OmegaDial

Users Guide

1 General Information

1.1 Introduction

Asteria Solutions Group's OmegaDial is an automated dialing application that enables you to deliver messages, conduct automated polling, and perform prospecting for new customers. The software supports multiple dialing efforts running concurrently, and provides viewing of current activity and analysis of campaign results. OmegaDial has been architected to be scalable, allowing the clustering of low cost servers to support the delivery of thousands of simultaneous calls. The software supports the use of analog circuits, digital T1 and E1 circuits, as well as Voice over IP (VoIP) for interconnecting to the PSTN. OmegaDial includes sophisticated Answering Machine Detection (AMD) algorithms to detect if an answering machine or voice mail system has been reached instead of a human, and allows users to instruct the dialer to perform different actions based on the answering results.

There are seven distinct steps to set up and mange dialing efforts:

- Upload sound files to be used with an automated dialing effort
- Create a request to dial, called a campaign
- Allocate telephony circuits or trunks to a campaign
- Create lists of numbers to be dialed, and associate one or more lists to a campaign
- Define the timeframes for when a campaign should be dialing
- Activate the campaign
- Review the results of the campaign

Lists of numbers may be created independent of campaigns, and assigned once campaigns have been created. This document provides step-by-step instructions how to perform these tasks.

1.2 OmegaDial Interface

OmegaDial has a web based interface to allow users to set up and manage campaigns. The dialer interface is integrated into the ASG configurator tool, presenting a common interface for users to upload sound files and define IVR actions. For users that are using the dialer in association with agents in Asterisk queues, the same interface may be used to set up extensions, devices, users, agents, supervisors, and call queues, as well as review call detail records and recorded calls.

The dialer has been designed to be scalable. If you are dialing over 250 simultaneous numbers, the solution will involve multiple computers. OmegaDial will be installed on the main server with a relational database. Additional servers will be associated with the main server to process dials as directed by the OmegaDial software. This cluster configuration will be set up by Asteria Solutions. To the user, the cluster will be seen as one dialing platform, and all dialer efforts will be defined using a single interface.

Selecting the Dialer link on the configurator interface will display a list of all campaigns, current status, and high level information about each campaign. One or more campaign listings can be expanded to display current results of the campaign and provide a drop down list of actions that can be taken on the campaign.

Go to Section II: Campaign Display Page for a detailed explanation.

Sound Files
A campaign will have one or more sound files to play when a dial is successful. OmegaDial provides a sound file upload utility and file management functions to allow users to easily upload, manage, and assign sound files. Users may define a hierarchical folder system and provide meaningful names to directories for organizing sound files on the server. Sound files may be recorded in various formats including .wav, mp3, etc. OmegaDial will convert the sound files into the necessary format used with the dialing application.

Go to Section II: Uploading Sound Files for a detailed explanation.

IVR
An Interactive Voice Response (IVR) is an application that takes specific action based on the tones detected from a phone set. These tones are called Dual Tone Multi-Frequency, or DTMF. For example, when a caller presses 0 to speak to an operator, the system is detecting the tone created when the 0 button is pressed on the phone set and then transfers the call to a specific extension associated with an operator.

Each dial campaign has an IVR that indicates what actions should occur once a call is successfully dialed. The IVR may be simple or complex. Simple IVRs are defined as a request to dial a number, play a recorded sound file, and disconnect the call. If desired, a different sound file may be played if the system detects an answering machine or voice mail as opposed to a live person. More complex IVRs are dialing efforts that prompt users for input and/or perform call transfers. IVRs may be linked together to create complex IVRs that automate numerous functions.

Complex IVRs are built using the IVR builder. Simple IVRs may be built with the IVR builder, or may be automatically created by OmegaDial during the Create Campaign command.

Go to Section II: Creating IVRs for a detailed explanation.

Campaigns
A campaign is a request to dial and perform one or more functions for a successful dial. Dials are considered successful if the call is answered by either a person or an answering machine. Campaigns are defined using the Create Campaign command.

Go to Section II: Creating and Editing Campaigns for a detailed explanation.

Contact Pools
Numbers to be dialed are uploaded into the system from Comma Separated Value (CSV) format files. CSV format number lists are generally purchased or created using a spreadsheet tool such as Excel. A list of numbers to be dialed is called a Contact Pool. There may be as many Contact Pools uploaded to the system as desired. Individual campaigns may have one or more Contact Pools assigned to define the numbers to dial.

Contact Pools actually have a hierarchical structure. A pool is made up of a list of contacts. Each contact may have one or multiple numbers associated with it. When uploading numbers, there are two types of Contact Pools available: Simple and Multiple. Simple is defined as having one number associated with each contact. Multiple is defined as having more than one number associated with each contact.

The type of Contact Pool dictates the behavior of the dialer. Campaigns using simple number Contact Pools will dial the number associated with the contact, and then dial the next contact, successful or unsuccessful. Campaigns using multiple number Contact Pools will dial the first number associated with a contact. If that dial is unsuccessful, the dialer will attempt the next number associated with that contact, and continue attempting numbers associated with that contact until a successful dial is initiated, or there are no more numbers associated with the contact. The dialer will then begin dialing the next contact.

Go to Section II: Creating and Assigning Contact Pools for a detailed explanation.

Trunks
Asterisk supports placing calls through analog and digital circuits as well as via VoIP. OmegaDial can allocate portions of available capacity to individual campaigns, insuring that a specific campaign gets some dialing capacity. While a campaign is active the allocated capacity may be changed dynamically. If capacity of a campaign is decreased, OmegaDial will complete current calls and then reduce dialing efforts to the new setting. If capacity of a campaign is increased, OmegaDial will immediately begin using the newly allocated channels for dials.

Go to Section II: Creating and Assigning Trunks for a detailed explanation.

Scheduling
Campaigns are either active or inactive. When a campaign is inactive, no dialing will occur. When a campaign is active, dialing will occur on the specific days of the week and times during the day specified in the schedule rules associated with that campaign. A campaign may have

one or multiple schedule rules. All rules defined for a particular campaign will apply to the campaign. For example, if you want a campaign to run during the month of May, dialing weekdays between 8:00 a.m. and 6:00 p.m. and on weekends dialing between 10:00 a.m. and 4:00 p.m., then you would create two rules. One rule would define the duration of May 1 through May 31 dialing on Mondays, Tuesdays, Wednesdays, Thursdays, and Fridays between 8:00 a.m. and 6:00 p.m., the other rule would define the duration of May 1 through May 31 dialing on Saturdays and Sundays between 10:00 a.m. and 4:00 p.m.

With the advent of local number portability and cellular phones, area codes no longer necessarily indicate location. Therefore the dialer does not make assumptions about time zones based on area codes. If it is desirable to dial multiple time zones, it is recommended that multiple campaigns be created. For example, in the continental United States there are four time zones. Therefore to maximize the ABC dialing campaign, one could create a campaign for the Eastern time zone, Central time zone, Mountain time zone, and Pacific time zone. Each campaign will be defined to have the same functionality except the scheduling rules will be associated with the time in the target time zone. Contact Pools are then created that contain numbers known to be in the target time zones, and associate the correct Contact Pools to the desired campaign.

Note: The dialer has one time clock associated with the main server where OmegaDial is installed. When defining rules for campaigns, the time specified is in the time zone of the main dialer so users will need to apply any offsets when targeting different time zones.

Go to Section II: Creating Rules for Scheduling Campaigns for a detailed explanation.

Activation

Campaigns are either active or inactive. When a campaign is inactive, no dialing will occur. When initially defining a campaign, it is recommended to set the campaign to inactive. After assigning Contact Pools, trunks, and dialing rules, then activate the campaign to commence dialing.

It is recommended that a test pool of numbers be created allowing users to verify the campaign has been correctly defined and the desired IVR actions have been defined correctly. After validating the campaign with a few test numbers, additional Contact Pools can be easily associated to the campaign.

Go to Section II: Activating and Deactivating Campaigns for a detailed explanation.

Reporting

OmegaDial tracks all dial activity of campaigns and stores them in a relational database. When a campaign summary is expanded, a high level summary of the specific campaign activity is presented by call disposition. If desired, a report can be generated that provides more detail, including the average total time and average answer time for each call disposition, and the number of calls that traversed each option defined in the IVR associated with the campaign. Report results may be exported to Comma Separated Value formatted files for further analysis. In addition, a report may be generated that displays the call detail record of every dial performed for a campaign.

Go to Section II: Generating Reports for Campaigns for a detailed explanation.

Building Contact Pools

In addition to reporting the call disposition from a campaign, new Contact Pools may be created from campaign results. For example, it may be of interest to generate a new Contact Pool based on the numbers that were successfully answered in a campaign to be used in a different campaign.

Go to Section II: Creating New Contact Pools from Report Results for a detailed explanation.

Archiving

An automated dialer that supports multiple simultaneous campaigns and can dial thousands of simultaneous numbers generates millions of records in the database. With continual use the database can become less responsive due to the shear volume of information that is stored. To insure optimal performance, OmegaDial provides an archiving mechanism to remove completed campaigns. Users may store past campaigns in a compact format, and if/when necessary, restore the campaigns for analysis. The frequency of needing to archive campaigns will be dependent on the size of campaigns and the hardware platforms in use.

Go to Section II: Archiving Campaigns for a detailed explanation.

2 Step-by-Step Instructions

2.1 Campaign Display Page

Selecting the Dialer link or selecting the Campaigns command will display a summary of current campaigns defined in OmegaDial. Individual campaigns may be expanded to display more information and available action commands. The information displayed represents:

Main Header Information:

Radio Button Red	Campaign Inactive
Radio Button Green	Campaign Active
1.1 Created	1.2 The date the campaign was created.
Active	True or False whether the campaign is activated
Scheduled	The number of schedule rules that currently apply to the campaign or Not Scheduled
Channels	The number of simultaneous dials assigned to the campaign
Last Status	The last known status of the dialer. Responses include: ▪ Out of numbers: OmegaDial has dialed all numbers assigned to the campaign ▪ Not scheduled: The current time is not included in any rules associated with the campaign

More information may be displayed by expanding one, many, or all campaigns. In expanded mode, the display will show the current call disposition statistics (Dialstatus) of the campaign.

Human	The number of live answers detected in the campaign
Machine	The number of answering machines or voice mail detected in the campaign
Normal	Dependent on the type of campaign: ▪ If AMD is not turned on, then means the number of successful dials ▪ If AMD is turned on, means the number of dials that neither human or machine could be determined
Congestion	The number of dials that were not made due to unavailability of resources. The unavailability of resources may be outbound carrier limitations, or target audience carrier limitations. Further analysis is required to determine the reason for congestion.
Busy	The number of dials unsuccessful because the target dial was in use.
No Answer	The number of dials unsuccessful because the target dial did not answer the phone.
Channel Unavailable	The number of dials unsuccessful because the dialer was unable to attempt the dial due to trunk constraints

In expanded mode, a drop down list becomes available to the user to manipulate the selected campaign. The commands available and their function are:

Refresh	Refreshes the display of the current campaign Dialstatus statistics
Edit Campaign	Allows changing variables associated with the campaign
Duplicate Campaign	Provides an easy mechanism to create a new campaign without having to reenter IVR information
Activate	Changes the status of the campaign to True
Deactivate	Changes the status of the campaign to False
Assign Pools	Link to the Assign Pool page where contact pools may be assigned and un-assigned from a campaign
Assign Trunks	Link to the Assign Trunks page where trunk capacity can be assigned to a campaign, or adjusted. If a campaign is active, the number of trunks may be increased or decreased in real time. If increased, the dialer will begin to use the newly assigned capacity immediately. If decreased, the dialer will complete in progress calls before decreasing the number of trunks being used for a campaign.
Reports	Generates call disposition report for the campaign
Schedule	Link to the rule builder page where rules defining when the campaign should be attempting dials may be created and deleted.
Delete	Deletes the campaign.

2.2 Uploading Sound Files

Selecting the IVR tab will display a summary of current IVRs in the system. IVRs typically use sound files to prompt users, so a sound file management subsystem is provided within the IVR builder tool. Selecting the Sounds command will display the recording studio page where sound files can be uploaded and managed.

If many sound files are to be used a directory structure may be created to help organize accessing files. Creating a hierarchical file structure will make accessing the desired sound file easier when using the IVR builder tool, allowing shorter lists to be presented when assigning a sound file. For example, if you want to manage sound files by the companies that you perform dialing campaigns, you may create directories called CompanyA, CompanyB, and CompanyC.

To create a new directory, name the directory and select Create Directory. To upload files into a specific directory, select a directory from the Upload File pull down menu. Select the Browse button and locate the sound file to be transferred to the server. Select Upload and the sound file will be uploaded into the desired folder.

Once a file has been uploaded it will be added to the display list of sound files in the selected directory. Sound files on OmegaDial server may be manipulated by selecting the check box associated with a particular file and using the Rename, Submit, or Delete commands.

2.3 Creating IVRs

An Interactive Voice Response (IVR) is an application that takes specific action based on the tones detected from a phone set. Selecting the IVR tab will display a list of IVRs currently defined in the system.

An IVR is made up of one or more actions linked together based on input from the dialed party. The IVR builder provides a point-and-click method to program IVRs. A simple example will be used to introduce navigating the IVR builder. Assume it is desirable to have a dialing campaign that dials a number, plays a message explaining a product and prompts the listener to press 1 if they would like more information about the product, which then prompts the user to press 1 to speak to an operator, or to press 2 if they would like to speak to an operator to process an order for the product. The IVR needs to:

1) play the introductory message and prompt the user to press 1 or 2
2) if 1 is pressed, play the more detailed message and prompt the user to press 1 for an operator
3) if 2 is pressed, transfer the call to a call center of operators to process the call
4) at the conclusion of transferring the call to an operator, hang up the call

Each of the steps in a phone tree consists of performing an action and then doing something after the action. Each collection of Action/Then commands is called a state. An IVR is a collection of states linked together to make up a complete IVR.

To create an IVR, select the Add button. You will be prompted to enter a name for the new IVR. Once a name is entered, the IVR builder will display a list of all states associated with the IVR. Each IVR has a Start state and Hangup state by default. Additional states may be created and linked together to instruct the dialer to perform the desired actions. To create a new state select the Add State button. The Create State page will be displayed. Enter a unique name for the State within the IVR. Then specify the action to perform within the state, and what should be done after the action is completed.

The available actions and their function are:

Play Sound	Plays a sound file
AGI Command	Performs an AGI command, which is an Asterisk scripting capability
Hangup	Disconnects the call
Forward	Redirects the call to a number outside the Asterisk PBX
Set Context	Assigns a URL to the call that will be used in conjunction with Asteria's Agent Client software to perform screen pops
Send to Queue	Redirects the call to an Asterisk queue
Capture Digits	Captures the DTMF tones entered by the listener
Send to User	Redirects the call to a user defined in the Asterisk PBX
Send to IVR	Redirects the call to a different IVR
Send to Extension	Redirects the call to a specific extension in the Asterisk PBX
Set Monitor	Currently not implemented
Add to DNC	Currently not implemented

The choices presented after an action are function dependent.

Play Sound
Selecting Play Sound will allow the user to select from a list of stock sounds (sound files provided with the Asterisk PBX) or from custom sounds (sound files uploaded by the user). The user may also select if Answering Machine Detection should be enabled by activating the check box. If Answering Machine Detection is turned on, then the user has the opportunity to specify what action to perform if an answering machine is detected (for example, play a different sound file or hang up without playing a sound file).

After playing the sound, the available actions are to wait for a key press or to transfer to another state. If wait for key press is selected, the user is presented a list representing 0 through 9 key presses. Each key press may be identified to specify the action that should be taken if a user presses that key, allowing the IVR to be directed to a different state based on the listener's action. One or more key press actions may be defined. In addition, a failure action may be specified to indicate what action should be taken if the listener does not press any key (or presses a key that does not have an associated action).

AGI Command
Selecting AGI Command will allow the user to specify the path and file name of an AGI script that should be run. AGI scripting allows access to Linux utilities and other programs, including databases that may be installed on the dialing server. AGI Command is used to integrate IVRs with other applications.

After executing an AGI command, the available action is to transfer to another state.

Hangup
Selecting Hangup will terminate the call. There is no subsequent action to Hangup.

Forward
Selecting Forward will allow the user to specify a number where the call should be redirected. For example, if the dialer is being used to generate leads for an existing call center, the forward action can be used to transfer the dial to the call center. Be sure to enter the entire number to reach the desired party, including national or international dial codes.

After forwarding a call, the available action is to Hangup.

Set Context
Selecting Set Context will allow the user to select from a list of previously defined call contexts. Call contexts are url strings defined using the Call Context tab in the ASG Configurator. Call contexts are appended to a call and are used by the Asteria Agent Client software to specify a particular web page to present to Agents when a call passes through an Asterisk call queue.

After setting a call context, the available actions are to transfer to another state or to Hangup.

Send to Queue
Selecting Send to Queue will allow the user to redirect a call to an Asterisk call queue from a list of previously defined queues. Call queues provide the functionality to stack up calls in the order they are received and distribute calls to available agents based on specified ring strategies. Call queues have many properties that impact how agents and agent supervisors process calls, and are defined using the Queues tab in the ASG Configurator.

After directing a call to a call queue, the available action is to Hangup.

Capture Digits
Selecting Capture Digits will allow the user to specify a variable name where the key presses of a listener will be stored. For example, if the dialer is being used in a polling application to rate a product, the response to a question can be captured into the specified variable.

After capturing the listener's response, the available actions are to transfer to another state or to Hangup.

Send to User
Selecting Send to User will allow the call to be redirected to a specific Asterisk user from a list of previously defined users on the Asterisk PBX. Users are defined using the Users tab in the ASG Configurator. Users may have one or multiple extensions.

After directing the call to a user, the available action is to Hangup.

Send to IVR
Selecting Send to IVR will allow the user to redirect the call to another IVR from a list of previously defined IVRs. In this fashion multiple IVRs may be linked together.

After directing the call to another IVR, the available action is to go to another state.

Send to Extension
Selecting Send to Extension will allow the user to redirect the call to an extension from a list of previously defined extensions on the Asterisk PBX. Extensions are defined using the Extensions tab in the ASG Configurator. There are a number of different extension types that may be configured with Asterisk.

After directing the call to an extension, the available action is to Hangup.

2.4 Creating and Editing Campaigns

Selecting the Add Campaign or Edit Campaign button presents a form to create or edit information necessary to define a campaign. The fields represent:

Campaign Name	Enter/edit the name to be associated with this campaign	
Email for Notification	Enter the email path for informational emails about campaign results	
Active	True activates the campaign, False deactivates the campaign	
IVR	Presents three options: Existing/Simple/Simple with AMD	
	if Existing	Displays pick list of available IVRs to assign/edit with this campaign
	if Simple	Displays pick list of sound files to play if human answers (answering machine or voice mail will be treated as a no answer)
1.3	if Simple with AMD	Displays pick list of sound files to play if human answers, and another pick list of sound file files to play if answering machine or voice mail is detected)
Prefix	The number pattern to pre-pend to each number in the Contact Pool(s) associated with this campaign. This may represent the account code for VoIP providers, digits necessary for an outside line from a PBX, or a country code when dialing internationally.	
Postfix	The number pattern to post-pend to each number in the Contact Pool(s) associated with this campaign. May be a number used for accounting purposes in call detail records, for example.	
Caller ID	The caller ID to be used when dialing this campaign	
Call Time Out	The amount of time in seconds that the dialer should try to dial a number in this campaign before terminating. This provides a maximum amount of time to allocate to an unanswered call.	
Attempts	The number of times the dialer should retry a contact in a Contact Pool that was unsuccessful because previous attempts had call dispositions of busy or no answer	
Use SIT Detection	Determines whether the dialer detects and reports on Special Informational Tones (SIT) provided by various carriers. If true and a SIT is detected, the SIT is reported and the dial is not retried. If false, the call is treated as busy and the retry attempts apply. Various SIT types are reported.	
Wait for Greeting	Enables messages to be played in their entirety when an answering machine is detected.	

2.5 Creating and Assigning Contact Pools

OmegaDial uses the concept of pools to determine the numbers to dial for a campaign. Pools have a hierarchical structure. A pool is a list of contacts. Each contact has a Name, an Account Number, and one or more numbers.

To create a pool, select the show pools command from the OmegaDial main menu. The list of pools will be displayed by name, the number of Contacts in each pool, and the campaign or campaigns that the pool is currently assigned. Actions available are Add Pool, Edit Pool, Edit Contacts, and Delete Pool.

Add Pool	Select the Add Pool command. You will be prompted to enter a name for the new pool. It is beneficial to provide meaningful names to easily identify a specific pool when assigning pools to campaigns. When complete, select the create pool button. 1.4 Once a pool has been created, you are presented commands to add, edit, and delete contact information
Add Contact	Allows manual input of a Contact Name and Account Number. Once a contact entry is created manually, the user will be presented the options to add, edit, and delete numbers associated with this contact.
Edit Contact	Allows editing of the selected Contact Name and Account Number. Select the radio button to identify the contact to edit, and enter new Contact Name and / or Account Number.
Upload Contacts	Allows contact information to be loaded from .csv format files. Selecting the Upload Contacts command will allow the user to select either a Simple format where there is one number per contact, or a Multiple format where there are more than one number per contact defined in the .csv file. The user may use the Browse button to select the appropriate .csv file to upload from their desktop.
Show Numbers	Displays the number(s) associated with the selected contact. Once the number(s) are displayed, numbers associated with the contact may be edited and deleted, and additional numbers may be added to the contact.
Delete Contact	Deletes the selected contact. If the Delete Contact command is selected, the user will be prompted to confirm the delete action.
Edit Pool	Allows editing of the selected pool's name.
Edit Contacts	Displays a list of all contacts in the pool and allows for adding, editing, uploading, showing of numbers, and deleting of contacts.
Delete Pool	Deletes the selected pool. If the Delete Pool command is selected, the user will be prompted to confirm the delete action.

2.6 Creating and Assigning Trunks to Campaigns

Asterisk supports interconnection via analog and digital circuits as well as via Voice Over IP. A connection to Asterisk is called a trunk. A trunk may carry one or more calls, depending on the type of interconnection. Trunks are assigned using the Devices tab of the configurator.

Once one or more trunks are configured, portions of the trunks may be assigned to individual campaigns. The amount of capacity assigned controls the number of simultaneous dials available to a specific campaign. To assign capacity:

On the campaign summary page expand the desired campaign listing.
Select the Assign Trunks command.

You will be presented a list of all trunks currently configured on the system, and a pull down selection displaying the number of channels on each trunk. Select the number of channels from the desired trunk to assign to the campaign and press the Assign Trunks command. This capacity will now be available to the campaign.

The assignment of trunks to campaigns is dynamic. For example, if a specific campaign has 50 channels assigned and it is desirable to increase the number of simultaneous calls, the assignment of additional capacity will cause the dialer to begin using additional capacity immediately. If it is desirable to decrease the number of simultaneous calls, the assignment of less capacity will cause the dialer to decrease the number of trunks in use as calls are completed.

2.7 Creating Rules for Scheduling Campaigns

When a campaign is active, dialing will occur on the specific days of the week and times during the day specified in the rules associated with that campaign. A campaign may have one or multiple dialing rules. To create a rule for a campaign, identify the campaign on the View Campaigns list, expand the campaign, and select the Schedule button. All rules associated with the selected campaign will be displayed.

Rules may be Added, Edited, or Deleted by selecting the appropriate command at the end of the rules display.

To add a rule, select the Add command. Under the Date display, select the duration that the new rule should be active using the Start and Stop calendar select lists. Under the Time display, select the time of day the new rule should be active using the Start and Stop clock select lists. Then identify the days of the week during the duration that the rule should be active by selecting the appropriate check boxes. When complete, Save the rule.

Rules may overlap in time. An active campaign will dial numbers if any rule associated with a campaign indicates OmegaDial should be dialing.

To edit a rule, select the Edit command and make any desired changes in the same manner that a rule is added.

To delete a rule, highlight the rule to be deleted by clicking on the check box associated with the rule and selecting the Delete Rule command. You will be prompted to confirm your Delete request. If the only rule indicating that dialing should be occurring at the time the rule is deleted, active calls will be completed but no more dial attempts will be made.

Note: Specifying Time of Day that a rule is active applies to the days of the week selected. Time of day does not overlap days. Time is specified in the time zone of the server, as displayed at the top of the rules page display. Offsets must be manually calculated for campaigns dialing different time zones.

2.8 Activating and Deactivating Campaigns

Campaigns are either active or inactive. When a campaign is inactive, no dialing will occur. If a campaign is active, then dialing may occur if the scheduling rules indicated that it is appropriate to be dialing, there are available contacts in the pools assigned to the campaign to be dialed, and there are available trunks assigned to the campaign.

A campaign status is initially set to Active or Inactive when creating the campaign. The status may be changed by either editing the campaign using the Edit Campaign command from the campaign display list, or by expanding the campaign in the list and selecting the Activate or Deactivate command.

If a campaign is active and placing calls when the Deactivate command is selected, OmegaDial will complete all current calls associated with the campaign but will not initiate any new dial attempts.

2.9 Generating Reports for Campaigns

Once a campaign is activated, reports can be generated. To access reports select the Dialer tab in the Configurator. Expand the campaign for which reports are to be generated. When the campaign is in expanded mode, select the Reports button to view the report. The table will show a Dialstatus, Count, Average Total Time, and Average Answer Time.

Dialstatus is the disposition of each number dialed. All Dialstatus terms and definitions are listed below. All of Dialstatus' may not be applicable for every campaign. Depending on the campaign, some may only have a few Dialstatus' that are applicable. Count is the current number of dials that apply to the corresponding Dialstatus.

ALL CALLS	The total of all calls dialed since the campaign was activated.
ANSWER	Dial successful because target dial answered the phone or an answering machine was detected.
BUSY	Dials unsuccessful because the target dial was in use.
CANCEL	1.5
CHANUNAVAIL	Dials unsuccessful because the dialer was unable to attempt the dial due to trunk constraints
CONGESTION	Dials that were not made due to unavailability of resources. The unavailability of resources may be outbound carrier limitations, or target audience carrier limitations. Further analysis is required to determine the reason for congestion.
DIALING	Dials currently being made.
HUMAN	Live answers detected in the campaign.
MACHINE	Answering machines or voice mail detected in the campaign.
NOANSWER	Dials unsuccessful because the target dial did not answer the phone.
NORMAL	Dependent on the type of campaign: 1.6 If AMD is not turned on, then means the number of successful dials 1.7 If AMD is turned on, means the number of dials that neither human or machine could be determined
REMAINING	Number of dials that have not yet been called
SIT_IC	Special Information Tone: Operator intercept
SIT_NC	Special Information Tone: No circuit found
SIT_RO	Special Information Tone: Reorder (system busy)
SIT_UNKNOWN	Special Information Tone: Unknown
SIT_VC	Special Information Tone: Vacant circuit (non-registered number)

2.10 Creating New Contact Pools from Report Results

Beside each Dialstatus listed, except All Calls, is a check box. New Contact Pools can be created from any Dialstatus on the report. In the Campaign report, select the check box that corresponds with the Dialstatus in which a Contact Pool should be created. Select the Build Pool button and a field called Pool Name appears. Give the pool a meaningful name to easily identify it and select the Go button. The pool is added to the list of all Contact Pools.

2.11 Archiving Campaigns

Over time usage of OmegaDial will accumulate completed campaigns. Each campaign tracks the results of every dial attempt. Removing completed campaigns improves the ease of use of the interface, in addition to improving the performance of the underlying database. Campaigns may be deleted at any time. However, frequently it is desirable to keep completed campaigns for future analysis and billing purposes. In this case, campaigns may be archived and restored at a later date. Archiving will remove and compact all data associated with a campaign from the database.

To archive a campaign:

From the Campaign Display page expand the target campaign.
Select the Archive Campaign command. You will be prompted to confirm the action.

To restore a campaign:

From the Campaign Display page select the Show Archives command.
A list all archived campaigns will be displayed.
Identify the campaign to be restored and select the download Archive command.

To delete an archived campaign:

Identify the archived campaign to delete from the archived campaign list.
Select the Delete Archive command. You will be prompted to confirm the delete action.

3 Dialer Quick Reference Guide

CREATING A DIAL CAMPAIGN – QUICK REFERENCE

STEPS	
1.8 Upload sounds in IVRs tab	Choose the file to be uploaded; Select the **Upload** button. (Note: The file will be converted to the necessary format when it is uploaded.)
1.9 Create IVR from IVRs tab (or use Simple IVR within the campaign)	For more than a simple blast message with AMD (Answering Machine Detection), create your IVR in the *IVRs* tab.
1.10 Create Campaign from Dialer tab	Select **Add Campaign** to define the campaign
1.11 Upload contact pools	Select **Show Pools** from *Contact Pools* From the list of pools, select **Add Pool** Name the pool and select **Create Pool** Contacts can be added manually by selecting **Add Contact** or a .csv file can be uploaded by selecting **Upload Contacts** If contacts are added manually, a unique identifier must be added in the Name field (Account ID is optional). Once the new contact is added select **Add Number** to associate a number to the contact. If contacts are uploaded, select Simple format if the contact list only contains one number per contact or Multiple Number format if there is more than one number per contact.
1.12 Assign pools	Go to **Show Campaigns** Expand the campaign that should be edited by selecting the button or arrow next to the campaign name. From the drop-down list select **Assign Pools** Check any number of pools that should be associated with this campaign
1.13 Assign trunks	Go to **Show Campaigns** Expand the campaign that should be edited by selecting the button or arrow next to the campaign name. From the drop-down list select **Assign Trunks** Select the number of channels that should be used from one or multiple trunks listed.
1.14 Schedule the campaign	Go to **Show Campaigns** Expand the campaign that should be edited by selecting the button or arrow next to the campaign name. From the drop-down list select **Schedule** Create one or multiple rules for the campaign (Note: If multiple rules are created, all rules will apply to the campaign)
1.15 Activate the campaign	Go to **Show Campaigns** Expand the campaign that should be edited by selecting the button or arrow next to the campaign name. From the drop-down list select **Schedule** Alternately, choose **Edit Campaign** from the drop-down list, change Active to True, and select **Update Campaign**.