical prompt.
  — ***Before Number:*** Check this box if the Positive Number prompt file should be played before the number
  — ***File to Play [end]:*** Select the file that plays the concluding announcement.
  — ***Highest No. Announced:*** This area states the highest number announced. Anything above this number will be announced in single fragments.

- **Digit by Digit**: In this format, the system will announce the contents of the announced field digit by digit. This may be used to announce social security numbers.

  — ***Language Gender table:*** This table is used to define, for each supported language, the gender in which the numbers will be announced
  — ***Negative Number Prompt:*** Select the file that plays the recording denoting a negative numerical prompt
  — ***Before Number:*** Check this box if the 'Negative Number prompt' file should be played before the number.
  — ***Positive Number Prompt:*** Select the file that plays the recording denoting a positive numerical prompt.
  — ***Before Number:*** Check this box if the Positive Number prompt file should be played before the number.
  — ***File to Play [end]:*** Select the file that plays the concluding announcement.

- **Sequential:** In this format, the system will announce the contents of the announced field as a sequential number (this is the format that is used to announce the place in queue).

  — ***File to Play [end]:*** Select the file that plays the concluding announcement.
  — ***Language Gender table:*** This table is used to define, for each supported language, the gender in which the numbers will be announced

- **Date:** In this format, the system will announce the contents of the announced field as a date.
  - — *Announce Format:* Select the format of the date announcement (for example: mon/dd/yyyy)
  - — *Week Day:* Check this box if the day of the week should be played before the date.
  - — *File to Play [end]:* Select the file that plays the concluding announcement.
- **Money:** This is the same as the number format but with the addition of units and subunits (for currency it may be Dollars and Cents, for weight it may be Kilos and Grams, and so on). The same format as number but with the addition of units (currency, weight, and so on).
  - — *Language Gender table:* This table is used to define, for each supported language, the gender in which the numbers will be announced
  - — *Type:* Choose decimal or integer.
  - — *Decimal Places:* This field is only active if decimal is selected in the 'type' field.
  - — *Currency Units Prompt:* Select the file that plays the recording denoting the type of currency units prompt (e.g., Dollars).
  - — *Currency Subunits Prompt:* Select the file that plays the recording denoting the type of currency subunits prompt (e.g., Cents).
  - — *Negative Number Prompt:* Select the file that plays the recording denoting a negative numerical prompt.
  - — *Before Number:* Check this box if the 'Negative Number Prompt' file should be played before the number.
  - — *Positive Number Prompt:* Select the file that plays the recording denoting a positive numerical prompt.
  - — *Before Number:* Check this box if the 'Positive Number Prompt' file should be played before the number.
  - — *File to Play [end]:* Select the file that plays the concluding announcement.
  - — **Time:** In this format, the system will announce the contents of the announced field as a time.
  - — *Announce Format:* Select the format of the time announcement (for example: hh:mm:ss: AM)
  - — *File to Play [end]:* Select the file that plays the concluding announcement.

5.4.2 Configuring the Announce Place in Queue Action

The Announce Place in Queue action announces the caller's position in the queue (Example: "You are the fifth caller in queue").

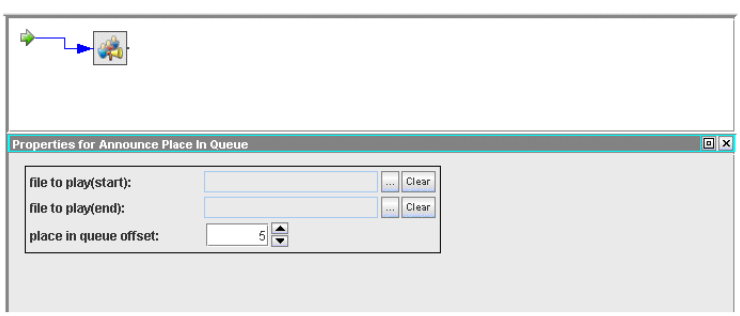

Figure 5-8 GCCS Administration Announce Place in Queue Action

To add an Announce Place in Queue action to a script, Click the right mouse button on the required script, position the cursor on the Insert Action option and select Announce Place in Q from the Actions menu.

The Action area displays the following fields for configuring the Announce Place in Q script action:

- **File to play [start]:** Select the recording that precedes the place in queue announcement.
- **File to play [end]:** Select the recording that follows the place in queue announcement.

Place in queue offset: Enter a number to be added to the true queue position in order to offset the caller's position. This allows a high priority call to go before someone in line without the person in line querying the wait time.

5.4.3 Configuring the Announce Wait Time Action

The Announce Wait Time action announces the expected wait time in the queue for this call.

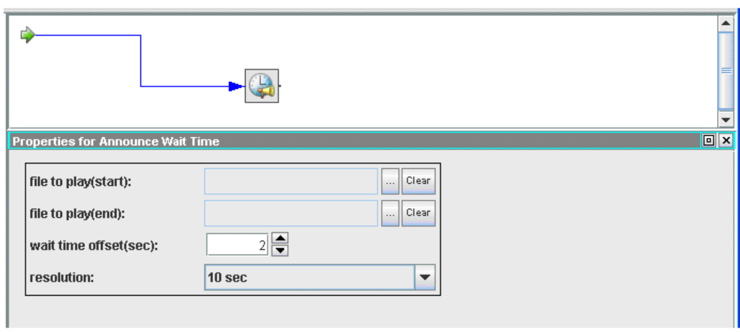

Figure 5-9 GCCS Administration Announce Wait Time Action

To add an Announce Wait Time action to a script, Click the right mouse button on the required script, position the cursor on the Insert Action option and select Announce Wait Time from the Actions menu.

The action area displays the following fields for configuring the Announce Wait Time script action:

- **File to Play [Start]:** Select the recording that precedes the wait time announcement.
- **File to Play [End]:** Select the recording that follows the wait time announcement.
- **Wait time offset (sec):** Enter a number of seconds to be added to the expected wait time in order to offset the caller's wait time. This allows a high priority call to go before someone in line without the person in line querying the wait time.
- **Resolution:** Defines the minimal resolution of the time announced. If, for example, it set to ten seconds, any time that is smaller is rounded up. It means that the wait time of fifteen seconds will be announced as twenty seconds.

5.4.4 Configuring the Branch To Script Action

This feature is only available in Enterprise Contact Center.

The Branch To Script action stops processing the call according to the current script and continues processing the call according to the specified script.

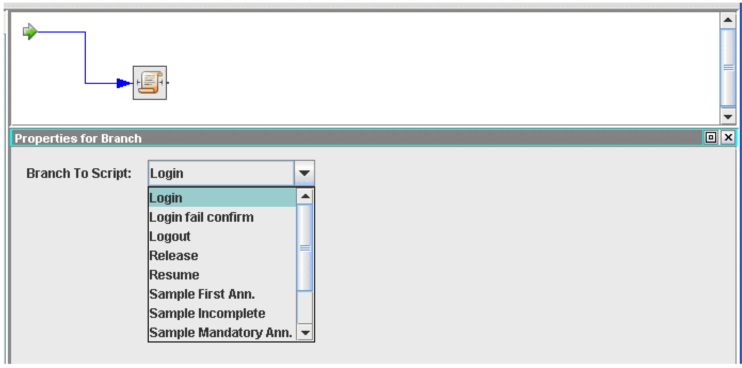

Figure 5-10 GCCS Administration Branch to Script Action

To add a Branch To Script action to a script, Click the right mouse button on the required script, position the cursor on the Insert Action option and select Branch To Script from the Actions menu.

The Action area displays the following fields for configuring the Branch To Script action:

- **Branch to script:** Select the script to branch to from the drop down list.

5.4.5 Configuring the Change Call Profile Script Action

This feature is only available in Enterprise Contact Center.

The Change Call Profile action allows you to directly change the profile of a call being processed by a script. Any new profile fields defined here are added to the call's profile. If the fields already exist in the profile, then their value is updated according to the modifications defined by the script. Specific fields of the Call Profile can also be modified by the following actions: Logic Switch, Menu, Get Digits and Customer Query. All User defined Call Profile fields (user fields and skills) are defined in the administration (missing text?)

To add a Change Call Profile action to a script, Click the right mouse button on the required script, position the cursor on the Insert Action option and select Change Call Profile from the actions menu.

The field's value is maintained throughout the call's life. For example, it may be viewed by the agent using the agent application.

The Call Profile Modifier area does not show the whole call profile. It only shows fields that are changed in the profile during the execution of the action.

As an example of call profile management, consider the following call sent to a script:

Call profile field definitions prior to the call:

Field: Value
Service Req'd: Sales Dept.
DNIS: 7100

The call passes through an action that defines the following call profile editor fields:

Field: Value
Service Req'd: Complaints Dept.

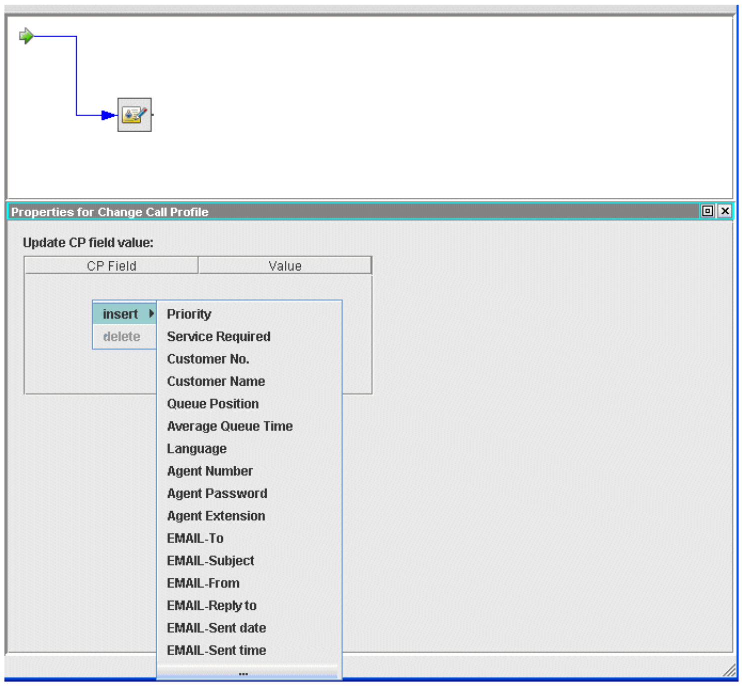

Figure 5-11 GCCS Administration Change Call Profile Action

Customer Type: Foreign

After processing of the action the call profile will be as follows:

Field: Value
Service Req'd: Complaints Dept.
DNIS: 7100
Customer Type: Foreign

To insert a new field:

Step 1 Right-click the mouse anywhere in the Call Profile Modifier area and select the Insert option. A pop-up list opens, displaying all the predefined call profile fields specified in the Contact Center Administration.

Step 2 Select the required field from the list. The selected field will be added to the fields displayed in the Call Profile Modifier area. It will also be displayed in the Call Profile Field Value Editor area.

Step 3 Enter a value in the Call Profile Field Value Editor to be assigned to this field when the action executes.

The newly defined user field and its value will be displayed in the Call Profile Modifier area.

To delete a field:

Step 1 Right-click the user field to be deleted in the Call Profile Modifier area.

Step 2 Select the Delete option.

The field will disappear from the list in the Call Profile Modifier area.

To delete a field:

Step 1 In the Call Profile Modifier area, select the user field to be edited. The selected user field and its value will be displayed in the Call Profile Field Value Editor area.

Step 2 Set the required value in the editing field. The edited user field will be displayed in the Call Profile Modifier area

5.4.6 Configuring the Collect Callback Info Action

The Collect Callback Information action defines the dialog that is necessary to obtain information from the user for callback purposes.

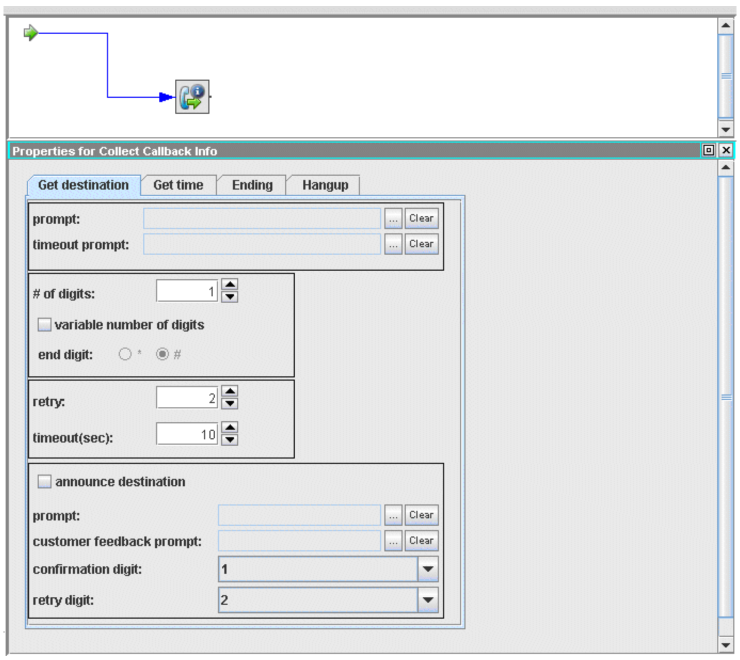

Figure 5-12 GCCS Administration Collect Callback Action – The Get Destination Tab

To add a Collect Callback Info action to a script, Click the right mouse button on the required script, position the cursor on the Insert Action Option and select Collect Callback Info from the Actions menu.

The action has four steps:

1. Ask the caller to enter the phone number that the system has to dial (the callback destination).
2. Ask the caller to enter the time that the caller wants that the system to dial (the callback time).
3. The IVR announces the confirmation announcement.
4. Finally, the IVR disconnects the call.

The Action area displays the following fields for configuring the Collect Callback Info action:

- **Get Destination Tab**

— ***Prompt:*** A voice file prompting the caller to enter the number to be called back.

— ***Timeout Prompt:*** Define the prompt file to be played if the caller has not responded within the predefined time.

— ***# of Digits:*** If the number of digits is known in advance the system will wait for the specified number of digits to be entered.

— ***Variable Number of Digits:*** Check this box if the number of digits is variable.

— ***End Digit:*** This field is activated if the variable length is checked and specifies the character that should be entered to signal the end of the number (Usually * or #).

— ***Retry:*** The number of times that the system will try to obtain the callback number when a timeout has occurred.

— ***Timeout (sec):*** Define the length of time in seconds that the system should wait for information to be entered.

— ***Announce Destination:*** Check this box if you want the information entered to be read back to the caller.

— ***Prompt:*** This is the announcement preceding the information 'read back' for example: "The number you have dialed is…"

— ***Customer Feedback Prompt:*** This is the prompt for information confirmation.

— ***For example:*** "To confirm this number, please dial one. To change the number please dial two."

— ***Confirmation Digit:*** Define the digit to be dialed for confirmation.

— ***Retry Digit:*** Define the digit to be dialed to re-enter the information.

- **Get Time Tab**

— ***Callback Time:*** Click this radio button if you want the customer to enter a specific time to be called back. This time is entered in five digits using the number 2 and 7 to denote am and pm for example: for 7:00am dial 07002 (2 denotes am), for 4.55pm dial 04557 (7 denotes pm).

— ***Callback Period:*** Click this radio button if you want the customer to enter how long the system should wait before callback. This time is entered in four digits, for example: For 2 hours and 10 minutes dial 0210.

— ***Prompt:*** A voice file played to the customer prompting them to enter the time they want to be called back.

— ***Timeout Prompt:*** Define the prompt file to be played if the caller has not responded within the predefined time.

— ***Error Prompt:*** A voice file is played to the customer prompting them that an error has occurred.

— ***Retry:*** The number of times that the system will try to obtain the time when a timeout has occurred.

— ***Timeout (sec):*** Define the prompt file to be played if the caller has not responded within the predefined time.

— ***Announce Time:*** Check this box if you want the information entered to be read back to the caller.

— ***Prompt:*** This is the announcement preceding the information 'read back'. For example: "The number you have dialed is…"

— *Customer Feedback Prompt:* This is the prompt for information confirmation For example: “To confirm this number, please dial one. To change the number please dial two.”

— *Confirmation Digit:* Define the digit to be dialed for confirmation.

— *Retry Digit:* Define the digit to be dialed to re-enter the information.

- Ending

— *File to Play:* Select the recording that precedes the end of the call.

- Hang-Up

5.4.7 Configuring the Customer Query Action

This feature is only available in Enterprise Contact Center.

The Customer Query action is used to check that a customer exists in the database, and, if so, to route the call according to customer-specific routing rules. Any field in the Call profile can be used to find a matching customer in the database. The value used as key is either the Caller ID, or a number received from the caller using the Get Digits action and stored in the Call Profile.

This action, when used in CCS Administration, can also be used to change the call profile and/or branch to other scripts depending on whether the customer was found or not. When used in GCCS Administration, this action has two exit points depending on whether the customer was found or not. In order to change the call profile, a Change Call Profile action should be added after each exit point.

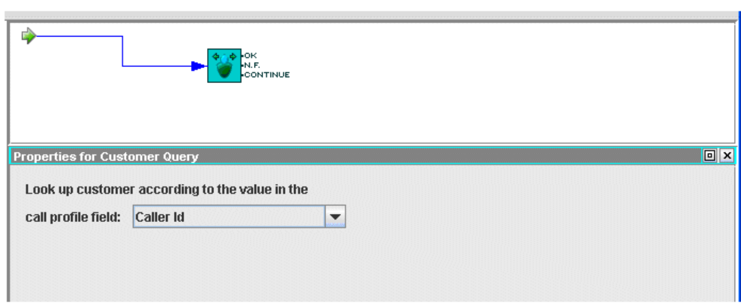

Figure 5-13 GCCS Administration Customer Query Action

To add a Customer Query action to a script, Click the right mouse button on the required script, position the cursor on the Insert Action option and select Customer Query from the Actions menu.

The Action area displays the following fields for configuring the Customer Query action:

- Area 1

— *Look up customer according to the value in the call profile field:* Select the Call Profile field you want to use as a search key for a customer in a database

The default is Caller ID but it can be changed to any Call Profile field by using the pull down list

The selected field’s value will be used to search the database for a customer with a customer ID that matches this value.

The following fields are relevant to CCS Administration only. In GCCS Administration, the branch option is implemented by the matched exit point; in order to change the CP, a Change Call Profile action should be connected to the matched exit point.

- Area 2
  - — ***If customer is found then:*** To define the system's response if the customer is found, click on the appropriate check box, as follows
    - ▷ *Call P.:* Check this check box to activate the Call Profile Modifier area, enabling a call, when processed, to update the Call Profile.
    - ▷ *Branch:* Check this check box to branch to another script in order to continue the processing of the call. A field is activated in which you may select the Call Control script to which you want to branch.
  - — ***If customer is NOT found then:*** To define the system's response if the customer is NOT found, click on the appropriate check box, as follows:
    - ▷ *Call P.:* Check this check box to activate the Call Profile Modifier area, enabling a call, when processed, to update the Call Profile.
    - ▷ *Branch:* Check this check box to branch to another script in order to continue the processing of the call. A field is activated in which you may select the Call Control script, to which you want to branch.

5.4.8 Configuring the Decision Action

This feature is only available in Enterprise Contact Center.

The Decision action compares a call profile to either another call profile field or a constant (number).

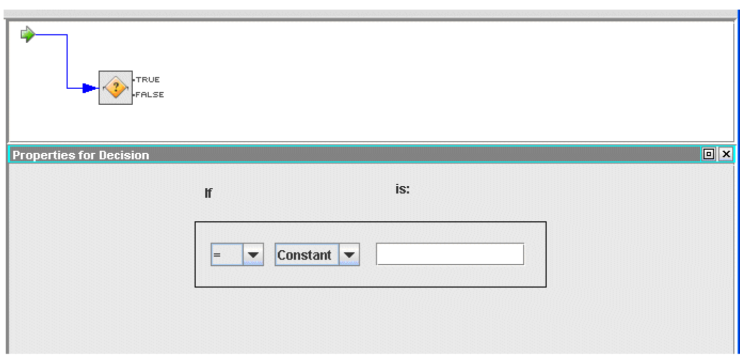

Figure 5-14 GCCS Administration Decision Action

To add a Decision action to a script, Click on the required script with the right mouse button, position the cursor on the Insert Action option and select Decision from the Actions menu.

The Action area of the Decision Action window displays the following fields and check boxes:

- **If:** Selects the Call Profile field whose value you want to compare.

  Use the drop-down list in this field to select a call profile parameter, user defined field, or user defined skill, to use as a comparative value for a Logic Branch.

- **As:** As a String or, As a Number.

This definition is required only for customized Call Profile fields (User Field).

Select whether the compare is a String or a Number.

Numeric compare relates to the value of the number.

String compare is alphabetic compare (for example: 'abzzz is '<' from 'aca').

- **Operation**: This field provides a drop-down list from which an operation can be selected to define how the comparison between the Call Parameter and Compare Values are made.

  The comparison operations are:

  =: Call parameter value is exactly equal to compare value.

  <>: Call parameter value is not equal to compare value.

  <: Call parameter value is less than compare value.

  >: Call parameter value is greater than compare value.

  <=: Call parameter value is less than or equal to compare value.

  >=: Call parameter value is greater than or equal to compare value.

  Else: An Else (otherwise) operation can be implemented for no previous match was found.

- **Constant or CP field:**

  — *Constant:* Compare with constant value; define the value in the edit box.

  — *CP field:* Select the CP field to compare with from the drop-down menu list.

The following fields are relevant to CCS Administration only. In GCCS Administration the Branch option is implemented by the matched exit point.

- **If condition is TRUE branch to a script**: Set a destination script to branch to when the condition is TRUE.
- **If condition is FALSE branch to a script**: Set a destination script to branch to when the condition is FALSE

5.4.9 Configuring the Dial Digits Action

This feature is only available in Enterprise Contact Center.

The Dial Digits action allows the system to dial digits to the other call's party. It may be used, for example, in outbound calls, to send DTMF digits to the other party if the other party is an automatic machine that responds to DTMF. The dialed digits may be predefined or may be the contents of a CP field.

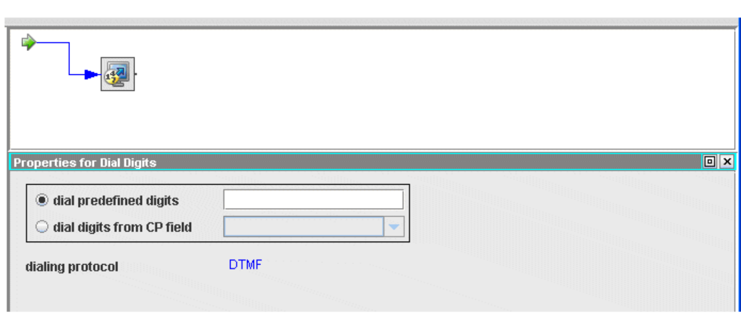

Figure 5-15 GCCS Administration Dial Digits Action

To add a Dial Digits action to a script, Click on the required script with the right mouse button, position the cursor on the Insert Action option and select Dial Digits from the Actions menu.

The Action area of the Dial Digits Action window displays the following fields and check boxes:

- **Dial predefined digits:** Check this radio button in order to dial a predefined sequence of digits. Enter the digits to dial in the edit box that appears to the right of the radio button.
- **Dial digits from CP field:** Check this radio button in order to dial a sequence of digits according to the contents of a call profile field. Use the drop-down list that appears to the right of the radio button to select a call profile
- **Dialing protocol**

5.4.10 Configuring the Get Digits Action

The Get Digits action prompts the caller to enter a sequence of digits which will be stored in a Call Profile field. For example, the caller may be prompted to enter a customer ID.

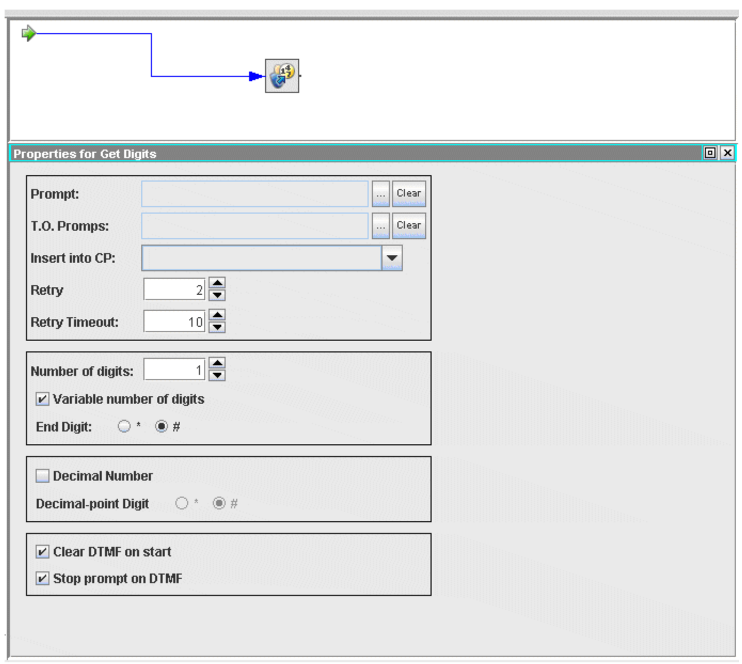

Figure 5-16 GCCS Administration Get Digits Action

To add a Get Digits Action to a script, Click the right mouse button on the required script, position the cursor on the Insert Action option and select Get Digits from the Actions menu.

The action area displays the following fields and check boxes:

- **Prompt:** The path of the file containing the voice prompt for the caller (for example: “Please enter your five digit Customer ID now.”).
- **Timeout Prompt:** The path of the file containing the voice message that the caller hears if digits were not entered within the defined timeout (for example: “If you do not have a touch-tone phone, please wait for operator assistance.”).

- **Insert into CP:** Use this drop-down list to select a Call Profile field in which the digits entered by the caller should be placed.
- **Retry:** Use this field to define the number of times that the system will prompt the caller to enter digits if the caller does not enter them. The prompt that the system will give the caller is the 'Timeout Prompt'.
- **Retry Timeout:** This field defines the time that the system will wait for the caller to enter the required number of digits.
- **Number of Digits:** Defines the number of digits expected. If the caller enters fewer digits and a timeout occurs, the system will retry unless the number of retries has been exceeded. If a variable number of digits is expected, this field defines the maximum number of digits to collect.
- **Variable Number of Digits:** If checked, the system will collect the digits dialed by the caller until the caller presses the terminating digit, or until 'Number of Digits' value is reached.
- **Terminating Digit:** Use this field to define the terminating digit that the caller is expected to enter in order to tell the system that all the digits were dialed.
- **Decimal Number:** Check this box if the digits that the caller is supposed to dial represents a decimal number. In this case, the Decimal Point Digit becomes active and must be defined.
- **Decimal-Point Digit:** Defines the digit that represents the decimal point. When the caller dials it, the system takes all the digits that have been collected and make it the integer part of the decimal number. The digits that the caller continues dialing will be counted as the fraction part of the decimal number.
- **Clear DTMF on Start:** When unchecked, any previously dialed digits will be entered in this action. When checked, the system will ignore all the previously dialed digits and will restart digit collection.
- **Stop Prompt on Caller DTMF:** Checking this box will cause the voice prompt to stop when the caller starts to dial a digit

5.4.11 Configuring the Get Next Record Action

This feature is only available in Enterprise Contact Center.

The Get Next Record action is associated with a SQL Execute action. It loads the results of the next record from the associated SQL Execute results set into the call profile according to the associated SQL Execute assignment rules.

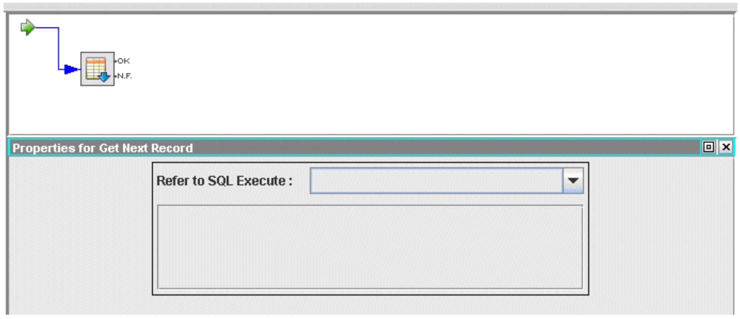

Figure 5-17 GCCS Administration Get Next Record Action

To add a Get Next Record Action to a script, Click the right mouse button on the required script, position the cursor on the Insert Action option and select Get Next Record from the Actions menu.

The action area displays the following fields and check boxes:

- **Refer to SQL Execute:** Select from the drop down list the name of the SQL Execute action to which this Get Next action refers.

The following fields are relevant to CCS Administration only. In GCCS Administration the Branch option is implemented by the matched exit point.

- **OK:** Select from the drop down list the script to branch to when the next record found and its results are loaded into the call profile.
- **Not Found:** Select from the drop down list the script to branch to when there is no next record.

5.4.12 Configuring the Give Menu Action

This action provides a menu to the caller. The caller receives a voice prompt and can choose an option by dialing a digit.

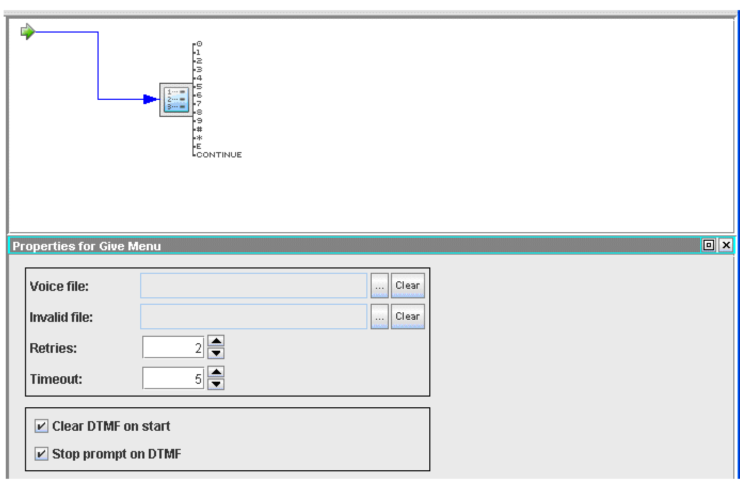

Figure 5-18 GCCS Administration Give Menu Action

To add a Menu action to a script, Right click the required script, position the cursor on the Insert Action option and select Give Menu from the Actions menu.

Setting the Give Menu action is a two step procedure. First define the voice prompts and other parameters such as number of retries, the wait time for the caller input, and so on. Then define the behavior of the system as a consequence of the caller's choices.

The action area (in the CCS Administration select the Parameters tab) displays the following fields and check boxes:

- **Prompt:** The path of the prompt file, heard by the caller, when a digit from the menu should be pressed. For example: "For technical support please press one, for product information please press two".
- **Invalid prompt:** The path of the prompt file that will be played if the caller presses a meaningless digit (one that has not been defined in the next step) and for which there is no specific behavior defined for "Error".

- **Clear DTMF on entry:** When checked, the system clears any previously received digits for this call. When unchecked, the system uses any previously received digits.
- **Stop prompt on DTMF:** When this box is checked, any digit pressed by the caller will terminate the currently played voice message, without waiting to the end of the message.
- **Retry:** Define the number of times the Invalid Prompt will be repeated if the caller does not respond or enters an invalid choice.
- **Timeout (sec):** Define the length of time (in seconds) to wait for a digit to be pressed.

The following fields are relevant to CCS Administration only. In GCCS Administration the Branch option is implemented by the matched exit point. In order to change the CP, a Change Call Profile action should be connected to the matched exit point.

- **Digit:** A list of digits (including the * and # symbols) that the caller may press in response to a voice prompt.

  To define an action that is activated by pressing a specific digit, Click the required digit. The digit button appears indented. It is only possible to select one digit at a time.

  An Error branch appears at the end of the digit list. This option can be used to define processing if the caller enters a digit that is not activated in the menu, or does not enter a digit at all.

  For each digit you can modify the following:

  — ***Call Profile:*** Clicking on this check box activates the digit alongside it. It also activates the Call Profile Modifier area of the CCS window, enabling the Call Profile to be updated when the caller presses the activated digit.

  — ***Branch:*** Enables the call to branch to another script in order to continue processing.

  Clicking on this check box activates a field in which another Call Control script can be defined as a branch destination. (Use the cursor to activate the field). The field provides a drop-down list from which the required script can be selected.

  Processing of the call will continue on the new script if the caller presses an activated digit. The call does not return to the original script. Be careful not to create infinite loops in which the script never finishes processing (for example, scripts that branch to each other or a script that branches to itself).

5.4.13 Configuring Hang-Up Action

This action will hang-up the call.

This action terminates the call as well as the script. Any action that follows it in CCS Administration will not be performed.

To add a Hang-Up Action to a script, Click the right mouse button on the required script, position the cursor on the Insert Action option and select Hang-Up from the Actions menu.

5.4.14 Configuring the Increase/Decrease Action

This feature is only available in Enterprise Contact Center.

The Increase / Decrease action allows numerical changes to the call profile field content, in relation to its current content. This capability allows the administrator to perform numeric functions, such as managing a counter and increasing the current priority.

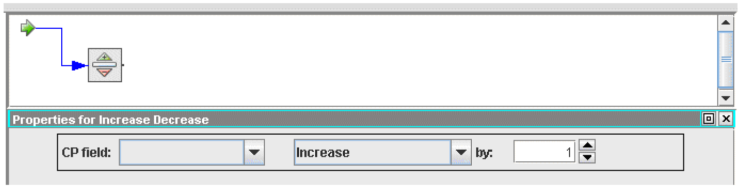

Figure 5-19 GCCS Administration Increase Decrease Action

To add an Increase/Decrease Action to a script, Click the right mouse button on the required script, position the cursor on the Insert Action option and select Increase/ Decrease from the Actions menu.

The action area displays the following fields and check boxes:

- **CP field**: Selects the Call Profile field that needs to be changed.
- **Increase/Decrease**: Selects the operation to Increase or Decrease.
- **By:** Defines the number to increase or decreased from the current value of the Call Profile Field.

5.4.15 Configuring IVR Application Start Action

This feature is only available in Enterprise Contact Center.

An IVR application is a statistical entity that may be used to collect data about how calls perform a script (or a part of a script). IVR applications are defined in Configuring the IVR Applications in the Contact Center Administration. This action starts data collection for the required IRV Application

To add an Application Start Action to a script, Click the right mouse button on the required script, position the cursor on the Insert Action option, and select the IVR Application Start from the Actions menu.

The action area displays the following fields and check boxes:

- **IVR Application:** Select from the drop down list the application name. When this action is performed on a call it will be counted as part of the statistics for this application

5.4.16 Configuring the IVR Application End Action

This feature is only available in Enterprise Contact Center.

An IVR application is a statistical entity that may be used to collect data about how calls perform a script (or a part of a script). IVR applications are defined in Configuring the IVR Applications in the Contact Center Administration. This action stops the data collection for the required IRV Application

To add an Application End Action to a script, Click the right mouse button on the required script, position the cursor on the Insert Action option, and select the IVR Application End from the Actions menu.

5.4.17 Configuring the Logic Switch Action

This feature is only available in Enterprise Contact Center.

The Logic Switch action enables a logical selection of how a call will be handled, based on the values of Call Profile fields. Some fields are user defined - such as customer ID - and others are defined by the system, such as time, priority, DNIS, etc.

The parameters defined in the Logic Switch action area are referred to as Logic Branches. Each Logic Switch action relates to one Call Profile field, but can contain up to 100 Logic Branches in CCS Administration and up to 10 Logic Branches in GCCS Administration. A Logic Branch consists of a compare value, (for example, Friday) and an operation (for example, equals =). The Logic Switch action matches a single call profile field with the correct Logic Branch so that the call will be handled according to actions defined in the branch, such as changing the call profile and/or branching to another script. When the first matching branch is found, it is used and no more matching is done.

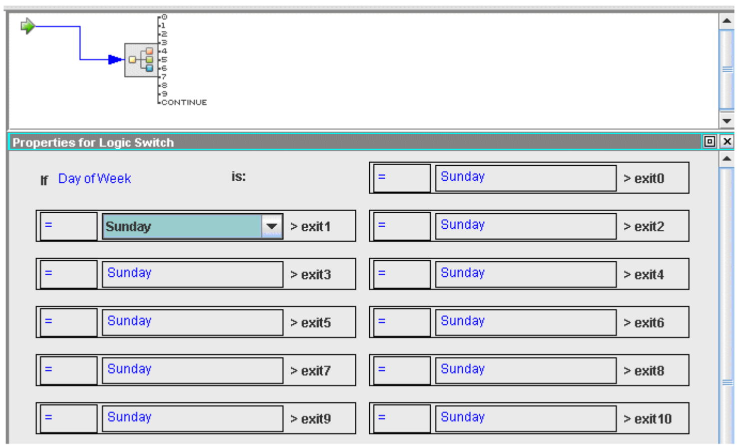

Figure 5-20 GCCS Administration Logic Switch Action

To add a Logic Switch Action to a script, Right click on the required script, position the cursor on the Insert Action> option and select Logic Switch from the Actions menu.

The action area displays the following fields and check boxes:

- **If (the tested field):** Select from the drop down list a call profile parameter (mandatory field/user defined field/user defined skill) as the value for comparison in this Logic Switch action. For example:

  The current time / day of week / date
  A built-in field in the call profile (for example: Caller Id, DNIS, Priority)
  A user-defined field in the call profile.
  A user defined skill.

- **As:** Displayed only when the compared call profile field is a system-defined field that can be compared as a number or as a string. Select from the drop down list the required comparison type (number or string).

- **Operator:** Provides a drop-down list from which the comparison operator can be selected.

  Comparison of text fields is not case-sensitive. All user fields and skills are treated as text fields and you must ensure that comparisons of these fields make sense.

  The comparison operations are:

!=: The Logic Branch will be triggered if the value of the selected call profile field is not equal to the compare value.

=: The Logic Branch will be triggered if the value of the selected call profile field is equal to the compare value.

<: The Logic Branch will be triggered if the value of the selected call profile field is less then the compare value

>: The Logic Branch will be triggered if the value of the selected call profile field is greater then the compare value.

<=: The Logic Branch will be triggered if the value of the selected call profile field is less then, or equal to, the compare value.

>=: The Logic Branch will be triggered if the value of the selected call profile field is greater then, or equal to, the compare value.

Else: The Logic Branch will be triggered by all the relations not mentioned before.

A branch using the ‘Else’ operator should be placed as the last Logic Branch in the list since, otherwise, branches that follow it will never be checked.

- **Compare to:** This parameter is context sensitive to the Tested Field’s type. For example, if the Call Profile Field parameter is ‘Media’ the Compare Value offers a drop-down list including “voice”, “chat” and “E-Mail”. Day of week will offer a list of day names. Other types of fields will expect compare values to be entered in the text field provided (for example, priority).

The following fields are relevant to CCS Administration only. In GCCS Administration, the Branch option is implemented by the matched exit point. In order to change the CP, a Change Call Profile action should be connected to the matched exit point.

- **Modify CP:** Check this box if a change to a call profile field is required when this branch is triggered. When checked, the Call Profile Modifier area of the CCS window becomes active, enabling the administrator to define the changes to the CP that should be made.
- **Branch to:** From the drop down list select a script to branch to when this branch is triggered.

5.4.18 Configuring the Login Primary Groups Action

This feature is only available in Enterprise Contact Center.

The Login Primary Groups action performs a login to the Primary Groups. Before performing this action, the ‘Agent Number’ CP field must be filled with the required agent number (using the Get Digits action). The agent extension is assumed to be the call’s calling device. The system is shipped with a predefined script, named ‘login,’ that implements it. The agent’s primary groups list is defined in the Contact Center Administration in the agents’ configuration screens.

To add a Login Primary Groups action to a script, Right click the required script, position the cursor on the Insert Action option and select Login Primary Groups from the Actions menu.

The Action area displays the following fields and check boxes for configuring the Login Primary Groups script action:

The following fields are relevant to CCS Administration only. In GCCS Administration the Branch option is implemented by the matched exit point

- **OK:** A script to branch to if the Login Primary Groups is successful.
- **Fail:** A script to branch to if the Login Primary Groups fails.

  This action is obsolete and exists only for backwards compatibility. Please use the Login/Logout action instead.

5.4.19 Configuring the Login/Logout Primary Groups

The Login/Logout Primary Group action plays a file that tells the caller its current status (logged in or logged out) and allows the caller to change the login/logout state.

This action is constructed from three steps, each represented by a different tab:

- **Details:** This tab points to wave files that tells the agent its current status and ask the agent for an input in order to change its state.
- **Get Agent Number:** When the Login is activated, it compiles the agent number.
- **Action Results:** This tab points to wave files that tell the agent the action results (success or failure) of both the login and logout.

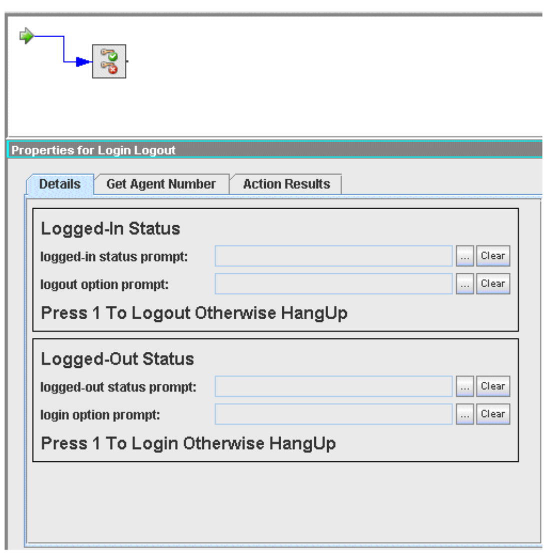

Figure 5-21 GCCS Administration Login/Logout Primary Groups Action

To add a Login/Logout Primary Groups action to a script, Right click the required script, position the cursor on the Insert Action option and select Login/Logout Primary Groups from the Actions menu.

The Action area displays the following fields and check boxes for configuring the Login/ Logout Primary Groups script action:

- **The Details Tab:** This tab points to wave files that tells the agent its current status and asks the agent for an input in order to change its state.
  - — *Logged-In Status:* This section is used if the caller is an already logged on extension
  - — *Logged-In Status Prompt:* Defines the prompt that tells the caller that the extension being used is already logged on.
  - — *Logout option prompt:* Defines the prompt that tells the caller to change the current state and perform a logout.
  - — *Press 1 To Logout Otherwise Hang Up:* By pressing 1 the status change is initiated. Otherwise the system will hang up the call.
- **Logged-Out Status:** This section is used if the caller is a non logged on extension
  - — *Logged-Out Status Prompt:* Defines the prompt that tells the caller that the extension being used is logged-out (not logged in yet).
  - — *Login option prompt:* Defines the prompt that tells the caller to change the current state and to perform a login.
  - — *Press 1 To Login Otherwise Hang Up:* By pressing 1 the status change is initiated. Otherwise the system will hang up the call.
- **The Get Agent Number tab:** When the Login is activated it compiles the agent number.
  - — *Prompt:* A voice file that prompts for the agent number.
  - — *Timeout Prompt:* Defines the prompt file to be played if the caller has not responded within the predefined time.
  - — *# of Digits:* The number of digits to collect. The system waits for the specified number of digits to be entered. The number of digits is fixed.
  - — *Retry:* The number of times that the system tries to obtain the agent number when a timeout occurs.
  - — *Timeout (sec):* Define the length of time in seconds that the system should wait for information to be entered.
  - — *Announce:* Check this box if you want the entered information to be read back to the caller.
  - — *Prompt:* This is the announcement preceding the information 'read back.' For example, "The number you have dialed is…"
  - — *Customer Feedback Prompt:* This is the prompt for information confirmation such as "To confirm this number, please dial one. To change the number please dial two."

    This parameter supports a multilingual environment.
  - — *Confirmation Digit:* Define the digit to be dialed for confirmation.
  - — *Retry Digit:* Define the digit to be dialed to re-enter the information.

- **The Action Results tab:** This tab points to wave files that tell the agent the action results (success or failure) of both the login and logout.
  - *Login*
    - *Success Prompt:* Define the prompt to play when login activation succeeds.
    - *Failed Prompt:* Define the prompt to play when login activation fails.
  - *Logout*
    - *Success Prompt:* Define the prompt to play when logout activation succeeds.
    - *Failed Prompt:* Define the prompt to play when logout activation fails.

5.4.20 Configuring the Logout Primary Groups Action

This feature is only available in Enterprise Contact Center.

The Logout Primary Group action performs a logout from the Primary Groups. The agent extension is assumed to be the call's calling device. The system is shipped with a predefined script, named 'logout,' that implements it. The agent's primary groups list is defined in the Contact Center Administration in the agents' configuration screens.

To add a Logout Primary Groups action to a script, Right click the required script, position the cursor on the Insert Action option and select Logout Primary Groups from the Actions menu.

The Action area displays the following fields and check boxes for configuring the Logout Primary Groups script action:

The following fields are relevant to CCS Administration only. In GCCS Administration the Branch option is implemented by the matched exit point

- **Confirm Logout Primary script:** A script to branch to when the Logout Primary Groups succeeds.

  This action is obsolete and exists only for backwards compatibility. Please use the Login/Logout action instead.

5.4.21 Configuring Overflow Action

This feature is only available in Enterprise Contact Center.

This action causes the call to overflow to the groups defined in the overflow groups list defined here. If the call has already overflowed to those groups, the action is ignored.

To add an Overflow action to a script, Right click the required script, position the cursor on the Insert Action option and select Overflow from the Actions menu.

The action area displays the following fields and check boxes for configuring the Overflow script action:

- **Overflow Groups:** This is the list of groups that the call will overflow to once the action is performed.

  To add groups to the Overflow Groups list, select them from the Available Groups list and click Add.

  To delete groups from the Overflow groups list, select them from the Overflow groups list and click Remove.

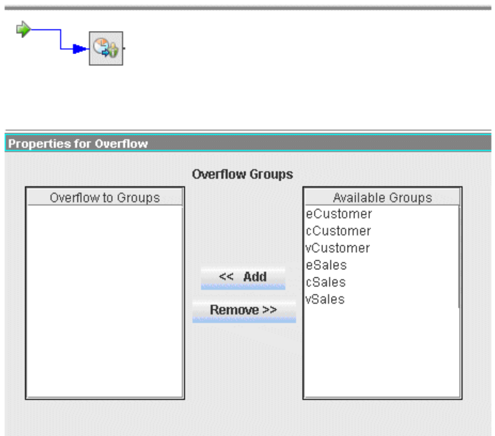

Figure 5-22 GCCS Administration Overflow Action

- **Available Groups:** This area is automatically filled with the list of available groups in the system. The groups that are already in the Overflow Groups list are not shown on this list.

5.4.22 Configuring Play Callback File Action

One of the options of a callback call is to transfer the call to a CC script before the call is transferred to an agent. Usually this script is used to play a file to the customer. In these scripts, this action should be used instead of the Play File action. It plays a file to the called customer at the beginning of a callback call. One of two files is played depending on whether the call was picked up by a person or an answering machine.

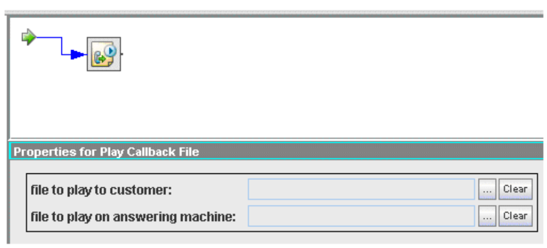

Figure 5-23 GCCS Administration Play Callback File Action

To add an Play Callback File action to a script, Right click the required script, position the cursor on the Insert Action option and select Play Callback File from the Actions menu.

The action area displays the following fields and check boxes for configuring the Play Callback File script action:

- **File to play to customer:** Select the file to be played if a person answers the call.
- **File to play on answering machine:** Select the file to be played if a machine answers the call.

5.4.23 Configuring Play File Action

The Play File action plays a pre-recorded voice file to the caller. The file name may be either defined in the action (predefined) or dynamically defined by a content of a CP field.

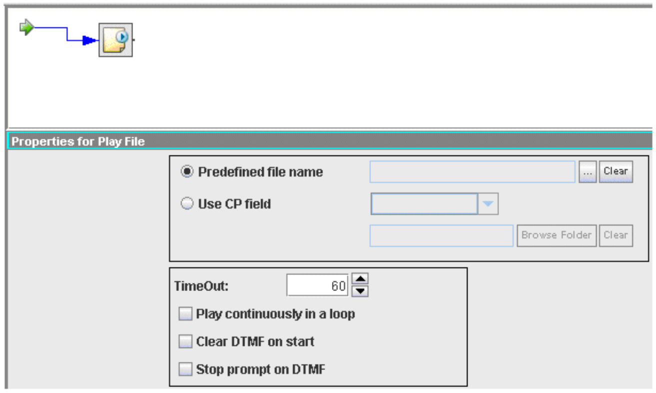

Figure 5-24 GCCS Administration Play File Action

To add a Play File action to a script, Right click the required script, position the cursor on the Insert Action option and select Play File from the Actions menu.

The Action area displays the following fields and check boxes for configuring the Play File script action:

- **Predefined File name:** Check this radio button if the action is used to play a predefined file. Define, in the edit box to the right, the path of the predefined voice file that should be played. Click the <…> in order to use the browser to set the file name.
- **Use CP Field:** Check this radio button if the action will play a file with a name defined by a content of a CP field. Use the list box to the right to define the CP field that should contain the file name. Use the <Browse Folder> button to define the path where the files should be found.
- **Timeout:** After the pre-defined timeout, the call will stop to hear the file and will continue to the next action in the script.
- **Play continuously in loop:** When this box is checked, the file should be played repeatedly until the timeout (see previous parameter) expires. If not checked, the voice file will play only once.
- **Clear DTMF on start:** When checked, any digits received before the action started will be cleared. When unchecked, previously received digits may be used in this action.
- **Stop play on caller DTMF:** When checked, any digit entered terminates the currently playing message.

5.4.24 Configuring the Release Action

This feature is only available in Enterprise Contact Center.

When an agent is in a Release state, the system will not route ACD calls to the agent's phone. The agent may still receive calls through transfers from other agents or incoming private calls. The Release action is used to release an agent. PC-Less agents may use a script that contains a release action to release from their groups. The action assumes that the call's calling device is the agent device. It then looks for the agent who is logged in to this extension. If such an agent is found, it verifies that the agent is not already released, and if so, the agent's state changes to released.

To add a Release action to a script, Right click the required script, position the cursor on the Insert Action option and select Release from the Actions menu.

The Action area displays the following fields and check boxes for configuring the Release script action:

The following fields are relevant to CCS Administration only. In GCCS Administration the Branch option is implemented by the matched exit point

- **Confirm Release Script**: From the drop down list select a script to branch to when the Release action succeeds.

  This action is obsolete and exists only for backwards compatibility. Please use the Release/Resume action instead.

5.4.25 Configuring the Release/Resume Action

The action assumes that the call's calling device is the agent device. It then looks for the agent who is logged in on this extension. If an agent is found, it then finds its current status (released or resumed).The action then plays a wave file telling the calling device, (assumed to be an agent device), the current status, and then prompts the agent to press the '1' key to toggle the current status. After the button is pressed, the action tries to change the status and then plays a wave file to tell the agent the action results (success or failure).

The action contains two tabs. 'Details', contains the definition of the announcements that tells the current status. 'Action Results' contains the definition of announcements that tells the action results.

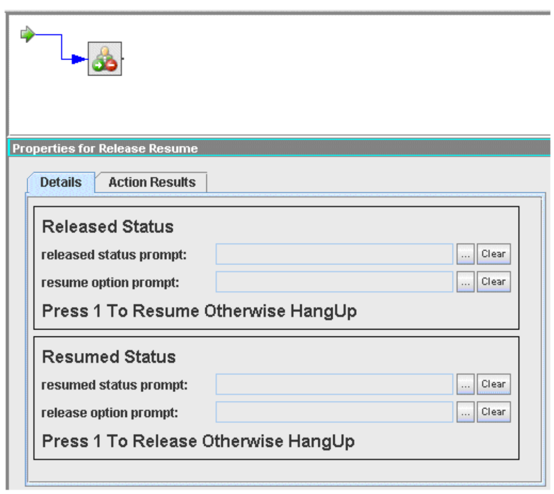

Figure 5-25 GCCS Administration Release/Resume Action

To add a Release/Resume action to a script, Right click the required script, position the cursor on the Insert Action option and select Release/Resume from the Actions menu.

The Action area displays the following fields and check boxes for configuring the Release/ Resume script action:

5.4.26 Configuring the Resume Action

This feature is only available in Enterprise Contact Center.

Returns the agent to normal ACD mode (When in Release state):

This action establishes the agent in the Ready State. In Ready state, the system will route ACD calls to the agent's phone. The Resume action is used to resume an agent. A PC-Less agent may use a script that contains it to resume to a normal ACD mode. The action assumes that the call's calling device is the agent device. It then looks for the agent who is logged in on this extension. If an agent is found, and the agent is in released state, the agent's state changes to idle.

To add a Resume action to a script, Right click the required script, position the cursor on the Insert Action option and select Resume from the Actions menu.

The Action area displays the following fields and check boxes for configuring the Resume script action:

The following fields are relevant to CCS Administration only. In GCCS Administration the Branch option is implemented by the matched exit point

- **Confirm Resume Script**: From the drop down list select a script to branch to when the resume action succeeds.

  This action is obsolete and exists only for backwards compatibility. Please use the Release/Resume action instead.

5.4.27 Configuring the Send Message Action

This feature is only available in Enterprise Contact Center.

The Send Message action is a chat-related action. Here you can define a message to be sent to a chat caller. Any of the messages predefined in the CCS Admin Options under the Messages tab may be sent.

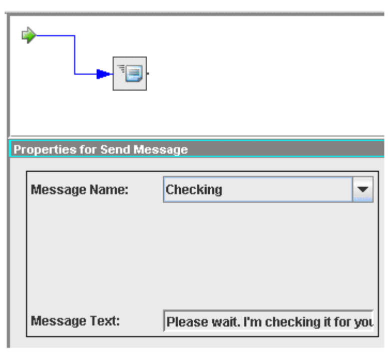

Figure 5-26 GCCS Administration Send Message Action

To add a Send Message action to a script, Right click the required script, position the cursor on the Insert Action option and select Send Message from the Actions menu.

The Action area displays the following fields and check boxes for configuring the Send Message script action:

- **Message**: From the drop down list, select a predefined message to be sent to the chat caller
- **Message text**: In this area, the selected message's text will appear. This area cannot be edited.

5.4.28 Configuring the Send Page Action

This feature is only available in Enterprise Contact Center.

The Send Page action is a chat-related action. Here you can define a message to be sent to a chat caller. Any of the messages predefined in the CCS Admin Options under the Messages tab may be sent.

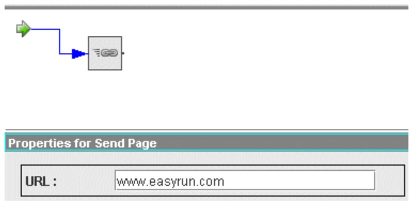

Figure 5-27 GCCS Administration Send Page Action

To add a Send Page action to a script, Right click the required script, position the cursor on the Insert Action option and select Send Page from the Actions menu.

The Action area displays the following fields and check boxes for configuring the Send Page script action:

- **URL:** Enter the URL for the internet page you want to send to a chat caller.

  No validity check is performed on the text entered in the URL field

5.4.29 Configuring the SQLConnect Action

This feature is only available in Enterprise Contact Center.

The SQLConnect action enables connection to an external database in order to make a query. For example, this action may be used to establish a connection with the organization's database, after which it is possible to branch to other scripts containing database queries, assuming that this connection has been established.

The SQLConnect action uses the database connections as defined in the system management configuration window in the Contact Center Administration.

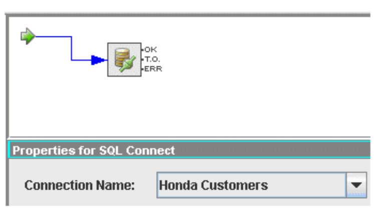

Figure 5-28 GCCS Administration SQL Connect Action

To add a SQLConnect action to a script, Right click the required script, position the cursor on the Insert Action option and select SQLConnect from the Actions menu.

The Action area displays the following fields and check boxes for configuring the SQLConnect script action:

- **Connection Name:** From this drop down list select the connection name. Connections can be added in the Contact Center Administration, in the system-interfaces configuration screens.

The followings fields are relevant to CCS Administration only. In GCCS Administration the Branch option is implemented by the matched exit point

- **Database Response**: The followings fields enable you to define the next action to perform in this script, based on the result of the SQLConnect action
  — *OK:* Define the script to which a branch is performed if the database connection is successful.
  — *Timeout:* Define the script to which a branch is performed if the database connection is not established within the timeout period.
  — *Error*: Define the script to which a branch is performed if the database connection has failed (due to any reason other than timeout— for example, incorrect password).

5.4.30 Configuring the SQLDisconnect Action

This feature is only available in Enterprise Contact Center.

The SQLDisconnect action enables you to disconnect from one of the databases that you are currently connected to (i.e. through the SQLConnect action).

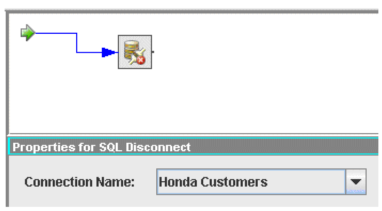

Figure 5-29 GCCS Administration SQL Disconnect Action

To add a SQLDisconnect action to a script, Right click the required script, position the cursor on the Insert Action option and select SQLDisconnect from the Actions menu.

The Action area displays the following fields and check boxes for configuring the SQLDisconnect script action:

- **Connection Name**: From this drop down list select the connection name. Connections can be added in the Contact Center Administration, in the system-interfaces configuration screens.

The followings fields are relevant to CCS Administration only. In GCCS Administration, the Branch option is implemented by the matched exit point

- **Branch to Script**: In this field you can define another script to which you want to branch

5.4.31 Configuring the SQLExecute Action

This feature is only available in Enterprise Contact Center.

The SQLExecute action enables you to send a query to the database to obtain specific information. The query is a SQL statement. For example, the query may find and retrieve the caller's priority and update the call profile's call priority value. If the result of the query is more then one record, there is an option to loop over the result set (using the Get Next Record action) and to perform actions on every record fetched. In order to do so, the SQLExecute action has a name that is referred by the Get Next Record action.

The SQLExecute action assumes that the connection to the database has already been made.

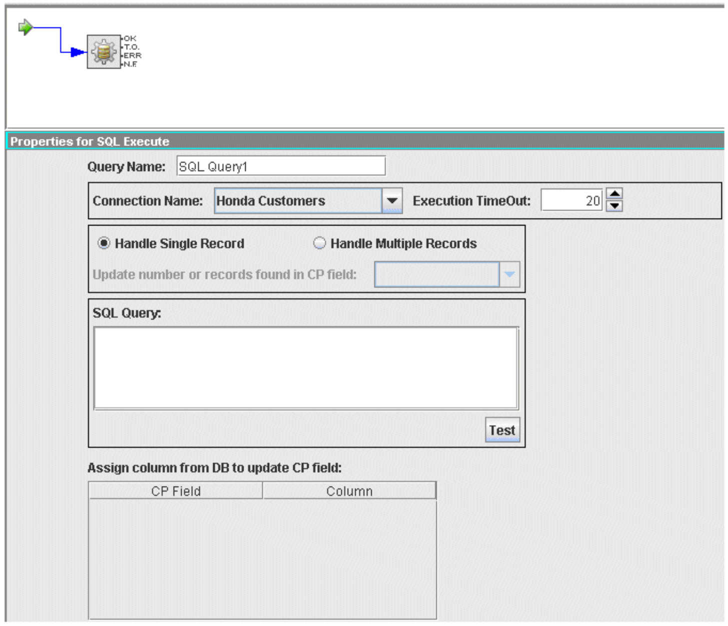

Figure 5-30 GCCS Administration SQL Execute Action

To add a SQLExecute action to a script, Right click the required script, position the cursor on the Insert Action option and select SQLExecute from the Actions menu.

The Action area displays the following fields and check boxes for configuring the SQLExecute script action:

- **Query Name**: A name that may then be referred by the Get Next Record action in order to loop over all the records fetched by the SQLExecute action.
- **Connection Name**: This field displays the name of the database that you are currently connected to.
- **Response Timeout:** In this field, you define the period of time that the system will try to query the database before timing out
- **Handle single Record:** Handle single Record
- **Handle multiple records**: Check this radio button if the query is expected to fetch more then one record. In this case, use the list box below to select a CP field in which the system will set the number of fetched records. Use the Get Next Record action to perform actions for every record fetched.
- **SQL Statement:** In this field you enter the query that you want to send to the database. The query is a SQL statement and contains an input & output command. The database administrator is usually responsible for writing this statement.

  No automatic syntax checking are performed on this field.
- **Assign Column for DB to Update CP Field:** To insert a new CP Field to the list of fields to be updated, right click in the area and Insert a field from the drop down list. In the Column field, enter the name of the database column that should be used as a source for updating the CP Field.

The column names are not automatically checked against the database and should be entered carefully.

The following fields are relevant to CCS Administration only. In GCCS Administration, the Branch option is implemented by the matched exit point

- **Database Response / Branch to Script**: This section enable you to define the next script to branch to according to the query results:
  - *OK:* In this field you define the next script to branch to if the query is successfully performed (i.e., the required information is retrieved from the database).
  - *Timeout:* In this field you define the next script to branch to if the query is not made within the timeout period (defined above).
  - *Error*: In this field you define the next script to branch to if the system is unsuccessful in making the query (for any reason other than timeout, i.e., incorrect statement).
  - *Not Found:* In this field, you define the next script to branch to if the required information does not exist in the database (i.e., the system cannot find the information specified in the statement).

5.4.32 Configuring the Transfer Action

The Transfer parameters define the destination to which a call will be transferred. The destination may be either defined in the action itself (predefined), or dynamically defined by the content of a CP field.

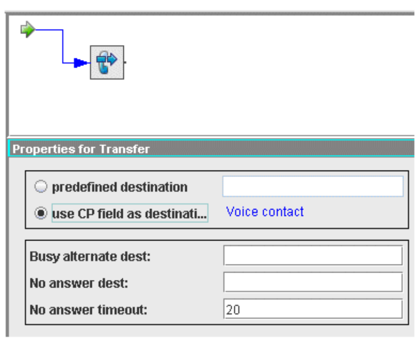

Figure 5-31 GCCS Administration Transfer Action

To add a Transfer action to a script, Right click the required script, position the cursor on the Insert Action option and select Transfer from the Actions menu.

The Action area displays the following fields and check boxes for configuring the Transfer script action:

- Transfer call to
  - *Predefined destination:* Check this radio button if the transfer destination is defined by this action. In the edit box to the right, enter the destination to which the call should be transferred. This must be a valid dial number in the PBX. (It may be an external dial number to the PBX).
  - *Use CP Field as destination:* Check this radio button if the transfer destination is dynamically defined by the content of a CP field. From the drop down list to the right select the CP field that will contain a value of a dial number. The

system will transfer the call to the dial number contained in the specified call profile field.

- **Busy alternate destination:** This field can be used to define an alternate destination to which the call should be transferred if the original destination is busy.
- **No answer destination:** This field can be used to define a destination to which a call should be transferred if there is no answer from the original destination.
- **No answer timeout (sec.):** This field can be used to define how long (in seconds) a call will wait for an answer before entering a state of timeout when it will be transferred to the "No Answer" destination.

  Enter the number of seconds directly in to the field or click the spin buttons.

5.4.33 Configuring the Wait Action

This feature is only available in Enterprise Contact Center.

The Wait Action causes a delay in the execution of a script. It may be used to allow a previous action to complete before the execution continues.

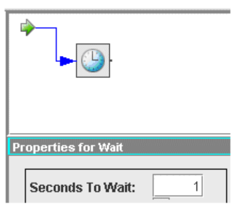

Figure 5-32 GCCS Administration Wait Action

To add a Wait action to a script, Right click the required script, position the cursor on the Insert Action option and select Wait from the Actions menu.

The Action area displays the following fields and check boxes for configuring the Wait script action:

- **Seconds to wait:** Enter the length of the delay in seconds. The Maximum length of delay is 1000 seconds.

CHAPTER 6

Wall Board Administration Application

6.1 Overview of the Wall Board Administration Application

Contact Center Wall Board Administration enables supervisors to communicate with entire groups of telephone agents simultaneously and provides supervisors with important information instantaneously.

Using this application, a supervisor can create and store new wallboard messages, modify existing messages and customize messages for individual groups. The supervisor also can create customized message scenarios, which may include messages and pop-up messages. Pop-up messages display at specific times for predefined periods.

6.1.1 Contact Center Wall Board Administration Main Screen

The Contact Center Wall Board Administration main screen is displayed once you have successfully logged into the application. The main screen is comprised of a menu bar with menu options, and a toolbar with three tool icons that provide you with quick access to the most frequently performed procedures.

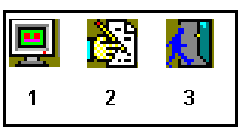

Figure 6-1 Wall Board Toolbar Icons

The toolbar provide the following functions:

- **Wallboard (1)**: Click the button to open The Wallboard Window
- **Message Editor (2)**: Click this button to open The Message Editor Window
- **Logout (3)**: Click this button to exit the wallboard administration and any other currently open Supervisor application.

6.2 The Message Editor Window

The Message Editor window is used to create and edit messages to be displayed on the wallboard.

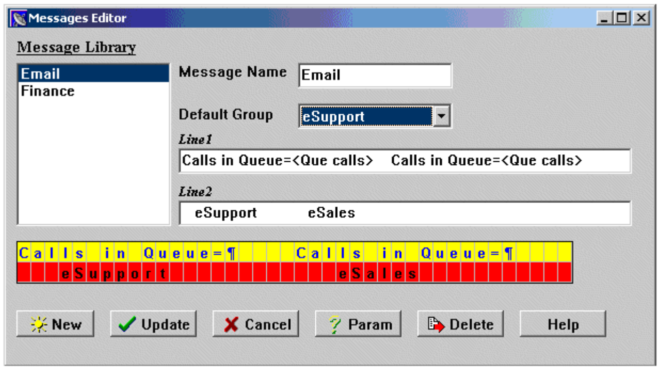

Figure 6-2 Message Editor Window

A new message can be created, or an existing one can be edited, using the following fields and buttons in the Message Editor:

- **Message Library:** The Message Library displays the messages that are available for use in the wallboard. Each time a new message is created, it is placed in the Message Library. The Message Library is displayed both in the Message Editor and the Wall Board window in the same format. A message is not removed from the list after being added to a scenario, allowing you to use any message an unlimited number of times.
- **Message Name:** This field displays the name of the selected message. When creating a new message, you must fill in this field. When modifying an existing message, you have the option to change the message name. The message name can contain a maximum of 32 characters
- **Default Group:** For any parameter in any message, a group must be assigned in order to be displayed. The parameter's group may be defined in various stages during the process of inserting a message to a scenario or to a popup
- **Line 1:** This area displays the first line of the selected message. This read-only area displays modifications made to the message in the work area of the Message Editor window. Each set of parenthesis represents a parameter that has been included in the message.
- **Line 2:** This area displays the second line of the selected message. This read-only area displays modifications made to the message in the work area of the Message Editor window. Each set of parentheses represents a parameter that has been included in the message
- **Message Area:** In the Message Area you can enter and edit messages.

  Each box represents one character and the paragraph marks represent parameters included in the messages. You can change the color of individual characters by right clicking their boxes.

  Each line has 40 characters for a total of 80 characters. The two lines of the message area are not continuous. Therefore, a message that begins on Line 1 and extends longer than 40 characters will not automatically continue on the next line. You must either press the <Enter> key or click where you want the message to continue.
- **New:** Click New to create a new message. All of the fields in the Message Editor are cleared, except for the Message Library. All of the fields in the Message Editor must be filled in for a new message to be complete.

- **Update:** Click Update after you have created a new message or modified an existing message selected from the Message Library. The changes are saved in the system.

  Changing a message that is part of a scenario will take affect only after pressing the Run button in the Wallboard window.
- **Cancel:** Click Cancel to undo any changes you have made and return to the original message.
- **Params:** Click Params to open the select parameter dialog box in which you can select preset parameters from the Parameters list. Parameters selected from this list are included in the message.
- **Delete:** Click Delete to erase a selected message. A warning appears. Click Yes to delete the message or No to cancel the process.
- **Help:** Click Help to open Contact Center Wall Board Administration Help.

To create a new message:

Step 1 In the Messages Editor window, click New. All the fields become blank except for the Message Library.

Step 2 In the Message Name field, enter the name of the new message .

Step 3 In the Default Group field, select from the drop down list the default group for the message (see Parameter's group assignment rules.

Step 4 In the work area, at the lower part of the window, type the new message.

Step 5 If you need to add a parameter to the new message, place the cursor where you want the parameter to appear within the message and click Params.

Step 6 When you have finished editing the message, click Update in the Message Editor window to save the new message. The new message's name appears in the Message Library.

When using the Message Area in the Message Editor, it is important to keep a few rules in mind:

- To begin typing, position the cursor where you want to begin the message and click the left mouse button.
- Clicking the spacebar on the keyboard inserts a small rectangle in the box (representing a space in the massage). You cannot type another character in a box with a space rectangle until you delete the space.
- You can highlight a block of text and press either <Delete> or <Backspace> on the keyboard to erase the selected text.
- Parameters cannot be modified in any way, but you can remove them from, or add them to, existing messages.

To edit a preprogrammed message:

Step 1 In the Message Editor window, select the message that you want to edit from the Message Library.

Step 2 Make any corrections within the Message Editor or the Parameters sub-window.

Step 3 When you have finished making the corrections, click Update at the bottom of the window. The changes are saved in the system.

To delete a message:

Step 1 In the Message Editor, click the message that you want to delete.

Step 2 Click Delete at the bottom of the window. A warning message appears.

Step 3 Click Yes to delete the message. The message is erased along with all the information related to it.

Click No to cancel. Deleting a message removes it from any scenario in which it appeared.

6.2.1 Adding Parameters to a Message

The messages displayed on the wallboard often contain important information that supervisors may want to convey to agents. The information is taken from real time reports. This information comes in the form of a predefined parameter. Each message can have its own combination of parameters, which represent information in a group

To add message parameters:

Step 1 Place the cursor where you want the parameter to appear within the message and click Params. The Parameters dialog box opens.

Step 2 From the Group list, select one of the groups to which the selected parameter will refer (see Parameter Group Assignment Rules).

Step 3 The Parameter list displays all the various parameters that can be added to a message. The Length field below the Parameter list indicates the maximum number of characters used to present the parameter's value. You can modify the displayed length by clicking the field and entering the required number.

Step 4 For example, you may have a message that informs the agents in the Sales group of their progress in answering calls. Click Sales in the Group field, then, select ASA from the list of parameters. This parameter indicates the Average Speed of Answer by the agents. Thus, when this parameter is included, a number indicating the ASA follows the message.

Step 5 To add the parameter to the message click OK. The Parameters dialog box closes. The new or modified parameter is added to the message and displayed in the work area of the Message Editor in the form of paragraph marks. The number of paragraph marks reflects the number of characters the parameter will take on the wallboard (as defined in the Length field in the Parameters sub-window).

Parameters and groups cannot be added to or edited in this application.

From the Parameters List, you can select any of the following parameters to be included in your message.

General Parameters

- **Grp name:** Use this parameter in order to display the name of the group
- **Grp num:** Use this parameter in order to display the group number

Currently in Queue

- **Que calls**: Number of Incoming ACD calls waiting in the groups queue.
- **Above T.ASA:** Number of Incoming ACD calls waiting in the groups queue more then T.ASA seconds.
- **Avg que time**: Average wait time of Incoming ACD calls waiting in the groups queue
- **Max que time**: Longest wait time of Incoming ACD calls waiting in the groups queue
- **STI 1 STI6:** One more step in the STI will be the target ASA in order to see how many call wait more than the target ASA.

Information for now

- **Agents**: Number of logged in agents
- **Rls agns**: Number Of Agents On Release
- **Wr-Up agns**: Number Of Agents On Wrap-Up
- **Idle agns**: Number Of Agents On Release
- **ACD agns**: Number Of Agents On Release
- **Non-ACD agns:** Number Of Agents On Release
- **Too long talk**: Number Of Agents On Release
- **Max talk time:** Longest ACD Call Talk Time (min:sec).

On The Current Time-Interval

- **TSF:** The TSF For The Current Time-Interval
- **Inc calls**: Number Of Incoming ACD Calls.
- **Ansd calls**: Number Of Answered ACD Calls.
- **% ansd calls**: Percentage Of Answered ACD Calls out of all incoming ACD calls.
- **Abnd calls**: Number Of Abandoned Calls.
- **% abnd calls**: Percentage Of Abandoned Calls out of all incoming ACD calls.
- **Avg time abnd:** Average Wait Time Of Abandoned Calls (sec.)
- **Max time abnd:** Longest Wait Time Of Abandoned Calls (sec.)
- **Intrfl out**: Number Of Calls Interflowed From Group
- **% Intrfl calls:** Percentage Of Calls Interflowed From Group out of all incoming ACD calls
- **Avg time Intrfl**: Average Wait Time Of Calls Interflowed From Group (sec.).
- **Max time Intrfl:** Longest Wait Time Of Calls Interflowed From Group (sec.).
- **Intrfl in**: Number Of Calls Interflowed To Group.
- **% Intrfl in**: Percentage Of Calls Interflowed To Group out of all incoming ACD calls.
- **RPH:** The Groups RPH. Calculated as the number of answered calls divided by the average number of agents thus giving the average number of calls answered by an agent of the group
- **Avg que time on**: Average Wait Time In Queue (sec.).
- **Max que time on**: Longest Wait Time In Queue (sec.).
- **Avg ACD talk on**: Average ACD Talk Time (min:sec).
- **Max ACD talk on:** Longest ACD Talk Time (min:sec).
- **ASA**: Average Answer Time (sec.).
- **RQD agns:** Required Number of Agents In Order To Meet The Target-ASA.
- **T ASA:** This is not a statistical parameter but displays the target ASA for the group as defined by the administrator.

6.2.2 Changing the Message Colors

Many wallboards support multiple background and foreground colors (foreground color is the text color). The Message Editor window enables the administrator to change these colors.

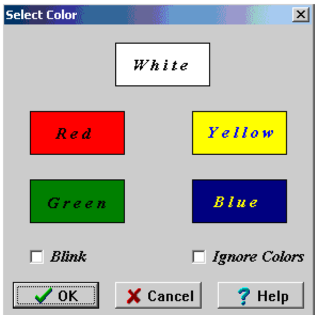

Figure 6-3 Change Color Dialog Box

To change the colors:

Step 1 In the work area of the Message Editor, highlight the area on which to apply the color changes.

Step 2 Click the right mouse button in the work area. The Select Colors window opens.

Step 3 Select a color from the color boxes. The options are:

- **Blue:** Background is blue; text is yellow
- **Yellow:** Background is yellow; text is blue.
- **White:** Background is white; text is black.
- **Red:** Background is red; text is black.
- **Green:** Background is green; text is black.

In order to set the blink option (i.e., the text will blink on the wallboard), check the Blink checkbox.

6.2.3 Parameter Group Assignment Rules

For any parameter in any message, a group must be assigned in order to be displayed. The parameter's group may be defined in various stages during the process of inserting a message to a scenario or to a popup:

- In the Add/Edit message to scenario/pop-up dialog box, there is an option to assign the parameter to a specific group, for each parameter in the message.
- In the Add/Edit message to scenario/pop-up dialog box, there is also an option to define a default group that, if defined, is used for every parameter that has no group assigned in the previous stage.
- In the message editor, in the select parameter dialog box, there is an option to assign the parameter to a specific group. This assignment is used if no assignment made in one of the previous options.
- In the message editor, there is an option to define a default group for the message. This group is used for every parameter is not assigned to a group in any of the previous stage.

6.3 The Wallboard Window

The Wall Board window displays the wallboard list and contains three tabs, Config, Scenario and Pop-Up. The Config tab is used to define the communication parameters to the selected wallboard. The Scenario tab is used to define the messages scenario for the selected wallboard. The Pop-Up tab is used to define the pop-up scenario for the selected wallboard. The Wallboard window enables the administrator to add new wallboards to the list, remove wallboards from the list and to 'run' the scenario or pop-up when changed.

6.3.1 The Wallboard Window – The Config. Tab

A new wallboard can be created, or an existing one can be edited, using the following fields and buttons in the Wallboard Window – The Config. tab:

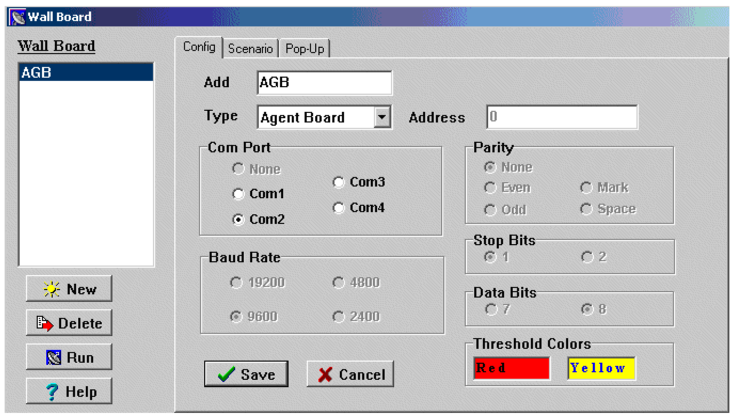

Figure 6-4 Wallboard Window – The Config tab

- **Name**: This field displays the name (up to 32 characters) of the selected wallboard
- **Address**: This field must contain the address of the wallboard connected to the COM port. When using chained wallboards, each wallboard must use a different address.
- **Type**: This drop-down list contains the following options that enable you to select the type of wall board currently being used:
  - — *AgentBoard:* No actual wallboard. The messages appear on the agent's computer using the Agent Board application.
  - — *Comfuture:* This wallboard conforms to the comfuture wall board protocol.
- **Spectrum/ Alpha**: This wallboard conforms to the Spectrum wall board protocol.
- **Com Port**: Click on one of the radio buttons in this area to define the com port to which the wallboard is connected.
- **Parity**: Click on the appropriate radio button in this area according to manufacturer definitions. When selecting the wallboard type, this parameter is changed to the manufacturer's default.
- **Stop Bits**: Click on the appropriate radio button in this area according to manufacturer definitions. When selecting the wallboard type, this parameter is changed to the manufacturer's default.

- **Data Bits:** Click on the appropriate radio button in this area according to manufacturer definitions. When selecting the wallboard type, this parameter is changed to the manufacturer's default.
- **Baud Rate:** Click on the appropriate of the radio buttons in this area according to manufacturer definitions. When selecting the wallboard type, this parameter is changed to the manufacturer's default.
- **Threshold Colors:** Thresholds are specific event values that, if exceeded, are marked by special colors. These colors are used in the wallboard to show values that have exceeded the threshold values. The color on the right indicates that the threshold of calls is almost reached and could become a problem. The color on the left indicates that the threshold has been surpassed and a major problem is at hand. You can change the colors by double clicking the left mouse button and using the Select Colors window.
- **Save:** Click this button to save the data choices that have been entered and return to the wallboard main window.
- **Cancel:** Click this button to undo any actions you performed or any new data you have entered. You will return to the previous window without saving any changes.
- **Run:** Clicking this button downloads the new scenario/pop-up settings to the wallboards and restarts the scenario.

To create a new wall board:

Step 1 On the left side of the Config window, click New. The Name field becomes blank.

Step 2 In the Name field, enter the name of the new wallboard.

Step 3 Enter the information in the other configuration fields (see above).

Step 4 Proceed to the Scenario and Pop Up windows and create the new wallboard message scenario.

6.3.1.1 Changing Threshold Colors

Thresholds are specific event values that, if exceeded, are marked by special colors. These colors are used to show values that have exceeded the threshold values. Two colors are used to signify that a parameter has exceeded its threshold. The default colors are yellow and red.

To change the threshold colors on the wallboard:

Step 1 In the Wall Board window, click the Config tab. The Config window appears.

Step 2 In the Threshold Colors field, at the bottom of the Config window, double click the color you want to change.

Step 3 Select a color from the color boxes. The options are:

- **Blue:** Background is Blue; test is Yellow
- **Yellow:** Background is Yellow; test is Blue
- **White:** Background is White; test is Black
- **Red:** Background is Red; test is Black
- **Green:** Background is Green; test is Black

In order to set the blink option (i.e., the text will blink on the wallboard), check the Blink checkbox.

6.3.2 The Wallboard Window – The Scenario Tab

A message scenario is a sequence of messages. Each message within the scenario is displayed on the wallboard for a specific amount of time. The Scenario window is used to build or modify message scenarios for the wallboards.

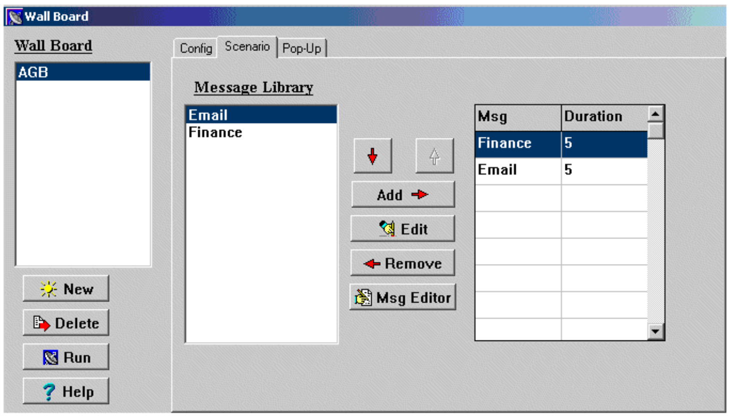

Figure 6-5 Wallboard Window – The Scenario Tab

The Message Library on the left of the window contains all of the messages created in the Message Editor. The Scenario Table, on the right side of the window, contains the names of the messages (in order of appearance) and the display time (in seconds).

The six action buttons, in the middle of the window, allow you to edit the scenario as follows:

- **Up arrow:** Click the up arrow to move the selected message up within the message scenario.
- **Down arrow:** Click the down arrow to move the selected message down within the message scenario.
- **Add:** Click Add to open the Add Messages to Scenario window and add a message to the message scenario.
- **Edit:** Click Edit to edit the selected message within the scenario; for example, to change the amount of time the message will be displayed or the group to which the message is directed. The Edit Message window opens.
- **Remove:** Click Remove to remove a selected message from the Scenario Table (the message is not removed from the Library).
- **Msg Editor:** Click Msg Editor to open the Message Editor and edit the selected message.

To create a message scenario:

Step 1 Select the wallboard for which you want to create a scenario from the list in the Wall Board window, and click the Scenario tab.

The Scenario window opens.

Step 2 In the Message Library on the left side of the Scenario window, select a message to be added to the message scenario and click Add.

The Add Message window opens.

Step 3 In the Time field, enter the amount of time, in seconds, that you want the message to appear on the wallboard.

Step 4 In the Default Group field, enter the appropriate group. This group will be used for any parameter that is not specifically assigned a group in the next step.

Step 5 Using the up and down arrows, select a parameter in the Param # field. Note that the selected parameter is highlighted in the message area and the parameter's name appears in the Name field.

Step 6 You can now change the Group assignment for this field. Continue to do this until you are satisfied with the parameters and their respective groups.

If you have decided to skip one field and not to assign a group for it, this parameter will display values that are related to the default group selected in step 4 of this procedure.

Step 7 When all of the information has been entered, click OK to include the message in the scenario.

Repeat steps 2-7 until all of the required messages are included in the scenario. A message can be used more than one time in a scenario.

To change the position of a message within the scenario, Click on the message in the scenario and use the Up/Down arrow buttons to either promote or demote the selected message.

6.3.2.1 The 'Add/Edit Message in a scenario' dialog box

This dialog box is displayed when the Add/ Edit buttons in the Wallboard Window in the scenario tab are clicked.

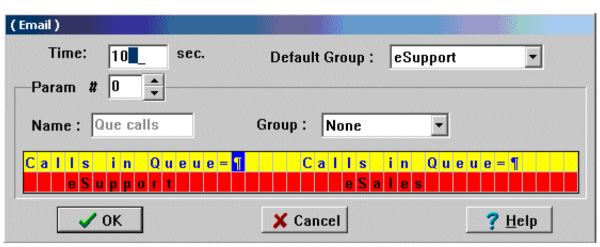

Figure 6-6 **'Add/Edit Message in a Scenario' Dialog Box**

The 'Add/Edit Message in a scenario' dialog box comprises:

- **Time:** The time in seconds the message will appear on the Agent/Wall board.
- **Default Group:** The default group is automatically assigned to every parameter in the message that is not assigned to a specific group.
- **Param #:** Use this section to assign a parameter to a group other then the default group. Use the up and down arrows to select a parameter, then change its assignment to a group using the Group list box.
- **Name:** This field displays the selected parameter name.

- **Group:** Changes the assignment of the selected parameter to a different group.

6.3.3 The Wallboard Window – The Pop-up Tab

A pop-up message is a message that appears at a specific date and time or at specific time interval. The pop-up window allows you to define when and how these messages are shown on the wallboard.

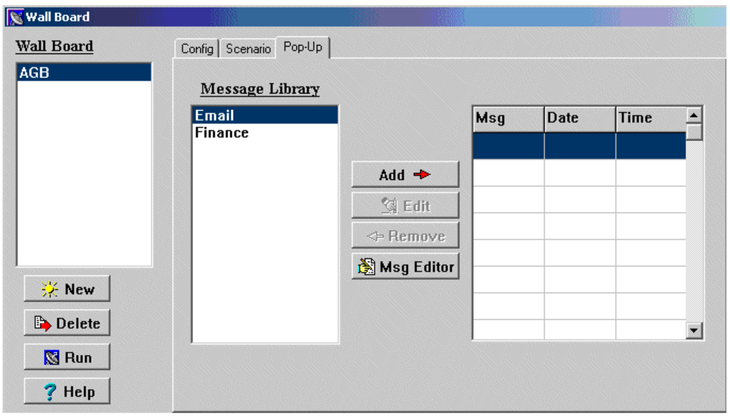

Figure 6-7 Wallboard Window – The Pop-up Tab

The Messages Library on the left of the window contains all of the messages created in the Message Editor. The Pop-Up table, on the right of the window, contains the message names and the date and time of their appearance.

The five action buttons allow you to edit the Pop-Up window, as follows:

- **Send Now:** Click Send Now to send the selected message to the wallboard. It will appear immediately in the message scenario.
- **Add:** Click Add to add a selected message to the pop-up list on the right of the window. The Add Message window opens.
- **Edit:** Click Edit to edit the selected pop up message within the scenario (for example, to change the amount of time or the intervals that the message will be displayed).
- **Remove:** Click Remove to remove a selected message from the pop-up list.
- **Msg Editor:** Click Msg Editor to open the Message Editor and edit the selected message.

To insert a pop-up message to a scenario:

Step 1 In the Pop-Up window, select a message to add to the Pop-Up scenario from the Message Library.

Step 2 Click Add. The Add Pop-Up Message window opens. (This window is identical to the Edit Pop-Up Message window, except that the latter displays the parameters of the message you want to edit.)

Step 3 In the From Date field, enter the date when the message is to start appearing on the wall board. The date must be entered in the DD/MM/YY format.

Step 4 In the To Date field, enter the date when the message is to stop appearing on the wall board. The date must be entered in the DD/MM/YY format.

Step 5 In the From Time field, enter the time when the message is to start appearing on the wall board. The time must be entered in the 24 hour format (00:00).

Step 6 In the To Time field, enter the time when the message is to stop appearing on the wall board. The time must be entered in the 24 hour format (00:00).

Step 7 In the Day of the Week area, click the days of the week when you want the pop-up message to appear.

Step 8 There are two ways to add a pop-up message: Concatenate to Scenario or Wipe Out. In the Concatenate to Scenario mode, the message is incorporated into the message scenario for the indicated amount of time. In the Time field, enter the exact length of time that the message should appear in the scenario. In the Wipe Out mode, the pop-up message overrides the scenario for the length of time that the message should appear. This type of pop-up message appears for the specific amount of time defined in the Time field and according to every time that was predefined in the every field. If two pop-up messages, defined by the Wipe Out method, are configured to appear at the same time, the message with the higher priority (as defined in the Priority field) will display.

Step 9 In the Default Group field, enter the appropriate group. This group will be used for any parameter that is not specifically assigned a group in the next step.

Step 10 Using the up and down arrows, select a parameter in the Param # field. Note that the selected parameter is highlighted in the message area and the parameter's name appears in the Name field.

Step 11 You can now change the Group assignment for this field. Continue to do this until you are satisfied with the parameters and their respective groups.

If you have decided to skip one field and not to assign a group for it, this parameter will display values that are related to the default group selected in step 4 of this procedure.

6.3.3.1 The 'Add/Edit Pop-Up Message' dialog box

This dialog box is displayed when the Add/ Edit buttons in the Wallboard Window in the pop-up tab are clicked.

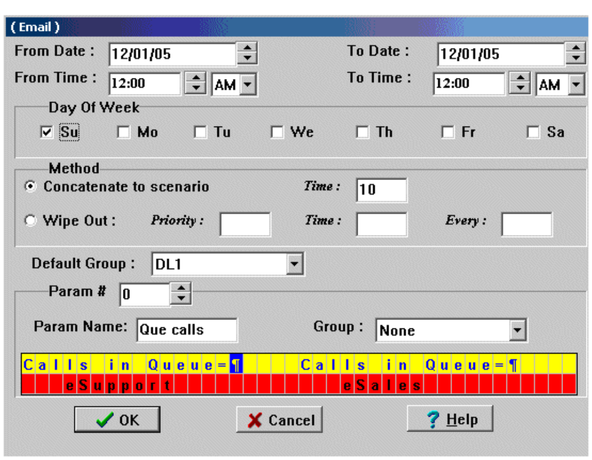

Figure 6-8 'Add/Edit Pop-Up Message' Dialog Box

The 'Add/Edit pop-up Message' dialog box comprises:

- **From Date / To Date**: Select the date range where the pop-up will be activated
- **From Time / To Time**: Select the time range where the pop-up will be activated
- **Day of Week**: Select the Days Of Week where, within the date range, the pop-up should be activated.
- **Method**: Use this area to select between two possible modes for the Pop-Up:
  - — ***Concatenate to scenario:*** In this mode the Pop-Up message is added to the scenario as if it was part of the scenario. It does not replace the scenario messages but added in between.
  - — ***Wipe Out:*** In this mode, the pop-up message will be displayed cyclically (the cycle time is defined by the 'Every' parameter) for the duration defined by the 'Time' parameter. When the pop-up message is displayed, it replaces the currently 'supposed to be displayed' message. If it happens that two pop-up messages should be displayed simultaneously, the one with the highest priority will be actually displayed.
- **Default Group**: The default group is automatically assigned to every parameter in the message that is not assigned to a specific group.
- **Param #**: Use this section to assign a parameter to a group other then the default group. Use the up and down arrows to select a parameter, then change its assignment to a group using the Group list box.
- **Name**: This field displays the selected parameter name.
- **Group**: Changes the assignment of the selected parameter to a different group.

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