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NEAX®2000 IVS

CallCenter WorX
System Manual

MARCH, 2000

NEC America, Inc.

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Overview

Chapter 1 CallCenterWorX Overview

Describes the functions of the application, the features and enhancements of its subsystems, the system capacities, and other documentation which may be helpful.

This page is for your notes.

CHAPTER 1 CallCenter WorX Overview

1. General Description

A call center often serves as the primary interface between customer and company. It is the new front line in business-to-business and consumer transactions, a customer contact center that must also remain in contact with the entire organization. When agent and customer share a call, a number of vital dynamics are in play:

- Communication is taking place at its most fundamental level—voice.
- Two-way information is being shared that dictates a transaction outcome—data.
- The transaction experience is either pleasant or unpleasant.
- Money is either made or lost.
- Customer loyalty is developed or disrupted.

CallCenterWorX is a suite of hardware and software solutions that are focused on customer care. It includes tools for enhancing accurate call direction, for maximizing and measuring performance, and for efficiencies in time and cost—a call center that not only works hard for you, but responds quickly and efficiently to the customer.

The CallCenterWorX suite includes the Automatic Call Distribution (ACD) system and the Management Information System (MIS), elements that streamline call flow and work flow. CallCenterWorX gives you a flexible, adaptable tool to control both the structure and the operation of your call center.

The ACD system supplements the call processing capabilities of the NEAX2000 IVS. Typical call routing is designed to connect each caller with the most appropriate agent to handle their call in the shortest time possible. Avoiding long wait times and getting the caller directly to someone who can deal with their request can have a substantial impact on customer satisfaction. The ACD facilitates the handling of a large volume of calls with the smallest number of resources, while at the same time minimizing a caller's wait for assistance.

When the ACD accepts a call, it can be configured to play a message to the caller and route the call in a pre-specified order to a queue of waiting calls for a particular split (group of agents). The queued call is then answered in sequence by the next available agent in that split.

As each call progresses through the system, the ACD provides data to the MIS, which translates the call-handling data into meaningful statistics. The MIS system of CallCenter*WorX* uses these statistics to offer call center managers and supervisors access to important real-time and historical data. This data is used for maximizing agent productivity and assuring quality performance in handling incoming and outgoing call volume in the call center.

The MIS Status Screens (Real-Time Screens) provide color-coded, up-to-the-second views of agent and queue activity. Statistics on the call volume, and on the effectiveness of the agents handling those calls, are computed in real-time and are displayed for the current hour and day. These statistics are also collected in the MIS database and used to generate reports in text or graphical format, giving you the data you need to make informed decisions concerning the management of your call center.

2. CallCenter WorX ACD 2.0 Features and Enhancements

The CallCenterWorX ACD 2.0:

- 1. Runs on the **Windows NT 4.0 Workstation** operating system using a **Client/Server** architecture, making information and processing directly available from the desktop interface.
- 2. Uses a **GUI interface** to make commands and controls easily accessible to the user.
- 3. Has the capacity to serve **10**, **20**, **30**, **40**, **60**, or **80 logged-in agents**.
- 4. Can support up to **nine tenants**.
- 5. Routes incoming calls using:
 - A user-defined set of call handling instructions named Call Control Vectors (CCVs), Week Schedules, and Holiday Schedules.
 - A system of **priorities and call overflows** designed to deliver calls rapidly and efficiently to the appropriate split or agent.
- 6. Has **dockable Toolbars** which can be dragged to other locations on the working screen. The user can also build a **personal toolbar** of most frequently used icons.
- 7. Provides **Toolbar icons** and **ToolTips** for all MAT commands, for opening report views, and for **online Help** and **context-sensitive Help**.
- 8. Provides **Data Entry screens** with a choice of background color pattern for each screen.
 - Data Entry screens can accept new data or revise previously entered data with **immediate confirmation** of the action. These screens list operational data in **drop-down menus**.
 - Each Data Entry screen can open to a **report view** showing the currently programmed data. The font style and size and the column headings in the report can be reset to suit your preference.
 - The report view can open to a **Print Preview** showing the report as it would be printed, and can send the report to a printer. A report can be saved to a **data file**, saved to a **Microsoft Excel** file, or exported to a **Microsoft Access** database.
- 9. Has a **optional Workbook area** showing a tab for each open screen with the MAT command icon for that screen. A report icon displays on top of the command icon for those screens open to the report view.
 - **Multiple screens** can be open simultaneously. A screen is made the active screen by selecting the appropriate Workbook tab.
- 10. Has an **optional Status bar** which reflects the state of the active screen.
- 11. **Supports 6 languages** (English, Japanese, French, German, Italian and Spanish) for display to the agent's D^{term} position.
- 12. Uses a **Trace Client** to view ACD call processing on screen. CCV programming diagnostics let you monitor the call flow in real-time to design or re-engineer your installation.

3. CallCenter WorX MIS 2.0 Features and Enhancements

The CallCenterWorX MIS 2.0:

- 1. Runs on the Windows NT 4.0 Workstation, Windows 95, and Windows 98 operating systems.
- 2. Uses a **GUI** interface to make commands and controls easily accessible to the user.
- 3. Provides a **dockable Toolbar** with **ToolTips** to speed and simplify operation.
- 4. **Monitors the performance** of the call center to maintain efficiency and determine the optimum number of agents and trunks to provide the best service at the lowest cost, using:
 - Real-time status screens displaying ongoing activity.
 - Current and historical reports for analysis of traffic and agent productivity.
 - The capacity for **additional MIS PCs** to be added on a remote basis. These additional MIS applications can be operated on a **TCP/IP**-based system or via an **RS-232** connection.
- 5. Analyzes statistical data received from the ACD and **stores historical data** for 38 days plus 47 hours.
 - Data accumulated during each hour is summarized and stored on the hard drive, then used to prepare **reports or graphs** detailing the activity of the call center for a day, a week, or a month.
- 6. Displays real-time activity screens showing **up-to-the-second caller activity and agent activity** in the call center in report or graph form.
 - This data can be printed on demand or by schedule.
 - Each report screen has a **modifiable grid layout** in which the data can be sorted alphabetically. The data can be refreshed to **update** the report, and the **printer setup** for the modified layout can be saved.
 - A text report can be saved into a **tab-delimited text file**. A graph view can be saved into a file as a **Bitmap or JPEG**. A text report or graph can be copied and pasted into **other Windows applications**.
 - A **variety of reports** providing different data views are available for agents and agent groups, splits, trunk groups, pilots, and tally codes.
 - **Multiple window views** can be open at the same time, letting the user view several real-time screens, a few reports, and the system configuration concurrently.
- 7. Has a **status bar** at the bottom of the MIS window which displays the current date and time, and the current Longest Waiting Call.
- 8. Offers a **wall board GUI** for wall message assignment and scheduling, providing the user with a selection of wall board types, message colors, real-time statistics, graphics, data scope, and display modes from drop-down lists.
- 9. Includes **online Help** and a **context-sensitive Help** system.
- 10. Supports both the **English and Japanese languages** for display to the user's screen.

4. System Capacities

Table 1-1 System Capacities

	Capacities		
No.	Item	CallCenter WorX ACD	CallCenter <i>WorX</i> MIS
1	Tenants per System	9	Note 1
2	Splits per ACD Tenant	Note 2	Note 2
3	Splits per System	30	30 Note 1
4	Splits per Logon ID	16	4
5	Active ACD Agents per System	80 Note 3 & Note 7	80 Note 3
6	Trunks per System	255 Note 7	255
7	Maximum Queue Depth	300	-
8	Priority Levels	1-250	Note 4
9	Maximum Calls in Queue per System	300	_
10	Transfer-to-PBX Numbers	120	-
11	Agent Logon ID Codes per System	300	300
12	Agent Logon ID Code Digits	9	9
13	Printers per System	1	1
14	Statistics Report History Limit	_	38 days + 47 hrs Note 5
15	MIS per System	Note 6	Note 6
16	Pilot Numbers	128 Note 7	-
17	Tally Code Names per Split	_	100
18	Tally Code Names per System	_	3000
19	Busy Hour Call Attempts (BHCA)	Note 8	_

- Note 1: See Chapter 2, Heading 8, "Multi-tenant MIS Considerations—Split Numbering."
- **Note 2:** The total number of splits per system (30) is shared among the total number of tenants (up to 9).
- **Note 3:** Agent positions available depend on the installed security key's capacity for logged-on agents. The total number of agents is shared among the total number of tenants (up to 9). Security keys are available in the following capacities: 10, 20, 30, 40, 60, and 80.
- Note 4: The MIS tracks Split queue calls as "High" and "Standard."
- **Note 5**: Current and previous days' statistics are stored on an hourly basis up to a maximum of 47 hours. Daily data is stored for the preceding 38 days.
- Note 6: See Chapter 2, Heading 7, "CallCenterWorX MIS PC Support."
- **Note 7:** Dependent upon the CallCenterWorX configuration formula based on the OAI monitoring limitations: (Agents x 2) + (Pilots and/or Personal Pilots) + Trunks + IVR Ports must be equal to or less than 256.
- **Note 8:** See the "NEAX2000 IVS² Business/Hotel/Data Features and Specifications" manual for this information (reflects IVS² information only).

5. Other Documentation

Other documentation available from NEC may offer helpful information for the specialized needs of your system.

Table 1-2 Related Documentation Available from NEC

Document Name					
CallCenterWorX ACD Features and Specifications Manual					
CallCenterWorX MIS Quick Reference Guide					
NEAX2000 IVS ² Business/Hotel/Data Features and Specifications					
NEAX2000 IVS ² Command Manual (shared binder)	151969				
NEAX2000 IVS ² Maintenance Manual (shared binder)					
NEAX2000 IVS ² OAI System Manual	151991				
NEAX2000 IVS ² Feature Programming Manual	151971				
NEAX2000 IVS ² Wireless Communication System Manual					
NEAX2000 IVS ² Remote PIM System Manual					
NEAX2000 IVS ² Installation Procedure Manual					
NEAX2000 IVS ² Office Data Programming Manual					
QueWorX Application Manual	0223634				
Navigator Reports Manual	241680				
Navigator Configuration Guide	241681				
Navigator Real-Time Screen Manual	241682				

CallCenterWorX Overview

Other Documentation

This page is for your notes.

CHAPTER 1 Page 8 Issue 3.0

Installation and Configuration

Chapter 2 System Requirements

Lists hardware, software, and information requirements for the most common configurations.

Chapter 3 Connection Drawings

Contains drawings and instructions for connecting the PBX to the computer(s) in several configurations.

Chapter 4 Programming the PBX and the D^{term}

Includes the assignment commands for the NEAX2000 IVS and the D^{term} Series E and Series III ACD terminals which enable them to use CallCenter*WorX*.

Chapter 5 Installing and Configuring the ACD Computer and the Remote MIS PC

Provides procedures for the basic installation and configuration of the computers used for CallCenterWorX.

Chapter 6 Installation of CallCenterWorX

Provides procedures for installing the CallCenterWorX program.

This page is for your notes.

CHAPTER 2 System Requirements

1. Variations in Setup

The CallCenterWorX ACD Client/Server architecture allows one or more Maintenance Administration Terminal (MAT) computers to program and monitor the ACD system. The ACD computer can then provide call-handling data to an MIS application (which is *not* a Client) for translation into meaningful statistics and reports. The MIS application can be loaded as part of the complete CallCenterWorX suite, or used alone on one or more remote MIS PCs. Each MIS application maintains an independent database. See this chapter, Heading 7, "CallCenterWorX MIS PC Support."

The installation CD-ROM contains three main installation options, which are:

- 1. CallCenterWorX suite, consisting of CallCenterWorX ACD, with the option to install the Server and MAT Client or only the MAT Client, plus CallCenterWorX MIS.
- 2. CallCenterWorX ACD, with the option to install the Server and MAT Client or only the MAT Client.
- **3.** CallCenter*WorX* MIS.

The **CallCenter** *WorX* **suite** (including MIS) installation, choosing the ACD Server and MAT Client, requires the CCWX Version 2 Security Key and Sentinel drivers (drivers are automatically installed with Server installation procedure).

The **CallCenter** *WorX* **ACD Server and MAT Client installation** requires Microsoft Windows NT 4.0 with Service Pack 5, a CCWX Version 2 Security Key, and Sentinel drivers (drivers are automatically installed with Server installation procedure).

The **CallCenter WorX ACD MAT Client installation** will run alone on Microsoft Windows NT 4.0 with Service Pack 5, Windows 98, or Windows 95 with OSR 2.5 4.00.1111 for Year 2000 compliance. It does not require a Security Key or Sentinel drivers.

• The complete suite (including MIS) installation using the MAT Client requires an MIS Security Key and Sentinel drivers (drivers are automatically installed with MIS installation procedure).

The **CallCenter** *WorX* **MIS installation** will run alone on Microsoft Windows NT 4.0 with Service Pack 5, Windows 98, or Windows 95 with OSR 2.5 4.00.1111 for Year 2000 compliance. It requires an MIS Security Key, and Sentinel drivers (drivers are automatically installed with MIS installation procedure).

NEC Global Navigator 3.03 or higher is also compatible with CallCenterWorX ACD. See this chapter, Heading 7, "CallCenterWorX MIS PC Support," and Heading 8, "Multi-tenant MIS Considerations—Split Numbering," for further information

2. ACD Computer (Client or Server) With and Without MIS

The following hardware, software, and information are required to install the CallCenterWorX ACD computer using TCP/IP.

Table 2-1 System Requirements for ACD Computer With and Without MIS

Minimum Requirements
Computer
Pentium 266 Mhz processor or higher
64 MB RAM or more
30 MB available hard-disk space or more
15" or larger SVGA monitor Note 1
1 floppy-disk drive or other data storage device
4X CD-ROM drive
1 parallel port for connection of Security Key
MS-compatible mouse
Network card (such as 3Com Etherlink III)
Computer Hardware
CallCenterWorX Version 2 Security Key Note 2
Software
NEAX2000 IVS Series 1700 software or higher (1900 or higher for INFOLINK)
Microsoft Windows NT 4.0 with NT Service Pack 5 or higher Note 3
CallCenterWorX CD-ROM installation disk
Information
IP address information for PBX
PBX Hardware
NEAX2000 IVS PBX
Circuit board PN-CC00 or PN-CC01
Circuit board PN-AP01
Circuit board PN-2DATA (optional card for announcements)
48-TW-0.3 Connecting Cable
CC00 Ethernet Cable Note 4
10 Base T Twisted 2P Cable of correct length
10 Base T Transceiver Note 4

- **Note 1:** *Must have video card and driver to support 1024 x 768 resolution*
- **Note 2:** CallCenterWorX Version 1 Security Key will not be compatible with this version of the application. CallCenterWorX ACD MAT Client without Server does not require a Security Key unless installed with MIS, which will require an MIS Security Key.
- **Note 3:** CallCenterWorX ACD MAT Client without Server can also use Microsoft Windows 95 or Windows 98. Windows 95 OSR 2.5 4.00.1111 is required for Year 2000 compliance.
- **Note 4:** *Not required when using PN-CC01.*

3. ACD Computer with MIS Using Remote MIS PC via TCP/IP

The following hardware, software, and information are required to install the CallCenterWorX ACD computer communicating with a remote MIS PC via TCP/IP.

Table 2-2 System Requirements for ACD Computer Using Remote MIS PC via TCP/IP

Minimum Requirements					
Computer					
Pentium 266 Mhz processor or higher					
64 MB RAM or more					
30 MB available hard-disk space or more					
15" or larger SVGA monitor Note 1					
1 floppy-disk drive or other data storage device					
4X CD-ROM drive					
1 parallel port for connection of Security Key					
MS-compatible mouse					
Network card (such as 3Com Etherlink III)					
Computer Hardware					
CallCenterWorX Version 2 Security Key Note 2					
Software					
NEAX2000 IVS Series 1700 software or higher (1900 or higher for INFOLINK)					
Microsoft Windows NT 4.0 with NT Service Pack 5 or higher Note 3					
CallCenterWorX CD-ROM installation disk					
Information					
IP address information and host name information for PBX and all PCs					
PBX Hardware					
NEAX2000 IVS PBX					
Circuit board PN-CC00 or PN-CC01					
Circuit board PN-AP01					
Circuit board PN-2DATA (optional card for announcements)					
48-TW-0.3 Connecting Cable					
CC00 Ethernet Cable Note 4					
10 Base T Twisted 2P Cables of correct lengths					
10 Base T Transceiver Note 4					
10 Base T Hub					

- **Note 1:** *Must have video card and driver to support 1024 x 768 resolution.*
- **Note 2:** CallCenterWorX Version 1 Security Key will not be compatible with this version of the application. CallCenterWorX ACD MAT Client without Server does not require a Security Key unless installed with MIS, which will require an MIS Security Key.
- **Note 3:** CallCenterWorX ACD MAT Client without Server can also use Microsoft Windows 95 or Windows 98. Windows 95 OSR 2.5 4.00.1111 is required for Year 2000 compliance.
- **Note 4:** *Not required when using PN-CC01.*

4. ACD Computer with MIS Using Remote MIS PC via RS-232 Serial Connection

The following hardware, software, and information are required to install the CallCenterWorX ACD computer communicating with a remote MIS PC via an RS-232 serial connection.

Table 2-3 System Requirements for ACD Computer Using Remote MIS PC via RS-232

Minimum Requirements					
Computer					
Pentium 266 Mhz processor or higher					
64 MB RAM or more					
30 MB available hard-disk space or more					
15" or larger SVGA monitor Note 1					
1 floppy-disk drive or other data storage device					
4X CD-ROM drive					
1 parallel port for connection of Security Key					
MS-compatible mouse					
Network card (such as 3Com Etherlink III)					
Computer Hardware					
CallCenterWorX Version 2 Security Key Note 2					
Software					
NEAX2000 IVS Series 1700 software or higher (1900 or higher for INFOLINK)					
Microsoft Windows NT 4.0 with Service Pack 5 or higher Note 3					
CallCenterWorX software CD-ROM					
Information					
IP address information for PBX					
PBX Hardware					
NEAX2000 IVS PBX					
Circuit board PN-CC00 or PN-CC01					
Circuit board PN-AP01					
Circuit board PN-2DATA (optional card for announcements)					
48-TW-0.3 Connecting Cable					
CC00 Ethernet Cable Note 4					
10 Base T Transceiver Note 4					
10 Base T Twisted 2P Cable of correct length					
Serial Hardware					
RS-232 cabling to run from COM Port to remote MIS PC					

- **Note 1:** *Must have video card and driver to support 1024 x 768 resolution.*
- **Note 2:** CallCenterWorX Version 1 Security Key will not be compatible with this version of the application. CallCenterWorX ACD MAT Client without Server does not require a Security Key unless installed with MIS, which will require an MIS Security Key.
- **Note 3:** CallCenterWorX ACD MAT Client without Server can also use Microsoft Windows 95 or Windows 98. Windows 95 OSR 2.5 4.00.1111 is required for Year 2000 compliance.
- **Note 4:** *Not required when using PN-CC01.*

5. Remote MIS PC Using TCP/IP

The following hardware, software, and information are required to install a CallCenter*WorX* remote MIS PC using TCP/IP.

Table 2-4 System Requirements for Remote MIS PC via TCP/IP

Minimum Requirements					
Computer					
Pentium 266 Mhz processor or higher					
64 MB RAM or more					
30 MB available hard-disk space or more					
15" or larger SVGA monitor Note 1					
1 floppy-disk drive or other data storage device					
4X CD-ROM drive					
1 parallel port for connection of Security Key					
MS-compatible mouse					
Network card (such as 3Com Etherlink III)					
Computer Hardware					
MIS Security Key					
Software					
Microsoft Windows NT 4.0 with Service Pack 4, or Windows 95, or Windows 98 Note 2					
CallCenterWorX software CD-ROM					
Information					
IP addresses and host name information for PBX and ACD and remote MIS PCs					
Hardware					
ACD computer connected to PBX via TCP/IP					
10 Base T Twisted 2P Cable of correct length					

Note 1: *Must have video card and driver to support 1024 x 768 resolution.*

Note 2: Windows 95 OSR 2.5 4.00.1111 is required for Year 2000 compliance.

6. Remote MIS PC Using RS-232

The following hardware, software, and information are required to install a CallCenter*WorX* remote MIS PC using serial RS-232 connection.

Table 2-5 System Requirements for Remote MIS PC via Serial RS-232

Minimum Requirements					
Computer					
Pentium 266 Mhz processor or higher					
64 MB RAM or more					
30 MB available hard-disk space or more					
15" or larger SVGA monitor Note 1					
1 floppy-disk drive or other data storage device					
4X CD-ROM drive					
1 parallel port for connection of Security Key					
MS-compatible mouse					
Computer Hardware					
MIS Security Key					
Software					
Microsoft Windows NT 4.0 with Service Pack 5 or higher, or Windows 95, or Windows 98 Note 2					
CallCenterWorX software CD-ROM					
Hardware					
ACD computer connected to PBX					
RS-232 Cable to run from ACD computer COM Port to remote MIS PC COM Port					

Note 1: *Must have video card and driver to support 1024 x 768 resolution.*

Note 2: Windows 95 OSR 2.5 4.00.1111 is required for Year 2000 compliance.

7. CallCenter WorX MIS PC Support

7.1 Multiple MIS PCs

CallCenterWorX provides the ability to have up to eight MIS PCs.

- The integrated MIS application on the main CallCenter*WorX* Server is controlled by the main CallCenter*WorX* system security key and is counted as one of the eight PCs.
- Each additional MIS PC requires a separate MIS security key.

It is important to know that each additional MIS PC is a separate MIS application. This means that the additional PC is *not a Client* to the main CallCenterWorX MIS, but maintains its own database.

- While an MIS PC application is online, it will collect data received from the ACD.
- If the MIS application is terminated or the PC it is running on is shut down, data collection stops.

If a true Client/Server MIS PC application is required, NEC Global Navigator 3.03 or higher will perform that function.

7.2 IP Connections

The CallCenterWorX ACD provides eight IP connections for MIS PCs or Infolink.

- If you are using the MIS at the main CallCenterWorX Server, then you have *seven* remaining connections to use for other MIS applications or Infolink.
- If you are using the MIS at the main CallCenterWorX Server and are utilizing Infolink, there are six remaining IP connections for additional MIS applications to use. Each additional connection usage diminishes the MIS IP connections available.
- QueWorX IVR is an Infolink application, so if it is installed, the initial limit of available IP connections for MIS applications is *seven* instead of eight.

8. Multi-tenant MIS Considerations—Split Numbering

The assignment of split numbers in the CallCenterWorX MIS is relative to the number of tenants being served by the entire system (which can be as many as 9 tenants). A single MIS application can number only one usable Split 1 in the system. It does not employ the naming conventions used by the ACD, which starts numbering for each tenant at Split 1 (such as Tenant 1 Split 1, Tenant 2 Split 1, Tenant 3 Split 1).

To allow for the total split numbers assigned to any previous tenants, a single MIS application must "name but not use" a number of splits equal to the total for all previous tenants *before* numbering usable splits for a new tenant. In a multi-tenant situation with more than one or two tenants, this requirement rapidly uses up the 30 split numbers available to a single MIS application, while the ACD may have more split numbers still available.

As shown in Table 2-6:

- Although the ACD can start split numbering in **Tenant 2** with "Split 1," the MIS must number that split as "Split 4" because numbers Split 1, Split 2, and Split 3 have already been used in **Tenant 1**.
- The "Cumulative Total for System" row in the table shows a total of only 5 split numbers (3+2) used by the ACD after Tenant 2, but a total of 8 split numbers (3+5) have been used by the MIS after Tenant 2, due to the numbering of three splits in Tenant 1 which must be "named but not used" in Tenant 2.
- After **Tenant 3**, the ACD has used a cumulative total of 9 split numbers (3+2+4) while the MIS has used a cumulative total of 17 split numbers (3+5+9), with 8 of those being "named but not used."

Note: Shaded cells in the MIS columns of Table 2-6 indicate the split numbers "named but not used" to allow for the MIS numbering system.

	Tenant 1		Tenant 2		Tenant 3	
	ACD	MIS	ACD	MIS	ACD	MIS
	1	1	1	1	1	1
	2	2	2	2	2	2
	3	3		3	3	3
				4	4	4
Numbers for Splits				5		5
						6
						7
						8
						9
Total Split #s Used ACD	3		2		4	
Total Split #s Used MIS		3		5		9
Cumulative Total for System	3	3	5	8	9	17

Table 2-6 Single MIS Application Split Number Usage

This limitation can be overcome by using a dedicated MIS application for each one or two tenants (there are nine possible tenants and eight possible IP connections for MIS applications), which would allow both the ACD and the MIS full benefit of all the allocated split numbers for the system. The use of multiple MIS PCs is discussed in the previous heading (Heading 7, "CallCenterWorX MIS PC Support"). Within the number of allowed IP connections, an ample number of MIS applications can be used to provide all needed services to tenants.

If multi-tenant usage is to be spread over the full ACD capacity of nine tenants, use NEC Global Navigator 3.03 which provides true multi-tenant capability as well as a Client/Server MIS PC application.

CHAPTER 3 Connection Drawings

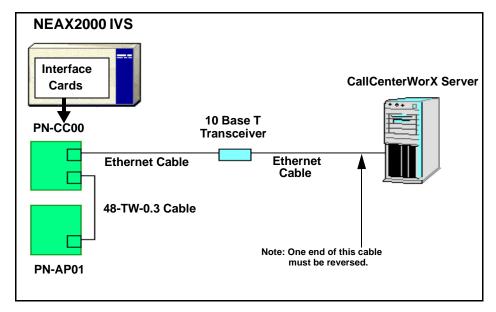


Figure 3-1 PN-CC00 Connection through 10 Base T Transceiver

1. Installing the PN-CC00 and the PN-AP01

- STEP 1: Mount the PN-CC00 in any slots LT10 (AP0) LT15 (AP05). The PN-CC00 requires two LT (AP) slots.
- STEP 2: Mount the PN-AP01 in any slot LT10 (AP0) LT15 (AP05).
- STEP 3: Set the PN-AP01 SENSE 0 switch to the slot number that is programmed in CM05 (see Chapter 4, Heading 1, "AP01 Initialization").
- STEP 4: Install the 48-TW-0.3 connecting cable from the DCB A connector of the PN-CC00 card to the bottom connector of the PN-AP01 card.
- STEP 5: Install the Ethernet cable from the AB Ether connector of the PN-CC00 card to the 10 Base T transceiver.
- STEP 6: Install the Ethernet cable from the transceiver to the network driver of the Server.

Note: *One end of this cable must be reversed.*

1.1 Crossover Reverse Pin-out

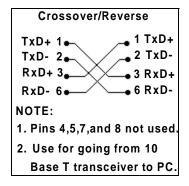


Figure 3-2 Crossover Reverse Pin-out

2. Installing the PN-CC01 and the PN-AP01

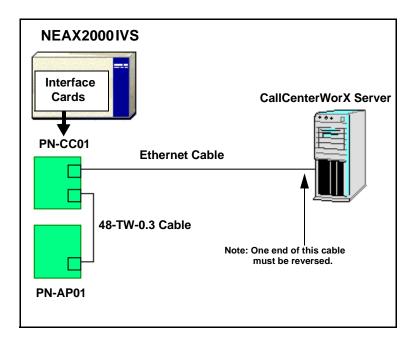


Figure 3-3 PN-CC01 Connection Straight to ACD Computer (Client or Server)

- STEP 1: Mount the PN-CC01 in any slots LT10 (AP0) LT15 (AP05). The PN-CC01 requires one LT (AP) slot.
- STEP 2: Mount the PN-AP01 in any slot LT10 (AP0) LT15 (AP05).
- STEP 3: Set the PN-AP01 SENSE 0 switch to the slot number that is programmed in CM05 (see Chapter 4, Heading 1, "AP01 Initialization").
- STEP 4: Install the 48-TW-0.3 connecting cable from the DCB A connector of the PN-CC01 card to the bottom connector of the PN-AP01 card.
- STEP 5: Install the Ethernet cable from the RJ-45 connector of the PN-CC01 card to the ACD computer (Client or Server) communicating via TCP/IP.

Note: *One end of this cable must be reversed.*

3. PN-CC00 Connecting Through a Hub

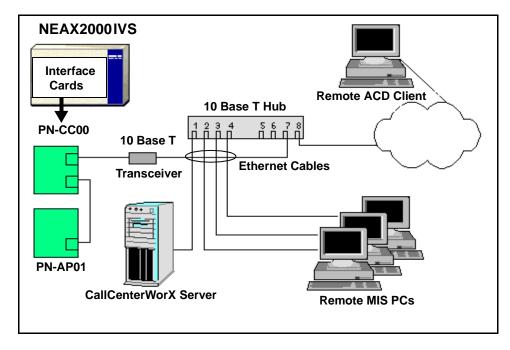


Figure 3-4 PN-CC00 Connecting Through a Hub

- STEP 1: The Ethernet cables going from the transceiver to the hub and from the hub to the Server and PCs are straight-through cables.
- STEP 2: The Ethernet cable from the transceiver to the hub goes into a port *other than* Port 8 of an 8-port hub or Port 4 of a 4-port hub. The last port in a hub is usually used as an uplink port, connecting to a LAN, another hub, a bridge, a router, or other such device. Verify this with the manufacturer's specifications for the hub you are using, since some hubs use Port 1 for uplink instead of the last Port.
- STEP 3: The Ethernet cables from the ACD computer (Client or Server) and from the MIS PC can go into any port that is not the uplink port.

3.1 Straight-Through Pin-out

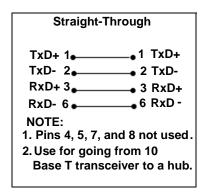


Figure 3-5 Straight-Through Pin-out

4. PN-CC01 Connecting Through a Hub

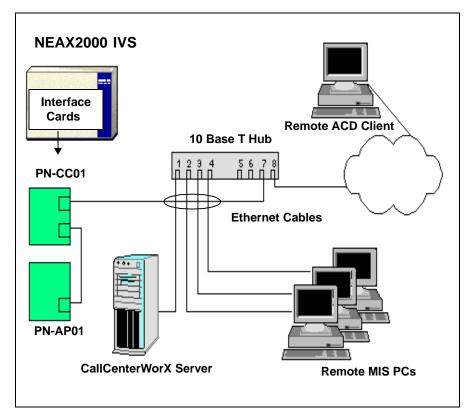


Figure 3-6 PN-CC01 Connecting Through a Hub

- STEP 1: The Ethernet cables going to the hub from the PN-CC01 and from the hub to the Server and PCs are straight-through cables.
- STEP 2: The Ethernet cable from the transceiver to the hub goes into a port *other than* Port 8 of an 8-port hub or Port 4 of a 4-port hub. The last port in a hub is usually used as an uplink port, connecting to a LAN, another hub, a bridge, a router, or other such device. Verify this with the manufacturer's specifications for the hub you are using, since some hubs use Port 1 for uplink instead of the last Port.
- STEP 3: The Ethernet cables from the ACD computer and from the MIS PC can go into any port that is not the uplink port.

5. PN-CC00 Connection for ACD Computer to Remote MIS PC Serially

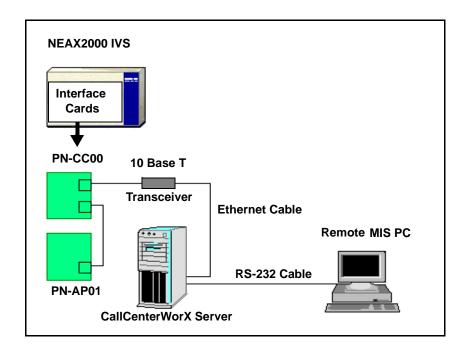


Figure 3-7 PN-CC00 with RS-232 Serial Connection

Note: *In this diagram, it is assumed the remote PC is using* CallCenterWorX MIS.

- STEP 1: Follow the procedures in this chapter, Heading 1, "Installing the PN-CC00 and the PN-AP01," to connect the PN-CC00 to the ACD computer.
- STEP 2: Connect one end of the RS-232 serial cable to a COM Port on the ACD computer.
- STEP 3: Connect the other end of the RS-232 serial cable to a COM Port on the remote PC which will be running the CallCenter*WorX* MIS program.
- STEP 4: Configure the ACD computer and the remote MIS PC by following the procedures in Chapter 5, "Configuration Procedures."

6. PN-CC01 Connection for ACD Computer to Remote MIS PC Serially

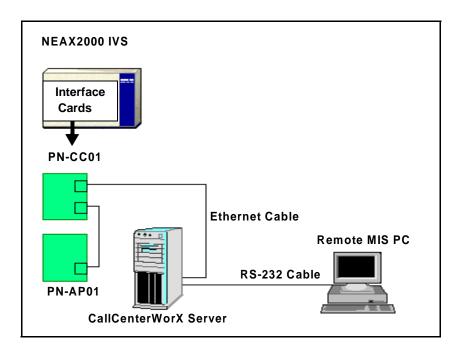


Figure 3-8 PN-CC01 Connection for ACD Computer to Remote MIS PC Serially

Note: *In this diagram, it is assumed the remote PC is using* CallCenterWorX MIS.

- STEP 1: Follow the procedures in this chapter, Heading 2, "Installing the PN-CC01 and the PN-AP01," to connect the PN-CC01 to the ACD computer .
- STEP 2: Connect one end of the RS-232 serial cable to a COM Port on the ACD computer.
- STEP 3: Connect the other end of the RS-232 serial cable to a COM Port on the remote PC which will be running the CallCenter*WorX* MIS program.
- STEP 4: Configure the ACD computer and the remote MIS PC by following the procedures in Chapter 5, "Configuration Procedures."

7. Connecting Wall Display Boards

Connections from the computer running CallCenterWorX MIS to the Spectrum Wall Display Board may vary according to the specific model of board. Instructions should be obtained from Spectrum Corporation regarding the model you are installing.

- The computer must be configured to output data to the board through a COM Port.
- Wall boards may be used in a "chained" series following connection specifications from Spectrum Corporation.

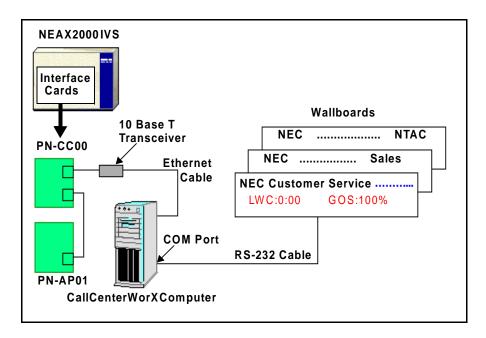


Figure 3-9 PN-CC00 Connecting ACD Computer or MIS PC to Wall Boards

See Figure 3-11 for connection of RS-232 cable into the COM Port on the back of the Host.

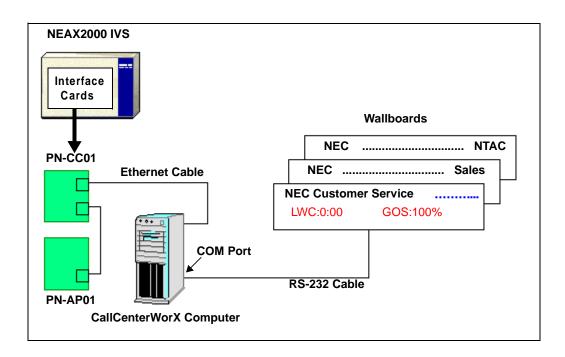


Figure 3-10 PN-CC01 Connecting ACD Computer or MIS PC to Wall Boards

As shown in Figure 3-11 below, the RS-232 Cable connects to the COM Port designated as an MIS Port (see Chapter 5, Heading 1.3, "ACD Computer Setup for Use with Remote MIS PC via RS-232").

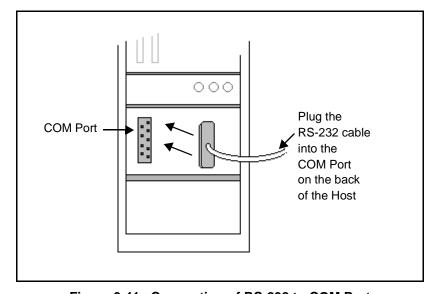


Figure 3-11 Connection of RS-232 to COM Port

Programming the PBX and the D^{term} CHAPTER 4

1. AP01 Initialization

START

DESCRIPTION

DATA

CM05

For the IVS (CP00 and CP03):

Assign the slot number to the PN-AP01 board according to the location of the board.

Note: The slot number is given by the SENSE 0 switch on the PN-AP01 board.

For the IVS 2000 Series Software (CP16): Assign the slot number to the PN-AP01

board according to the location of the board.

Note: The slot number is given by the SENSE 0 switch on the PN-AP01 board.

For the IVS 2 (CP14):

Assign the slot number to the PN-AP01 board according to the location of the board.

Note: The slot number is given by the SENSE 0

switch on the PN-AP01 board.

ID code all clear with AP. To clear the AP perform the following:

CMD6

$$\boxed{\text{ST}} + \text{D60} + \boxed{\text{DE}} + 0000 + \boxed{\text{DE}} + \text{CCC} + \boxed{\text{EXE}}$$

Note: Switch 1 on the PN-AP01 must be set as follows:

OFF

2

After clearing the AP01, change SW1-2 and SW1-3 back to the "ON" position.

END

- (1) Slot number (04-15)
- (2) PN-AP01 board



Y = 0

- (1) Slot number (04-15)
- (2) PN-AP01 board



Y = 0

- (1) Slot number (04-15)
- (2) PN-AP01 board

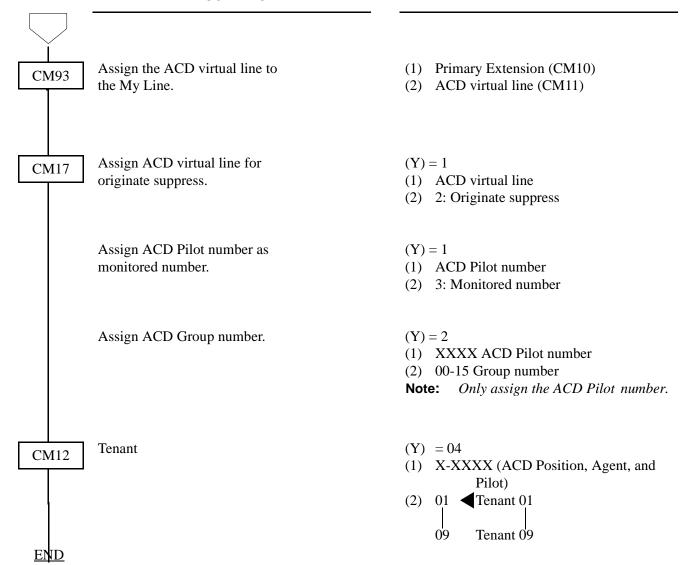
INITIAL

2. Programming the ACD Position Prime Line and My Line

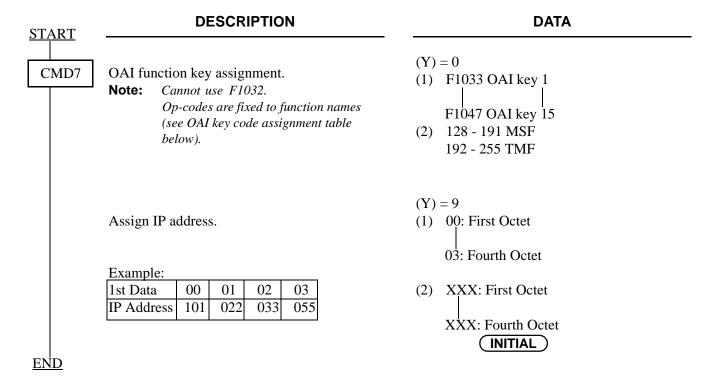
<u>START</u>	DESCRIPTION	DATA
CM10	For the IVS (CP00 and CP03): Assign the primary extension.	(1) LEN 0000-0511(2) FXXXX Station number
	For the IVS 2000 Series Software (CP16): Assign the primary extension.	(1) LEN X00-X63 (X = PIM No. 0-7)(2) FXXXX Station number
	For the IVS ² (CP14): Assign the primary extension.	(1) LEN X00-X63 (X = PIM No. 0-7)(2) FXXXX Station number
CM11	For the IVS (CP00 and CP03): Assign the ACD virtual line and ACD Pilot numbers. Note: Use LEN 0000-0127 ONLY.	(1) LEN 0000-0127(2) Virtual number
	For the IVS 2000 Series Software (CP16): Assign the ACD virtual line and ACD Pilot numbers. Note: Use LEN 000-127. Using the PZ-M537 MP expansion card allows LEN 000-255 to be monitored.	(1) LEN 000-127(2) Virtual number
	For the IVS ² (CP14): Assign the ACD virtual line and ACD Pilot numbers. Note: Use LEN 000-127. Using the PZ-M537 MP expansion card allows LEN 000-255 to be monitored.	(1) LEN 000-127(2) Virtual number

DESCRIPTION

DATA



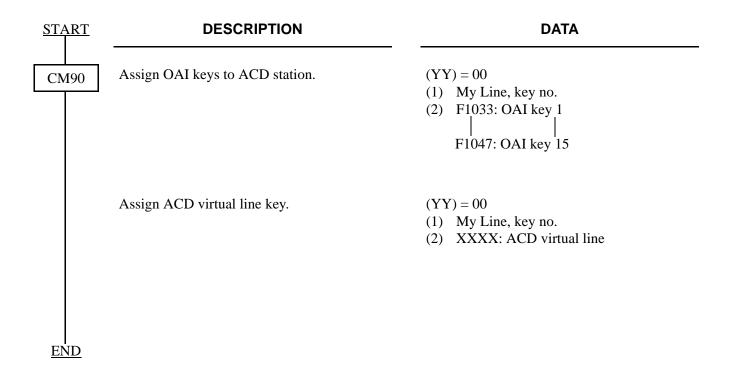
3. Programming ACD/OAI Operation Codes



OAI Key Code Assignment

Function Name	OAI Key Code	OP Code	Function Key Code
Break	1	187	F1033
Auto/Manual	2	252	F1034
Work	4	253	F1036
Night	5	188	F1037
Trunk/Trouble	6	250	F1038
Tally	7	189	F1039
Assist	8	254	F1040
Emergency	9	255	F1041
Log On/Off	10	190	F1042
Monitor	12	191	F1044
Call Waiting	14	249	F1046

4. Programming D^{term} Key Assignment

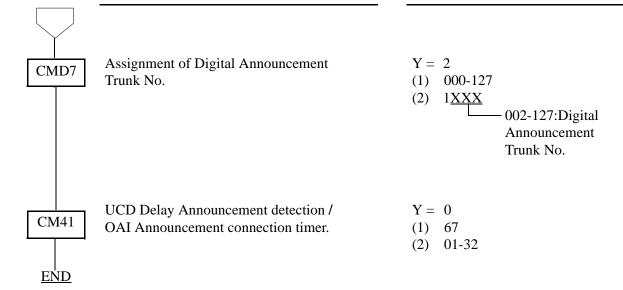


5. Programming ACD Group Announcements

DESCRIPTION DATA START For the IVS (CP00 and CP03): CM10 Assign a Digital Announcement Trunk (1) LEN (0000 - 0512) Circuit No. to the required LEN. (2) EB002 - EB127 **Note:** *The Digital Announcement Trunk* PIM 0/1: EB000 - EB031 PIM 2/3: EB032 - EB063 Circuit No. must be assigned to the first LEN (level 0) and/or the third PIM 4/5: EB064 - EB095 PIM 6/7: EB096 - EB127 LEN (level 2) of each LT slot. For the IVS 2000 Series Software (CP16): Assign a Digital Announcement Trunk (1) LEN X00-X63 (X = PIM No. 0-7) Circuit No. to the required LEN. (2) EB002 - EB127 **Note:** *The Digital Announcement Trunk* PIM 0/1: EB000 - EB031 Circuit No. must be assigned to the PIM 2/3: EB032 - EB063 first LEN (level 0) and/or the third PIM 4/5: EB064 - EB095 LEN (level 2) of each LT slot. PIM 6/7: EB096 - EB127 *For the IVS*² (*CP14*): Assign a Digital Announcement Trunk (1) LEN X00-X63 (X = PIM No. 0-7) Circuit No. to the required LEN. (2) EB002 - EB127 **Note:** *The Digital Announcement Trunk* PIM 0/1: EB000 - EB031 Circuit No. must be assigned to the PIM 2/3: EB032 - EB063 first LEN (level 0) and/or the third PIM 4/5: EB064 - EB095 LEN (level 2) of each LT slot. PIM 6/7: EB096 - EB127 Assign the function for each Digital YY = 00CM49 Announcement Trunk. (1) 000-127: Digital Announcement Trunk Circuit No. assigned by CM10. Message Group No. 16<u>XX</u> (02-63) for Multi-connection announcement service for OAI.

DESCRIPTION

DATA



6. Sending of Returned Result and SMFN

START	DESCRIPTION	DATA
CM65	Returned Result (RR) sending priority when receiving Switch Control Facility (SCF). Note: For CallCenterWorX this must be a "0".	(YY)= 28 (1) Tenant # 01-09 (2) 0: Send RR after SMFN. 1: Send RR before SMFN.
	Service feature for each Tenant	(YY) = 27 (1) Tenant # 01-09 (2) 0: ACD 1: ■ Non-ACD
CM08	Sending of SMFN when answering a held call	 (1) 461 (2) 0: Sent. 1: ■ Not sent.
	While the station (STA-A) is talking with another station (STA-B), after consultation hold with a CO call, when STA-B has hung up.	 (1) 117 (2) 0: STA-A returns to the call with the CO line. 1: ◀ STA-A hears ROT.
	Note: For Assist and Monitor to work properly, this must be set to a "0."	
	Transfer a trunk call into an ACD group from a station or SN 610/716 Attcon.	(1) 460 (2) 0: Allowed 1: ◀ Not allowed
END		

7. Programming the D^{term} Series E ACD Terminal

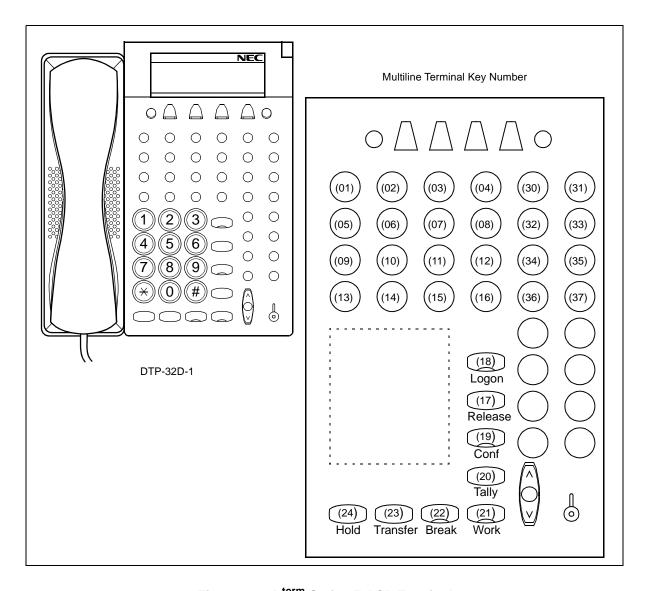


Figure 4-1 D^{term} Series E ACD Terminal

7.1 Programming the Keys

Use CM90 YY= 00 and the functions listed to program Keys 17 through 24.

Key 17 = F1020 Release

Key 18 = F1042 Log On (OAI Key 10, CMD7 Y=0 OP-Code 190)

Key 19 = F1012 Conference

Key 20 = F1039 Tally (OAI Key 7, CMD7 Y=0 OP-Code 189)

Key 21 = 1036 Work (OAI Key 4, CMD7 Y=0 OP-Code 253)

Programming the PBX and the D^{term}

Programming the D^{term} Series E ACD Terminal

Key 22 = 1033 Break (OAI Key 1, CMD7 Y=0 OP-Code 187)

Key 23 = F1004 Transfer

Key 24 = F1010 Hold

All other ACD function keys will be programmed on Keys 1 through 16.

7.2 Service Conditions

- 1. In order for Logon (Key 18) and Break (Key 22) to chime, a speaker key must be assigned to a Key between 1 and 16.
- 2. The Feature (F1011), Recall (F1015), Redial (F1000), and Answer (F4001) Keys can be assigned to Keys between 1 and 16.
- 3. Do not use the MAT command F2, "Copy of D^{term} Key", if your ACD terminals are a mixture of Series III and Series E sets. The key layouts are different between these two terminals. You can copy from Series E to Series E, and from Series III to Series III, but you cannot copy from Series E to Series III.
- 4. If the first port (level 0) of the card is set to a 1 (Elite) in CM12 YY=17, a PN-4DLCA or PN-4DLCM card must be installed. When using a PN-4DLCD card with the first port (level 0) set to a 1 (Elite) in CM12 YY=17, the ACD Keys will not function and there is no display on the terminal.
- 5. D^{term} series ACD terminals are supported with Series 1800 software CJ0.17 and above.

8. Programming the D^{term} Series III ACD Terminal

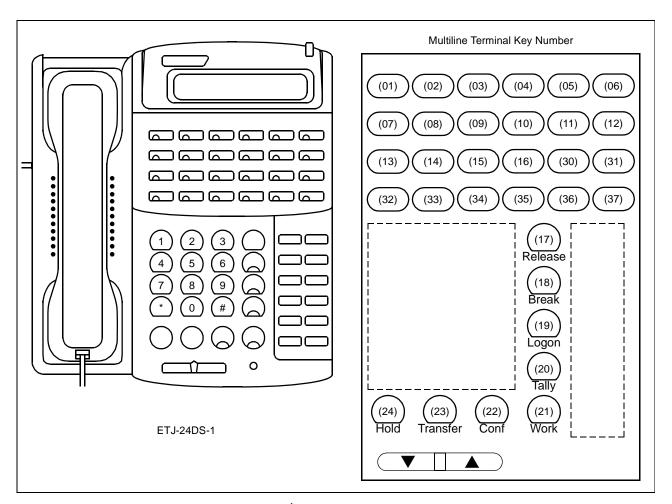


Figure 4-2 D^{term} Series III ACD Terminal

8.1 Programming the Keys

Use CM90 YY= 00 and the functions listed to program Keys 17 through 24.

Key 17 = F1020 Release

Key 18 = F1033 Break (OAI Key 1, CMD7 Y=0, OP-Code 187)

Key 19 = F1042 Log On (OAI Key 10, CMD7 Y=0, OP-Code 190)

Key 20 = F1039 Tally (OAI Key 7, CMD7 Y=0, OP-Code 189)

Key 21 = F1036 Work (OAI Key 4, CMD7 Y=0 OP-Code 253)

Key 22 = F1012 Conference

Key 23 = F1004 Transfer

Key 24 = F1010 Hold

Programming the PBX and the D^{term}

Programming the D^{term} Series III ACD Terminal

All other ACD function keys will be programmed on Keys 1 through 16.

8.2 Service Conditions

- 1. In order for Logon (Key 19) and Break (Key 18) to chime, a speaker key must be assigned to a Key number between 1-16.
- 2. The FNC (F1011), Recall (1015), LNR/SPD (F1000), and Answer (F4001) Keys can be assigned to Keys 1-16.
- 3. Do not use the MAT command F2, "Copy of D^{term} Key", if your ACD terminals are a mixture of Series III and Series E sets. The key layouts are different between these two terminals. You can copy from Series E to Series E, and from Series III to Series III, but you cannot copy from Series E to Series III.
- 4. If the first port (level 0) of the card is set to a 1 (Elite) in CM12 YY=17, a PN-4DLCA or PN-4DLCM card must be installed. If you use a PN-4DLCD card with the first port (level 0) set to a 1 (Elite) in CM12 YY=17, the ACD Keys will not function and there is no display on the terminal.
- 5. D^{term} series ACD terminals are supported with Series 1800 software CJ0.17 and above.

CHAPTER 5 Configuration Procedures

The basic options available for configuring common setups using CallCenterWorX are diagrammed below.

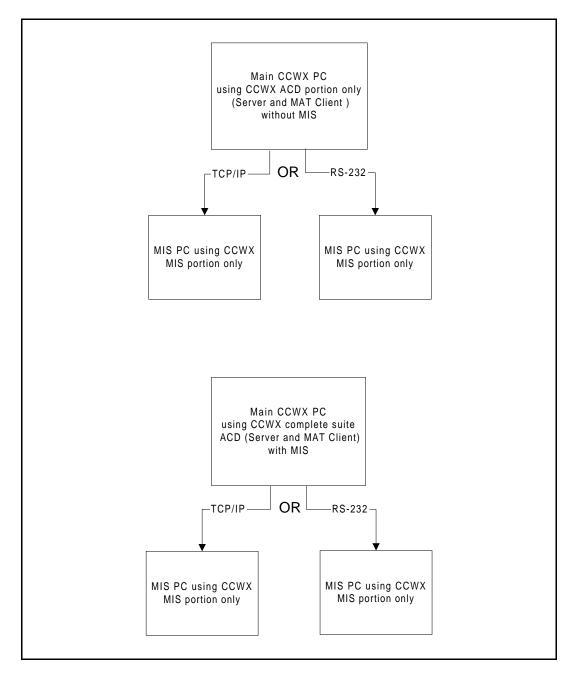


Figure 5-1 Configuration Options

This chapter provides procedures for configuring the components to perform in the above setups.

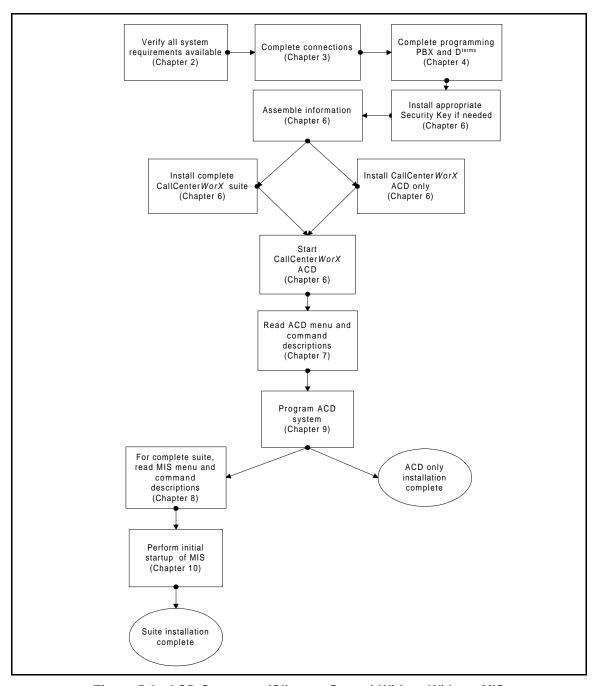


Figure 5-2 ACD Computer (Client or Server) With or Without MIS

1. Configuring the ACD Computers

1.1 ACD Computer (Client or Server) With or Without MIS

For the ACD computer (Client or Server) with or without MIS, use the following procedure:

- STEP 1: Verify that the system requirements specified in Table 2-1 of Chapter 2 are available.
- STEP 2: Depending upon your PBX hardware, complete the connections described in Chapter 3, Heading 1, "Installing the PN-CC00 and the PN-AP01" (illustrated in Figure 3-1 and Figure 3-2), or in Heading 2, "Installing the PN-CC01 and the PN-AP01" (illustrated in Figure 3-3).
- STEP 3: Complete the procedures in Chapter 4, "Programming the PBX and the D^{term}."
- STEP 4: Follow the procedures in Chapter 6, Heading 1, "Security Key Installation Instructions."
 - If you wish to run the **ACD Server and MAT Client** option on this computer, with or without the MIS application, install a CallCenter*WorX* Version 2 Security Key.
 - If you wish to run **only** the ACD MAT Client option on this computer, no Security Key is required.
 - If you wish to run the ACD MAT Client and the MIS application on this computer, an MIS Security Key is required.
- STEP 5: Read Chapter 6, Heading 2, "Installation Information Needed," and assemble the information needed for installing CallCenterWorX.
- STEP 6: Choose one of the following:
 - If you wish to run **both the ACD and MIS** portions of the program on this computer, install the *complete* CallCenterWorX suite by following the procedures in Chapter 6, Heading 3, "CallCenterWorX CD-ROM Installation Instructions." Please note that the remote MIS PC to be configured later *is not a client* to the server MIS installation; all MIS databases are independent.
 - If you wish to run **only the ACD** portion of the program on this computer, install *only* the CallCenter*WorX* ACD program (either the MAT Client option or the Server and MAT Client option) by following the procedures in Chapter 6, Heading 3, "CallCenterWorX CD-ROM Installation Instructions."
- STEP 7: Follow the procedures in Heading 4, "Starting CallCenterWorX ACD," in Chapter 6.
- STEP 8: Program the ACD system as described in Chapter 9, "ACD Procedures." Information on the menu commands and data screens can be found in Chapter 7, "ACD Menu Commands."
- STEP 9: If you installed only a CallCenter*WorX* ACD option (MAT Client or Server and MAT Client) in Step 6, the procedure is complete.
- STEP 10: If you installed the complete CallCenterWorX suite with MIS in Step 6:
 - (a) Follow the procedures in Chapter 10, Heading 1, "CallCenterWorX MIS Initial Setup."
 - (b) Close the CallCenterWorX MIS-Setup window.

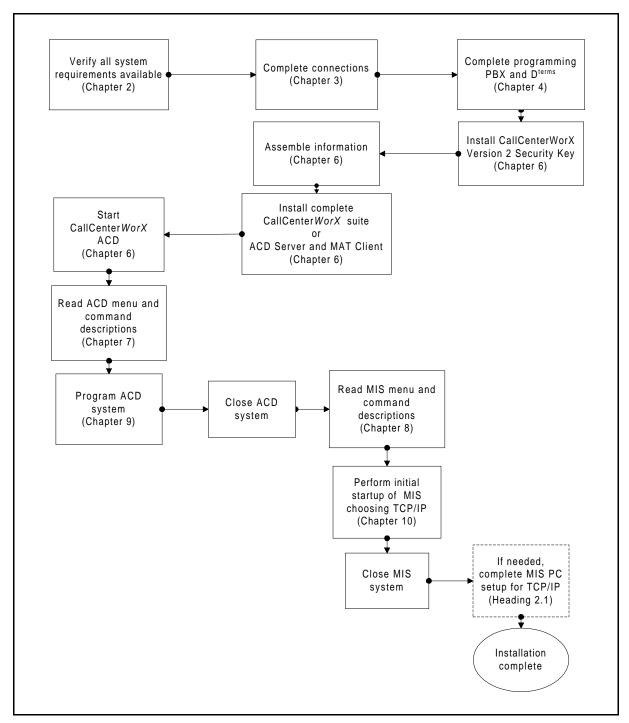


Figure 5-3 ACD Computer Setup for Use with Remote MIS PC via TCP/IP

1.2 ACD Computer Setup for Use with Remote MIS PC via TCP/IP

For the ACD computer communicating with a remote MIS PC via TCP/IP, use the following procedure:

- STEP 1: Verify that the system requirements specified in Table 2-2 of Chapter 2 are available.
- STEP 2: Depending upon your PBX hardware, complete the connections described in Chapter 3, Heading 3, "PN-CC00 Connecting Through a Hub" (shown in Figure 3-4 and Figure 3-5), or in Chapter 3, Heading 4, "PN-CC01 Connecting Through a Hub" (shown in Figure 3-6).
- STEP 3: Complete the procedures in Chapter 4, "Programming the PBX and the D^{term}."
- STEP 4: Following the procedures in Chapter 6, Heading 1, "Security Key Installation Instructions," install a CallCenter*WorX* Version 2 Security Key.
- STEP 5: Read Chapter 6, Heading 2, "Installation Information Needed," and assemble the information needed for installing CallCenterWorX.
- STEP 6: Following the procedures in Chapter 6, Heading 3, "CallCenterWorX CD-ROM Installation Instructions," install either:
 - The complete CallCenterWorX suite, choosing ACD Server and MAT Client plus CallCenterWorX MIS. Please note that the remote MIS PC to be configured later *is not a client* to the server MIS installation; all MIS databases are independent.
 - The CallCenter*WorX* ACD Server and MAT Client only.
- STEP 7: Follow the procedures in "Starting CallCenterWorX ACD" in Chapter 6, Heading 4.
- STEP 8: Program the ACD system as described in Chapter 9, "ACD Procedures." Information on the menu commands and data screens can be found in Chapter 7, "ACD Menu Commands."
- STEP 9: On the **Server menu**, click **MAT**, then click **Disconnect**.
- STEP 10: Click **Exit** on the **File menu** to close the CallCenterWorX ACD system.
- STEP 11: If CallCenterWorX MIS is loaded, open the MIS following the procedures in Chapter 10, Heading 1, "CallCenterWorX MIS Initial Setup." and follow the procedures for the Communication Type TCP/IP.
- STEP 12: Close the CallCenterWorX MIS-Setup window.
- STEP 13: If not already completed, go to Heading 2.1, "MIS PC Setup for Use via TCP/IP" in this chapter and complete all steps.

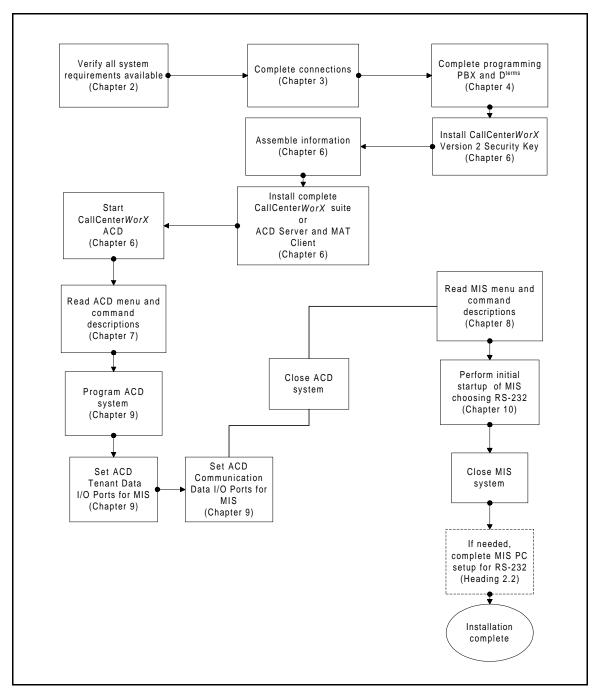


Figure 5-4 ACD Computer Setup for Use with Remote MIS PC via RS-232

1.3 ACD Computer Setup for Use with Remote MIS PC via RS-232

- For the ACD computer communicating with a remote MIS PC via serial RS-232 connection, use the following procedure:
- STEP 1: Verify that the system requirements specified in Table 2-3 of Chapter 2 are available.
- STEP 2: Depending upon your PBX hardware, complete the connections described in Chapter 3, Heading 5, "PN-CC00 Connection for ACD Computer to Remote MIS PC Serially" (shown in Figure 3-7), or in Chapter 3, Heading 6, "PN-CC01 Connection for ACD Computer to Remote MIS PC Serially" (shown in Figure 3-8).
- STEP 3: Complete the procedures in Chapter 4, "Programming the PBX and the D^{term}."
- STEP 4: Following the procedures in Chapter 6, Heading 1, "Security Key Installation Instructions," install a CallCenter*WorX* Version 2 Security Key.
- STEP 5: Read Chapter 6, Heading 2, "Installation Information Needed," and assemble the information needed for installing CallCenterWorX.
- STEP 6: Following the procedures in Chapter 6, Heading 3, "CallCenterWorX CD-ROM Installation Instructions," install either:
 - The complete CallCenterWorX suite, choosing ACD Server and MAT Client plus CallCenterWorX MIS. Please note that the remote MIS PC to be configured later *is not a client* to the server MIS installation; all MIS databases are independent.
 - The CallCenterWorX ACD Server and MAT Client only.
- STEP 7: Follow the procedures in Heading 4, "Starting CallCenterWorX ACD," in Chapter 6.
- STEP 8: Program the ACD system as described in Chapter 9, "ACD Procedures." Information on the menu commands and data screens can be found in Chapter 7, "ACD Menu Commands."
- STEP 9: Access the ACD Tenant Data dialog by selecting the **Tenant Data** command from the **MAT menu** or selecting the **Tenant icon** on the console **Toolbar**.
- STEP 10: When the Tenant Data dialog displays, in the area marked "I/O Port Assignment" you will find tabs marked COM1 and COM2. On each tab are buttons to select "OFF" or to select "MIS" (which enables you to set that communication port to send and receive MIS data for this tenant). Select the appropriate port (COM1 or COM2) and click the button marked MIS.
- STEP 11: Click **Update** to enter your selection into the system data. The Status Bar display informs you that the system data has been updated.
- STEP 12: Click **Close** to exit the dialog.
- STEP 13: Access the ACD Communications Data dialog by selecting **Communications Data** from the **MAT** menu, or by selecting the **Communications icon** on the console **Toolbar**.
- STEP 14: When the Communication Data dialog displays, in the area marked "I/O Ports" are two areas labeled "Port 1" and "Port 2" showing port type. Select the same port you specified in Step 10 above (**COM1** or **COM2**) and click the **MIS-2** option.
- STEP 15: Click **Update** to enter this into the system data. The Status Bar display informs you that the system data has been updated.

Configuration Procedures

Configuring the ACD Computers

- STEP 16: Click **Close** to exit the dialog.
- STEP 17: On the Server menu, click MAT, then click Disconnect.
- STEP 18: Click **Exit** on the **File menu** to close the CallCenterWorX ACD system.
- STEP 19: If the MIS was installed, read the information on the menu commands and data screens in Chapter 8, "MIS Menu Commands."
- STEP 20: Perform the initial startup of the MIS system as described in Chapter 10, "MIS Procedures," choosing the **Communication Type RS-232** and setting the **COM Port** to agree with the port chosen in Step 10: and Step 14: above.
- STEP 21: Close the CallCenterWorX MIS–Setup window.
- STEP 22: If needed, complete the setup for the remote MIS PC using RS-232 (see this chapter, Heading 2.2).

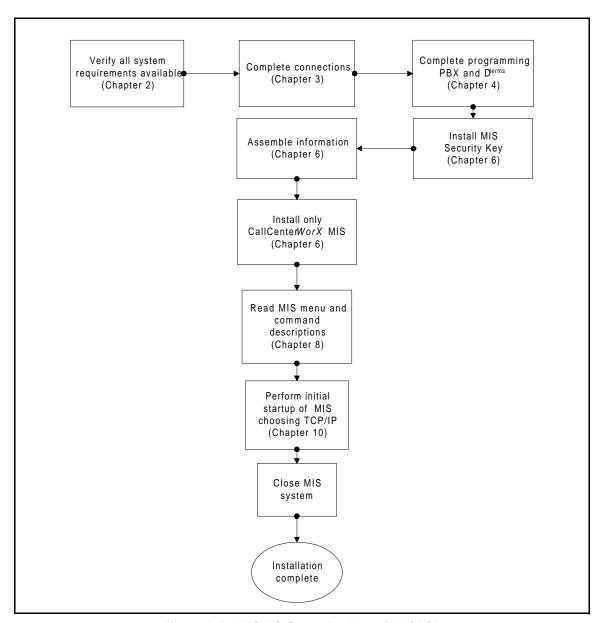


Figure 5-5 MIS PC Setup for Use via TCP/IP

2. Configuring the MIS PCs

2.1 MIS PC Setup for Use via TCP/IP

- STEP 1: Verify that the system requirements specified in Table 2-4 of Chapter 2 are available.
- STEP 2: Depending upon your PBX hardware, complete the connections described in Chapter 3, Heading 3, "PN-CC00 Connecting Through a Hub" (illustrated in Figure 3-4 and Figure 3-5), or in Chapter 3, Heading 4, "PN-CC01 Connecting Through a Hub" (shown in Figure 3-6).
- STEP 3: If not already done, complete the procedures in Chapter 4, "Programming the PBX and the D^{term}."
- STEP 4: Follow the procedures in Chapter 6, Heading 1, "Security Key Installation Instructions," installing an *MIS Security Key*.
- STEP 5: Read Chapter 6, Heading 2, "Installation Information Needed," and assemble the information needed for installing CallCenterWorX.
- STEP 6: Install *only the MIS portion* of the CallCenter*WorX* program, following the procedures in Chapter 6, Heading 3, "CallCenterWorX CD-ROM Installation Instructions."
- STEP 7: When program installation is complete, follow the procedures in "CallCenterWorX MIS Initial Setup" in Chapter 10, choosing the **Communication Type TCP/IP**.
- STEP 8: Follow the procedures in Chapter 10, Heading 9, "System Name Assignment," to assign a System Name in the MIS. Information on the MIS menu commands can be found in Chapter 8, "MIS Menu Commands."
- STEP 9: Close the CallCenter *WorX* MIS–Setup window.

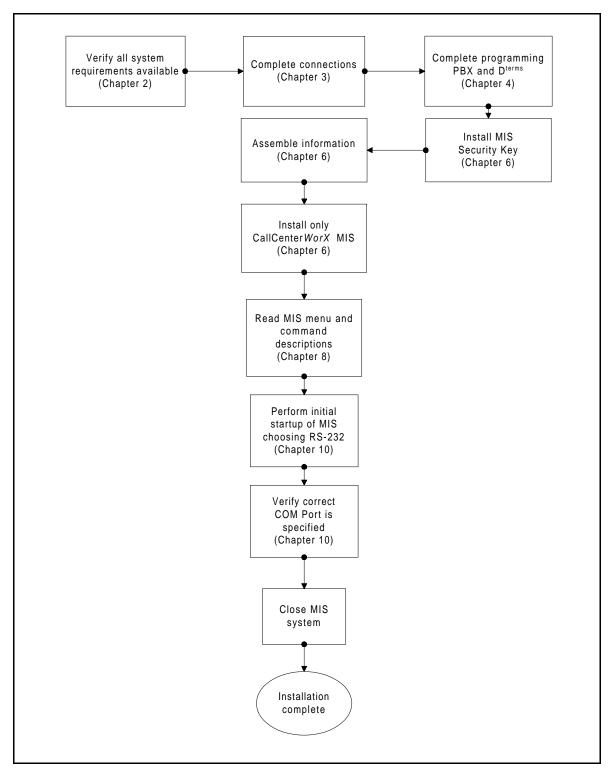


Figure 5-6 MIS PC Setup for Use via RS-232

2.2 MIS PC Setup for Use via RS-232

- STEP 1: Verify that the system requirements specified in Table 2-5 of Chapter 2 are available.
- STEP 2: Depending upon your PBX hardware, complete the connections described in Chapter 3, Heading 5, "PN-CC00 Connection for ACD Computer to Remote MIS PC Serially" (shown in Figure 3-7), or in Chapter 3, Heading 6, "PN-CC01 Connection for ACD Computer to Remote MIS PC Serially" (shown in Figure 3-8).
- STEP 3: If not already done, complete the procedures in Chapter 4, "Programming the PBX and the D^{term}."
- STEP 4: Follow the procedures in Chapter 6, Heading 1, "Security Key Installation Instructions," installing an MIS Security Key.
- STEP 5: Read Chapter 6, Heading 2, "Installation Information Needed," and assemble the information needed for installing CallCenterWorX.
- STEP 6: Install *only the MIS portion* of the CallCenter*WorX* program, following the procedures in Chapter 6, Heading 3, "CallCenterWorX CD-ROM Installation Instructions."
- STEP 7: When the program installation is complete, follow the procedures in "CallCenterWorX MIS Initial Setup" in Chapter 10, choosing the **Communication Type RS232**.
- STEP 8: Verify that the correct **COM Port** is specified. It must be the same as assigned in the ACD Tenant Data (see this chapter, Heading 1.3, Step 10:).
- STEP 9: The Baud Rate, Parity, Data Bits and Stop Bit items will appear with default values. Verify that the **Baud Rate** setting shows a value of 9600.
- STEP 10: Verify the **default settings** for the other parameters. The default setting for Parity is "Even". The default setting for Data Bits is "7," and the default setting for Stop Bit is "1."
- **Important:** Do not change these default settings without consulting your network administrator. If the settings appear with values different from the defaults, notify your network administrator.
 - STEP 11: Close the CallCenterWorX MIS–Setup window.

Configuration Procedures Configuring the MIS PCs

This page is for your notes.

CHAPTER 5 Page 50 Issue 3.0

CHAPTER 6 Installation

1. Security Key Installation Instructions

The CallCenterWorX Version 2 Security Key and MIS Security Key are 25-pin connectors that attach to your computer's parallel printer port. This key must be installed before running the CallCenterWorX program. The CallCenterWorX Version 1 Security Key is not compatible with Version 2 of this application.

STEP 1: Locate the Security Key (Figure 6-1).

• CallCenterWorX Version 2 Security Keys support different numbers of logged-on agents (10, 20, 30, 40, 60, or 80) depending on the size of system installed. You have the option to change to a different Security Key at a later time if you want to increase the capacity of your CallCenterWorX system.

Note: *The 10-agent key does not support Infolink.*

• You may have also received one or more MIS Security Keys if you are using a configuration option calling for one or more MIS PCs.

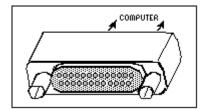


Figure 6-1 Security Key

STEP 2: Install the CallCenterWorX Version 2 Security Key or MIS Security Key:

- (a) Attach the Security Key to your computer's parallel printer port (see Figure 6-2).
- (b) Tighten the screws to connect the key securely to the port.
- (c) If a printer is connected to your computer, disconnect the printer cable from your computer; attach the Security Key; then attach the printer cable to the outside connector of the Security Key.

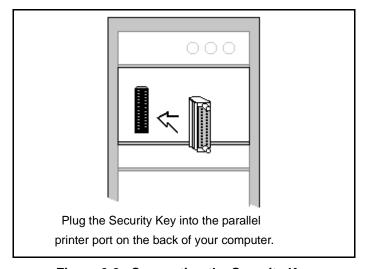


Figure 6-2 Connecting the Security Key

2. Installation Information Needed

To complete the installation, you will need to have the following information available.

2.1 ACD Installation Option

After the first few installation screens, you will reach the "Setup Type Selection" screen (Figure 6-11). In this screen you select whether to install the **MAT Client** setup (CallCenterWorX MAT), or the **Server** setup (CallCenterWorX ACD & CallCenterWorX MAT) which sets up both the Server and Client. Make your choice based on the intended function of the particular piece of equipment you are configuring.

You would typically install a Server setup on the physical system which connects to a PBX. The MAT is included in order to configure the ACD Server. If you want an additional system (or several) which can configure the ACD remotely, install the MAT Client setup. You can have only one ACD Server per PBX, but you can have more than one MAT Client.

The ACD Server setup requires Windows NT 4.0 with NT Service Pack 5, but the MAT Client setup without the Server will run on Windows NT 4.0 with NT Service Pack 5, Windows 98, or Windows 95 (Windows 95 OSR 2.5 4.00.1111 is required for Year 2000 compliance).

2.2 IP Address or Host Name

During the installation of the ACD Server setup, you will be asked to enter the **IP Address** of the PBX. If you don't know this address, check with your network administrator. The Server can dynamically determine its own IP address, as can the MAT Client(s).

For the PC using MIS via TCP/IP, ask your network administrator for the **Host Name** of the Server.

2.3 Location of Installed Program

The default destination directory for the program files is C: \Program Files \ NEC CallCenterWorX. You may accept that location, or choose to place the program files in a different directory by using the "Browse" button. If you select a different destination directory for the files, be sure to make a note of the path so that you can locate the files later if necessary.

3. CallCenter WorX CD-ROM Installation Instructions

Use the CD-ROM in your CallCenterWorX package to install CallCenterWorX. You have the option to:

- Install the entire CallCenter*WorX* suite, which includes both ACD (for Server and MAT Client, or for MAT Client) and MIS, using Windows NT 4.0 with NT Service Pack 5.
- Install only the ACD (for Server and MAT Client, or for MAT Client) using Windows NT 4.0 with NT Service Pack 5, Windows 95, or Windows 98.
- Install only the MIS using Windows NT 4.0, Windows 95, or Windows 98.

Note: If you install only the ACD or the MIS and later find you need to add the other, you can do so using the same CD-ROM.

Accessing the documentation on the CD-ROM requires Adobe Acrobat Reader® Release 4.0 (included on the CD-ROM). Using the Reader, you can:

- Open the "CallCenterWorX ACD Features and Specifications" manual.
- Open the "CallCenterWorX System Manual."
- Open the "CallCenterWorX MIS Quick Reference Guide"

3.1 Installation Setup

Important: Be sure to close all Windows programs and screen savers that are running and disable any virus detection programs before using the Setup program.

The Setup consists of a series of dialog boxes that supply default answers to questions regarding the installation of files to your hard disk. To accept the default answers, click the **Next** button. To make changes, click the **Browse** button and make desired changes, then click **OK** to return to the dialog box and click **Next** to move to the next screen. To quit the installation, click **Cancel**.

STEP 1: Insert the CallCenter*WorX* CD-ROM into your computer's CD-ROM drive. The auto-run feature of CallCenter*WorX* displays the **Introduction** screen.

Note: If the auto-run doesn't perform, launch from the Windows taskbar Start command. Select Run and type in D:\Setup (where D is the drive for your CD-ROM).



Figure 6-3 Installation Introduction

STEP 2: At this point you can choose to:

- (a) Exit from the installation process by clicking the **Exit** choice.
- (b) Click **Contact** for NEC America, Inc. mailing address, telephone number, and e-mail address.



Figure 6-4 Contact NEC America

(c) Open the Documentation option by clicking **Documentation** and selecting the CallCenter*WorX* System Manual, the CallCenter*WorX* ACD Features and Specifications Manual, or the CallCenter*WorX* MIS Quick Reference Guide. These files are in PDF[™] format and can be read using Adobe Acrobat Reader[®] (included on the installation CD-ROM).

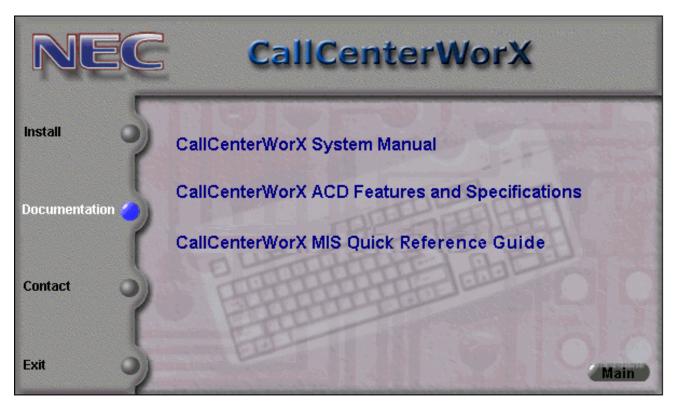


Figure 6-5 Documentation

(d) Install CallCenterWorX by clicking Install.

STEP 3: If you choose the **Install** option, the CallCenterWorX Program screen (Figure 6-6) displays.



Figure 6-6 Install Selection

STEP 4: Click on the installation option of your choice. If you choose the CallCenterWorX Suite or CallCenterWorX ACD, the Welcome screen in Figure 6-7 displays. (Screens for CallCenterWorX MIS are shown in this chapter, Heading 3.4, beginning with Figure 6-22.)



Figure 6-7 Welcome - ACD

STEP 5: Read the instructions in the Welcome screen and click Next to continue, or Cancel to quit Setup. If you click **Next**, the Software License Agreement screen (Figure 6-8) displays.

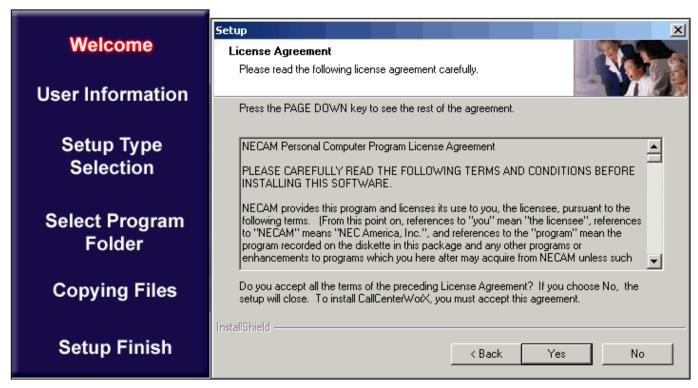


Figure 6-8 License Agreement - ACD

STEP 6: Read the agreement and if you accept all the terms, click **Yes**.

Installation

CallCenterWorX CD-ROM Installation Instructions

STEP 7: The User Information screen displays (Figure 6-9). Enter your name and the name of your company. Click Next.

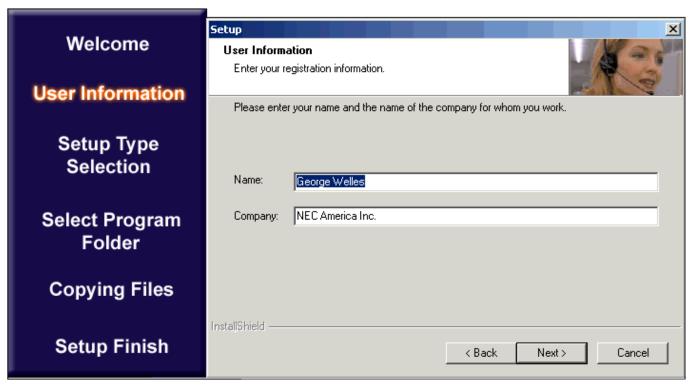


Figure 6-9 User Information - ACD

STEP 8: The Choose Destination Location screen displays (Figure 6-10). If you wish to change the destination for these files, click **Browse** and select another folder. (You may wish to make a note of the different location for future reference.) Click **OK** to return to this screen. When the path shown in the Destination Folder area is satisfactory, click **Next**.

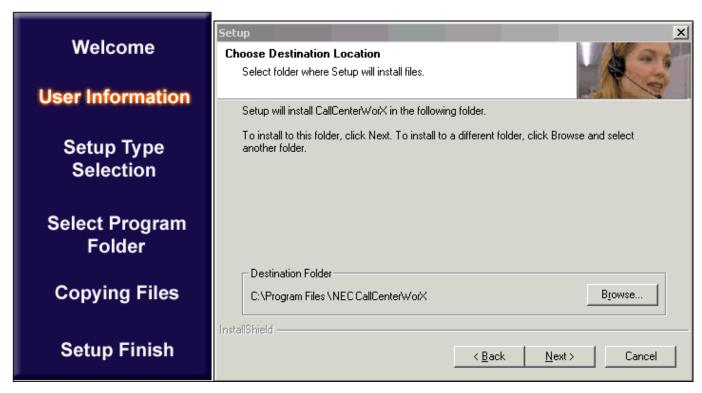


Figure 6-10 Choose Destination Location - ACD

Installation

CallCenterWorX CD-ROM Installation Instructions

STEP 9: The Setup Type Selection screen displays. If you wish to install the ACD MAT Client, select **Client** and click **Next**. The selection shown in Figure 6-11 selects the MAT Client installation. The screens following this one (shown in Figures 6-12 through 6-15) will complete this option.

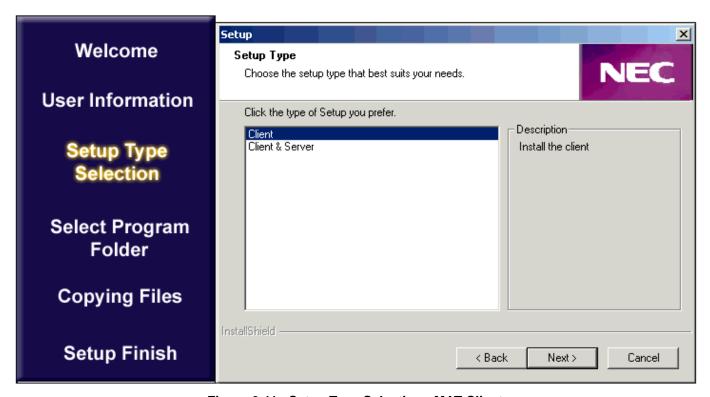


Figure 6-11 Setup Type Selection - MAT Client

STEP 10: If you wish to install the Server and MAT Client, go to Heading 3.3. Screens showing installation of the Server and MAT Client (Figures 6-16 through 6-21) illustrate that option.

3.2 MAT Client Installation Option

STEP 1: Selection of the MAT Client causes the Select Program Folder screen to display (see Figure 6-12). You may accept the choice already selected, select a folder name from the existing folder list, or type a new name in the box. When the folder name shown in the Program Folders box is satisfactory, click **Next**.

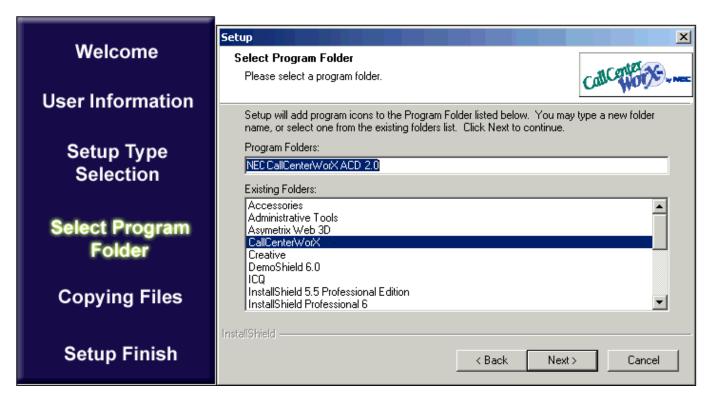


Figure 6-12 Select Program Folder - MAT Client

STEP 2: The first Copying Files screen displays (see Figure 6-13). It shows the progress of installing the program files on your hard disk. No action is required from you to continue this process. If you wish to stop the installation, click Cancel.

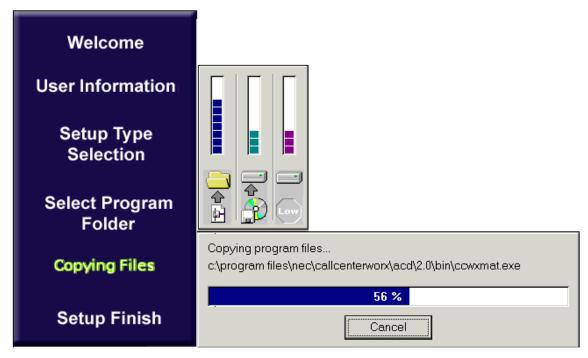


Figure 6-13 Copying Files - MAT Client

STEP 3: When the copying of files is complete, the Add Folder Icon screen displays. Click **OK** to continue.

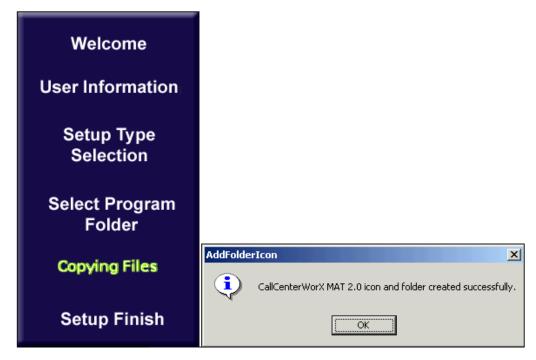


Figure 6-14 Add Folder Icon - MAT Client

STEP 4: The CallCenter*WorX* Setup Finish screen displays. If you would like to view the README file, check that box. If you would like to launch the CallCenter*WorX* MAT program now, check that box. Click the **Finish** button to complete the setup of the ACD MAT Client option.

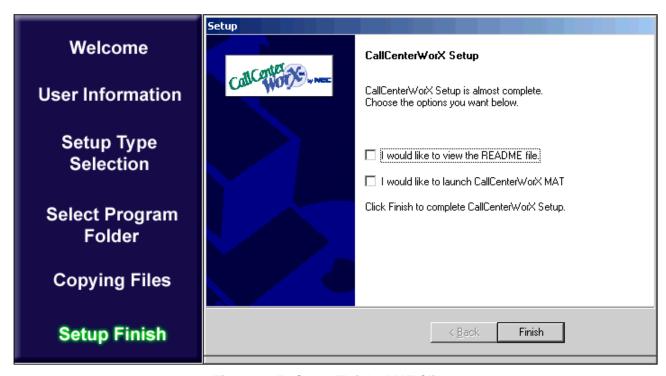


Figure 6-15 Setup Flnish - MAT Client

If you have chosen to install the entire CallCenterWorX suite (both ACD and MIS programming), the setup program will automatically continue with the MIS portion of the installation (see this chapter, Heading 3.4, "MIS Installation Option").

If you are installing only the ACD MAT Client programming, see this chapter, Heading 4, "Starting CallCenterWorX ACD," for procedures needed for the initial ACD startup.

3.3 Server and MAT Client Installation Option

The selection shown in Figure 6-16 selects the Server and MAT Client installation. This screen will display after the Choose Destination Location screen shown in Figure 6-10.



Figure 6-16 Setup Type Selection - Server and MAT Client

STEP 1: Select **Client & Server** and click **Next**. The IP Address Configuration screen will display (Figure 6-17).

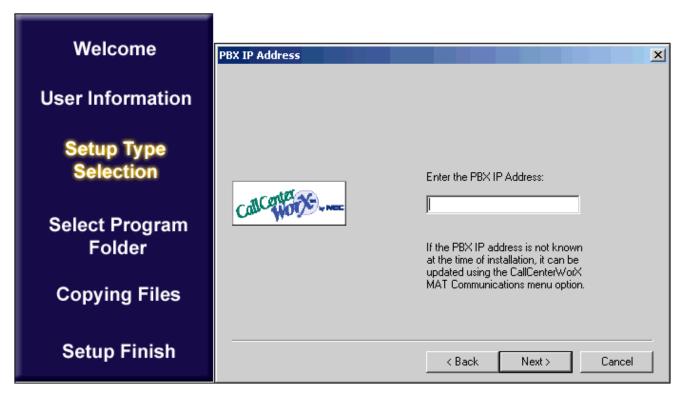


Figure 6-17 IP Address Configuration - Server and MAT Client

STEP 2: Enter the **PBX IP Address** for CallCenter*WorX* to connect to. This should be the same IP address you entered as part of the "Programming the PBX" instructions. Under Chapter 4, Heading 3, "Programming ACD/OAI Operation Codes," using "CMD 7 Y=9," you entered a four-octet code (four 3-digit numbers separated by periods). Enter that same code here and click **Next**.

If you don't know the correct PBX IP Address to enter here, consult your network administrator.

STEP 3: The Select Program Folder screen displays (Figure 6-18).

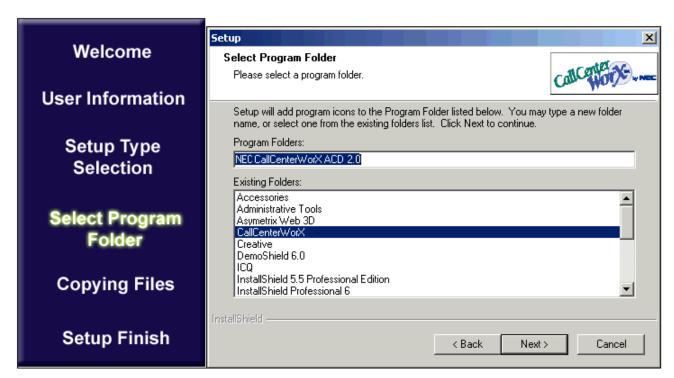


Figure 6-18 Select Program Folder - Server and MAT Client

STEP 4: You may accept the choice already selected, select a folder name from the existing folder list, or type a new name in the box. When the folder name shown in the Program Folders box is satisfactory, click **Next**.

STEP 5: The first Copying Files screen displays (see Figure 6-19). It shows the progress of installing the program files on your hard disk. No action is required from you to continue this process. If you wish to stop the installation, click Cancel.

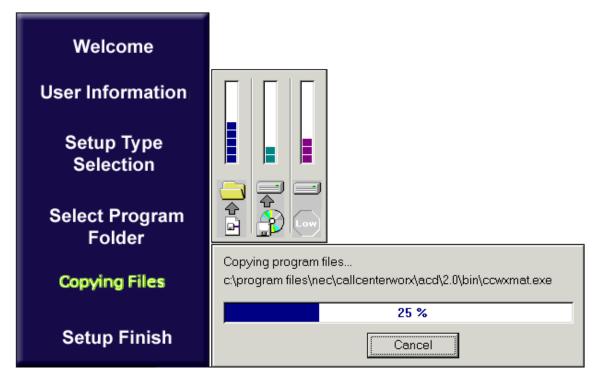


Figure 6-19 Copying Files - Server and MAT Client

STEP 6: When the copying of files is complete, the Add Folder Icon screen displays (Figure 6-20). Click **OK** to continue.

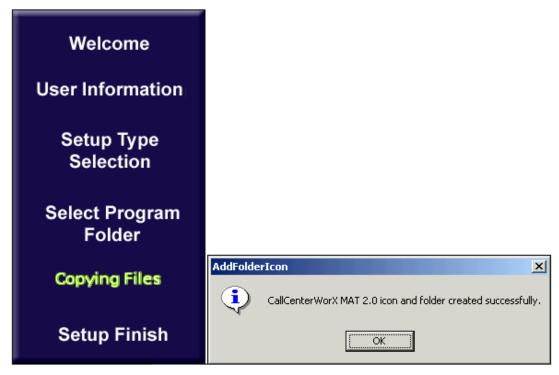


Figure 6-20 Add Folder Icon - Server and MAT Client

STEP 7: The CallCenter*WorX* Setup Finish screen displays (Figure 6-21). If you would like to view the README file, check that box. If you would like to launch the CallCenter*WorX* MAT program now, check that box. Click the **Finish** button to complete the setup of the ACD Server and MAT Client option.

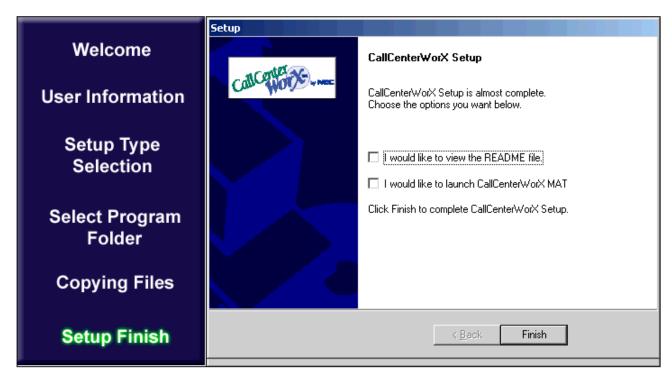


Figure 6-21 Setup Finish - Server and MAT Client

If you have chosen to install the entire CallCenter*WorX* suite (both ACD and MIS programming), the setup program will automatically continue with the MIS portion of the installation (see this chapter, Heading 3.4, "MIS Installation Option").

If you are installing only the ACD Server and MAT Client programming, see this chapter, Heading 4, "Starting CallCenterWorX ACD," for procedures needed for the initial ACD startup.

3.4 MIS Installation Option

If you selected CallCenter*WorX* MIS in Step 4 of Heading 3.6, or if you are installing the complete CallCenter*WorX* suite, the Welcome screen in Figure 6-22 displays.

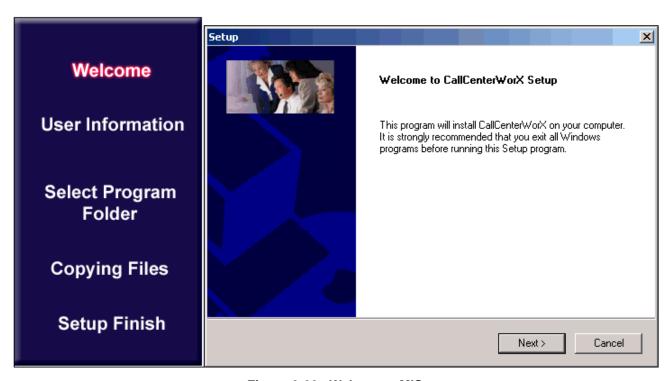


Figure 6-22 Welcome - MIS

STEP 1: Read the instructions in the Welcome screen and click Next to continue, or Cancel to quit Setup. If you click **Next**, the Software License Agreement screen (Figure 6-23) displays.

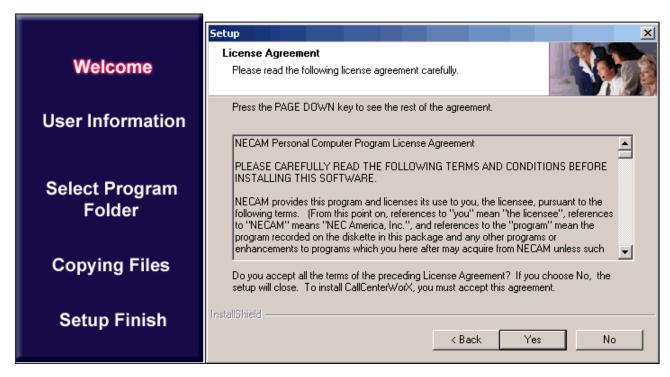


Figure 6-23 License Agreement - MIS

STEP 2: Read the agreement and if you accept all the terms, click **Yes**.

STEP 3: Enter **your name** and the **name of your company** in the dialog boxes of the User Information screen (Figure 6-24). Click **Next**.

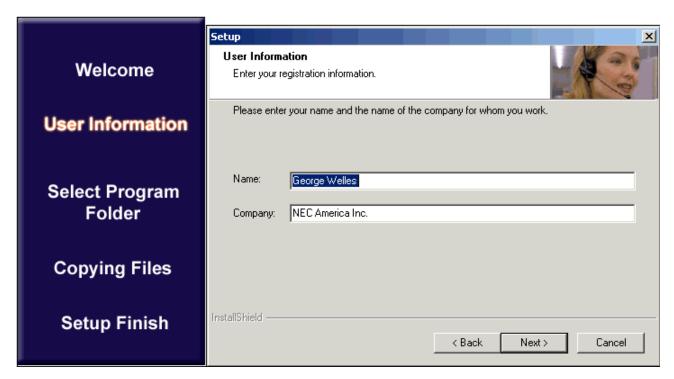


Figure 6-24 User Information - MIS

STEP 4: The Choose Destination Location screen displays (Figure 6-25). If you wish to change the destination for these files, click **Browse** and select another directory. (You may wish to make a note of the different location for future reference.) Click **OK** to return to this screen. When the path shown in the Destination Folder area is satisfactory, click **Next**.

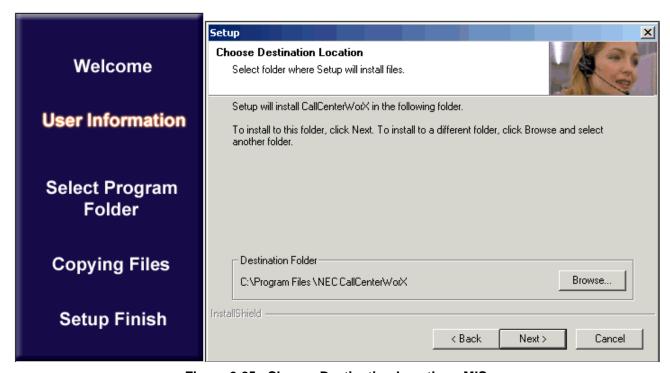


Figure 6-25 Choose Destination Location - MIS

STEP 5: The Select Program Folder screen displays (Figure 6-26). To accept the default program folder name, click **Next**. If you wish to change the destination for these files, click **Browse** and select another folder. (You may wish to make a note of the different location for future reference.) Click **OK** to return to this screen. When the folder name shown in the Program Folders box is satisfactory, click **Next**.

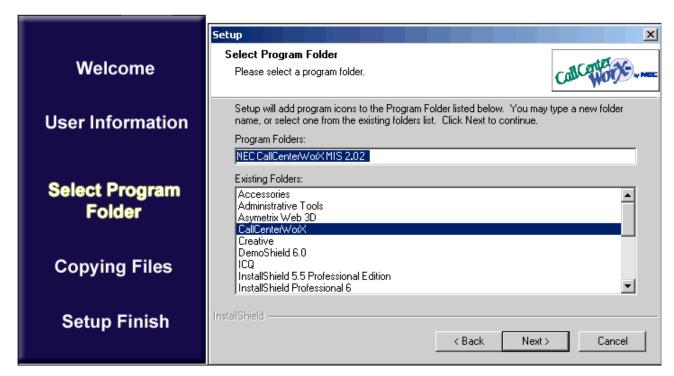


Figure 6-26 Select Program Folder - MIS

STEP 6: The Copying Files window displays (Figure 6-27). It shows the progress of installing the program files on your hard disk. No action is required of you to continue this process. If you wish to stop the installation, click Cancel.

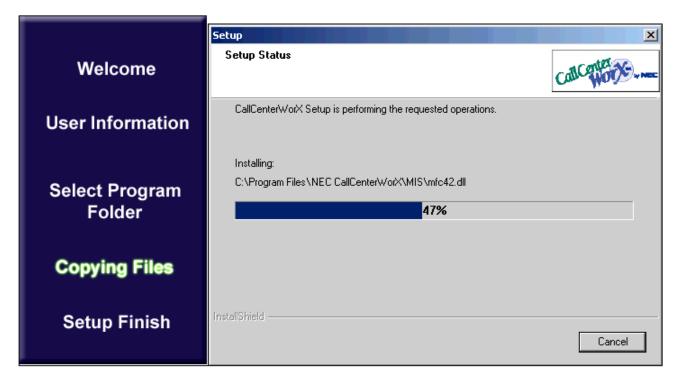


Figure 6-27 Copying Files - MIS

STEP 7: When file copying is complete, the Setup Finish screen displays (Figure 6-28), allowing you to complete the Setup and automatically launch CallCenter*WorX* MIS. Click **Finish**.

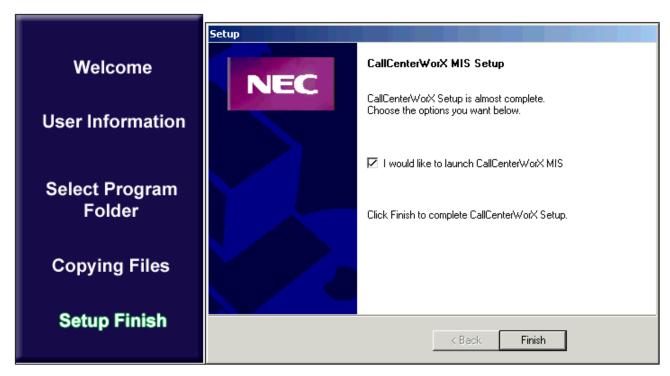


Figure 6-28 Setup Finish - MIS

STEP 8: Your computer automatically performs the program launch.

The CallCenterWorX MIS program is now installed and ready to configure. See Chapter 10, Heading 1., "CallCenterWorX MIS Initial Setup" for configuration procedures needed for the initial MIS setup.

CallCenterWorX MIS menu commands are described in Chapter 8.

4. Starting CallCenter WorX ACD

STEP 1: Select Programs \ NEC CallCenterWorX \ ACD \ ACD from the Start bar.

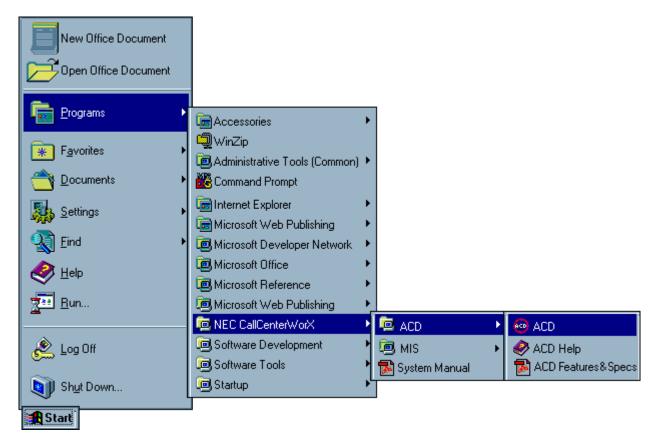


Figure 6-29 Starting CallCenter WorX ACD

STEP 2: The CallCenterWorX ACD Console displays (Figure 6-30).

The CallCenterWorX logo (the red CCWX Status symbol) will not be spinning, and the toolbar icons will be dimmed out. The icons are enabled when connection is established to the ACD Server from the Client MAT. The CCWX Status symbol starts spinning when the ACD Server establishes a connection and successfully subscribes to the PBX.

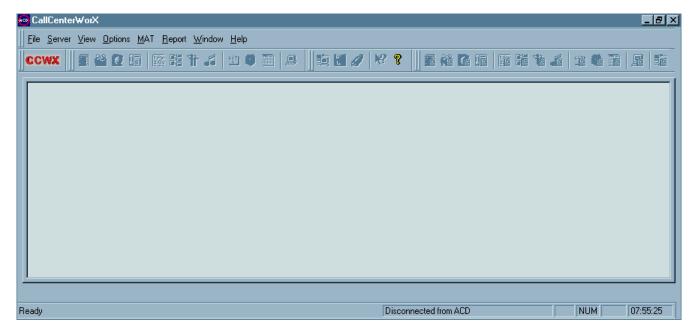


Figure 6-30 CallCenter WorX ACD Console

See Chapter 7, Heading 2, "Server Menu," for further information on Server connectivity.

See Chapter 9, "ACD Procedures" for the method of programming (Heading 1.), the recommended programming order (Heading 2.), and instructions for each command (Heading 3. through Heading 17.).

Menu Commands

Chapter 7 ACD Menu Commands

Describes all ACD menu commands and subcommands.

Chapter 8 MIS Menu Commands

Describes all MIS menu commands and subcommands.

This page is for your notes.

CHAPTER 7 ACD Menu Commands

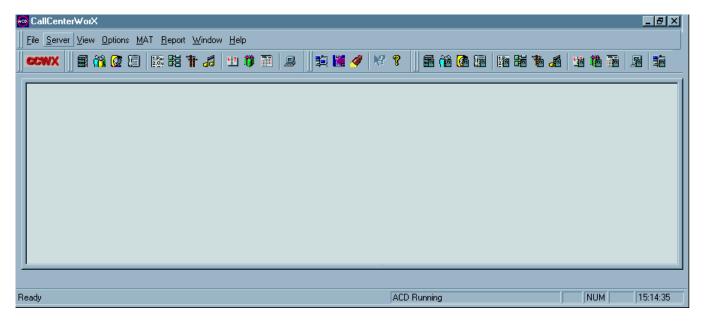


Figure 7-1 CallCenter WorX ACD Console Screen

The main console screen for CallCenter*WorX* ACD displays the red "CCWX" Status symbol. The icons are enabled when connection is established to the ACD Server from the Client MAT. The red CCWX Status symbol starts spinning when the ACD Server establishes a connection and successfully subscribes to the PBX.

File Menu

1. File Menu

The File menu contains the **Exit** command, which provides an orderly exit from the program.

2. Server Menu

The Server Menu comprises:

- a. The **ACD Server** option with two choices:
 - 1. **Connect**, to connect to the ACD Server.

To connect to the Server, you can select the **Server** menu command, choose **ACD Server**, and choose **Connect** (see Figure 7-2).



Figure 7-2 ACD Server Connection

The **Server Name dialog box** displays. If the correct name of the designated server displays, click **OK** (see Figure 7-3). If the server name displayed is not correct, type in the correct server name or server IP address and click **OK**. When the CCWX symbol begins to spin, you have established connectivity with the ACD Server.

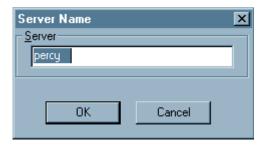


Figure 7-3 Server Name Dialog

- 2. **Disconnect**, to disconnect from the ACD Server. This command is active only when the Server is connected.
- b. The **Trace Server** option with two choices:
 - Connect, to connect to the Server providing trace procedures. When connected to this Server, the
 Output Window command option under the Window menu displays trace data to a blue screen area
 which opens beneath the main console screen. This data is for the use of technicians in tracing and
 diagnosing Server and Client behavior.
 - 2. **Disconnect**, to disconnect from the Server providing trace procedures. This command is active only when the Trace Server is connected.

3. View Menu

The View Menu controls the behavior of the Toolbars, the Workbook area, and the Status Bar on the console screen.

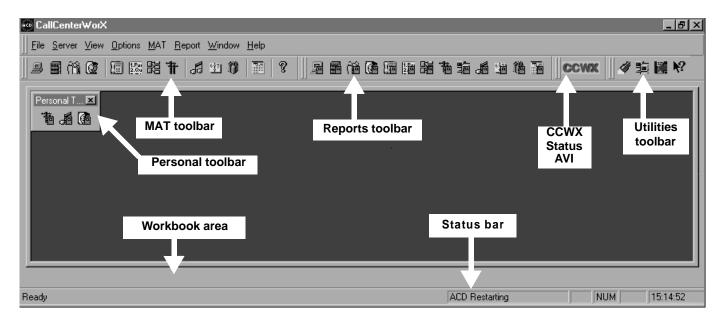


Figure 7-4 Console Screen

The **Toolbar** areas shown in Figure 7-4 are the **MAT** command toolbar, the **Reports** toolbar, the **Utilities** toolbar, and the **Personal** toolbar.

- The **MAT toolbar** icons provide one of the three ways to access MAT commands.
- Reports can be generated by use of the **Report toolbar** icons as well as from the Data Entry screen List button.
- The **Utilities toolbar** icons are for use by technical staff in maintaining the database and monitoring ACD functions.
- The **Personal toolbar** can be named to suit your purpose and can include any icons you wish to use.

Selecting the **Toolbars** option under the **View menu** displays the check list of available toolbars (Figure 7-5).



Figure 7-5 Toolbars Options

- Toolbars can be displayed (checked) or hidden (unchecked).
- A toolbar can be relocated to any portion of the screen, including the Workbook area.
- The **Reset** button will restore the default condition to the toolbars.
- Personal toolbars can be created for specific purposes or for convenience in frequent usage. Using the
 New... button in the main Toolbars dialog box to display the New Toolbar window (see Figure 7-6), you
 can type in a custom name for the new toolbar.

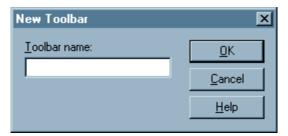


Figure 7-6 New Toolbar Window

You can drag individual icons to the new toolbar to construct a personalized selection in any order.

Note: If you move an icon onto a personal toolbar which you later deactivate, and the icon is then missing from its original (source) toolbar, re-selecting the original toolbar in the main **Toolbars** dialog box (Figure 7-5) and pressing the **Reset** button will restore the icon.

The **Workbook** area of the console screen shows a tab for each screen as it is opened, allowing rapid selection when multiple screens are displayed.

- The tab shows the icon of the command with the name of the command.
- The Workbook area can be removed to increase space on the main screen by clicking the checked option under the **View menu**. This toggles to an unchecked option which removes the Workbook until you check it again.

The **Status Bar** on the console screen indicates the current condition of the system.

- The "Ready" on the left side indicates that the system is connected and ready for the input of commands or data.
- "ACD Restarting" on the right side (see Figure 7-4) indicates that the ACD is restarting after stopping (see other status statements listed below). An "Access Denied" message indicates that the Client does not have Server launch permissions enabled.

State	Message
CCWX Symbol Not Spinning, Icons Disabled	Not Connected to ACD
	ACD Stopped
	ACD Shutting Down
CCWX Symbol Not Spinning, Icons Enabled	ACD Paused
	ACD Initializing
	ACD Restarting
	ACD Restoring DB
	ACD Restoring PBX Connection
	ACD Unable to Establish PBX Connection
	ACD Subscribing to PBX Services
CCWX Symbol Spinning, Icons Enabled	ACD Running

• The **Status Bar** area can be removed by clicking the checked option under the **View menu**. This toggles to an unchecked option and converts the Status Bar area to screen area. Clicking on the unchecked Status Bar option restores the Status Bar to the screen.

4. Options Menu

- The **Workbook / Toggle Icons** option allows the choice of showing or not showing the command icon on the Workbook tab at the bottom of the screen.
- The **Redraw** choice provides the options of **Normal** or **Optimized** for refreshing the screen.
- **Background** offers a choice of colors and textures for the Data Entry screens. The next screen opened after making a color selection will show that background color while the screen is open.

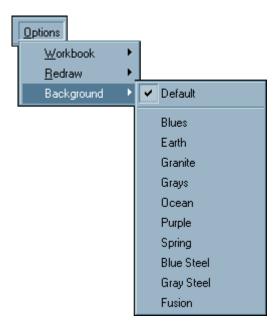


Figure 7-7 Data Entry Screen Background Colors

5. MAT Menu

5.1 Menu Commands

The commands used for the Maintenance Administration Terminal (MAT) functions are listed in this menu, providing one of three ways to select a MAT command data screen:

- 1. Selecting a command from the **menu bar** using the mouse (such as selecting the **Tenant Data** command by clicking **Tenant Data** under the **MAT menu**).
- 2. Selecting a command from the **keyboard** by holding down the **Control and Shift keys** and pressing an alphabetic letter (such as selecting the **Tenant Data** command by holding down **CTRL** and **SHIFT** and pressing **T**). For a complete list of MAT menu and keyboard commands, see Figure 9-2.
- 3. Selecting a command from the **MAT icon Toolbar** located under the menu bar by using the mouse (such as selecting the **Tenant Data toolbar icon**).



Figure 7-8 MAT Toolbar Icons

Each screen displays its icon in the top left corner, and the icon also appears on the screen's tab in the Workbook area.

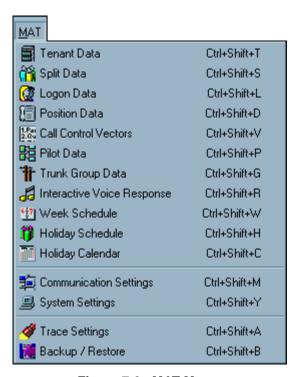
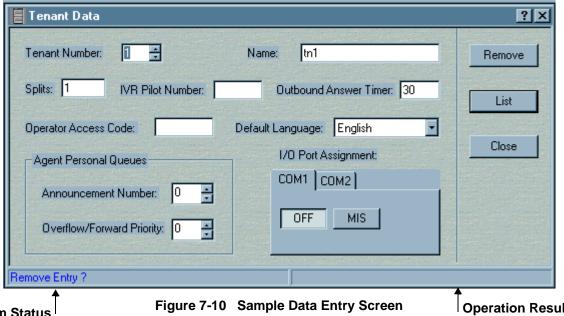


Figure 7-9 MAT Menu



Form Status Message Bar Operation Result Message Bar

5.2 Data Screen Buttons

- The top button reflects the status of the contents. The first or configuration data entry will cause the top button to show "Update." Press the Update button (or the keyboard Enter key) to save an entry or a change. Any data entry or change after the first entry will cause the top button to show "Remove." You can press the top button (now the Remove button) to remove a previous entry.
- The center List button opens a Report screen view of the current data configured for this command.
 That screen displays icons allowing you to Save to a file, Save to Microsoft Excel, Print, Print
 Preview, Export to Microsoft Access, or Change font style or size directly from the Report view.
- The bottom **Close** button closes the data screen without saving any changes if the top button (Update/Remove) has *not* been pressed previously. Pressing the **keyboard Escape key** also closes the screen without saving entries or changes if Update/Remove has *not* been pressed previously.

5.2.1 How to Use the Buttons

- (a) To save newly entered or changed information, press **Update** or the **Enter** key.
- (b) To delete information, press **Remove**.
- (c) To close without saving changes, press **Close** instead of **Update**, or press the **Escape** key.
- (d) To close after saving changes by pressing **Update** or **Enter**, press **Close**.

5.3 Information Choices

The choices shown in the drop-down boxes in the data screen sometimes include only the information previously entered. For example, if only Split 1 and Split 2 have been entered and saved, those will be the only options shown, even though the Tenant Data may have been configured to allow more than 2 splits and the CallCenterWorX ACD system will handle a total of 30 splits (distributed among all tenants).

In order to access an additional option, it must first be entered as new information and the Update button (or Enter key) pressed. It will then become another choice.

Attempted entry of out-of-range information (such as more splits than a tenant has been configured for) will generate a red error message on the Operation Result Message Bar (see Heading 5.4) of the Data Entry Screen.

5.4 Message Bars

The **Form Status Message Bar**, located in the **bottom left** area of the Data Entry Screen (see Figure 7-10), reflects the current state of information entry in the form.

State	Message
An entry exists which is unchanged this session	Remove Entry?
A change has been made to an existing entry	Update name of entity (such as Split)
An entry is made that does not yet exist in the ACD	New name of entity

The **Operation Result Message Bar**, located in the **bottom right** area of the Data Entry Screen (see Figure 7-10), reflects the result of the current entry in the form.

State	Message
Correct entry of an item (within character and digit limits, within configuration limits)	ACD Data written successfully (in green)
Attempted entry of an item which already exists in another entity	Entry exists in another <i>name of entity</i> (in red)

6. Report Menu

The first options available on the Report Menu are:

- Save to Text File, which saves the data to the text file name you specify.
- **Save to Excel File**, which saves the data to a Microsoft Excel file.
- Export to Access database, which exports the file to a Microsoft Access database.
- **Print Report**, which outputs a report to a designated printer without opening the Data Entry screen.
- **Print Preview**, which displays a sample of the report as it will be printed.

These options are also available as icons on the menu bar of the Data Report screen (which is created by pressing the **List** button on the Data Entry screen).



Figure 7-11 Report Menu

Opening a Report screen for a particular MAT command name can be done in any of four ways:

- 1. Select a MAT command name from the listing of report titles under the **Report menu** (see Figure 7-11).
- 2. Hold down the **ALT and Shift** keys and enter the **letter** specified in the Report menu listing for that command.
- 3. Press the **List button** on the Data Entry screen for that command.
- 4. Select the icon for that command from the **Reports Toolbar**.

Pressing the **List button** opens the Data Report screen.

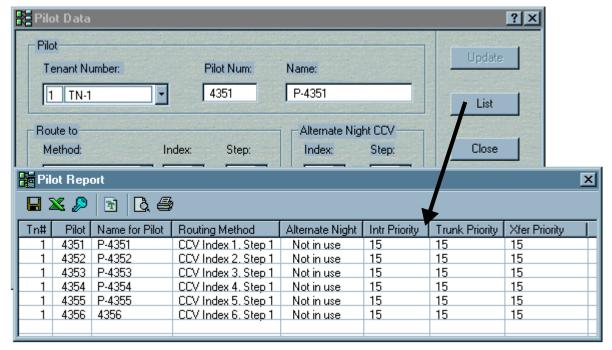


Figure 7-12 Sample Data Entry and Data Report Screens

The **icons** on the Data Report Screen shown in Figure 7-12 offer quick ways to:

- Save the data to a text file.
- Save the data to a Microsoft Excel file.
- Export the data to a Microsoft Access database.
- Change the font style and size used in the report.
- View a Print Preview of the report.
- Send the report to a printer.

Data Reports which are too wide for the whole report to fit on the screen will appear with a horizontal scroll bar across the bottom, allowing you to move across the columns. You can also adjust the viewing position of a report by selecting the title bar with the mouse and dragging the report to bring the desired columns into view.

The **columns** in a Data Report screen (shown in Figure 7-12) can be resized or rearranged by using the mouse to drag the column headings.

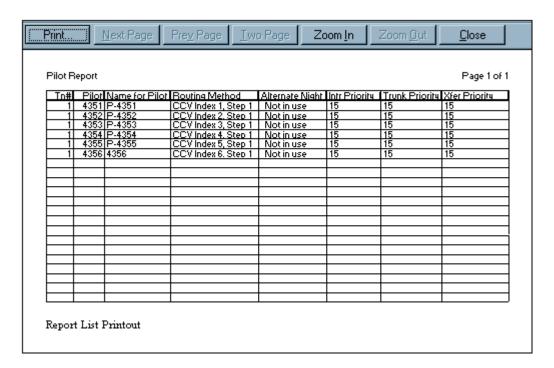


Figure 7-13 Sample Report Print Preview Screen

The **Print Preview screen** shown in Figure 7-13 can be opened by choosing the **Print Preview command** on the Report menu, or by clicking the **Print Preview icon** on the Data Report menu bar.

- The **Print** command sends the report to the printer.
- The **Next Page**, **Previous Page**, **Two Page**, **Zoom In**, and **Zoom Out** commands on the Print Preview menu bar allow you to have varying views of the displayed report.
- The **Close** command closes the Print Preview screen.
- The column arrangement will reflect any column adjustments made in the Data Report screen.

7. Window Menu

Cascade

• Places all open dialogs on top of each other in a cascading fashion, with each title bar visible and selectable.

Tile

Places all open dialogs apart from each other with some overlap between dialogs, with each item selectable.

Close All

Closes all open screens.

Output Window

- Opens a blue trace viewing area below the console area (between the Workbook Area and the Status Bar) for use by technical personnel.
- Permits technical monitoring of logged events in the ACD. This output can be printed or e-mailed to another location if your technician requests.

8. Help Menu

- **Help Topic** opens the CallCenter*WorX* ACD online Help system (explained in detail in Chapter 11, "CallCenterWorX Online Help").
- **About** provides data about the CallCenter*WorX* ACD system.

ACD Menu Commands

Help Menu

This page is for your notes.

CHAPTER 8 MIS Menu Commands

1. File Menu

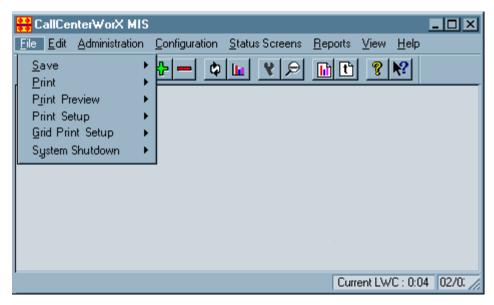


Figure 8-1 File Menu

The following commands are listed under the File menu:

- **Save** confirms the entry of information.
- **Print** sends the current information to the designated printer.
- **Print Preview** displays an example of what the print output will look like.
- **Print Setup** allows you to choose the printer destination, the paper size and source, the number of copies, and the printer properties such as orientation, graphic resolution, and layout.
- **Grid Print Setup** evokes display of the Report Layout Grid (see Chapter 10, Figure 10-21). This grid permits formatting of report data margins, titles, grid lines, page order, and centering axis. The grid allows you to save this setting for future printouts of the report.
- **System Shutdown** is the command by which you exit CallCenterWorX MIS.

2. Edit Menu

The Edit menu contains commands for many of the icons on the console Toolbar.



Figure 8-2 Edit Menu Commands

 The Add Record and Delete Record commands refer to the Assignment windows under the Configuration menu.



Figure 8-3 Add Record and Delete Record Icons

2. The **Text View** and **Graph View** commands determine in what form status screens and reports appear. These commands apply in both the Status Screens menu and the Reports menu.



Figure 8-4 Graph View and Text View Icons

3. **Refresh Report** updates screens already running. The **Create Graph** command operates under the Status Screens and the Reports menus.



Figure 8-5 Refresh Report and Create Graph Icons

4. The **Modify Graph** command alters existing graphs. The **Zoom Out** enlarges or reduces the screen image.



Figure 8-6 Modify Graph and Zoom Out Icons

3. Administration Menu

The commands under this menu are Change Password and Disk Usage.

The **Change Password** dialog should be used only by the call center manager or network administrator as a periodic security measure.

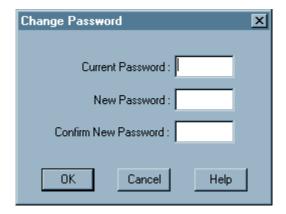


Figure 8-7 Change Password Dialog

The **Disk Usage** screen is for information only, providing a report of disk space used and available.

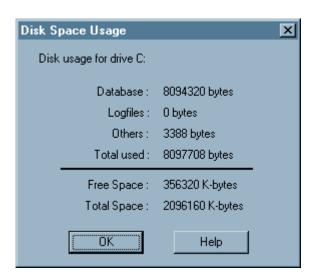


Figure 8-8 Disk Space Usage Screen

4. Configuration Menu

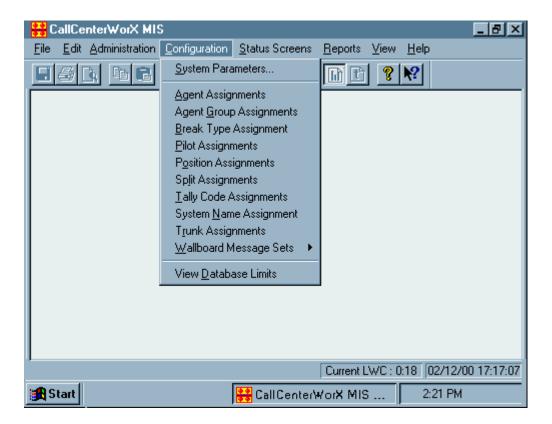


Figure 8-9 Configuration Menu Screen

The Configuration menu allows the call center manager to establish the basic parameters of the MIS. The **System Parameters** window settings (see Figure 8-11 and Figure 8-12) determine the method of communication with the ACD system and set other preferences for the operation of the MIS. The other listed commands open screens to accept configuration of the features of the MIS.

4.1 System Parameters

There are several kinds of configuration data used in CallCenterWorX:

- 1. ACD configuration data is used in the ACD system and affects the processing of calls. The initial data for **Agent Logon ID Code** assignments, **Position Split Assignments**, **Split Inflow Threshold**, and **Overflow Delay Threshold** are downloaded to the MIS system during start-up. These fields are stored in the ACD system but may be modified in the MIS.
- MIS local configuration data is used only by CallCenterWorX MIS and does not affect the ACD. The Grade of Service Threshold, Answer Delay Interval, Abandon Delay Interval, and Wall Board Configuration fields are assigned and stored in CallCenterWorX MIS.
- 3. Some communication parameters must be programmed and changed in both the ACD and MIS systems, such as setting or modifying the **Communication Port** for the computer, and **Break Type** enablement and assignment.
- 4. Certain configuration data used in the MIS (assigned names such as Split Name and Agent Name, which are referenced by both systems) can be synchronized to match the configuration data in the ACD. Although naming is an optional feature, the use of a name in addition to a number may enable the call center manager to more easily identify an entity.

These names are downloaded to the MIS database at start-up. The acceptance or rejection of this download may be set under the **Download Names** field in the **Change System Parameters** window (see Figure 8-11), accessed from the **Configuration menu**.

4.2 Modifying Delay Intervals

The **Delay Intervals** parameter is listed on the **System Parameters window** under the Configuration menu. Figure 8-10 shows the default settings of the delay intervals used in reporting Answer Delay and Abandon Delay statistics for splits and trunk groups. The intervals are measured in seconds.

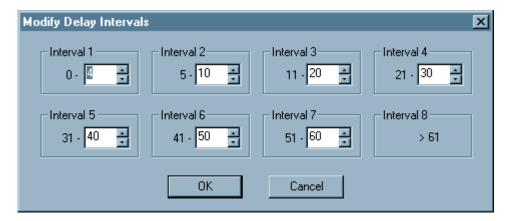


Figure 8-10 Modify Delay Intervals Window

These intervals can be modified to change the size of the "buckets" into which all answered calls or abandoned calls fall (the beginning number in each interval changes in reference to the setting of the previous ending number). When calls are answered or abandoned within these specified time intervals, the counts are incremented accordingly.

4.3 Configuring Communication Type

Before you can run CallCenterWorX MIS you must properly configure the **Communication Type** and **Port** (or **Host / Host Name**). If communication settings are incorrect, CallCenterWorX MIS will not run. The **System Parameters** command under the **Configuration menu** opens the setup window called the **Change System Parameters window** which is used to configure the Communication Type and Port (or Host/Host Name).

The **Communication Type** field in the Change System Parameters window (see Figure 8-11 and Figure 8-12) offers a choice of either TCP/IP or RS-232. The Type choice determines which items can be set in the Communication section of the window.

• **RS-232** is a standardized serial interface between data communications equipment (such as computers) and data terminal equipment (such as modems and terminals).

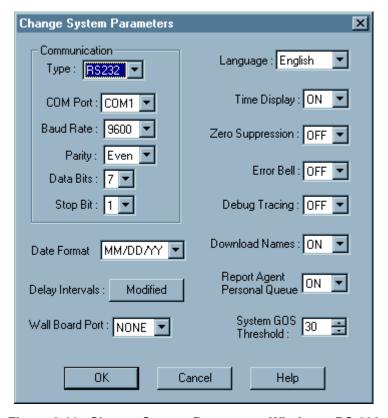


Figure 8-11 Change System Parameters Window – RS-232

• **TCP/IP** (Transmission Control Protocol/Internet Protocol) is a set of protocols (rules to add order to data transmission) to provide end-to-end connectivity between a data source and a destination on a network.

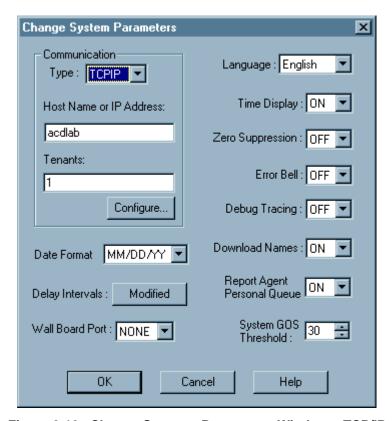


Figure 8-12 Change Systems Parameters Window – TCP/IP

The **Host Name or IP Address** is the network name of the ACD Server which directs the CallCenter*WorX* system; it is the name given to the CallCenter*WorX* computer when TCP/IP is selected as the MIS Communication Type. A matching Host Name is required for communication between CallCenter*WorX* ACD and CallCenter*WorX* MIS. Your network administrator can provide this name.

Important: It is essential to configure the Tenant numbers to be monitored by the MIS and to assign the System Name. This procedure is discussed in Chapter 10, Heading 9, "System Name Assignment."

4.4 Agent Assignments

The **Agent Assignment window** under the **Configuration menu** is used to add or modify agent information.

Agent Assignment							_
	Agent ID	Agent Name	Agent Group Number	Agent Group Name	Position	Attribute Split	
1	101	Jerry	1	Blue	4306	1	
2	102	Chris	1	Blue	4311	1	
3	103	Ron	1	Blue	4312	1	
4	104	Jim	1	Blue	4313	1	
-5	105	Jay	3	Cowboys	4314	1	
6	201	Mark	1	Blue	4308	2	
7	202	John	2	Stars	4309	2	
8	203	Beth	1	Blue	4310	2	

Figure 8-13 Agent Assignment Window

All agent information is referenced by the Agent ID. The Agent Assignment window displays:

- Agent Logon ID
- Agent Name
- Agent Group Number
- Agent Group Name
- Agent Position (if logged on)
- Attribute Split assignments

Note: Terms listed above are defined in Chapter 14, "Terms and Concepts."

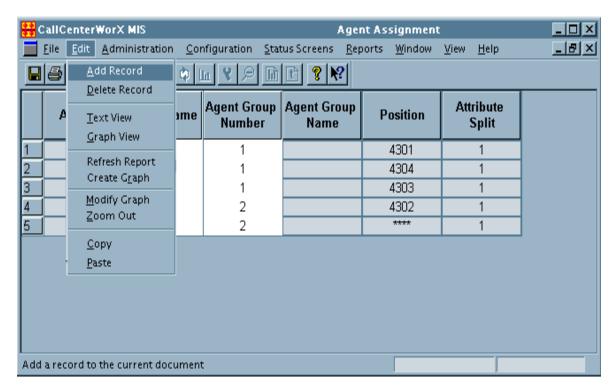


Figure 8-14 Edit Add Record Selection

From the **Edit menu** of the **Agent Assignments window** (see Figure 8-14), choosing **Add Record** displays the Add Agent Record window (Figure 8-15).



Figure 8-15 Add Agent Record Window

- The **Agent ID** is a numeric logon ID which may be up to 9 digits long (leading zeros are not allowed). It is required information, since all other agent programming refers to it.
- The **Agent Name** field may contain up to 20 alphanumeric characters.
- The **Agent Group Number** may range from 1 to 16 and is set in the MIS.
- The **Attribute Split** is the agent's primary split, which sets up the agent's allowed Break types, after call Work mode, and other parameters derived from the ACD setting for that split.

4.5 Agent Group Assignments

Agent Groups are collections of agents grouped for comparative analysis.

- Agent Groups are an MIS entity rather than being set up in ACD programming. All agents are originally members of Group 1 and must be reassigned to other groups if you choose to use this feature.
- Membership in a group is not restricted by an agent's split assignment. An agent group may contain members of different splits.
- A group may be named to represent the factor being analyzed (such as Evening, Sales, or Training) or given a team-type name (such as Red, Blue, Stars, or Rangers) to suit the purpose of the analysis.
- The use of agent groups is optional in CallCenterWorX, but if groups are defined the database will collect data on them for display and reports (see the Agent Group Reports category under the Reports menu).
- Agent groups may be created at any time by choosing Agent Group Assignments under the Configuration menu.

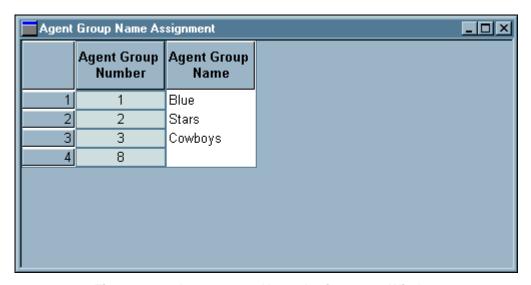


Figure 8-16 Agent Group Name Assignments Window

4.6 Break Type Assignments

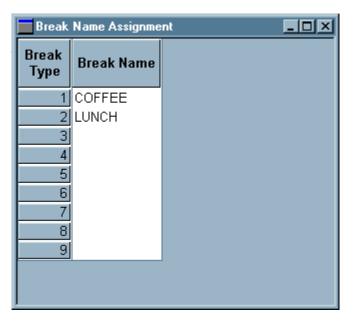


Figure 8-17 Break Type Assignment Window

The ACD MAT commands offer the choice of either one or nine break types. **Break Type Assignments** are set under the MIS **Configuration menu**, and Break names may have up to 20 alphanumeric characters. The agent presses the Break key and is prompted to enter a number representing the type of break. The "CallCenterWorX ACD Features and Specifications" manual provides detailed procedures on using the Break feature.

The Reports menu provides the Agent Break Report (see Figure 8-51) under the Agent Reports command, and the Split Break Report under the Split Reports command which can be specific to each split (see Figure 8-60).

4.7 Pilot Assignment

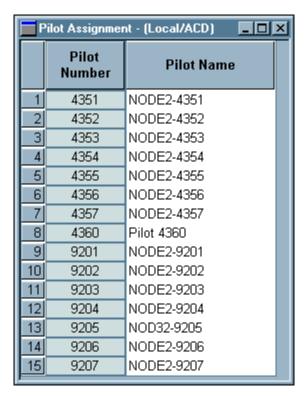


Figure 8-18 Pilot Assignment Screen

This screen lists the names of the pilot numbers configured in the ACD database. Pilot Names are assigned in the ACD as part of the Pilot Data programming and will be downloaded to the MIS at start-up. If you wish to have independent Pilot Names in the MIS, you must have the "Download Names" setting at OFF in the Change Systems Parameters screen (see Figure 8-11 and Figure 8-12).

Adding or deleting Pilot Names follows the same procedures as shown in this chapter under Heading 4.4, "Agent Assignments," for adding or deleting an agent. With the **Pilot Assignment** screen open under the **Configuration menu**, the **Edit menu** provides "Add Record" or "Delete Record" options which allow the Pilot names to be modified.

A personal pilot number is the PBX directory number, assigned in the ACD Agent Logon ID Data procedure, which will reach the ACD agent directly. Personal pilots cannot be named.

4.8 Position Assignments

Position Numbers are assigned in the ACD and determine which incoming line numbers will be ACD lines. The Position Class specifications of "Supervisor" or "Agent" are used as a reporting convenience, but are not differentiated by the CallCenter*WorX* ACD.

Under the **Configuration menu** in the **Position Assignments window**, a Position may be assigned to a specific split or as an "any-split" position. In order to respond to dynamic load balancing demands, a position can be reassigned to a different split in order to place an agent in a split where that agent is most needed.

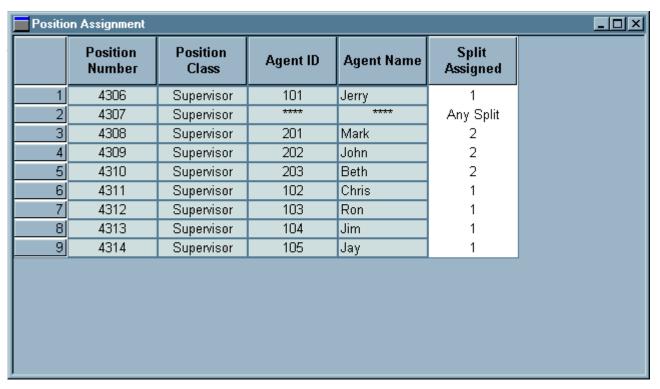


Figure 8-19 Position Assignment Window

4.9 Split Assignments

The **Split Assignment window** (Figure 8-20) under the **Configuration menu** enables users to modify several parameters for each split, including the Split Name, After Call Work Mode, Day/Night Mode, Night Service split destination, and the thresholds for Grade of Service (GOS), Inflow, and Overflow. The window indicates the current status for each split and provides drop down menus in each category to modify values.

- **Split Name** is an optional alphanumeric name of up to 20 characters which identifies the split in addition to the required Split Number.
- After Call Work Mode determines whether:
 - Agents in that split are available for new incoming ACD calls immediately after finishing each call (Ready).
 - Agents in that split are allowed some wrap-up time at the conclusion of each call before the next call is assigned (Work).

Day/Night Mode

- Permits the split to receive calls (Day).
- Closes down the split's incoming queue and diverts callers to the Night Service destination (Night).

Night Service destination

- Specifies another split to receive calls when this split is in Night Mode.
- Specifies which PBX station receives the calls (possibly an answering machine). Programming this PBX station is done in the ACD MAT commands.

Other options are:

- A Night Announcement Channel option for playing announcements to callers.
- An Attendant Console option which receives calls for the split in Night Mode.
- **Grade of Service Threshold** specifies the maximum time a call can wait to be answered to be counted as "answered within the Grade of Service Threshold." The Grade of Service is defined as a percentage of calls answered within a specified amount of time (the Grade of Service Threshold) in relation to the total number of calls received. This is set in the MIS.
- **Inflow Conditional threshold** specifies the threshold minimum number of Ready agents or the maximum queue depth permitted to allow inflow calls from another queue. Too few agents or too many calls in queue will disable inflow calls. This is set in the ACD but may be modified in the MIS.
- Overflow Delay threshold specifies the number of seconds a caller waits for an agent in the primary
 queue before overflowing to a secondary queue. This is set in the ACD but may be modified in the MIS.

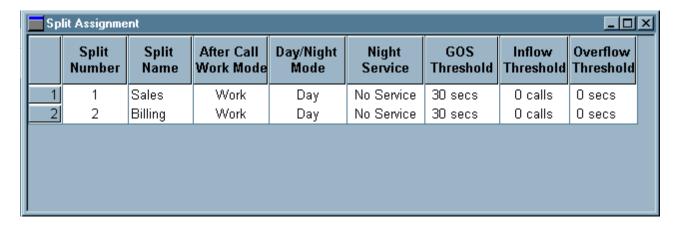


Figure 8-20 Split Assignment Window

See Chapter 2, Heading 8, "Multi-tenant MIS Considerations—Split Numbering" for an explanation of Split numbering in CallCenterWorX MIS.

4.10 Tally Code Assignments



Figure 8-21 Tally Name Assignment Window

The Tally feature allows agents to use the dial keypad to register the occurrence of several specific events, such as responses to various advertising methods, sales campaigns, or calls from particular locations. You may assign Tally Names (using up to 20 numerals or letters) by individual split to track the various tally codes entered by an agent, since multiple tally counts may be entered for a single phone call.

Detailed information on Tally Codes is available in the "CallCenterWorX ACD Features and Specifications" manual.

Adding or deleting Tally Names follows the same procedures as shown in this chapter under Heading 4.4, "Agent Assignments," for adding or deleting an agent. When the Tally Assignment screen is open under the Configuration menu, the Edit menu provides "Add Record" or "Delete Record" options which allow the Tally names to be modified.

4.11 System Name Assignment



Figure 8-22 System Name Assignment Window

The Configuration menu lists the System Name Assignment command, which opens the Change System Name window shown in Figure 8-22. If the MIS is configured for TCP/IP, only the tenants that are assigned under the TCP/IP configuration are available for use as the System name; not all tenants are shown.

Note: If the MIS is communicating via an RS-232 serial connection, the only tenant available is Tenant 1.

The System Name is related to the Tenant Name which may have been assigned in the ACD programming.

- If you wish to use the ACD database name, you can check the checkbox and select a tenant from the drop-down menu.
- If you choose to use an independent System Name, you can leave the check box unchecked and enter your own name choice in the System Name dialog box.
- If you request a tenant that does not exist on the ACD, the MIS will fail to receive the download information and the System Name will not be assigned.

Important: An MIS dedicated to one ACD tenant should select that tenant's name from the list. The selected tenant's name will be inserted in the System Name dialog box.

4.12 Trunk Assignments

The Trunk Allocation window displays the Trunk Group Number, Trunk Group Name, and the Number of Circuits allocated for each trunk group (sometimes called a "trunk route"). Circuit assignments and queuing priorities are set in the MAT commands of CallCenter*WorX* ACD.

Only the Trunk Group Name can be modified in CallCenterWorX MIS.

From the **Configuration menu**, the **Trunk Assignments** command accesses the **Trunk Allocation Window** (Figure 8-23) where a trunk group name of up to 20 characters may be assigned to a trunk group number.

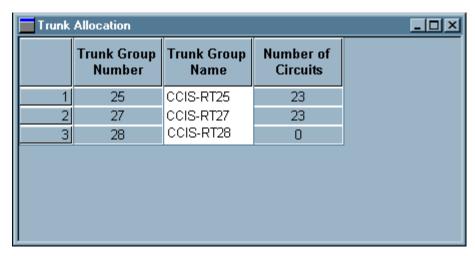


Figure 8-23 Trunk Allocation Window

4.13 Wallboard Message Sets

CallCenterWorX MIS can display real-time statistics to the optional Spectrum Wall Display Boards which provide up-to-the-second information on call center activity. This information is displayed to agents and supervisors as the events take place, allowing all members of the call center to monitor the performance of a specified split or of the center as a whole.

The information for display is specified in a Message Set, a series of messages:

- Composed of text and data fields.
- Displayed on a particular Spectrum Wall Display Board type.
- Using colors, graphics, and display modes to convey the information.

The data fields shown in these message sets are the same ACD statistical information appearing in the real-time status screens displayed on the monitor. There are 15 different data fields available, which are based on either split or system data.

For a single-line board type, up to 15 messages may be sent (one at a time) in the series that makes up the set, and a dual-line board type can display a series of 30 messages in a set. The same Message Set may be sent to up to four boards of the same type. Only one Message Set may be sent to each board at a time.

A Message Set is identified by a set number and a set name, and is specified for a particular type of wall board. The type of board determines:

- How many lines of display are available.
- How many characters an individual message may contain.
- Whether the display can be in amber, green, and red, or only in red.

The message displayed can be:

- All graphic.
- All user-defined text.
- A combination of user-defined text and data fields.

The mode of display ranges through 25 variations, such as flash, rotate, and scroll. Preset graphic displays can be included in the Message Set.

The **Wallboard Message Sets window** is accessed from the **Configuration menu**. There are screens for constructing a message (see Figure 8-26) and for scheduling the display of the message on a particular board or boards (see Figure 8-27).

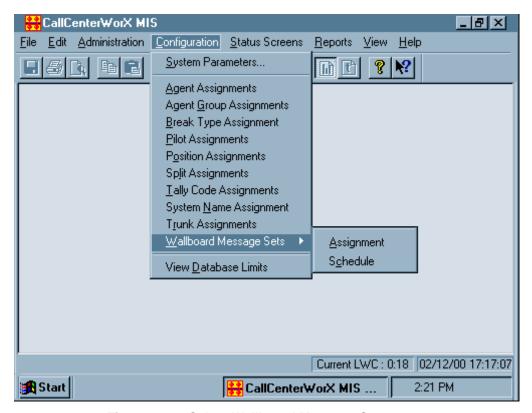


Figure 8-24 Select Wallboard Message Sets



Figure 8-25 Message Set Name Assignment Dialog

Selecting Wallboard Message Sets—Assignment under the Configuration menu and clicking on Create Message Set Name opens the Message Set Name Assignment dialog box in Figure 8-25. Entering a Message Set Name, selecting a board type, and pressing OK opens up the Message Sets Assignment Screen (see Figure 8-26). Board types and their characteristics are listed in Chapter 10, Table 10-1, "Wallboard Types."

4.14 Constructing Message Sets

Message Sets are constructed in the **Message Sets Assignment** screen (Figure 8-26) which shows all the Message Sets assigned in the system (up to 50 Message Sets).

- Drop down menus provide a choice of existing messages to be altered or deleted.
- New messages can be named and their elements specified by choices from these menus.

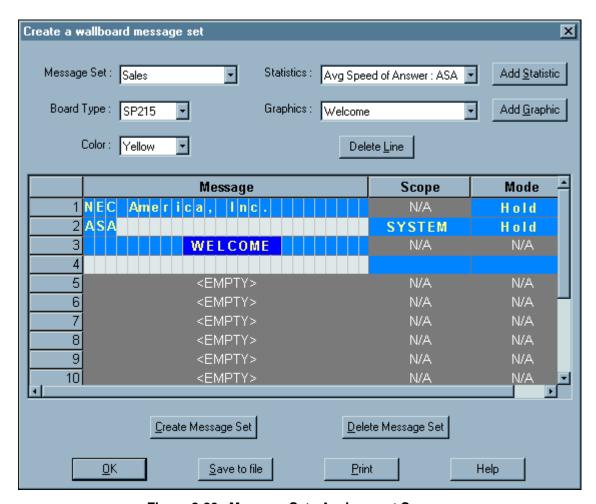


Figure 8-26 Message Sets Assignment Screen

4.15 Scheduling Message Sets

The **Schedule Wallboard Message Sets** screen (Figure 8-27) lists the message sets that have been constructed and sets up the display plan for them, determining:

- Time of display
- Speed (interval between messages in a multi-message set)
- Individual wall board destination (display number)

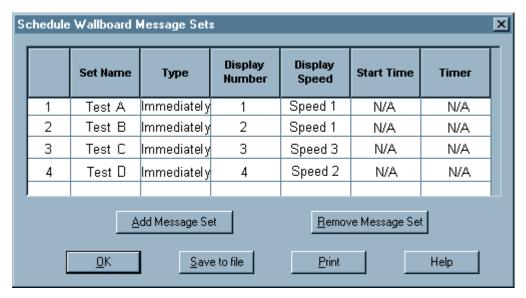


Figure 8-27 Schedule Wallboard Message Sets

4.16 View Database Limits

The Configuration menu contains the View Database Limits command.

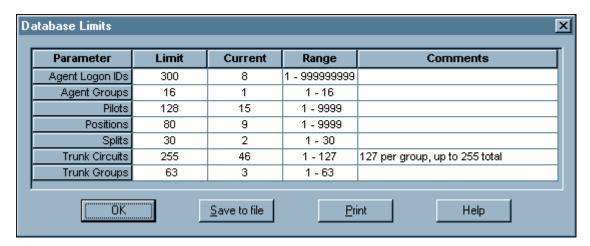


Figure 8-28 Database Limits Screen

The Database Limits screen displays information about the current CallCenterWorX database. It shows the maximum number of entries available for each database section, as well as the quantity currently assigned. It also indicates the allowed range of acceptable values for each database section.

Important:

If any of the database limits have been exceeded, that section appears in red and the text "Database Limits Exceeded" is displayed against a red background in the top left corner of the screen. It is not advisable to continue CallCenterWorX operation if database limits have been exceeded, because this can disrupt statistical collection even in portions of the database which seem to be within the limits. For example: a call assigned to split 3 (OK) and overflowed to split 125 (out of range) will generate incorrect call statistics for split 3.

There are two possible error types:

- 1. Exceeding the limit on the total quantity of entities input for one section (defining 301 agent logon IDs or 35 splits).
- 2. Assigning an entity outside of the allowed range (such as trying to use split 104).

Upon entry of incorrect or unacceptable data, CallCenterWorX MIS generates an error message which appears at the bottom of the screen. A listing of error messages and suggested solutions appears in Chapter 13, "MIS Error Messages."

This figure is provided as reference material only, since limits are determined by both hardware and software considerations.

5. Status Screens Menu

The MIS Status Screens (also referred to as Real-time Screens) provide up-to-the-second views of the agent and queue activity at the system level and the split level. Statistics on call volume, and on the effectiveness of the agents handling those calls, are computed in real-time and displayed for the current hour and day, providing rapid feedback to the call center manager.

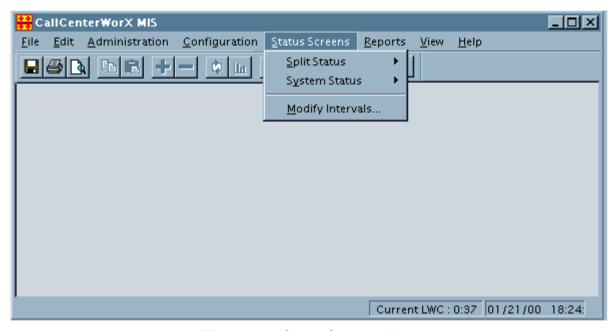


Figure 8-29 Status Screens Menu

The Status Screens:

- Display the number of calls currently waiting in various queues of the ACD.
- Display the current function being performed by the agents assigned to handle the waiting calls.
- Provide an immediate assessment of the current operation, to assist in spotting tendencies at the earliest possible moment.
- Automatically reflect changes made in the System Configuration screen.
- Have a print preview capability that shows how a real-time status screen or a report will look when it is printed.
- May be viewed in either graph or table format with a click of the Graph View Button or the Text View Button on the console.

Terms and abbreviations used in the graphs and text displays are defined in Chapter 14, "Terms and Concepts." The statistical methods used to calculate the information displayed in the screens are defined in Chapter 12, "MIS Statistical Definitions and Methods."

5.1 Split Status

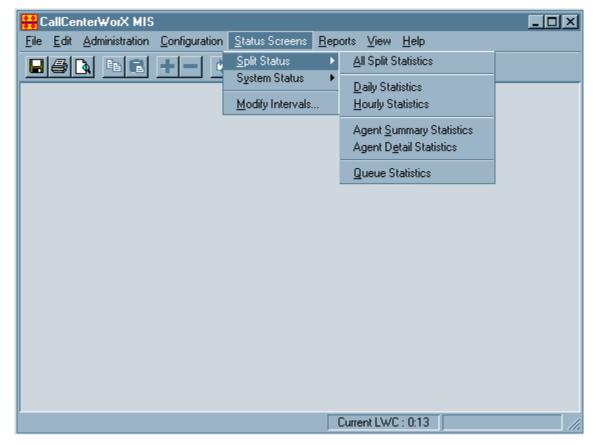


Figure 8-30 Split Status Screen Menu

The Split Status menu includes screens, displayed in either text or graph format, which look at call center split activity from a variety of perspectives.

The first option on the submenu is **All Split Statistics**. Choosing this setting displays the Split Statistics as shown in Figure 8-31.

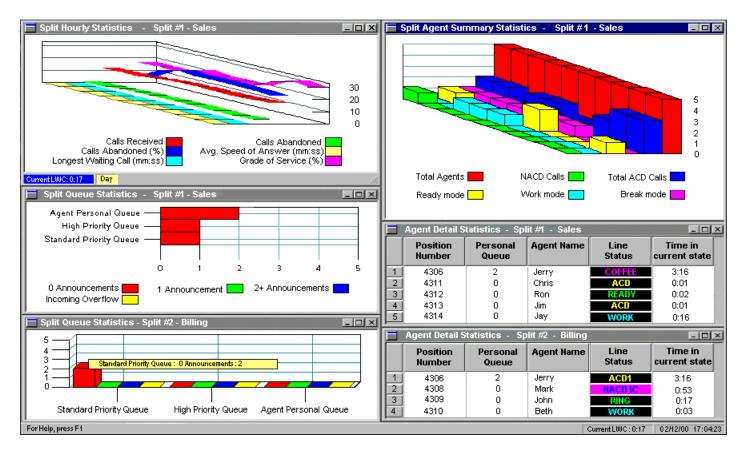


Figure 8-31 All Split Statistics

5.1.1 Daily Statistics

This screen displays activity since midnight in either graph or text format. Figure 8-32 shows the graph format.

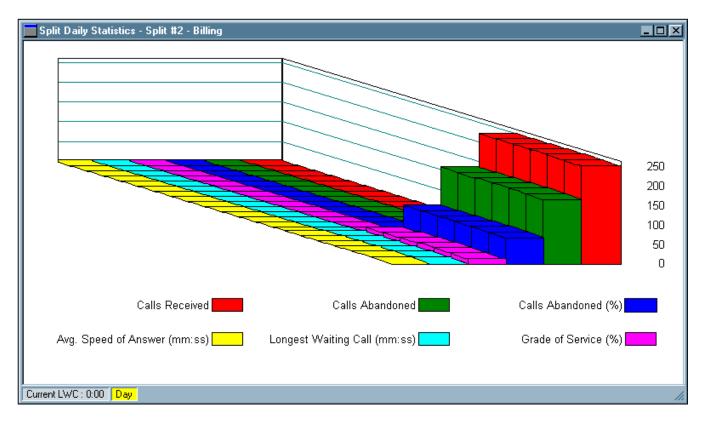


Figure 8-32 Split Daily Statistics - Graph Format

5.1.2 Hourly Statistics

This screen displays activity since the beginning of the current hour in either text or graph format (see Figure 8-33).

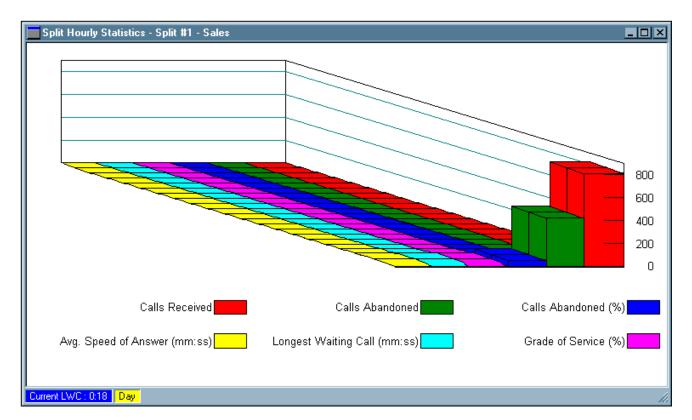


Figure 8-33 Split Hourly Statistics - Graph Format

Terms illustrated by the symbols in the above graph are defined in Chapter 14, "Terms and Concepts".

5.1.3 Agent Summary Statistics

The Split Agent Summary Statistics screen shows the number of agents logged-on to the split and a count of how many agents are in each mode (Figure 8-34).

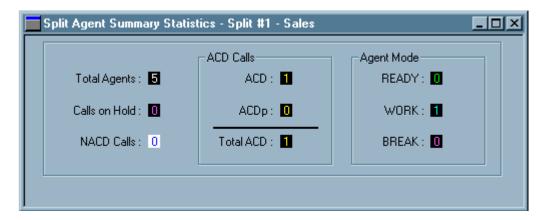


Figure 8-34 Agent Summary Statistics - Text Format

ACD Calls are calls to agent positions.

NACD Calls are non-ACD calls on the PBX line or My Line.

ACDp indicates a call to the agent's personal queue.

Terms and acronyms used in statistical displays are defined in Chapter 14, "Terms and Concepts."

5.1.4 Agent Detail Statistics

This screen displays a list of individual agents logged-on to the split with detailed information about the current state of their ACD and PBX lines (see Figure 8-35).

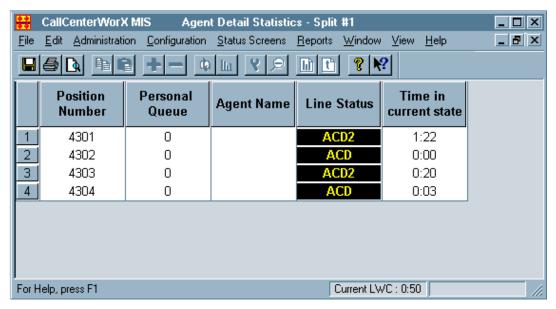


Figure 8-35 Agent Detail Statistics

This display will probably be the most active, as it reflects each agent state change in coded colors. As agents progress from one state to another, their corresponding displays are updated within a second, and the agents' timers are reset to zero to begin counting time in the new state.

In Figure 8-35, agents 4301 and 4303 show a Line Status of "ACD2." Since these statistics are included in a status screen for Split #1, the number following the "ACD" status indicates that these are multi-split agents who are taking calls for Split #2 although they are logged-on in Split #1.

5.1.5 Queue Statistics

This report displays activity in three possible types of queues.

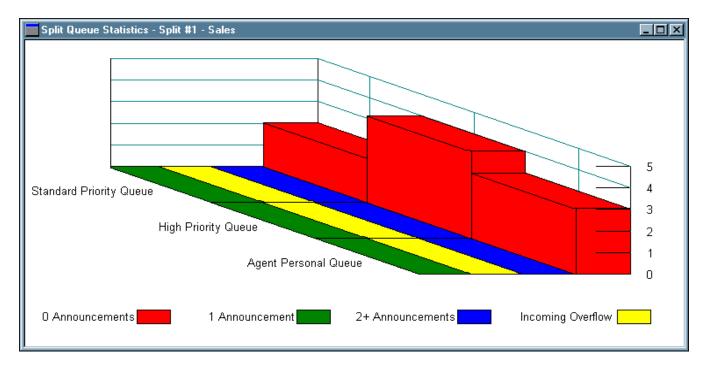


Figure 8-36 Queue Statistics Screen - Graph Format

5.1.5.1 Standard and High Priority Queues

The ACD Pilot Data and Trunk Group Data commands set priority levels for incoming calls. ACD priority numbers can range from 1 to 250, with the default being 15. Priority numbers from 1 to 9 are considered "high" priority, and from 10 to 250 are considered "standard" priority. The ACD Logon Data command sets the agent's personal pilot number, and the priority setting for that number is done in the Pilot Data configuration.

Based on these priority settings, incoming calls are placed in a High Priority queue or a Standard Priority Queue.

- Each split has a **High Priority Queue**, and a **Standard Priority Queue**. An incoming call will wait in either queue in up to four splits until an agent is ready to handle the call.
- When agents are available, calls are removed from the queue in the same order in which they arrived.
- When all agents are busy, calls wait in the queue, possibly hearing recorded music or a timed series of recorded announcements.

As the names imply, when there are calls waiting in both queues, those in the High Priority Queue are serviced first.

MIS Menu Commands

Status Screens Menu

5.1.5.2 Agent Personal Queue

Each agent has a queue for calls that are directed specifically to that agent. This **Agent Personal Queue**:

- Is associated with the agent's logon ID code.
- Functions in the same manner as the split's two queues but has the highest priority.

An agent will always be assigned a call from the personal queue before taking a call from either of the other queues. If the agent is not logged-on when a personal queue call arrives, the call is routed to an alternate destination that is specified during CallCenterWorX ACD database programming.

5.2 System Status

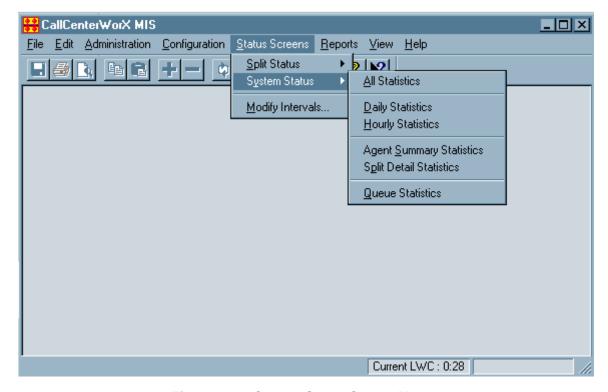


Figure 8-37 System Status Screen Menu

The System Status screens offer statistics on a system-wide basis, encompassing information from all splits. These screens can be displayed in text or graph format.

As shown in Figure 8-37, the first option on the submenu is **All Statistics**. Choosing this setting displays all the System Status windows listed on the submenu.

5.2.1 Daily Statistics

This screen displays activity in the system since midnight in either graph or text format.

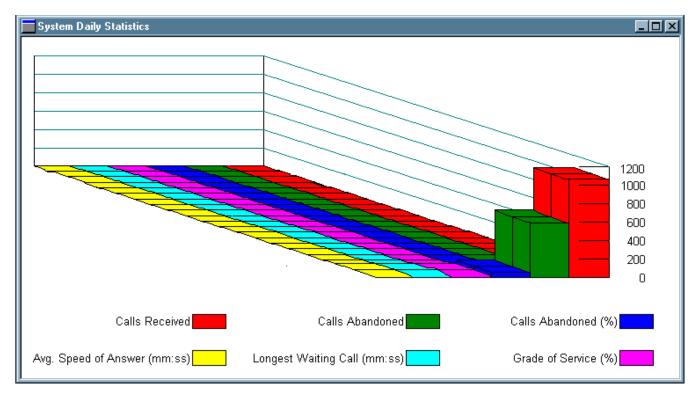


Figure 8-38 System Daily Statistics - Graph Format

Terms illustrated by the above graph are defined in Chapter 14, "Terms and Concepts."

5.2.2 Hourly Statistics

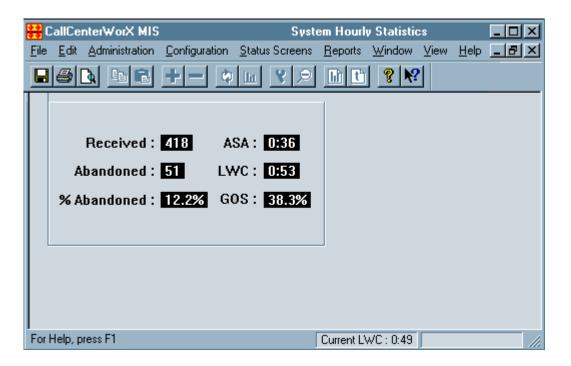


Figure 8-39 System Hourly Statistics - Text Format

This screen displays activity in the total system since the beginning of the current hour. Further information on Average Speed of Answer (ASA), Longest Waiting Call (LWC), and Grade of Service (GOS) can be found in Chapter 14, "Terms and Concepts."

5.2.3 Agent Summary Statistics

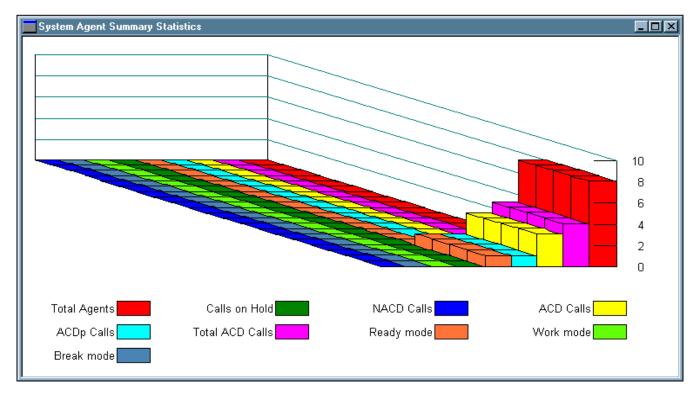


Figure 8-40 System Agent Summary Statistics - Graph Format

This screen summarizes the activity of all agents currently logged-on to the system.

5.2.4 Split Detail Statistics

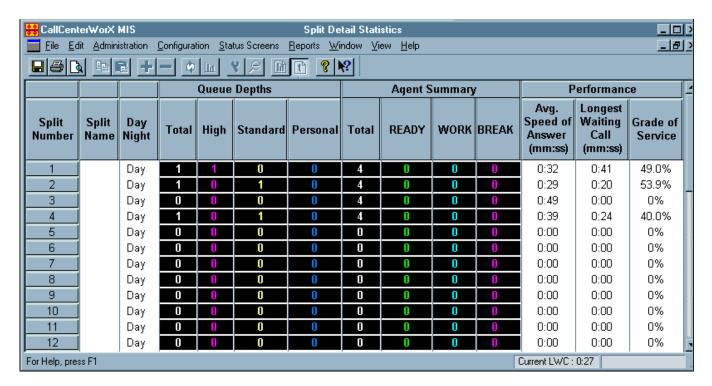


Figure 8-41 Split Detail Statistics Screen

The System Status statistical screens follow the same basic pattern as the screens displaying split statistics, except that where the split-oriented screens show Agent Detail statistics, the system-oriented screens show Split Detail statistics.

5.2.5 System Queue Statistics

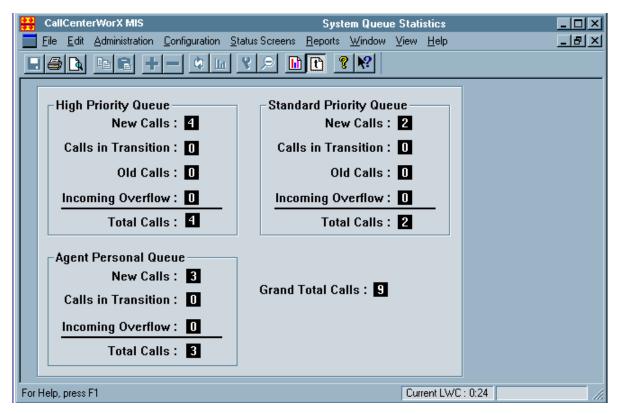


Figure 8-42 System Queue Statistics Screen - Text Format

As shown in Figure 8-42, the Queue Statistics screen for the system reflects all calls in all queues based on length of time in queue, specifying New Calls (have received 0 announcements), Calls in Transition (have received 1 announcement), Old Calls (have received 2 or more announcements), and any Incoming Overflow from other queues. These calls can also be illustrated in the graph format (see Figure 8-43).

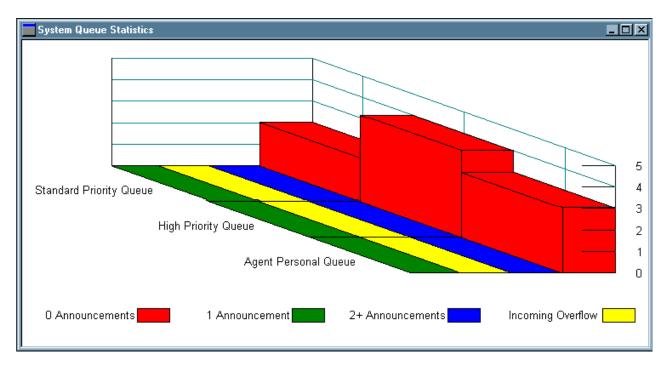


Figure 8-43 System Queue Statistics Screen - Graph Format

Status Screens Menu

5.3 Modify Intervals

The statistics in the Status Screens may be updated at intervals selected by the call center manager. The **Modify Intervals** option under the **Status Screens menu** opens the dialog box which modifies the refresh rate intervals for both the Split and System Statistics Screens (see Figure 8-44).

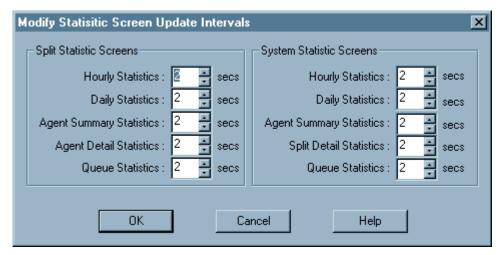


Figure 8-44 Modify Statistic Screen Update Intervals

The available refresh rates range from 1 second to 300 seconds, and can be set by using the up and down arrows at each parameter or by typing in a number.

6. Reports Menu

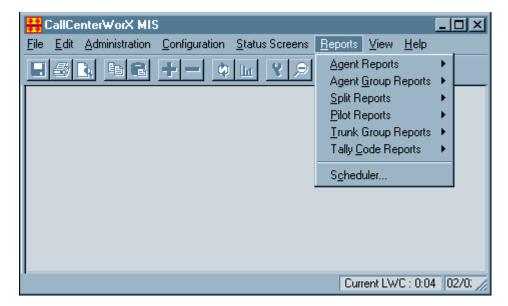


Figure 8-45 Reports Menu Screen

A wide range of reports is available in CallCenterWorX MIS, with features allowing flexibility in report presentation.

- Each report screen has a modifiable grid layout. Columns and rows may be rearranged by drag-and-drop, and their size can be changed. Each column can be sorted alphabetically.
- The printer setup for the new grid layout is stored and may be retrieved for future use.
- A print preview capability is available for reports.
- The Refresh Report icon on the toolbar updates report content without the need to repeat the first report generation procedure.
- A text report can be saved into a tab-delimited text file.
- A text report can be copied into other Windows applications.

Detailed procedures for generating and scheduling a report may be found under Heading 10 in Chapter 10, "MIS Procedures."

6.1 Agent Reports

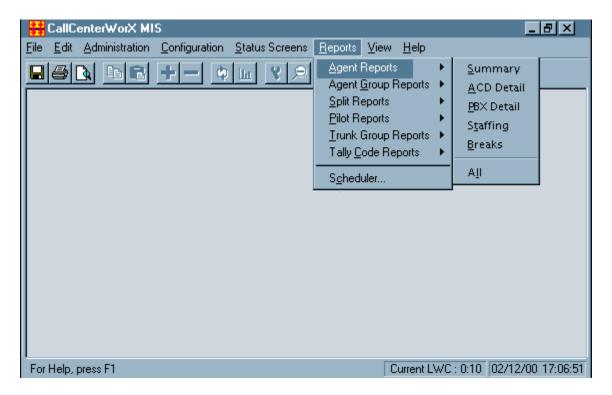


Figure 8-46 Agent Reports Menu

The Agent Reports Menu includes the option of **All** reports, which generates all the other reports listed above (see Figure 8-46). Agent activity is reported in terms of the following parameters (defined in Chapter 12, "MIS Statistical Definitions and Methods" and in Chapter 14, "Terms and Concepts"):

- Total ACD Calls Answered
- Total ACD Talk Time
- Average ACD Talk Time
- Total ACD Hold Time
- Total All PBX Calls
- Total PBX Talk Time
- Total PBX In Calls Answered
- Total PBX In Talk Time
- Total PBX Out Calls Made
- Total PBX Out Talk Time
- Total Calls Answered

- Total Calls Transferred
- Total Hold Time
- Average Talk Time
- Total Talk Time
- Total Assist Requests
- Total Staff Time
- Total Ring Time
- Total Work Time
- Total Break Time
- Break Type Statistics

6.1.1 Agent Summary Report

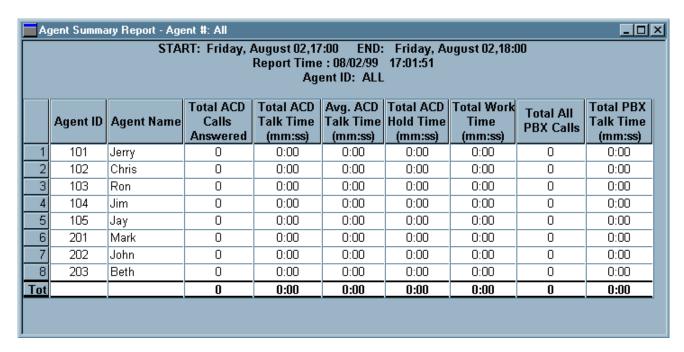


Figure 8-47 Agent Summary Report - All Agents

The Agent Summary Report supplies an overall view of agent activities. This report can be generated on a single agent or on all the available agents.

6.1.2 Agent ACD Detail Report

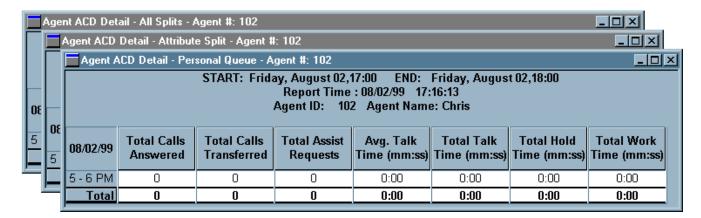


Figure 8-48 Agent ACD Detail Report - Personal Queue

The Agent ACD Detail Report gives an analysis of the ACD activities performed by the agent. The data is separated on a per split basis (for multi-split agents) and the agent's Personal Queue (if configured). This report can be generated on a single agent or on all the available agents. Although both report types include the same data, the display of the reports is different.

The single agent report outputs the data for each split to which the agent is assigned, and for the agent's Personal Queue, each on a separate screen or page:

- All splits and Personal Queue summed together
- Attribute Split
- Second, third, and fourth Split (if multi-split agent)
- Personal Queue (if configured).

The All Agents report is a single-page report which shows the data for each of the agents' assigned splits and the agents' Personal Queues (if configured). The report is output on a per agent basis for all agents.

6.1.3 Agent PBX Detail Report

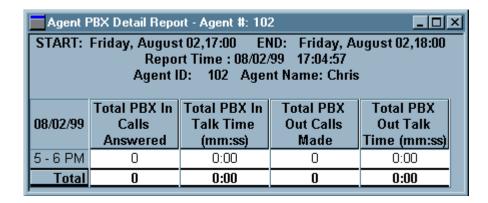


Figure 8-49 Agent PBX Detail Report - Single Agent

The Agent PBX Detail Report provides a breakdown of the PBX (non-ACD) activities performed by the agent. This report can be generated on a single agent or on all the available agents.

6.1.4 Agent Staffing Report

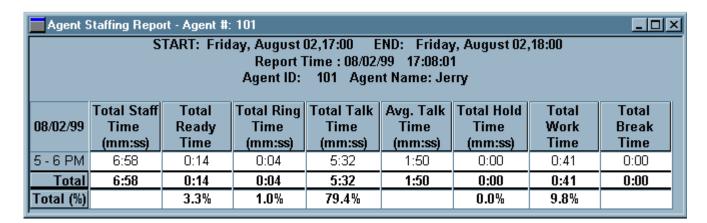


Figure 8-50 Agent Staffing Report - Single Agent

The Agent Staffing Report lists the amount of time agents have spent in specific states (such as Ready, Ring, Talk, Work, and Break).

The **TOTAL** line at the end of the report gives the sum of the time amounts, and a second line, **TOTAL(%)**, provides the percentages of each total in relation to the total time available. An explanation of the procedures used for calculating these percentages is in Chapter 12, "MIS Statistical Definitions and Methods."

This report can be generated for a single agent or for all available agents.

6.1.5 Agent Break Report

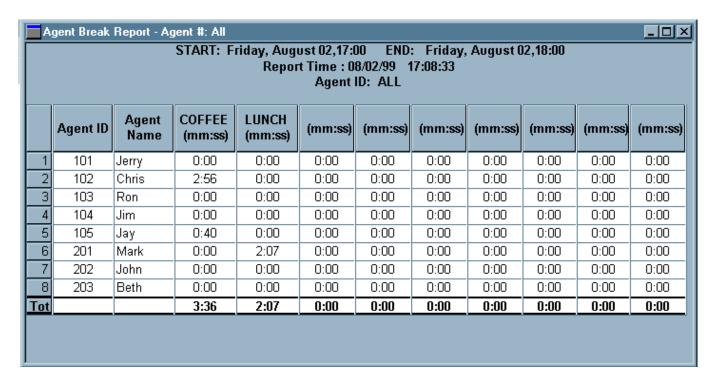


Figure 8-51 Agent Break Report - All Agents

The Agent Break Report supplies an analysis of all nine available Break types and the amount of time an agent spent in each type of break. This report can be generated for a single agent or for all of the available agents.

6.2 Agent Group Reports

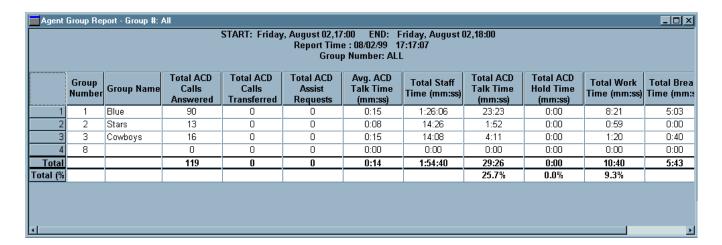


Figure 8-52 Agent Group Report

An Agent Group is a collection of agents grouped for comparative analysis (independent of the agents' assigned splits) existing only in the MIS. Agent groups may be created at any time by assigning agents to an agent group (such as Red or Blue), even though these agents may work in a variety of splits. All agents are originally in Group 1 and must be moved to other groups in the MIS programming if you wish to maintain agent group statistics.

Definitions of terms and statistical methods shown in column headings in the report in Figure 8-52 can be found in Chapter 12, "MIS Statistical Definitions and Methods," and Chapter 14, "Terms and Concepts."

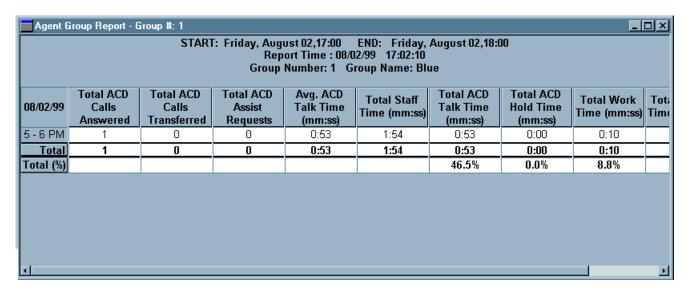


Figure 8-53 Agent Group Summary Report Screen

The Agent Group in the above Summary Report (Figure 8-53) can be made up of agents from various splits who have been placed in this group for statistical purposes. The naming of a Group is optional, but may be used to illustrate the purpose of the analysis (such as Evening or Training), or may be a team name (such as Stars or Rangers).

Agent Groups exist only in the MIS and are not an ACD entity. When Groups are specified, the MIS will collect data and prepare reports on them.

6.3 Split Reports

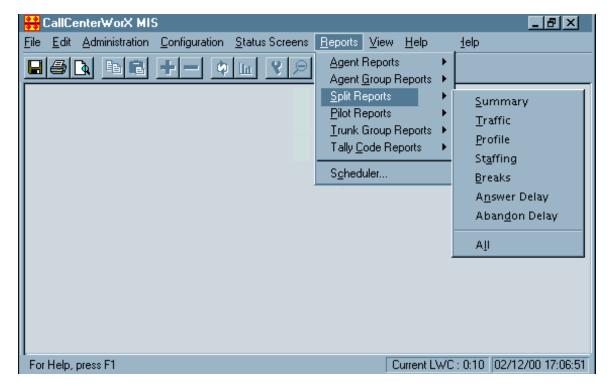


Figure 8-54 Split Reports Menu

The Split Reports show split activity with respect to the following parameters (defined in Chapter 12, "MIS Statistical Definitions and Methods"):

- · Total Calls Received
- · Total Calls Answered
- · Total Calls Abandoned
- Total Calls Overflowed
- Percentage of Calls Abandoned
- Average Speed of Answer
- Longest Waiting Call
- Grade of Service
- Total ACD Calls Received
- Total ACD Calls Answered
- Total ACD Calls Abandoned
- Total ACD Calls Overflowed
- Total ACD Calls Transferred
- Average ACD Talk Time

- Average Delay Time Abandoned
- Average Delay Time Overflowed
- Total Staff Time
- Total Ready Time
- Total Ring Time
- Total Talk Time
- Average Talk Time
- Total Hold Time
- Total Work Time
- · Total Break Time
- Time in Each Break Mode
- Answer Delay Time
- Abandon Delay Time

The All option on the submenu calls up all the individual the Split Reports listed above it.

6.3.1 Split Summary Report

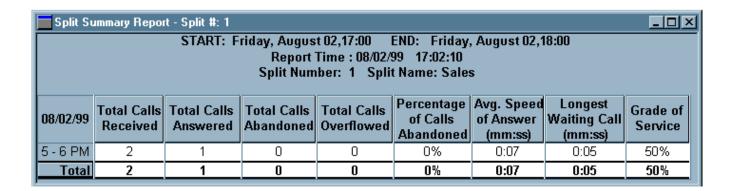


Figure 8-55 Split Summary Report

The Split Summary Report provides a concise collection of data on split activities. You can generate this report for a single split or for all the available splits.

6.3.2 Split Traffic Report

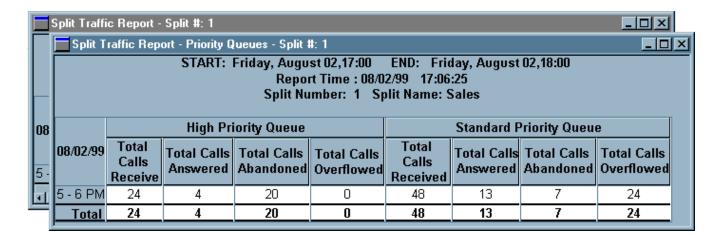


Figure 8-56 Split Traffic Report

The Split Traffic Report generates two different views of the split's incoming traffic. The Split Traffic Report can be generated for a single split or all splits available.

Each screen or page reports two groups of data (side by side for comparison):

- 1. High Priority Queue and Standard Priority Queue (see front screen in Figure 8-56)
- 2. Combined High and Standard Priority Queues and the Agent Personal Queue (back screen)

6.3.3 Split Profile Report

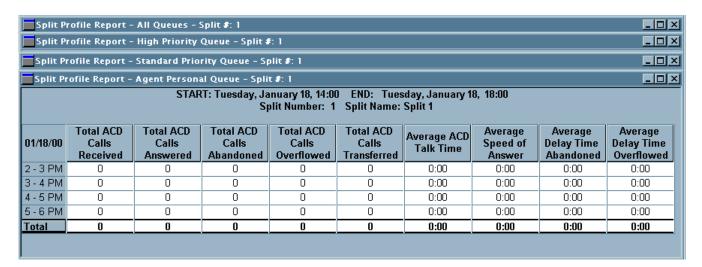


Figure 8-57 Split Profile Report

The Split Profile Report (Figure 8-57) lists counts of call activities and the average times that calls spent in specific states. This report can be generated on a single split or on all the available splits. It generates up to four screens or pages covering the three available queues for a split, and a summary screen or page which adds all three queues together. A fourth report will be output only if CallCenter*WorX* is configured for Agent Personal Queue reporting.

6.3.4 Split Staffing Report

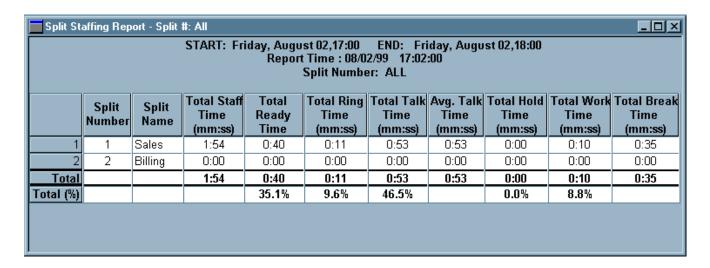


Figure 8-58 Split Staffing Report

The Split Staffing Report lists the amount of time the agents in the split spent in specific states (such as Ready, Ring, Talk, Hold, Work and Break).

The **TOTAL** line at the end of the report gives the sum of the time amounts, and a second line, **TOTAL** (%), provides the percentages of each total in relation to the total time available. An explanation of the procedures used for calculating these percentages is in Chapter 12, "MIS Statistical Definitions and Methods."

This report can be generated for a single split or for all available splits.

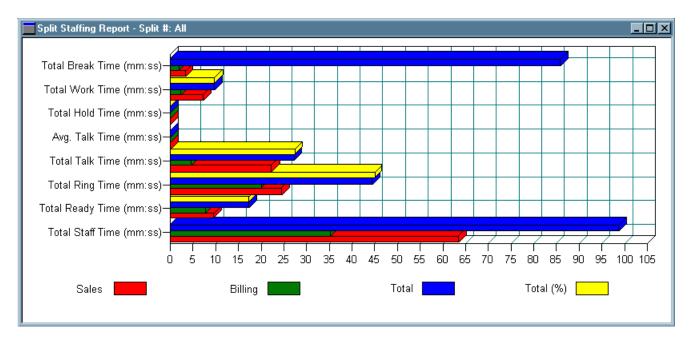


Figure 8-59 Split Staffing Report - Graph Format

Other aspects of split activity can be shown by the graph format. This is the Extended Horizontal Bar Graph style, one of 19 graph styles available.

6.3.5 Split Break Report

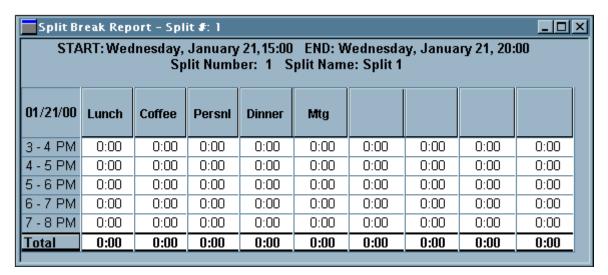


Figure 8-60 Split Break Report - Single Split

The Split Break Report supplies an analysis of all nine available Break types and the amount of time the agents of the split spent in each type.

This report can be generated for a single split or for all the available splits.

6.3.6 Split Answer Delay Report

Split Answer Delay Report - Split #: 1 START: Tuesday, January 18, 15:00 END: Tuesday, January 18, 17:00 Split Number: 1 Split Name: Split 1											
01/18/00	0.4 secs	5-10 secs	11-20 secs	21-30 secs	31.40 secs	41-50 secs	51-60 secs	>60 secs			
3-4 PM	0%	0%	0%	0%	0%	0%	0%	0%			
4 - 5 PM	1%	0%	0%	0%	0%	0%	0%	0%			
Total	1%	0%	0%	0%	0%	0%	0%	0%			

Figure 8-61 Split Answer Delay Report - Single Split

The Split Answer Delay Report shows an analysis of the answer delay times callers are experiencing in this split. There are eight time intervals (buckets) available into which all answered calls will fall. When calls are answered within these specified time intervals, the counts are incremented accordingly.

The report displays a percentage of calls answered within each interval in relation to the total number of calls answered. This report can be output for a single split or for all available splits.

The time intervals used for calculation and display may be modified under the **Configuration Menu** using the **System Parameters** command (see Heading 4.2).

6.3.7 Split Abandon Delay Report

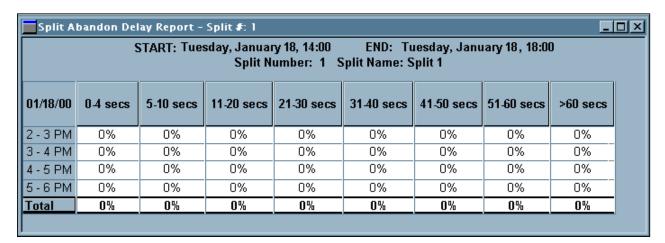


Figure 8-62 Split Abandon Delay Report

The Split Abandon Delay Report provides an analysis of the wait times experienced by callers who abandoned after being queued to this split. There are eight time intervals (buckets) available into which all abandoned calls will fall. When calls are abandoned within these specified time intervals, the counts are incremented accordingly.

The report displays a percentage of calls abandoned within each interval in relation to the total number of calls abandoned. This report can be output for a single split or for all the available splits.

The time intervals used for calculation and display may be modified under the **Configuration Menu** using the **System Parameters** command (see Heading 4.2).

6.4 Pilot Reports

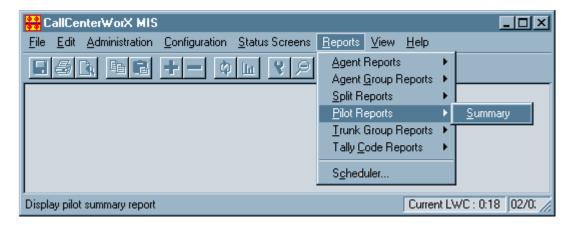


Figure 8-63 Pilot Report Menu

The Pilot Report provides an analysis of pilot number activity, and is reported in terms of the following parameters:

- Total Calls Received
- Total Calls Answered
- Total Calls Abandoned
- Total Calls Transferred
- Average Speed of Answer
- Longest Waiting Call
- Grade of Service
- Total ACD Talk Time
- Average ACD Talk Time

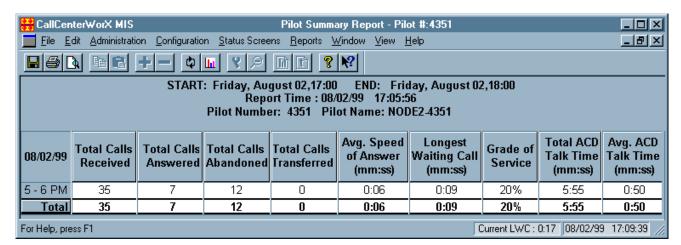


Figure 8-64 Pilot Summary Report

Traffic on any pilot number can be analyzed for a designated period. Terminology in the report column headings and the means of calculating those statistics are explained in Chapter 12, "MIS Statistical Definitions and Methods," and Chapter 14, "Terms and Concepts."

6.5 Trunk Group Reports

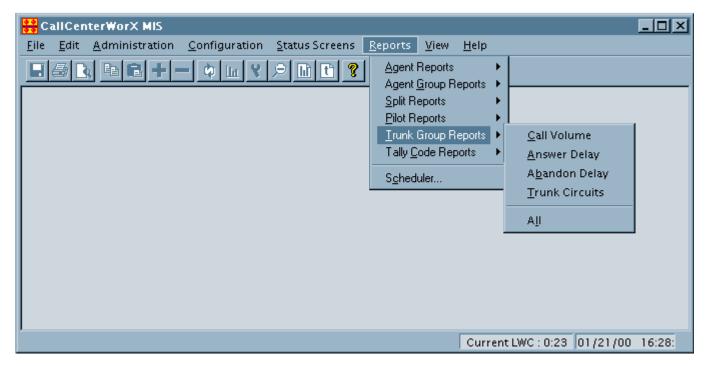


Figure 8-65 Trunk Group Report Menu

Trunk Group Reports display information on a trunk group or trunk circuit basis without regard for the split or agent to which the call is ultimately directed. The **All** option on the submenu produces all four of the reports listed above it.

The Trunk Group Reports show trunk activity with respect to the following parameters (most are defined in Chapter 12, "MIS Statistical Definitions and Methods"):

- Trunk Group Number
- Trunk Group Name
- Total ACD Calls Received
- Total ACD Calls Answered
- Average Speed of Answer (mm:ss)
- Total ACD Calls Abandoned

- Average Delay Time Abandoned
- All Trunks Busy Time (mm:ss)
- Number of Trouble Reports
- Answer Delay (% calls)
- Abandon Delay (% calls)

6.5.1 Trunk Group Call Volume Report

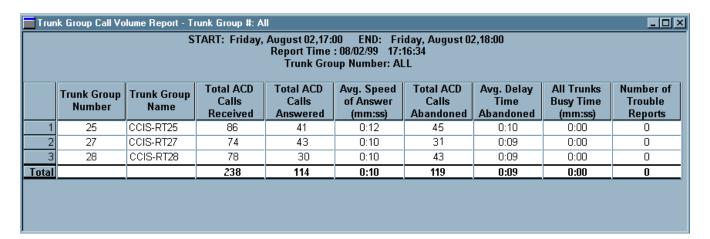


Figure 8-66 Trunk Group Call Volume Report - All Groups

This report can be generated for a single trunk group or for all trunk groups available. Terminology in the report column headings and the means of calculating those statistics are explained in Chapter 12, "MIS Statistical Definitions and Methods," and Chapter 14, "Terms and Concepts."

6.5.2 Trunk Group Answer Delay Report

Trunk Group Answer Delay Report - Trunk Group #: 27 START: Friday, January 11, 16:00 END: Friday, January 11, 18:00 Report Time : 01/11/00 18:17:07 Trunk Group Number: 27 Trunk Group Name: CCIS-RT27											
01/11/00	0-4 secs (% calls)	5-10 secs (% calls)	11-20 secs (% calls)	21-30 secs (% calls)	31.40 secs (% calls)	41-50 secs (% calls)	51-60 secs (% calls)	>60 secs (% calls)			
4 - 5 PM	0%	0%	0%	0%	0%	0%	0%	0%			
5-6 PM	28.2%	41.8%	11.9%	8.5%	7.6%	0.8%	0.8%	0%			
Total	28.2%	41.8%	11.9%	8.5%	7.6%	0.8%	0.8%	0%			

Figure 8-67 Trunk Group Answer Delay Report

This report shows an analysis of the answer delays that callers experienced on this trunk group. There are eight time intervals (buckets) into which all answered calls fall. When calls are answered within these specified time intervals, the counts are incremented accordingly. The report displays a percentage of calls answered within each interval in relation to the total number of calls answered.

This report can be output for a single trunk group or for all the available trunk groups.

6.5.3 Trunk Group Abandon Delay Report

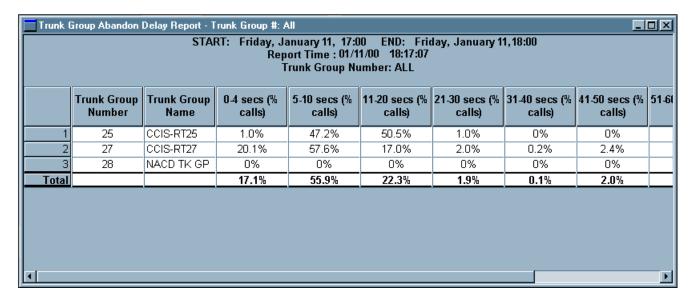


Figure 8-68 Trunk Group Abandon Delay Report

This report shows an analysis of wait times experienced by callers who abandoned after the call was received by the trunk group. There are eight time intervals (buckets) into which all abandoned calls fall. When calls are abandoned within these specified time intervals, the counts are incremented accordingly. The report displays a percentage of calls abandoned within each interval in relation to the total number of calls abandoned.

This report can be output for a single trunk group or for all the available trunk groups.

6.5.4 Trunk Group Trunk Circuit Report

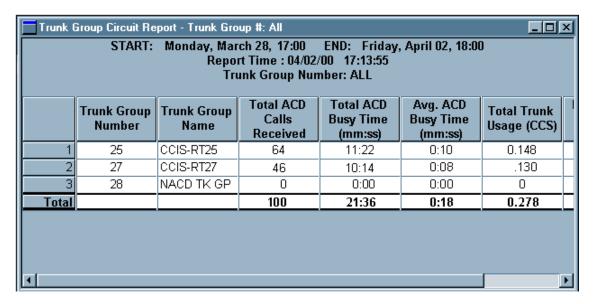


Figure 8-69 Trunk Group Trunk Circuit Report - All Groups

The Trunk Group Trunk Circuit Report supplies data gathered on each individual circuit of a trunk group. The report may be generated for a single circuit of a specified trunk group, for all circuits of the specified trunk group, or for all available trunk groups. Although these reports provide the same type of data, the basis of each report is different.

Terminology in the column headings and the means of calculating those statistics are explained in Chapter 12, "MIS Statistical Definitions and Methods," and Chapter 14, "Terms and Concepts."

6.6 Tally Code Reports

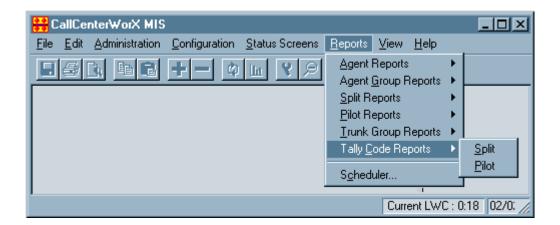


Figure 8-70 Tally Code Reports Menu

Tally Codes entered by the agents can be analyzed based on Split activity or based on Pilot Number. A Split can be programmed in the ACD to require a Tally entry by the agent while a call is in progress, or during the after-call Work mode. When a Split is configured for Tally Required, an agent will not be able to answer a new incoming ACD call until a Tally entry has been made for the previous ACD call.

Tally Codes allow agents to register occurrences of several specific events using the dial keypad, such as responses to various advertising methods, sales campaigns, or calls from particular locations. Multiple Tally entries may be recorded for a single phone call.

Detailed information on Tally Codes can be found in the "CallCenterWorX ACD Features and Specifications" manual.

Tally activity is reported on the following parameters:

- Tally Total Count all tally entries by the specified entity during the specified time period
- Tally Total Duration the total time period being surveyed
- Tally Average Duration the total count of tallies divided by the total number of minutes

6.6.1 Tally Code Summary Report by Split

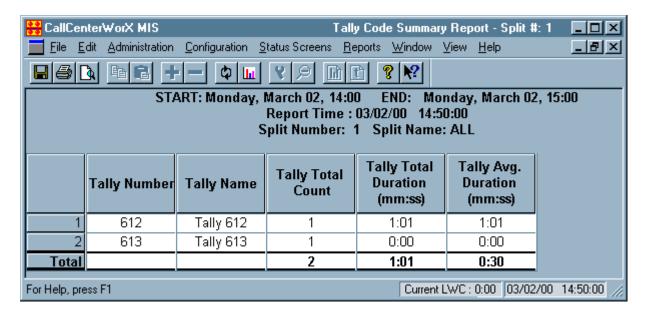


Figure 8-71 Tally Code Summary - Split

This report indicates the incidence of all Tally entries by all Splits during a specified time period, listing them by the numbers and names assigned in the Tally Names Assignment window (see this chapter, "Tally Code Assignments"). Tally Code Numbers can be up to 9 digits.

6.6.2 Tally Code Summary Report by Pilot

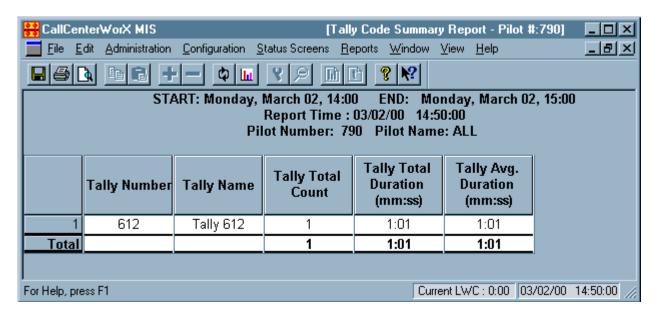


Figure 8-72 Tally Code Summary - Pilot

This report indicates the incidence of all Tally entries by specified Pilot Numbers during a specified time period, listing them by the numbers and names assigned in the Tally Names Assignment window (see this chapter, "Tally Code Assignments").

6.7 Report Scheduler

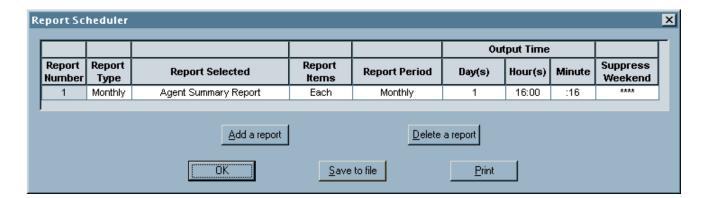


Figure 8-73 Report Scheduler Screen

CallCenter*WorX* allows you to schedule a report for output to the printer at a selected time using the **Report Scheduler** window (see Figure 8-73).

- Any report which can be generated can be scheduled for output.
- Up to 50 reports may be registered in the schedule.
- Once registered, the report will automatically be sent to the printer at the designated output time, which can be specified to the minute.

Detailed instructions on generating and scheduling reports may be found in Heading 10 in Chapter 10, "MIS Procedures."

View Menu

7. View Menu

The View menu allows the Toolbar and the Status bar to be visible (if checked) or not visible (if not checked) on the MIS console screen.

The **Toolbar** (located just under the Menu bar) contains icons which provide shortcuts to many menu commands.

The Status bar (located across the bottom of the console screen) shows the date and time, and the current Longest Waiting Call.

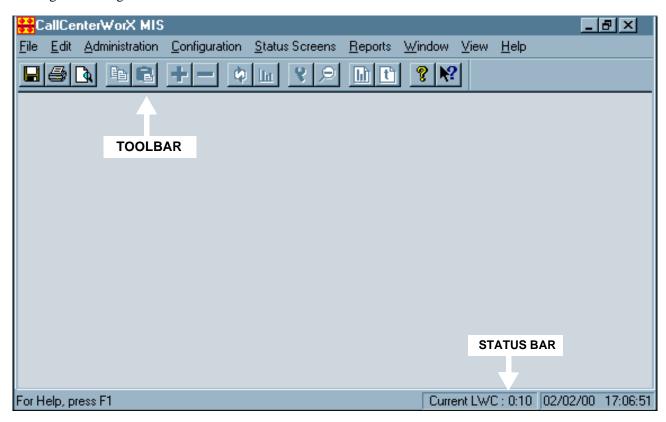
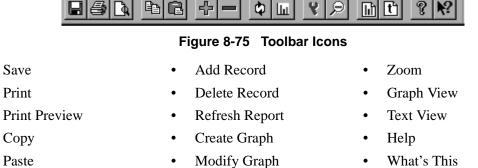


Figure 8-74 View Menu Commands



Save

Print

8. Help Menu

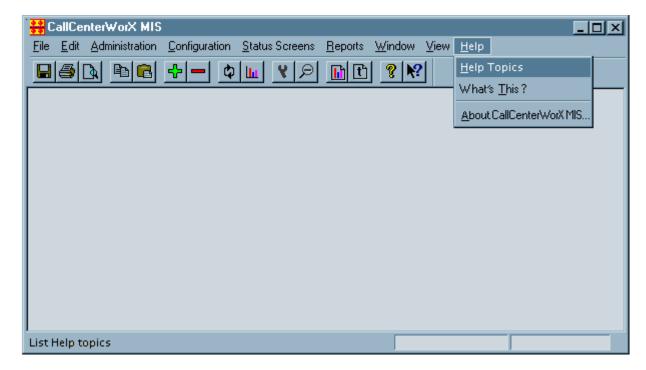


Figure 8-76 Help Menu Commands

Selecting the **Help Topics** option opens the Table of Contents to the MIS online Help system. You may then choose which topic will provide the information you need (see Chapter 11, "CallCenterWorX Online Help").

MIS Menu Commands

Help Menu

This page is for your notes.

Procedures

Chapter 9 ACD Procedures

Contains procedures for programming the ACD MAT system.

Chapter 10 MIS Procedures

Contains procedures for configuring and using the MIS system.

This page is for your notes.

CHAPTER 9 ACD Procedures

1. Method of Programming

1.1 Entering Data

Data is entered in the CallCenterWorX ACD programming by use of the Data Entry screens found under the **MAT menu**. They are accessed in one of three ways:

- Selecting a command from the **menu bar** using the mouse (such as selecting the **Tenant Data** command by clicking **Tenant Data** under the **MAT menu** shown in Figure 9-2).
- Selecting a command from the keyboard by holding down the Control and Shift keys and pressing
 an alphabetic letter (such as selecting the Tenant Data command by holding down CTRL and SHIFT
 and pressing T).
- Selecting a command from the **icon Toolbar** (located under the menu bar) by using the mouse (such as clicking the **Tenant Data toolbar icon)**.



Figure 9-1 MAT Command Toolbar Icons

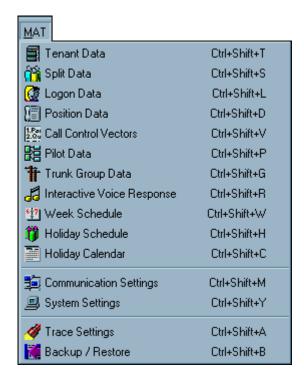


Figure 9-2 MAT Menu and Keyboard Commands

ACD Procedures

Order of programming

2. Order of programming

Because some commands depend on information having been previously programmed before the command can accept data, the CallCenter*WorX* ACD MAT should be programmed in the following order:

- 1. Tenant Data
- 2. Split Data
- 3. Agent Logon Data
- 4. Position Data
- 5. Call Control Vector Data
- 6. Pilot Data
- 7. Trunk Group Data
- 8. Interactive Voice Response Data
- 9. Week Schedules Data
- 10. Holiday Schedules Data
- 11. Holiday Calendar Data

3. Tenant Data

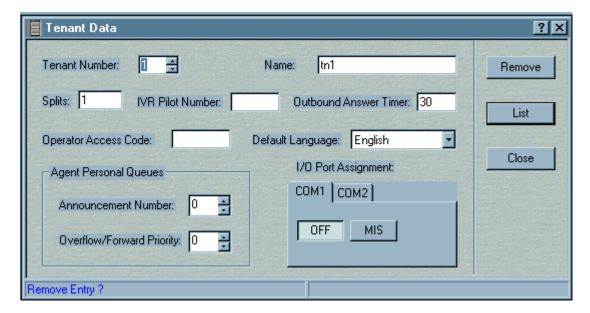


Figure 9-3 Tenant Data Screen

STEP 1: **Tenant Number** (required)

Using the up and down arrows, select the desired **Tenant Number** between 1 and 9.

STEP 2: Name

Enter the **Tenant Name** (optional).

STEP 3: Splits

Enter the quantity of splits for this tenant.

Important:

A total quantity of 30 splits is available to be shared among all 9 possible tenants. Entry of a quantity exceeding the remaining available number of split assignments will generate an error message in the Operation Result Message Bar saying "Tenant Database is full." Press the Tenant Data screen List button or the Tenant Data Report icon to display a report showing the current status of split assignments, to determine whether splits are available to be assigned.

STEP 4: IVR Pilot Number

Enter a PBX directory number to be used by the ACD to access ports on an IVR (2 to 4 digits).

STEP 5: Outbound Answer Timer

Enter a time (in seconds) to indicate if an outbound call was successfully completed.

STEP 6: Operator Access Code

Enter the directory number for dialing the operator as programmed in the PBX.

ACD Procedures

Tenant Data

STEP 7: Default Language

From the drop-down menu, choose the language to be used tenant-wide if there are no agents logged on to the ACD database using a Logon ID. Each D^{term} requires a language for display, and the Logon Data procedure (see this chapter, Heading 5.) specifies by agent the language to be displayed on that agent's D^{term} LCD display. The default Tenant language being chosen in this step is used when no agent is logged on using a Logon ID and the Logon Data therefore cannot specify.

STEP 8: Agent Personal Queues

(a) Announcement Number

Using the up and down arrows, select the number indicating which announcement to use for all personal queues in this Tenant. Announcement Number 1 is not available. Valid values are from 2-58; the default is 0 = not used.

(b) Overflow/Forward Priority

Enter the priority level to use for split queuing after overflow or call forwarding.

STEP 9: I/O Port Assignment

- (a) On the COM 1 tab, select OFF or MIS to determine if this port is used for MIS reporting for this tenant.
- (b) On the COM 2 tab, select OFF or MIS to determine if this port is used for MIS reporting for this tenant.
- STEP 10: Press **Update** to save the new information.
- STEP 11: Press Close to exit the data screen.

4. Split Data

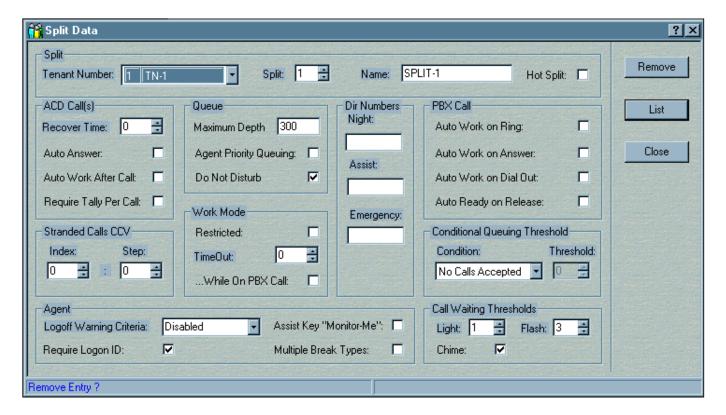


Figure 9-4 Split Data Screen

STEP 1: After assigning the Tenant data, access the **Split Data** dialog (Figure 9-4).

STEP 2: Split

(a) **Tenant Number** (required)

Select the tenant number from the drop-down menu showing all assigned tenants in the system.

(b) Split (required)

Select the split number using the up and down arrows, or enter a new split number of up to two numeric characters with a value between 1 and 30. The 30 possible splits in CallCenterWorX are shared among the 9 possible tenants, and split numbering begins with "1" for each tenant. Press the **List** button on the Split Data screen to see a listing of previously configured splits for all tenants.

Important: Step 3: Splits of the Tenant Data programming sets the quantity of splits for this tenant. You cannot configure more than that programmed quantity of splits for this tenant.

(a) Name (optional)

Enter an optional split name of up to 20 alphanumeric characters.

(b) Hot Split

If used, all members of this split must be "automatic" agents. There cannot be a mixture of standard agent positions and hot agent positions in the same split. This feature is designed for analog devices only, such as answering machines, dictation machines, and voice mail machines. D^{term} stations cannot be used as members of a Hot Split.

Click to check this box if this split destination will be continually available to answer calls (such as an automated attendant port). This split is typically not staffed and always logged on. A position in this split must be removed from the database to be logged off.

STEP 3: ACD Call(s)

(a) **Recover Time** (optional)

Using the up and down arrows, set a time between 0 and 255 seconds which indicates the amount of time an ACD call can ring at an agent's position before being recovered (put back into its original queue at the highest priority). It resumes processing its original CCV at the point at which it was removed. After the call is recovered, the agent is immediately forced to Work mode with a flashing Work LED and the display "CALL RECOVERED."

(b) Auto Answer (required)

- Check to select Automatic to connect calls automatically to the agent.
- If not checked, the agent is required to press the Answer button to answer an incoming call.

(c) Auto Work After Call (required)

- Check to put the agent position into Work mode (unavailable to take ACD calls) after disconnecting from an ACD call.
- If not checked, the agent position goes into Ready mode (available to receive a new ACD call) immediately after disconnecting from a previous ACD call.

(d) Require Tally Per Call (optional)

Check to set the requirement that an agent must enter a per-call tally code before the next call will be allowed to ring in to the position.

STEP 4: Stranded Calls CCV (optional)

(a) **Index** (optional)

Use the up and down arrows to set the CCV Index to use when recovering calls left in queue after all agents in the split have logged off. Valid values are 0 to 60 (0 = feature not used).

(b) Step (optional)

Use the up and down arrows to set the CCV Step to use when recovering calls left in queue after all agents in the split have logged off. Valid values are 1 to 20.

STEP 5: Queue

(a) Maximum Depth (required)

Enter the maximum number of calls that can be in queue at any given time. Valid ranges are from 1 to 300. If you use Variable Depth Queuing (see Chapter 14 for an example), the valid range is from 5% to 1000%.

(b) Agent Priority Queuing (required)

- Check to require that agents are queued according to the split preference in their logon data.
- Leave unchecked to place agents on a "first come first served" basis in which the longest waiting agent receives the next call.

(c) **Do Not Disturb** (required)

- Check to indicate that calls are not queued when no agents are logged in to the split.
- Unchecked (OFF) permits calls to be queued when no agents are logged in to the split. This is the default value.

STEP 6: Work Mode

(a) Restricted

- Check to restrict agents from going to Work mode under certain conditions, or to limit the conditions under which Work mode is used (see the "CallCenterWorX ACD Features and Specifications" manual for detailed listing).
- Unchecked does not restrict Work mode access.

(b) **Time Out** (required)

Using the up and down arrows, select the number of seconds that a position can stay in Work mode before being forced to Ready mode. When the timeout expires, the agent will be assigned a call if there are calls waiting in queue. The agent may use a Tally-Oh code to disable the timeout. The Tally-Oh code must be used while in Work mode and only affects the current timeout. Valid values are from 0 to 999 (0 = feature not used). See the "CallCenterWorX ACD Features and Specifications" manual for detailed information on Tally-Oh codes.

(c) ...While on PBX Call (optional)

Check to apply Work mode timeout (as in Step 6:(b)) to agents' calls on their PBX lines.

STEP 7: Directory Numbers

(a) Night (optional)

Enter the directory number (2 to 4 digits) where calls will be routed when this split is in Night mode. This must be a pilot number.

(b) **Assist** (optional)

Enter the directory number (up to 4 digits) where calls will be routed for assist requests. This number is overridden by the Assist number in the Logon Data dialog for a particular agent (see Step 8:(c), "Assist Key\Monitor Me").

(c) **Emergency** (optional)

Enter the directory number (up to 4 digits) where calls will be routed for emergency requests. This number is overridden by the Emergency number in the Logon Data dialog for a particular agent. See the "CallCenterWorX ACD Features and Specifications" manual for detailed information on emergency monitoring.

STEP 8: Agent

(a) Logoff Warning Criteria

This feature enables a "Logoff Warning" to display if an agent tries to log off when the number of calls in queue for the split is greater than or equal to the number of logged on agents. You can set a value between "1 Agent" and "9 Agents" for the maximum number of agents still logged on to the split when the warning is given. For example, if there are 5 calls in queue, if the setting is "5 Agents," and if 8 agents are logged on, then 3 agents can logoff without the warning displaying. If there are still 5 calls in queue, the next of the 5 remaining logged on agents who tries to logoff will receive the warning.

The more general "Calls>Agents" setting will display the warning to any agents who try to log off when the number of queued calls is equal to or greater than the number of logged on agents, however large or small the number of logged on agents or number of calls in queue.

Choosing the default "Disabled" disables the warning feature.

For more detailed information, see the "CallCenterWorX ACD Features and Specifications" manual.

(b) Require Logon ID

Check to require a Logon ID for Agents logging on to this split.

(c) Assist Key "Monitor Me"

Check to enable the "Monitor-Me" feature. An agent may request to be monitored by a specific supervisor by pressing the ASSIST key. This sends a request to the Assist directory number (see Step 7:(b)) and allows the supervisor to be in a silent monitor connection listening to the agent and the calling party. This differs from the normal Monitoring function, which is initiated by the supervisor rather than the agent. See the "CallCenterWorX ACD Features and Specifications" manual for detailed discussions on both types of monitoring.

Unchecked leaves the ASSIST key functioning to allow an agent to call a supervisor for assistance during an ACD call. This action places the active call on hold and places a call to a pre-programmed number (any station in the PBX, an attendant, an individual supervisor, a pilot number for a split of supervisors, etc.).

(d) Multiple Break Types

Check to allow nine break types; default setting (unchecked) is one break type. Break types can be named in the CallCenter*WorX* MIS.

STEP 9: PBX Call

(a) Auto Work on Ring (optional)

Check to automatically put the agent into Work mode when an incoming call is received on the agent's PBX line.

(b) Auto Work on Answer (optional)

Check to automatically put the agent into Work mode when an incoming call is answered on the agent's PBX line.

(c) Auto Work on Dial Out (optional)

Check to automatically put the agent into Work mode when an offhook condition exists or a dial tone is present on the agent's PBX line.

(d) Auto Ready on Release (optional)

Check to automatically put the agent into Ready mode upon releasing a call on the agent's PBX line.

STEP 10: Conditional Queuing Threshold (optional)

(a) Use the up and down arrows to set the appropriate value as indicated below:

• No Calls Accepted: No incoming calls are accepted into the queue.

• Agents Available: Specify the minimum number of available agents before

calls can be accepted into the queue. If the number of available agents is greater than or equal to the minimum specified, the call will be accepted. Valid values are from

1 to the maximum number of positions for your

installation.

• Calls In Queue: Specify the maximum number of unanswered calls

allowed in the split queue before additional calls will not be accepted. If the number of waiting calls is less than this number, the call will be accepted. Valid values are from 1 to the maximum number of positions for your installation.

Note: See the "Queuing-ACD" section in the "CallCenterWorX ACD Features and Specifications" manual for detailed information on Conditional Queuing Threshold.

STEP 11: Call Waiting Thresholds

(a) Light (optional)

Using the up and down arrows, select the minimum number of calls which can wait in this split before turning on the Call Waiting lamp. Valid values are from 0 to 300 (0 = feature not used).

(b) **Flash** (optional)

Using the up and down arrows, select the minimum number of calls which can wait in this split before flashing the Call Waiting lamp. Valid values are from 0 to 300 (0 = feature not used).

(c) Chime (optional)

Check to produce a Chime at positions currently in Work mode or Break mode when the Call Waiting lamp is turned on or begins flashing.

STEP 12: Press **Update** to save the new information.

STEP 13: Press **Close** to exit the data screen.

5. Logon Data

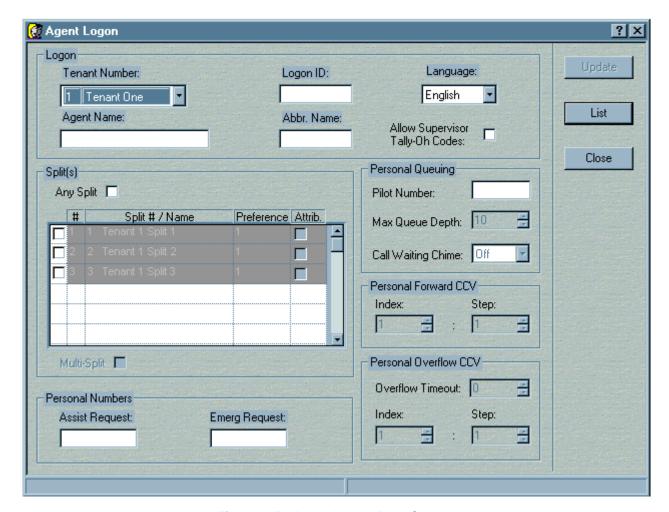


Figure 9-5 Agent Logon Data Screen

STEP 1: Logon

(a) **Tenant Number** (required)

Select the tenant number from the drop-down menu.

(b) Logon ID (required)

Enter the agent's unique Logon ID number of up to nine numeric characters with a range of 1 to 99999999. Preceding zeros are not allowed. An ID code may be used at only one position at any given time. Multiple logons with the same ID are not permitted.

(c) Language (required)

From the drop-down menu, select the language which will appear on the agent's D^{term} display. The language selected in the Tenant Data specifies the tenant-wide language if no agents are logged on using a Logon ID, while this selection is agent-specific.

(d) Agent Name (optional)

Enter the name of the agent or supervisor associated with the Logon ID number.

(e) Abbreviated Name (optional)

Enter an abbreviated agent name of up to five alphanumerical characters for use in reports.

(f) Allow Supervisor Tally-Oh Codes (optional)

Check to allow the position to use Supervisor Tally-Oh codes, which invoke various actions such as statistical displays and mode changes. This permits supervisors to log in at various positions based on Logon ID number, rather than being limited to positions which are configured to accept the Tally-Oh codes. Detailed information on Supervisor Tally-Oh Codes is available in the "CallCenter*WorX* ACD Features and Specifications" manual.

STEP 2: Split(s)

The listing of split numbers and names (see Figure 9-5) will appear with a dim-out over a number of splits equal to the number configured for this tenant. (The dim-out in Figure 9-5 indicates that 3 splits have been configured in the Tenant Data for this tenant.)

Note: The number of splits configured for this tenant in the Tenant Data limits the number of entries acceptable in this step. For example, if only two splits have been configured in Tenant Data, only two split numbers, names, and preferences will be accepted in the data entry boxes in the Logon Data configuration.

(a) Any Split (optional)

Check to allow the agent's split to be determined by the setting in the Position Data command. Leave unchecked to specify the agent's working split(s) in the following steps.

(b) # (required)

Check the box to the left of this column and enter the first Split Number that the agent is allowed to take calls from (values are from 1 to 30 for as many splits as are assigned—see **Note** above). Depending on the number of splits configured in the Tenant Data, an agent is allowed to take calls from up to 16 splits.

(c) **Split # / Name** (automatic entry)

The entry of a Split Number in Step 2b displays a listing of the previously assigned number and name for that split.

(d) **Preference** (required)

Click in this field and use the up and down arrows to select the agent's skill level rating for the specified split. Valid values are from 1= highest to 99 = lowest.

(e) Attribute (required)

Check this box to select the split which is to be the agent's attribute (primary) split.

(f) Multi-Split (optional)

Check this box to allow the agent to be logged into all of the allowed splits at once.

STEP 3: Personal Numbers

(a) Assist Request (optional)

Enter a directory number (up to 4 digits) to be used for the agent's assist requests. This number overrides the Assist number in the Split Data dialog.

(b) Emergency Request (optional)

Enter a directory number (up to 4 digits) to be used for the agent's emergency requests. This number overrides the Emergency number in the Split Data dialog.

STEP 4: **Personal Queuing**

(a) Pilot Number (required)

Enter the PBX directory number (2 to 4 digits) which will reach the ACD agent directly.

Maximum Queue Depth (required)

Use the up and down arrows to select the maximum number of calls that can be in queue at any given time. Valid range is from 1 to 300.

(b) Call Waiting Chime (required)

Using the drop-down menu, choose Off, First, or All to select how the agent will be chimed for incoming Personal Queue calls.

STEP 5: Personal Overflow CCV

(a) **Timeout** (optional)

Use the up and down arrows to select the number of seconds that a call should wait in the agent's Personal Queue before overflowing to the Call Control Vector specified in Step 5(b). Valid values are 0 to 999 (0 = feature not used).

(b) Index (optional)

Use the up and down arrows to select the CCV Index number to use when the Timeout (Step 5a) overflows its limit. The valid range is from 1 to 60.

(c) Step (optional)

Use the up and down arrows to select the CCV Step number to use when the Timeout (Step 5a) overflows its limit. The valid range is from 1 to 20 steps.

STEP 6: Personal Forward CCV

(a) Index (optional)

Use the up and down arrows to select the CCV Index number to use when forwarding a call from the agent's Personal Queue when the agent's position is vacant or in Break mode, or when a personal call is recovered using the Call Recover feature. Valid values are from 1 to 60.

(b) **Step** (optional)

Use the up and down arrows to select the CCV Step number to use when forwarding a call from the agent's Personal Queue when the agent's position is vacant or in Break mode, or when a personal call is recovered using the Call Recover feature. The valid range is from 1 to 20 steps.

- STEP 7: Press **Update** to save the new information.
- STEP 8: Press **Close** to exit the data screen.

6. Position Data

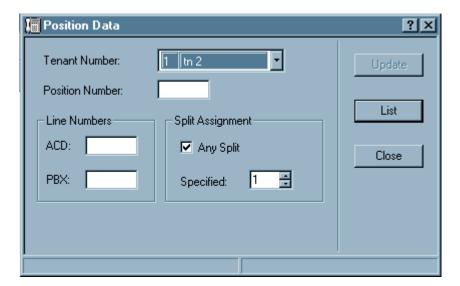


Figure 9-6 Position Data Screen

STEP 1: **Tenant Number** (required)

Select the tenant number from the drop-down menu.

STEP 2: **Position Number** (required)

For programming a new entry, enter a PBX directory number for the position, using up to 4 digits from 10 to 9999. The Position number and PBX line number entries are the same entity; they are the My Line. If the My Line number is entered in this field, then the PBX line number field below will be filled with that entry.

For querying existing Position data, you can specify either a PBX number or an ACD number. Either number will pull up the entry if it is found in the database.

STEP 3: Line Numbers

(a) ACD (required)

Enter the telephone directory number that receives all of the ACD calls for this position via pilot or personal pilot numbers, using up to 4 digits from 10 to 9999.

(b) **PBX** (optional if analog station)

Enter an additional PBX directory number for the position, using up to 4 digits from 10 to 9999. (See Step 2.)

Important: There should only be two lines on an ACD position: the My Line (PBX) and the ACD Line. If other lines are programmed on an ACD position, the MIS status may be incorrectly reported.

Do not allow Call Pickup to ACD lines. Do not permit calls to be presented to, or to be made from, an ACD line directly.

STEP 4: **Split Assignment** (required)

(a) Any Split

- Check to allow any split to work through this position; the splits will be determined by the Logon ID.
- Leave unchecked to limit the position to the specified split.

(b) Specified

Use the up and down arrows to limit the position to a specified split (values of 1 to 30) if desired.

- STEP 5: Press **Update** to save the new information.
- STEP 6: Press **Close** to exit the data screen.

7. Call Control Vectors

A detailed explanation of the Call Control Vectors programming concept can be found in the "CallCenterWorX ACD Features and Specifications" manual.

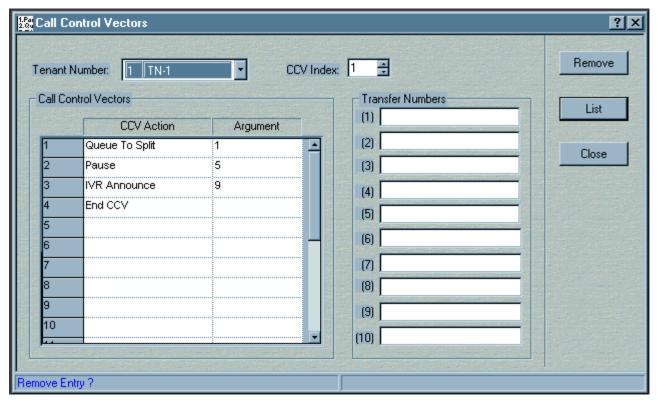


Figure 9-7 Call Control Vectors Screen

STEP 1: Prior to performing the CCV entries:

- (a) Assign **Station Data** in the PBX for any station or position that is referenced by the CCV as a transfer destination (see Chapter 4, Heading 2, "Programming the ACD Position Prime Line and My Line").
- (b) Assign a **Pilot** number to go to the CCV, or to a **Week Schedule** that references the CCV if assigned (see Chapter 4, Heading 2, "Programming the ACD Position Prime Line and My Line").
- (c) Set up any **IVR data** that will be referenced for announcements (through Que *WorX* or another Infolink application).
- (d) Complete the assignments of PBX data for **Announcement Trunks** that are referenced by the CCV (see Chapter 4, Heading 5, "Programming ACD Group Announcements").
- (e) Assign data in the ACD for any **Splits** that are referenced by the CCV (see this chapter, Heading 4, "Split Data").
- (f) Configure **Tally DN** data before using the Tally Long or Tally Short CCV Actions (see this chapter, Heading 14, "System Data," step 1).
- STEP 2: Open the **Call Control Vectors** screen through the MAT command or icon.

STEP 3: Tenant Number

Using the drop-down menu, choose the number (required) and name (optional) of the **Tenant** which the ACD is serving.

STEP 4: CCV Index

Enter an **Index** number (from 1 to 60) to a CCV.

STEP 5: Call Control Vectors

(a) CCV Action

In the first available **CCV Action** (Step) field (step numbers can range from 1-20), click in the data field and select an Action from the drop-down menu. You can also select an Action by entering the first letter (or enough letters to make the entry unique) and pressing the Tab key. This will fill in the Action step entry. An Action step can be inserted into an existing series by using the keyboard **Insert key**. Action steps can be removed with the keyboard **Delete key**. Possible CCV Actions are:

•	Pause	•	Cond. Queue	•	IVR Announce	•	IVR Dn
•	Announcement	•	Dequeue From	•	ETA Less	•	Split < ETA
•	Goto CCV	•	Queue To Split	•	ETA Greater	•	Split > ETA
•	Hang Up	•	End CCV	•	Ring Delay	•	Up Priority
•	Transfer to PBX	•	If Not Queued	•	Tally Short		
•	New Priority	•	Skip	•	Tally Long		

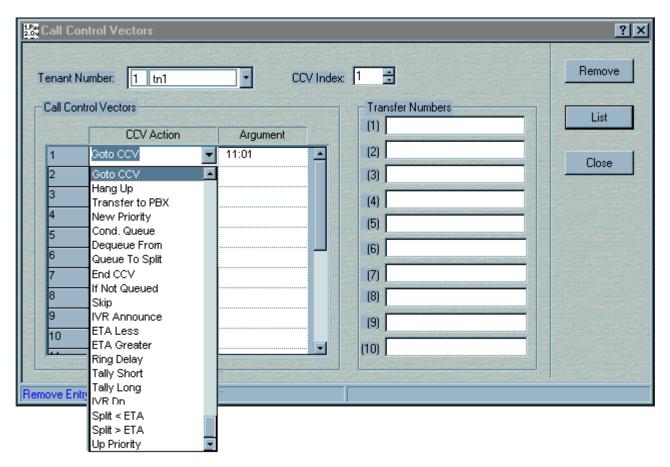


Figure 9-8 CCV Action Choices

(b) Argument

Tab to the **Argument** field and enter a valid Argument for the corresponding Action. This can be a split number (as in Argument 1 in Figure 9-7), the number of seconds if a Pause Action is programmed (as in Argument 2 in Figure 9-7), or other specifications needed to carry out the programmed Action.

STEP 6: Repeat Step 5 for each **CCV Action** you want to assign.

STEP 7: Transfer Numbers

In the Transfer Numbers field, enter the directory number to be dialed for each "Transfer To PBX" or "IVR Dn" CCV step.

- STEP 8: Press **Update** to save the new information.
- STEP 9: Press **Close** to exit the data screen.

8. Pilot Data

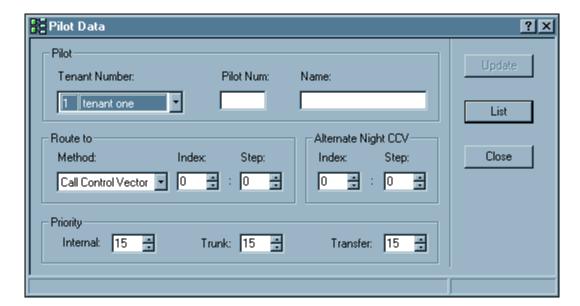


Figure 9-9 Pilot Data Screen

- STEP 1: Prior to performing the Pilot Data entry, assign each **Pilot Number** as a "monitored number" in the PBX if this has not already been done (see Chapter 4, Heading 2, "Programming the ACD Position Prime Line and My Line").
- STEP 2: Open the **Pilot Data** screen (Figure 9-9) through the MAT command or icon.
- STEP 3: **Tenant Number** (required)

Using the drop-down menu, select the number of the **Tenant**.

STEP 4: **Pilot Number** (required)

Enter a **PBX directory number** (**Pilot Number**) that is dialed in order to enter the ACD (valid range 2 to 4 digits).

STEP 5: Name (optional)

Enter the **Name** to be displayed on the agent's D^{term} LED when a call is assigned from this Pilot Number.

STEP 6: Route to (required)

Under Route to **Method**, use the drop down menu to choose between **CCV** and **Week Schedule** as the method to be used to route a call presented to this Pilot Number.

(a) Index

If you selected **CCV**:

(1) Tab to the **Index** field and use the up and down arrows to choose the **CCV Index Number**.

Pilot Data

(2) Tab to the **Step** field and use the up and down arrows to choose the starting **CCV Step**.

(b) Week Schedule

If you selected **Week Schedule**, tab to the **Week Schedule** field and enter the **Week Schedule** reference number.

STEP 7: Alternate Night CCV

Normally, calls that attempt to queue to a split in night mode will follow the split's night routing (if the call is not already queued in another split). This feature allows calls to be routed to a different night destination based on the pilot number the call originally used. Calls can then be sent to the same split from different pilot numbers, and can be routed to different night destinations.

(a) Index

Enter the **CCV** index to use for the pilot's alternate night destination.

(b) Step

Enter the **CCV Step** number to use for the pilot's alternate night destination.

STEP 8: **Priority**

Priority numbers can range from 1 to 250, with the default being 15.

(a) Internal

Enter the **priority number** (1-highest to 250-lowest) to use when queuing internal calls to the Pilot Number from a station or non-ACD trunk.

(b) Trunk

Enter the **priority number** (1-highest to 250-lowest) to use when queuing ACD trunk calls to the Pilot Number.

(c) Transfer

Enter the **priority number** (1-highest to 250-lowest) to use when queuing transferred calls to the Pilot Number.

STEP 9: Press **Update** to save the new information.

STEP 10: Press **Close** to exit the data screen.

9. Trunk Group Data

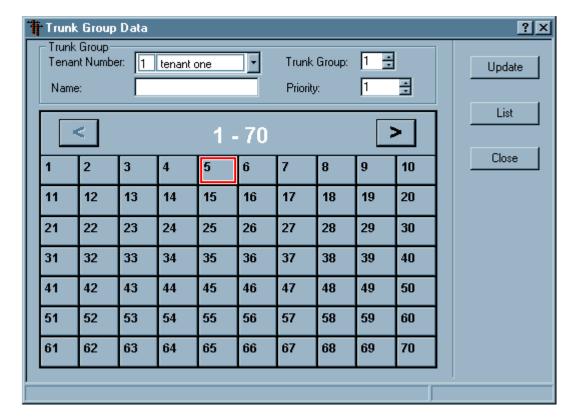


Figure 9-10 Trunk Group Data Screen

STEP 1: **Tenant Number** (required)

Using the drop-down menu, select a valid Tenant Number.

STEP 2: **Trunk Group** (required)

Using the up and down arrows, select a Trunk Group Number between 1 and 63.

STEP 3: Name (optional)

Enter the Trunk Group Name (such as WATS, DID, or another significant name). This name may be displayed on the agent's D^{term} LED display

STEP 4: **Priority** (required)

Using the up and down arrows, select the priority level of this Trunk Group (1-highest to 250-lowest). The default priority is 15.

STEP 5: Trunk Table Selection (required)

There are four number pads for the selection of trunk circuits. The circuit numbers begin with 1 through 70 (see Figure 9-10) and pressing the "greater than" button (>) opens the second number pad for selecting circuits 71 through 140 (see Figure 9-11).

Two further number pads—for selecting circuits 141 through 210, and circuits 211 through 255—are accessed by pressing the > button to go to higher values. Press the < button to go to lower values.

Using the number pads, **select the circuits** to make up the Trunk Group. Each selected circuit number will show a red border (see button 5 in Figure 9-10). To remove a circuit from the group, press the numbered key again (the red border will be removed).

CallCenterWorX provides 255 circuits, configurable in up to 63 trunk groups, to be shared among the 9 possible tenants. A Trunk Group can have up to 127 circuits. Trunk Group numbers are unique to the tenant they are configured for, and attempted entry of an already-assigned Trunk Group number will generate an error message in the Operation Result Message Bar on the Data Entry screen.

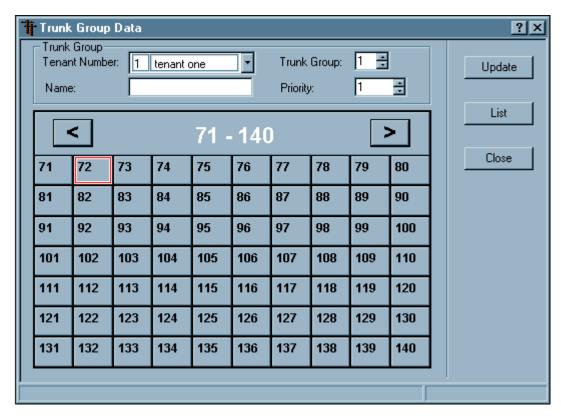


Figure 9-11 Trunk Group-Second Number Pad of Four

- STEP 6: After completing the selection of circuits for this Trunk Group, press **Update** to save the information.
- STEP 7: Press **Close** to exit the data screen.

10. IVR Data

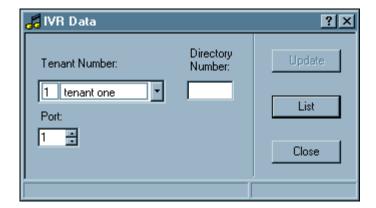


Figure 9-12 IVR Data Screen

- STEP 1: Prior to entering the IVR Data:
 - (a) Assign IVR numbers in the PBX (see Chapter 4, Heading 2, "Programming the ACD Position Prime Line and My Line").
 - (b) Enter the IVR Pilot Number in the ACD Tenant Data (see this chapter, Heading 3, "Tenant Data").
- STEP 2: Open the IVR Data MAT command screen (see Figure 9-12) using the menu or the toolbar icon.
- STEP 3: Tenant Number

Select the Tenant Number from the drop-down menu.

STEP 4: **Directory Number**

Enter a PBX Directory Number (2 to 4 digits) to register it as an IVR port with the ACD.

STEP 5: Port

Using the up and down arrows, select a Port on the IVR to be associated with the IVR Directory Number (see Step 4) on the PBX.

- STEP 6: Press **Update** to save the new information.
- STEP 7: Press **Close** to exit the data screen.

11. Week Schedules

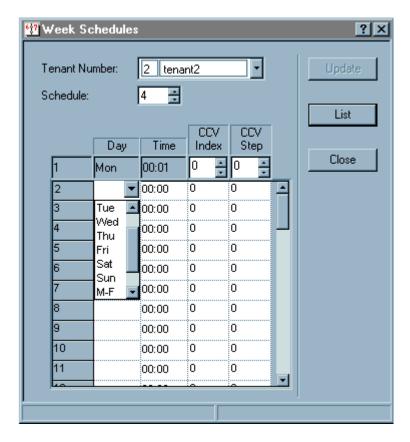


Figure 9-13 Week Schedules Screen

STEP 1: Tenant Number

Select a Tenant Number from the drop-down menu.

STEP 2: Schedule

Select a Week Schedule Number using the up and down arrows. The valid range is from 1 to 30. Week Schedule Numbers are unique to the tenant they are configured for, and attempted entry of an already-assigned number will generate an error message in the Operation Result Message Bar on the Data Entry screen. Press the **List** button to see a report of all Week Schedule configurations for all tenants.

STEP 3: Day-Time-CCV Index-CCV Step

(a) Day

Click in the Day column to generate the drop-down menu, and select a Day to be assigned to this Week Schedule. Options include individual choices by day (such as Monday, Tuesday); choice of business day or weekend (M-F, S-S); or the option of ALL. The first entry is pre-set at Monday, which is the beginning of the week to the ACD.

(b) Time

Select a Start Time for the day selected in Step 4a. Click in the field to generate up and down arrows. The first entry is preset at "00:01."

(c) CCV Index

Select a CCV Index (reference number) for a Call Control Vector (see Heading 7, "Call Control Vectors," Step 4) assigned to this Week Schedule. Click in the field to generate up and down arrows.

(d) CCV Step

Select the Call Control Step number (between 1 and 20) in this CCV which begins the sequence of call routing for the day and time programmed above. Click in the field to generate up and down arrows.

Since Monday at one minute past midnight is the beginning of the week to the ACD, the **Index** and **Step** values for the first (Monday) entry will be automatically programmed with the values of the last entry made if no other entries have been made in the Monday fields. Under ordinary circumstances the user will not need to program the Monday entry.

- STEP 4: Repeat Steps 4a, 4b, 4c, and 4d for each entry you want to include in the Week Schedule.
- STEP 5: Press **Update** to save the new information.
- STEP 6: Press **Close** to exit the data screen.

12. Holiday Schedules

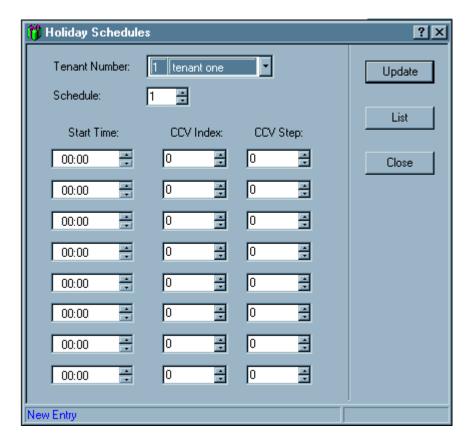


Figure 9-14 Holiday Schedules Screen

STEP 1: Assign a Week Schedule (see Heading 11, "Week Schedules") for the holiday(s) planned.

STEP 2: Tenant Number

Select a tenant number from the drop-down menu.

STEP 3: Schedule

Select a schedule number between 1 and 30 by using the up and down arrows. Up to thirty schedules can be programmed per tenant.

STEP 4: Start Time

Select a starting time for this schedule number.

STEP 5: CCV Index

Select the CCV Index reference for this schedule number.

STEP 6: CCV Step

Select the Call Control Vector Step number (between 1 and 20) in this CCV which begins the sequence of call routing for the day and time programmed above.

- STEP 7: Repeat Steps 4, 5, and 6 for each entry you want to include in this holiday schedule.
- STEP 8: Press **Update** to save the new information.
- STEP 9: Press **Close** to exit the data screen.

13. Holiday Calendar

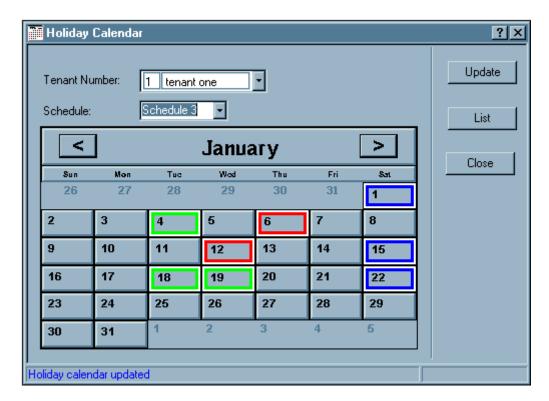


Figure 9-15 Holiday Calendar Screen

STEP 1: Tenant Number

Select a Tenant Number from the drop-down menu.

STEP 2: Schedule

Select a Holiday Schedule number from 1 to 30 to be used on a particular date (see Heading 12, "Holiday Schedules"). The drop-down menu for Schedule number will include a list showing each schedule number and its associated color (see Figure 9-16).

STEP 3: Calendar Setting

- (a) Select the desired **month** by using the forward (>) or backward (<) buttons.
- (b) Select the desired **date** by pressing the numbered date buttons on the calendar. The selected date will be highlighted by a colored square indicating which of the thirty schedules has been programmed (see Figure 9-15).

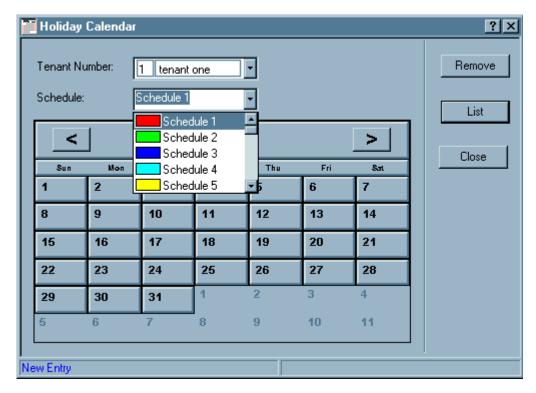


Figure 9-16 Schedule Number Menu

- STEP 4: Repeat Steps 3(a) and 3(b) until all desired holiday dates have been programmed. The Holiday Calendar can be programmed up to 365 days in advance, and there is no limit to the number of holidays that can be programmed within a month.
- STEP 5: Press **Update** to save the new information.
- STEP 6: Press **Close** to exit the data screen.

System Data

14. System Data

CAUTION: These settings should be modified with care as they alter the behavior of the ACD.

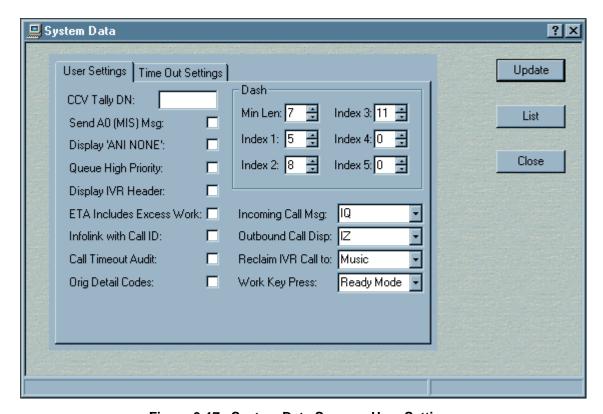


Figure 9-17 System Data Screen - User Settings

14.1 User Settings

This data is used to customize the ACD for specific features including Infolink and MIS message generation, debugging tools, and phoneset operation. It is primarily for use by technical personnel.

Note: To use default values, leave a checkbox unchecked. To verify current settings, press the **List button** to display the System Data report.

STEP 1: **CCV Tally DN** (optional)

This field provides a directory number to be used when sending tally codes to the MIS as a result of Call Control Vector processing (Tally Long/Tally Short). Normally, entered tally codes are associated with the agent position which input them. However, there is no agent position when using CCV tally codes and the MIS system requires that each tally code have an associated position. Value = 4 numeric characters.

STEP 2: Send A0(MIS) Msg. (required)

Values: Yes / No Default = No

This field determines whether or not the A0 MIS message is sent by the ACD to an attached MIS system. This message contains the address of the ACD call record.

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STEP 3: **Display 'ANI NONE'** (required)

Values: Yes / No Default = No

This field determines whether the "ANI NONE" message will be displayed on agent terminals (ringing and answer) for ACD calls which have no associated ANI information. The display is simply omitted from the connection display sequence when the value "No" is chosen.

STEP 4: Queue High Priority (required)

Values: Yes / No Default = No

This field determines whether incoming ACD calls with a priority of 1, 2, or 3 will adhere to maximum queue depth values for a given split. A value of "Yes" will instruct the ACD to queue ALL such calls to a split (as directed by a Call Control Vector) regardless of queue depth limitations. All other calls (priorities above 3) will be subject to maximum queue limits. Priority is determined based upon ACD database programming in the Pilot Data, Trunk Group Data, and CCV programming.

STEP 5: **Display IVR Header** (required)

Values: Yes / No Default = Yes

The field specifies whether the IVR dialed digits connection display is to contain a leading descriptor "IVR." Disabling this descriptor allows an increase to 16 characters to be displayed instead of 12. The IVR dialed digit connection display is not displayed unless it is activated using Tally-Oh 021. See the "CallCenter *WorX* ACD Features and Specifications" manual for detailed information.

STEP 6: ETA Includes Excess Work (required)

Values: Included / Excluded Default = Excluded

This field determines whether or not agents who have been in work mode for an excessively long time will be included in the calculation of the Estimated Time to Answer (ETA) for a particular call or split.

STEP 7: Infolink with Call ID (required)

Values: Yes / No Default = No

This field determines whether the ACD will send call identifier fields as part of certain Infolink messages (IQ/Iq, IS, IT, IU, IV). These fields uniquely identify an individual call while it remains inside the realm of the ACD to help Infolink applications keep track of the call.

STEP 8: Call Timeout Audit (required)

Values: Enable / Disable Default = Disable

This field enables a specialized call record audit for finding and correcting potential problems in the timeout processing routines inside the ACD.

ACD Procedures

System Data

STEP 9: Orig Detail Codes (required)

Values: Yes / No Default = No

This field specifies which values the ACD will send for the detail code field of Infolink Acknowledgement (IY and IX) messages. The value of "Yes" will result in detail codes of 01-06 (those specified in the original version of Infolink) only. The use of original codes only might be needed if the Infolink application cannot properly handle additional codes which have been added to the Infolink specification.

STEP 10: Incoming Call Msg (required)

Values: IQ / Iq Default = IQ

This field determines which type of Infolink Incoming Call Notification (IQ/lq) message will be generated by the ACD. Both contain similar information (the lq adds the queued to split numbers) about an ACD call which has just queued to an ACD split.

STEP 11: Outbound Call Disp (required)

Values: IZ / lz Default = IZ

This field indicates which type of Infolink Outbound Call Disposition (IZ/lz) message will be generated by the ACD. Both contain similar information (the lz adds the pilot/personal pilot number associated with the outbound call) about the disposition of an outbound ACD call.

STEP 12: Reclaim IVR Call to (required)

Values: Music / Ringback Default = Music

This field determines what will be heard by callers who have been connected to an IVR (via Infolink) and subsequently reconnected to an ACD pilot.

STEP 13: Work Key Press (required)

Values: Disable Timer/Ready Mode Default = Ready Mode

This field allows the customization of the effect of pressing the work key when in "timed" work mode (as a result of work mode timeout programming). Pressing the work key can result in either (1) agent immediately exiting work mode, or (2) work mode timer being deactivated and the agent remaining in work mode until the work key is pressed again.

STEP 14: Dash

(a) Min Len (required)

Values: 1 to 16 Default = 7

This field determines the minimum length (digits) of ANI information which will result in the ACD inserting dashes in the ANI agent display for ACD calls (ringing and answer). For example, the value of 7 would require that the ANI contain at least 7 digits before any dashes would be displayed. The location of any dashes is determined by other system data fields.

(b) Index 1 (required)

Values: 0 to 11 Default = 5

This field determines the location of the first dash (if appropriate) for ANI agent displays for ACD calls (ringing and answer). For example, the default value of 5 would result in a dash being inserted between the 4th and 5th digits of the ANI (counting backward from the last digit). An ANI of 2145559999 would then be displayed with a dash inserted as such: 214555-9999. A value of 0 indicates that the dash is not desired.

(c) Index 2 (required)

Values: 0 to 11 Default = 8

This field determines the location of the second dash (if appropriate) for ANI agent displays for ACD calls (ringing and answer). For example, the default value of 8 would result in a dash being inserted between the 7th and 8th digits of the ANI (counting backward from the last digit). An ANI of 2145559999 would then be displayed with a dash inserted as such: 214-5559999. A value of 0 indicates that the dash is not desired.

(d) Index 3 (required)

Values: 0 to 11 Default = 11

This field determines the location of the third dash (if appropriate) for ANI agent displays for ACD calls (ringing and answer). For example, the default value of 11 would result in a dash being inserted between the 10th and 11th digits of the ANI (counting backward from the last digit). An ANI of 12145559999 would then be displayed with a dash inserted as such: 1-2145559999. A value of 0 indicates that the dash is not desired.

(e) Index 4 (required)

Values: 0 to 11 Default = 0

This field determines the location of the fourth dash (if appropriate) for ANI agent displays for ACD calls (ringing and answer). For example, the default value of 11 would result in a dash being inserted between the 10th and 11th digits of the ANI (counting backward from the last digit). An ANI of 12145559999 would then be displayed with a dash inserted as such: 1-2145559999. A value of 0 indicates that the dash is not desired.

(f) **Index 5** (required)

Values: 0 to 11 Default = 0

This field determines the location of the fifth dash (if appropriate) for ANI agent displays for ACD calls (ringing and answer). For example, the default value of 11 would result in a dash being inserted between the 10th and 11th digits of the ANI (counting backward from the last digit). An ANI of 12145559999 would then be displayed with a dash inserted as such: 1-2145559999. A value of 0 indicates that the dash is not desired.

System Data

CAUTION:

Use extreme caution. Do not modify *any* of these settings except at the direction of NEC technical personnel (your NEC Associate or the NEC National Technical Assistance Center).

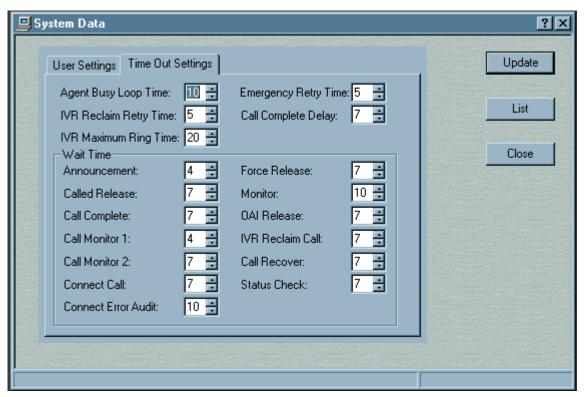


Figure 9-18 System Data Screen - Time Out Settings

14.2 Time Out Settings

This data maintains the ACD's System Data for time out information. It allows custom programming of some timers used by the ACD.

This data is critical to the operation of the ACD and should be modified with extreme caution and only at the direction of NEC technical personnel.

15. Communication Data

Note: *This command is primarily a utility service used by technicians.*

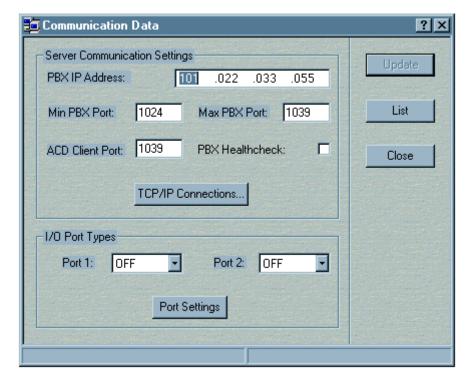


Figure 9-19 Communication Data Screen

STEP 1: Server Communication Settings

Important: Changes to the Server settings will require shutdown and restart of the Server.

(a) PBX IP Address (required)

Enter the four octet IP address for the PBX.

(b) Min PBX Port

The Min PBX Port and Max PBX Port values indicate the range on the socket ports that the PBX specified in Step 1(a) is monitoring for external TCP/IP connection data. These settings tell the ACD what ranges to try in order to establish connection. The default value of the Min PBX Port setting is 1024.

(c) Max PBX Port

The default value for the Max PBX Port as discussed in Step 1(b) is 1039.

(d) ACD Client Port

The ACD Client Port listens for external TCP/IP connections to the ACD (such as Infolink, an MIS connection, or a Trace connection). The default value is 1039.

(e) PBX Healthcheck

When this box is checked, a monitoring signal is sent and received every 32 seconds to confirm connectivity. After two instances of non-return of the signal, the ACD restarts and reconnects with the PBX.

The default condition is unchecked = OFF.

STEP 2: View TCP/IP Connections

Press this button to look at remote TCP/IP clients that are currently connected to the ACD (by Connection Number, Connection Type, Remote IP Address, Remote Socket Port, Tenant Subscriptions, RX Bytes, and TX Bytes).

STEP 3: **I/O Ports**

(a) Port 1 Type (required)

From the drop-down menu, select:

- MIS-2 to send MIS information or trace data over this port.
- **DOWNLOAD** to force an MIS download over an MIS port. This option will not alter the existing port type.
- **OFF** if this port is not used.

(b) Port 2 Type (required)

From the drop-down menu, select:

- MIS-2 to send MIS information or trace data over this port.
- **DOWNLOAD** to force an MIS download over an MIS port. Used only if the trace destination is set to "I/O Port." This option will not alter the existing port type.
- **OFF** if this port is not used.

STEP 4: Port Settings

Press this button to invoke the control panel aplet that is currently installed on the Windows NT system. This provides a way to go manually to the Windows Settings/Control Panel.

Note: This applies only if the MAT is run on the same computer as the ACD.

- STEP 5: Press **Update** to save the new information.
- STEP 6: Press **Close** to exit the data screen.

16. Backup Database

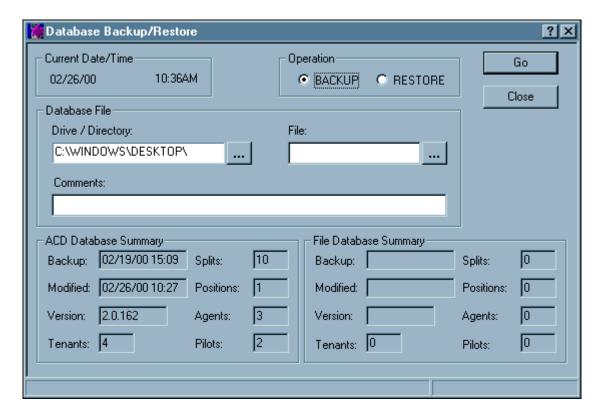


Figure 9-20 Backup Database Screen

STEP 1: Operation

(a) Backup

Select this option to back up the ACD database file.

(b) Restore

Select this option to restore the database file using a previous Backup file.

STEP 2: Database File

(a) Drive/Directory

- (1) Use the browse button (showing three dots) to open the **Select Directory** dialog box (see Figure 9-21).
- (2) Choose the drive and directory for the location of the ACD database file and press **OK**

_



Figure 9-21 Select Directory - Backup

(b) File

- (1) Use the browse button (showing three dots) to open the **Select File** dialog box (see Figure 9-22).
- (2) Enter a filename for the ACD database file or select a listed file and press **Open**.

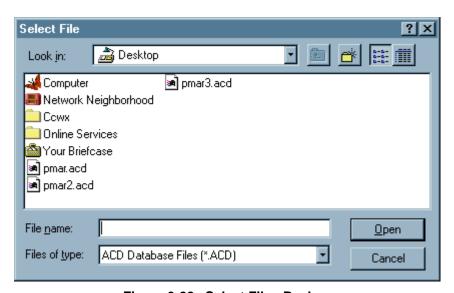


Figure 9-22 Select File - Backup

(3) If a filename is entered, it should have an ACD extension.

STEP 3: Comments

Enter any comments you would like to be associated with the database file.

STEP 4: ACD Database Summary

(a) Backup

The date, hour, and minute of the current backup of the database.

(b) Modified

The date, hour, and minute of the last modification to the data in this backup.

(c) Version

The version of the software used in this backup.

(d) Tenants

The number of Tenants configured in this backup of the database.

(e) Splits

The number of Splits configured in this backup of the database.

(f) Positions

The number of Agents configured in this backup of the database.

(g) Agents

The number of Agents configured in this backup of the database.

(h) Pilots

The number of Pilots configured in this backup of the database.

STEP 5: File Database Summary

The items are the same as for the ACD Database Summary above. The statistics in the File Database Summary are for comparison to the statistics in the latest ACD Database Summary.

17. Trace Settings

CAUTION:

This feature should be used *only* at the direction of NEC technical personnel (your NEC Associate or NEC National Technical Assistance Center).



Figure 9-23 Trace Settings Screen

The check boxes in the **Subsystem** and **State Machine** sections provide a way for engineers to select trace data in order to investigate different types of problems.

STEP 1: Destination

(a) Screen

Check to display Trace messages to the screen.

(b) File

Check to send Trace messages to a file. If checked, enter the destination file name.

- STEP 2: Press **Update** to save the new information.
- STEP 3: Press **Close** to exit the data screen.

CHAPTER 10 MIS Procedures

1. CallCenter WorX MIS Initial Setup

STEP 1: Select **Programs \ NEC CallCenter WorX \ MIS \ MIS Setup** from the **Start menu** on your taskbar as shown in Figure 10-1.

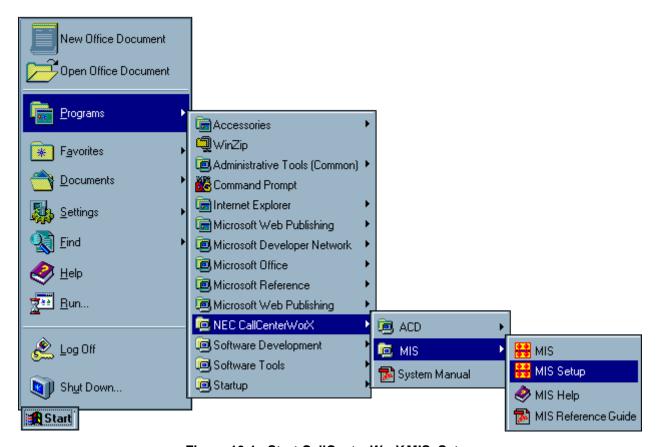


Figure 10-1 Start CallCenter WorX MIS-Setup

Important: If you did not choose the C:\Program Files directory as the location for the CallCenterWorX program files during the installation procedure, and you did not make a note of the location you chose, you will need to use Windows Explorer or the Find tool in the Start menu on the taskbar to find the CallCenterWorX MIS—Setup executable.

STEP 2: The CallCenterWorX MIS–Setup window displays, as shown in Figure 10-2.

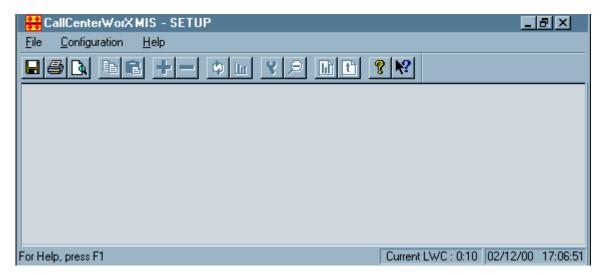


Figure 10-2 CallCenter WorX MIS-Setup Window

STEP 3: From the **Configuration menu**, select **System Parameters**. The Change System Parameters window displays, as shown in Figure 10-3.

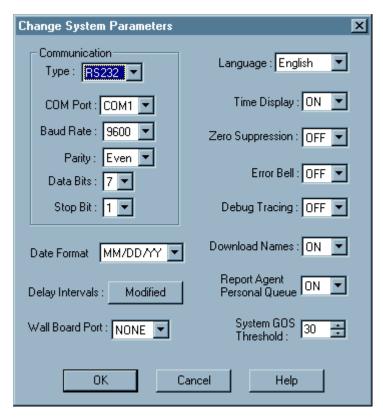


Figure 10-3 Change System Parameters Window-RS-232

- STEP 4: Click the **Communication Type** drop down menu and select either **RS-232** or **TCP/IP**.
 - (a) Choose **RS-232** (see Figure 10-3) if you are setting up a serially connected PC. The fields used for an RS-232 connection—**COM Port**, **Baud Rate**, **Parity Bit**, **Data Bits**, and **Stop Bit** as shown in Figure 10-3— are set to default values. Go to **Step 5**.
 - (b) If you choose **TCP/IP** (see Figure 10-4), the Communication Type fields used for RS-232 are replaced by **Host Name or IP Address** and **Tenants** fields. A matching Host Name is required for communication between the CallCenter*WorX* ACD and CallCenter*WorX* MIS. Go to **Step 9**.

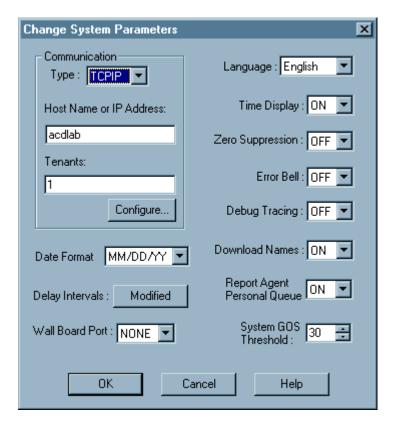


Figure 10-4 Change Systems Parameters Window-TCP/IP

- STEP 5: If you selected **RS-232** in Step 4, select the appropriate **COM Port** from the COM Port drop down menu (refer to Chapter 5, Heading 1.3, Step 10: and Heading 2.2, Step 8:). Go to **Step 6**.
- **Important:** The default values in the RS-232 fields for Baud Rate, Parity, Data Bits, and Stop Bits should not be changed without consulting your network administrator.
 - STEP 6: (Optional) Select the appropriate **Wall Board Port** from the Wall Board Port drop down menu. This cannot be the same port selected as the COM Port in Step 5:. Go to **Step 7**.
 - STEP 7: Start with most settings at the default value. The ones you might want to change are:

(a) Download Names

This setting controls whether the names given in the ACD database are downloaded to the MIS database upon startup (see this chapter, Heading 2, "Configuring the MIS," and Heading 3, "Naming Entities," for details). If you wish to keep the MIS database independent, set this parameter to "OFF." The default for this item is "ON."

(b) Report Agent Personal Queue

This setting depends on the ACD Logon Data. If a personal queue is configured there, the "ON" setting here will allow reporting on Agent Personal Queue statistics.

(c) System GOS Threshold

The Grade of Service specifies the percentage of calls answered within a specified amount of time in relation to the total number of calls received. This setting determines the number of seconds used in calculating the Grade of Service.

- STEP 8: Click **OK** to save the new communication configuration and close the CallCenter*WorX* MIS–Setup window.
- STEP 9: If you selected **TCP/IP** in Step 4, enter the Host Name or IP address in the **Host Name or IP Address** field. Your network administrator can tell you the Host Name to assign.
- STEP 10: Press the **Configure button** to open the Select Tenants screen in Figure 10-5. The **Tenants to Choose From** listing shows the range of tenant numbers (1–9) available to be used by CallCenter-*WorX* ACD, but is not an indication that all of these numbers have actually been configured in the ACD. See this chapter, Heading 9, "System Name Assignment," for further information.

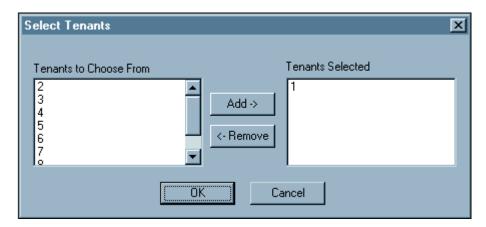


Figure 10-5 Select Tenants Window

STEP 11: Select a tenant number you wish to monitor and use the **Add button** to move it to the **Tenants**Selected listing. The Remove button moves a selected number back to the Tenants to Choose From listing. The number(s) on the Tenants Selected listing will appear in the Tenants box under the Communication section on the Change System Parameters screen. See Chapter 2, Heading 8, "Multi-tenant MIS Considerations—Split Numbering," for detailed information concerning tenant assignment in the MIS.

Note: If one or more tenants are assigned under the TCP/IP configuration and none of these tenants exist in the ACD, the MIS will fail to receive the download information and will not initialize.

- STEP 12: Click **OK** to save the setting. Go to **Step 13**.
- STEP 13: Start with most of the remaining settings at the default value. The ones you might want to change are:

(a) Download Names

This setting controls whether the names given in the ACD database are downloaded to the MIS database upon startup (see this chapter, Heading 2, "Configuring the MIS," and Heading 3, "Naming Entities," for details). If you wish to keep the MIS database independent, set this parameter to "OFF." The default for this item is "ON."

(b) Report Agent Personal Queue

This setting depends on the ACD Logon Data. If a personal queue is configured there, the "ON" setting here will allow reporting of Agent Personal Queue statistics.

(c) System GOS Threshold

The Grade of Service specifies the percentage of calls answered within a specified amount of time in relation to the total number of calls received. This setting determines the number of seconds used in calculating the Grade of Service.

STEP 14: Click **OK** to save the new communication configuration and close the CallCenter*WorX* MIS–Setup window.

MIS Procedures

Configuring the MIS

2. Configuring the MIS

There are several types of configuration data which affect the runtime characteristics of the CallCenterWorX program.

2.1 ACD configuration data

ACD configuration data is used in the ACD system and affects the processing of calls. The initial data for these fields is downloaded to the MIS system during start-up. The following fields are *stored* in the ACD system but may be *modified* in the MIS:

- Agent Logon ID Code assignment
- Position Split Assignment
- Split Inflow Threshold & Overflow Delay Threshold

2.2 Local configuration data

Local configuration data is used only by the MIS and does not affect the ACD. This data can be used to adapt the MIS for your particular operations. The following fields are *assigned and stored* in CallCenterWorX MIS:

- Grade of Service Threshold
- Answer Delay Interval and Abandon Delay Interval
- Wall Board Configuration

2.3 Assigned Names

Certain configuration data used in the MIS (assigned names such as Split and Agent, which are referenced by both systems) can be synchronized to match the configuration data in the ACD (see Heading 3, "Naming Entities").

3. Naming Entities

CallCenterWorX entities such as **Tenant**, **Split**, **Trunk Group**, **Pilot**, **Tally Code**, and **Agent Group** can be named. Although this is an optional feature, the use of a name in addition to a number may enable the call center manager to more easily identify an entity. Refer to the specific procedures to determine size limits for each type of name.

- Some of these entities can also be named in the ACD database, and these names are downloaded to the MIS database at start-up.
- The acceptance or rejection of this download can be set under the **Download Names** field in the **Change System Parameters** window (see Figure 10-3 and Figure 10-4) accessed from the **Configuration menu**.
 - The "ON" setting accepts the downloaded names and synchronizes the databases on this item.
 - The "OFF" setting rejects the downloaded names and makes the databases independent on this item.

Important: The ACD data download will override an MIS entry unless the Download Names setting is "OFF."

4. Agent Procedures

4.1 Adding an Agent

The Agent Assignment window is used to add or modify agent information. All agent information is referenced by the Agent Logon ID. The **Agent ID** is displayed along with the **Agent Name**, **Agent Group Number**, **Agent Group Name**, **Agent Position** (if logged on), and **Attribute Split** assignments.

- STEP 1: From the **Configuration menu**, select **Agent Assignments** to access the Agent Assignments window (Figure 8-11).
- STEP 2: From the **Edit menu** in the **Agent Assignments** window, select **Add Record**. The Add Agent Record window displays (Figure 10-6)



Figure 10-6 Add Agent Record Window

STEP 3: Enter a numeric logon ID in the **Agent ID** field. This value can be up to 9 digits long. Leading zeros are not allowed.

Note: To change the **Agent ID** or **Attribute Split** after they are entered requires deleting the entire Agent Record, then adding a new Agent Record which includes the new **Agent ID** and **Attribute Split**. Refer to **Heading 4.3**, "Deleting an Agent", for information on deleting an agent's record.

- STEP 4: Enter an agent name in the **Agent Name** field. This name can contain up to 20 alphanumeric characters.
- STEP 5: Select an agent group number in the **Agent Group** field (see **Heading 5**.). This number can range from 1 to 16. The **Agent Group** field has up and down arrows, and you can enter a number by either of the following methods:
 - Double-click the current number and type over it.
 - Use the up and down arrows to scroll through the list of available numbers and select the desired number.
- STEP 6: Click the **Attribute Split** drop down menu and select the number of the primary split in which this agent will be working.

- STEP 7: Choose one of the following:
 - Click **OK** to add the agent and close the Add Agent Record window.
 - Click Cancel to close the Add Agent Record window without adding the new agent.

4.2 Changing an Agent Name

- STEP 1: On the CallCenter*WorX* console screen, open the **Configuration menu** (see Figure 8-9) and select **Agent Assignment** to access the Agent Assignments window as shown in Figure 8-13.
- STEP 2: Choose one of the following:
 - Triple-click the **Agent Name** field you wish to change. (The first click moves the cursor into the field, the second and third clicks act as a regular double-click by highlighting the text.)
 - Use the **up**, **down**, **left**, and **right** arrows on your keyboard to select the **Agent Name** field you wish to change.
- STEP 3: Type the new agent name over the selected old agent name and press **Enter**.

Note: The fields which require data entry in CallCenterWorX MIS are designed to be self-explanatory. If you have difficulty operating a specific field, click one of the help buttons (discussed in Chapter 11, Heading 2, "Accessing the Online Help System") to open the online Help.

4.3 Deleting an Agent

- STEP 1: From the **Configuration menu**, select **Agent Assignments** to access the Agent Assignment window as shown in Figure 8-13.
- STEP 2: From the **Edit menu** in the **Agent Assignment window**, select **Delete Record**. The Delete Agent Record window displays as in Figure 10-7.



Figure 10-7 Delete Agent Record Window

- STEP 3: Enter the **row number** (from the Agent Assignment window) of the agent you wish to delete in the **Select a record to delete** field.
- STEP 4: Choose one of the following:
 - Click **OK** to delete the agent and close the Delete Agent Record window.
 - Click **Cancel** to close the Delete Agent Record window without deleting the agent record.

5. Agent Group Name Assignment

- STEP 1: Choose Agent Group Assignments under the Configuration menu. The Agent Group Name Assignment window (see Figure 8-16) will display.
- STEP 2: All agents are originally assigned to Agent Group 1 and must be reassigned to create other groups.
 - (a) If this has been done previously, a listing of any previously assigned numbers and names will appear on the **Agent Group Name Assignment** screen. Choose the next unused group number and go to **Step 3**.
 - (b) If this is the first additional group, begin the new group entry in **Step 3**.
- STEP 3: Enter the new **Agent Group Number** from the drop-down menu in that column.
- STEP 4: Enter the **Agent Group Name** you wish to assign in the Agent Group Name column.
- STEP 5: Choose one of the following:
 - Select **OK** to accept the entry and close the assignment window.
 - Select **Cancel** to close without assigning the name.
- STEP 6: If you chose to assign a new Agent Group Number and Agent Group Name, and you wish to place agents in this new group, open the **Agent Assignment** window under the Configuration menu.
- STEP 7: Enter the appropriate number in the Group Number field for an Agent to be assigned to the new group.
- STEP 8: Choose one of the following:
 - Select **OK** to accept the entry and close the assignment window.
 - Select **Cancel** to close without assigning the number.

6. Pilot Assignment

STEP 1: From the **Configuration menu**, select **Pilot Assignment**. The Pilot Assignment screen will display (Figure 10-8).

Note: If the Pilot Numbers have received names in the ACD programming, these names will be downloaded at startup. If you want to keep MIS names independent of the ACD database, you must set Download Names to "OFF" in the System Parameters.

- STEP 2: The Pilot Numbers configured in the ACD will be listed. To add a Pilot Name to a Pilot Number, select the **Edit menu** in the **Pilot Assignments** window, and select **Add Record**.
- STEP 3: Enter a **Pilot Name** of up to 20 alphanumeric characters in the Pilot Name column.
- STEP 4: Select **OK** to accept the entry and close the assignment window, or select **Cancel** to close without assigning the name.
- STEP 5: To delete a Pilot Name, select the **Edit menu** in the **Pilot Assignments** window, and select **Delete Record**.
- STEP 6: Select the Pilot Name you wish to delete (this deletes only the Pilot Name, not the number).
- STEP 7: Select **OK** to accept the action and close the assignment window, or select **Cancel** to close without deleting the name.

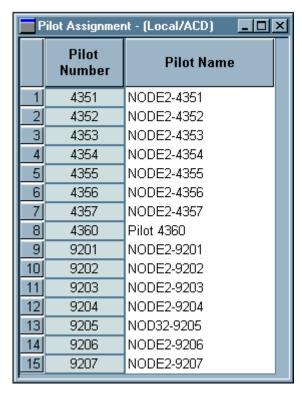


Figure 10-8 Pilot Assignment Window

7. Position Assignment

The CallCenterWorX ACD Position Data command sets up relationships between splits and positions. To assign a split to a position, or to reassign a previous assignment:

- STEP 1: Open the **Position Assignments** dialog under the **Configuration menu**.
- STEP 2: Select the **Split Assigned** field you wish to change.
- STEP 3: Select the new split number or "any split" from the drop down menu.
- STEP 4: Choose one of the following:
 - Select **OK** to accept the entry and close the assignment window.
 - Choose **Cancel** to close without assigning the name.



Figure 10-9 Position Assignment Window

8. Tally Code Assignment

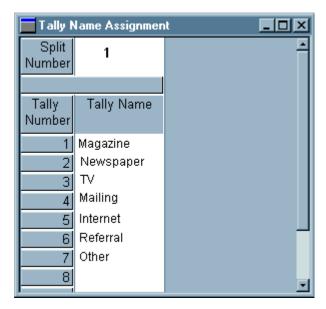


Figure 10-10 Tally Name Assignment Window

The Tally feature allows agents to use the dial keypad to register the occurrences of several specific events, such as responses to various advertising methods, sales campaigns, or calls from particular locations. You may assign Tally Names (using up to 20 numerals or letters) by individual split to track the various tally codes entered by an agent, since multiple tally counts may be entered for a single phone call. Tally Code Names are used in the Tally Code Summary Reports by Split and by Pilot. Tally Code Numbers are not configured in the ACD. A Tally Code Number can be up to 9 digits.

- STEP 1: From the **Configuration menu**, select **Tally Assignment**. The Tally Name Assignment screen will display (Figure 10-10).
- STEP 2: To add a Tally Name to a Tally Number, select the **Edit menu** in the **Tally Assignments** window, and select **Add Record**.
- STEP 3: Enter a **Tally Name** of up to 20 alphanumeric characters in the Tally Name column.
- STEP 4: Select **OK** to accept the entry and close the assignment window, or select **Cancel** to close without assigning the name.
- STEP 5: To delete a Tally Name, select the **Edit menu** in the **Tally Assignments** window, and select **Delete Record**.
- STEP 6: Select the Tally Name you wish to delete (this deletes only the Tally Name, not the number).
- STEP 7: Select **OK** to accept the action and close the assignment window, or select **Cancel** to close without deleting the name.

9. System Name Assignment

The Configuration menu lists the System Name Assignment command which opens the Change System Name window shown in Figure 10-11. If the MIS is configured to use an RS-232 serial connection, this assignment option will not be available. Only the tenants that are assigned under the TCP/IP configuration (see this chapter, Heading 1, Step 4:) are available for use as the System Name; not all tenants are shown as choices.

The System Name is related to the Tenant Name which was assigned in the CallCenterWorX ACD programming.

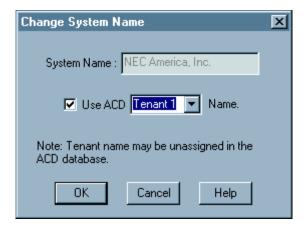


Figure 10-11 System Name Assignment Window

STEP 1: System Name

If you choose to use an independent System Name, you can leave the check box unchecked and enter your own name choice in the System Name dialog box.

STEP 2: Use ACD Name

If you wish to use the ACD database name, check the checkbox and select a tenant from the drop-down menu. If the tenant selected does not exist in the ACD, the System Name will not be assigned.

10. Trunk Group Name Assignments

The **Trunk Allocation** window (Figure 10-12) displays the Trunk Group Number, Trunk Group Name, and Number of Circuits allocated for each listed trunk group (sometimes called a "trunk route"). Circuit assignments and queuing priorities are set in the MAT commands of CallCenter*WorX* ACD.

Only the Trunk Group Name can be modified in CallCenterWorX MIS.

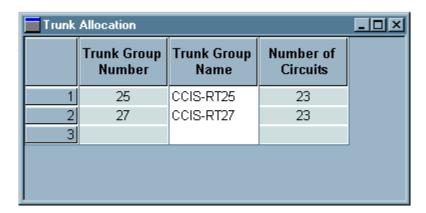


Figure 10-12 Trunk Allocation Window

- STEP 1: To add a Trunk Group Name to a Trunk Group Number, select the **Edit menu** in the **Trunk Assignments** window and select **Add Record**.
- STEP 2: Enter a Trunk Group Name of up to 10 alphanumeric characters in the **Trunk Group Name** column.
- STEP 3: Select **OK** to accept the entry and close the assignment window, or select **Cancel** to close without assigning the name.
- STEP 4: To delete a Trunk Group Name, select the **Edit menu** in the **Trunk Assignments** window, and select **Delete Record**.
- STEP 5: Select the Trunk Group Name you wish to delete (this deletes only the Trunk Group Name, not the number).
- STEP 6: Select **OK** to accept the action and close the assignment window, or select **Cancel** to close without deleting the name.

See Heading 3, "Naming Entities," in this chapter for download options concerning Trunk Group Names.

11. Wall Display Board Assignments

11.1 Assigning Message Sets

STEP 1: In the Configuration menu, select Wallboard Message Sets.

STEP 2: Select Assignments.



Figure 10-13 Create Wallboard Message Set

STEP 3: When the **Create a Wallboard Message Set** screen appears (see Figure 10-13), select the **Create Message Set** button.

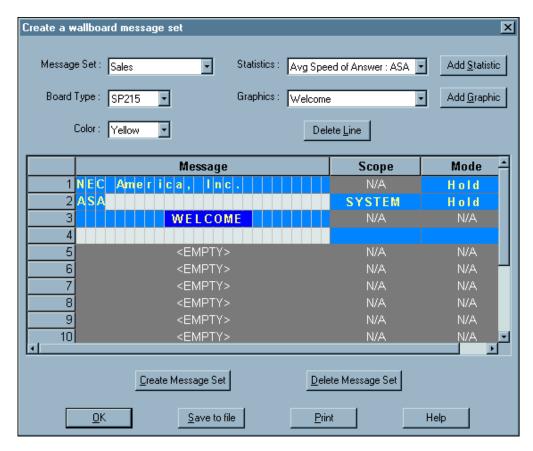


Figure 10-14 Wallboard Message Set Window

- STEP 4: In the **Message Set** field, enter a name of up to 11 alphanumeric characters, or select an existing name from the drop-down list.
- STEP 5: In the **Board Type** field, select a board type from the drop-down list (for selection see Table 10-1).
- STEP 6: Select a **Color** from the drop-down list. (Some board types support only red.)
- STEP 7: In the **Message** area, selecting **<EMPTY>** will open a message field containing a number of slots (the number depends on the board type used). When this field is open, you may:
 - (a) Enter a message by typing a letter, using the right arrow to move to the next slot, typing the next letter, and so on. The **Scope** field is inactive for typed messages, but the **Mode** field allows a choice of 25 display modes (such as Hold, Roll Right, and Twinkle).
 - (b) Add statistics from the drop-down list. The **Add Statistic** button is activated when the message field is open. Choose System or Split in the **Scope** field, and the **Mode** field allows a choice of display modes.
 - (c) Add a graphic from the drop-down list. The Add Graphic button is activated when the message field is open. The Scope field is inactive for graphics, but the Mode field allows a choice of 25 display modes.

MIS Procedures

Wall Display Board Assignments

STEP 8: (Optional) Select **Save to file** and specify a destination file, or select **Print** if you wish to print the message set.

STEP 9: Select **OK** to end the assignment section.

Table 10-1 Wallboard Types

Model Number	Case Size (Cabinet) L" x D" x H" (Lcm x Dcm x Hcm) Message Area L" x H" (Lcm x Hcm)	Chars Min/Max	Lines Displayed: Character Size Inches (cm)	Red LEDs	Color LEDs
215R & 215C	28.9" x 2.1" x 4.5" (73.4 x 5.3 x 11.4) 27" x 2.1" (68.6 x 5.3)	15 / 30	One line: 2.1" (5.3cm)	215R	215C
320C -	57.4" x 3.8" x 5.5" (145.8 x 9.7 x 14.0) 54" x 3.1" (137.2 x 7.9)	20 / 34	One line: 3.1"(7.9cm)	N/A	320C
330C -	84.4" x 3.8" x 5.5" (214.4 x 9.7 x 14.0) 81" x 3.1" (205.7 x 7.9)	30 / 51	One line: 3.1"(7.9cm)	N/A	330C
714C "Big Dot"	49" x 4.25" x 6.25" (124.5 x 10.8 x 15.9) 45.6" x 4" (115.8 x 10.16)	14 / 27	One line: 4"(10cm)	N/A	714C
4120R & 4120C	40.2" x 5.1" x 7.7" (102.1 x 12.9 x 19.6) 36" x 4.8" (91.4 x 12.2)	10 / 60	Two-line mode: 1.5"(3.8) or 2.1"(5.3) One-line mode: 4.8"(12.2cm)	4120R	4120C
4160R & 4160C	52.2" x 5.1" x 7.7" (132.5 x 12.9 x 19.6) 48" x 4.8" (121.9 x 12.2)	14 / 80	Two-line mode: 1.5"(3.8) or 2.1"(5.3) One-line mode: 4.8"(12.2cm)	4160R	4160C
4200R & 4200C	64.2" x 5.1" x 7.7" (163 x 12.9 x 19.6 60" x 4.8" (152.4 x 12.2)	18 / 100	Two-line mode: 1.5"(3.8) or 2.1"(5.3) One-line mode: 4.8"(12.2cm)	4200R	4200C

11.2 Scheduling Message Sets

The Schedule Wallboard Message Sets screen (Figure 10-15) lists the message sets that have been constructed and sets up the display plan for them, determining:

- Type of display
- Individual wall board destination (display number)
- Speed (interval between messages in a multi-message set)

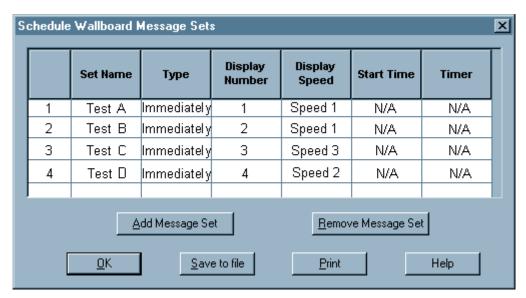


Figure 10-15 Schedule Wallboard Message Sets

- STEP 1: In the Configuration menu, select Wallboard Message Sets.
- STEP 2: Select **Schedule**.
- STEP 3: Select **Add Message Set** to open the dialog box.
- STEP 4: Select the (Message) Set Name from a drop-down list of assigned messages.
- STEP 5: Select the **Display** (**Board**) **Number** from the drop-down list of 1 to 4.
- STEP 6: Select Add.
- STEP 7: Select the **Display Speed** (from 1 = slowest to 5 = fastest).
- STEP 8: Select **OK**. A box will appear stating that the Message Set has been sent to the display board.
- STEP 9: To remove a message set previously scheduled, highlight the scheduled message to be deleted and press the **Remove Message Set button**.
- STEP 10: Select **OK** to close the dialog.

12. Reports

CallCenterWorX MIS contains a set of statistical reports providing data to guide call center management decisions. The MIS maintains a database of the past 40 days of statistical data. The current and previous days' statistics are stored on an hourly basis (up to a maximum of 47 hours), while daily data is stored for the preceding 38 days.

Using a series of menus, statistical data is separated into:

- Major categories
- Minor categories
- · Report dialogs

12.1 Major Categories

The Major Categories are the first level of menu items displayed when you select one of the MIS main menus (such as Configuration, Status Screens, or Reports). Figure 10-16 shows the major categories available under the **Reports menu**, which are Agent Reports, Agent Group Reports, Split Reports, Pilot Reports, Trunk Group Reports, and Tally Code Reports.

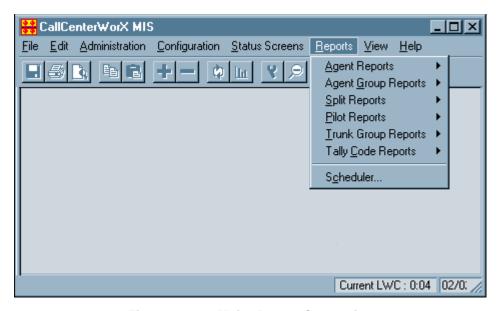


Figure 10-16 Major Report Categories

12.2 Minor Categories

Each major category (such as **Agent Reports**) has its own set of minor category reports. Figure 10-17 shows the minor categories associated with the **Agent Reports** major category (Summary, ACD Detail, PBX Detail, Staffing, and Breaks).

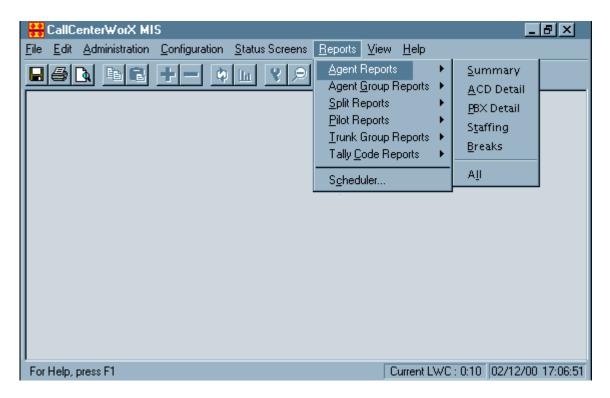


Figure 10-17 Minor Report Categories

12.3 Generating a Report

The following sample procedure focuses on generating an Agent Report, but the window elements and navigation tools used in the procedure are generic and can be applied when generating any CallCenterWorX MIS report.

12.3.1 Selecting the Subject

- STEP 1: From the **Reports menu** (Figure 10-16) select one of the **Major categories** (in this example, we have selected Agent Reports).
- STEP 2: Click on a **Minor category** from the Major category you selected in Step 1 (Figure 10-17).
- STEP 3: The **Agent Report window** displays (Figure 10-18), allowing you to select the parameters for your report. (In this example, any of the reports on the Agent Report Minor Category menu would bring up this window.)

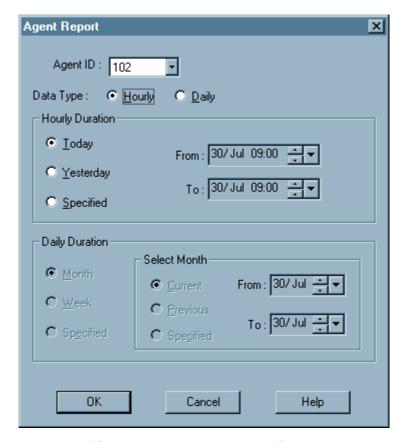


Figure 10-18 Agent Report Window

STEP 4: Click on the drop-down menu and select the number of the entity you want the report to focus on.

Important: This example shows the **Agent ID** drop down menu, but the field name will vary depending on the Major and Minor category used to access the Report window.

- STEP 5: Choose from the following Data Types:
 - Click the Hourly radio button to activate the Hourly Duration box. Then go to Step 6.

- Click the **Daily** radio button to activate the **Daily Duration** box. Then go to **Step 7**.
- STEP 6: Choose from the following in the Hourly Duration box:
 - Click the **Today** or **Yesterday** radio button. Go to **Step 8**.
 - Click the **Specified** radio button to activate the **From** and **To** fields. Go to **Step 9**.
- STEP 7: Choose from the following in the Daily Duration box:
 - Click the **Month** radio button in the Daily Duration box. Go to **Step 8.**
 - Click the **Week** radio button. Go to **Step 8.**
 - Click the **Specified** radio button to activate the **From** and **To** fields. Go to **Step 9**.
- STEP 8: Choose from the following in the Select Month box:
 - Click the **Current** radio button. Go to **Step 9.**
 - Click the **Previous** radio button. Go to **Step 9**.
 - Click the **Specified** radio button to activate the **From** and **To** fields. Go to **Step 9**.
- STEP 9: Highlight the day, month, hour, or minutes in the **From** field, then use the up and down arrows to adjust the date and time to determine when the report should begin. Or, you can use the large down arrow (to the right of the up and down arrows) to display a calendar to select the day and month. Then go to **Step 10.**

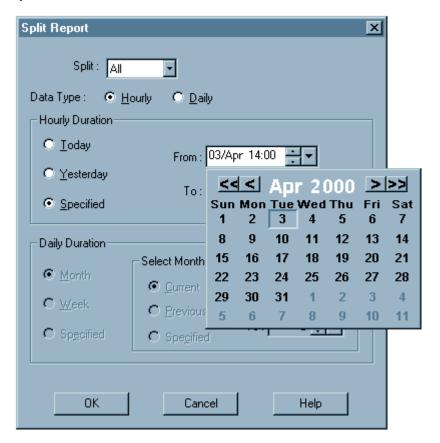


Figure 10-19 Calendar Drop Down Menu

STEP 10: Click OK.

The data will be retrieved from stored information, formatted into a report, and displayed on the monitor. All of the reports are designed to be displayed so that no left-right scrolling is needed to see all of the data. Data may be scrolled up and down a line or a page at a time to bring the most pertinent data within view.

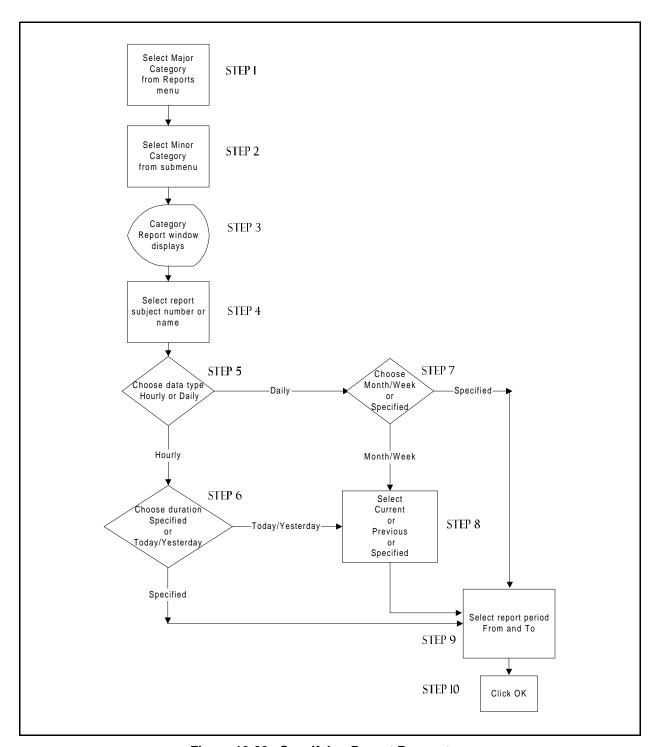


Figure 10-20 Specifying Report Parameters

12.3.2 Formatting a Report

A print preview capability lets you see the default layout of a text report. A modifiable grid screen (see Figure 10-21) allows you to drag-and-drop or change the size of certain columns or rows. Each column can be sorted by alphabetical order

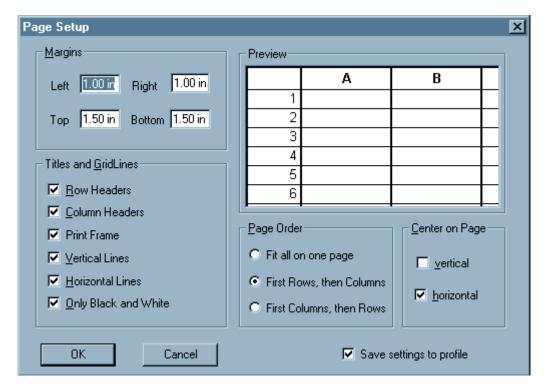


Figure 10-21 Report Layout Grid

Check the **Save settings to profile** checkbox to save the profile in the NT registry.

12.4 Scheduling and Printing a Report

CallCenterWorX allows you to schedule a report for output to the printer at a selected time using the Report Scheduler window (see Figure 10-22).

Any report which can be generated can be scheduled for output. Up to 50 reports can be registered in the schedule. Once registered, the report(s) will automatically be sent to the printer at the specified output time.

In order to register a report for scheduled output, you must complete three steps. Steps (a) and (b) are the same as for displaying a report to the screen (see Heading 12.3, "Generating a Report"), but Step (c) is unique to scheduling a report to print.

- (a) Identify the report subject.
- (b) Specify the timeframe the report covers.
- (c) Specify the hour and minute when the printed output should be generated.

Note: Reports cannot be set to generate on-the-hour.

STEP 1: Under the **Reports menu**, select **Scheduler**. The Report Scheduler window displays (see Figure 10-22).

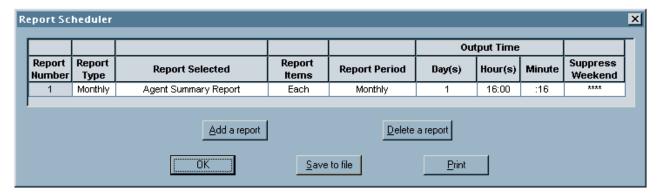


Figure 10-22 Report Scheduler Window

- STEP 2: Press the Add a report button, causing the Add a Report window to display.
- STEP 3: Press the **Select a report** button in the Add a Report window and choose a Major category (in this example, Split Reports) and a Minor category (in this example, Breaks) from the drop-down menu, as in the example in Figure 10-23.

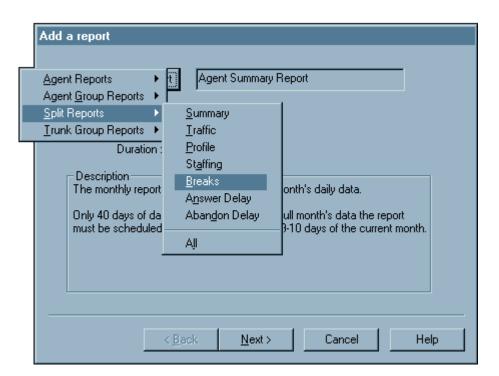


Figure 10-23 Add a Report Window

STEP 4: Press **Next>**. The Report Duration window displays (see Figure 10-24).

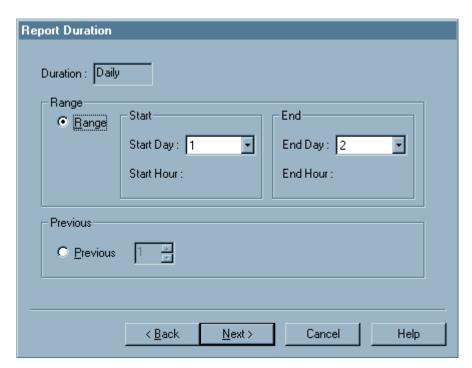


Figure 10-24 Report Duration Window

STEP 5: Select the **Duration**, **Range**, and **Previous** parameters.

STEP 6: Press Next>. The Report Output Time window displays (see Figure 10-25).

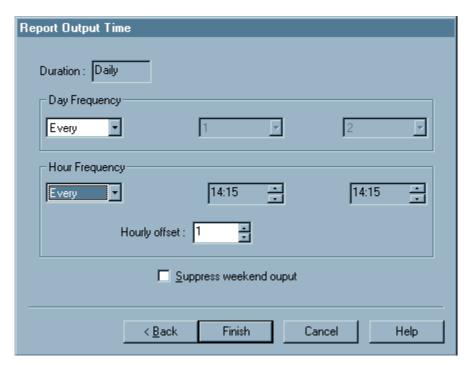


Figure 10-25 Report Output Time Window

- STEP 7: Select the **Duration**, **Day** and **Hour Frequency** and whether to **Suppress weekend output** (see Heading 12.5 "Weekend Suppression of Printing" below for important considerations on scheduling print output on weekends).
- STEP 8: Press **Finish**. The Report Scheduler window (see **Figure 10-26**) displays showing the output settings of the report just entered.

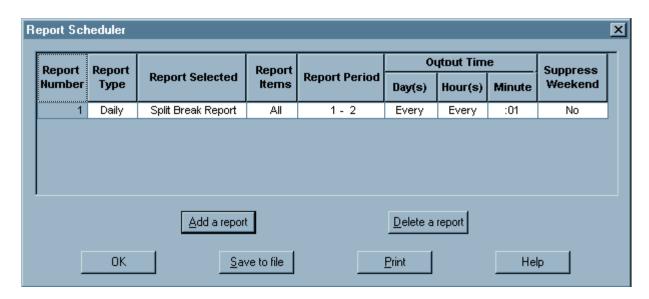


Figure 10-26 Completed Report Output Schedule

12.5 Weekend Suppression of Printing

An important question to consider is whether to suppress printing reports on weekend days.

- The weekend is defined as starting at midnight on Friday and ending at midnight on Sunday.
- Since some locations are staffed only during normal business days, Monday through Friday, the scheduled reports may not need to be output over the weekend.
- If you check the "Suppress weekend output" checkbox in the Report Output Time window, this report will *not* be sent to the printer if *any* of the scheduled output times falls during a weekend hour.

Important: Weekend Suppression causes reports not to print out on Saturday or Sunday. A Monday-through-Friday business should schedule daily reports to run as a "today" report at some time prior to midnight. A daily report scheduled as a "yesterday" report might print out prior to a day's opening (such as at 6:30 a.m.). If weekend suppression is enabled, Friday's report would be suppressed - it could not print at 6:30 a.m. on Saturday.

12.6 Generating a Graph from a Report

Once a report has been generated, it can be viewed in either its original report format or in a variety of graph formats. This section explains how to select the type of graph, as well as what types of graphs are available.

12.7 Selecting a Type of Graph

STEP 1: Click the Create Graph button on the console Toolbar. The **Choose Graph Style** window displays (see Figure 10-27).

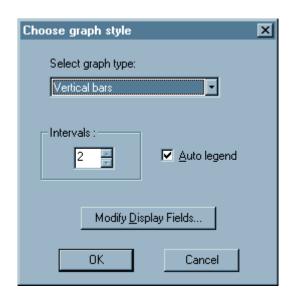


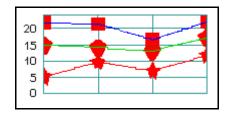
Figure 10-27 Choose Graph Style Window

- STEP 2: **Select graph type** from the drop-down menu.
- STEP 3: Choose the refresh rate **Interval** in seconds, selecting the number using the up and down arrows.
- STEP 4: Check the **Auto Legend** checkbox if you wish to have the legend display.
- STEP 5: Press the **Modify Display Fields** button to alter the report graph display.
- STEP 6: Click the **OK** button. The graph view of the report displays.

12.8 Types of Graphs

CallCenterWorX MIS can generate the following types of graphical representations of reports:

12.8.1 Line graph



The Line graph draws a line connecting the data points of a group. The markers used in this graph are called widgets. Choose **Line plot, with point markers** to display this type of graph.

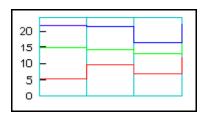
12.8.2 Line Only graph

A Line Only graph is a Line graph without the widgets. Choose **Line plot, no markers** to display this type of graph.

12.8.3 Step graph

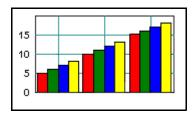
The Step graph is similar to a Line graph except that horizontal and vertical line segments (forming a step) connect the data points of a group. Choose **Step chart, with point markers** to display this type of graph.

12.8.4 Step Line Only graph



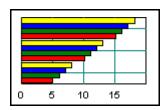
A Step-Line Only graph is a Step graph with no widgets. Choose **Step chart, no markers** to display this type of graph.

12.8.5 Vertical Bar graph



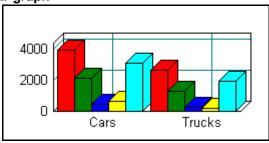
In a Vertical Bar graph, the data values are indicated by the vertical extent of individual rectangles. Choose **Vertical bars** to display this type of graph.

12.8.6 Horizontal Bar graph



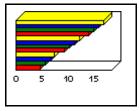
In a Horizontal Bar graph, the data values are indicated by the horizontal extent of individual rectangles. Choose **Horizontal bars** to display this type of graph.

12.8.7 Extended Vertical Bar graph



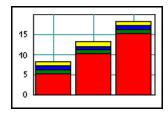
The Extended Vertical Bar style gives the bars and axes a 3-D look. Choose **3D Vertical bars** to display this type of graph.

12.8.8 Extended Horizontal Bar graph



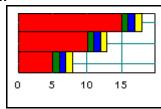
The Extended Horizontal Bar graph style gives the bars and axes a 3-D appearance. Choose **3D Horizontal bars** to display this type of graph.

12.8.9 Stacked Vertical Bar graph



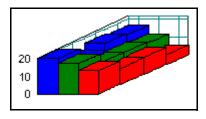
In a Stacked Vertical Bar graph, the bars for different groups are displayed one behind another rather than side-by-side. The values from the different groups are not summed. The Strata Vertical Bar graph is what some people expect for a stacked bar graph. Choose **Stacked vertical bars** to display this type of graph.

12.8.10 Stacked Horizontal Bar graph



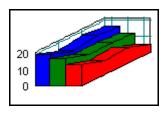
In a Stacked Horizontal Bar graph, the bars for different groups are displayed one behind another rather than side-by-side. The values from the different groups are not summed. The Strata Horizontal Bar graph is what some people expect for a stacked bar graph. Choose **Stacked horizontal bars** to display this type of graph.

12.8.11 Manhattan graph



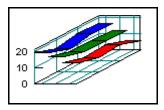
An IsoBar or "Manhattan" graph represents data values as a three-dimensional rectangle. The data value is plotted against both its group and index. The resulting chart resembles the Manhattan skyline. Because negative values cannot be represented, a standard bar chart is drawn if the data contain negative values. Choose **Manhattan chart** to display this type of graph.

12.8.12 RoofTop graph



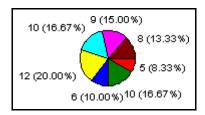
An IsoArea or "Roof Top" graph is similar to an IsoBar graph except the "roof top" between data values comprises sloped surfaces rather than steps. No lines are drawn to separate the indices. Because negative values cannot be represented, a standard bar chart is drawn if the data contain negative values. Choose **Rooftop chart** to display this type of graph.

12.8.13 Ribbon graph



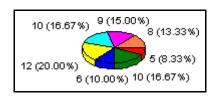
A Ribbon graph is similar to an IsoArea graph except just the "roof top" is drawn without any sides. Choose **Ribbon chart** to display this type of graph.

12.8.14 Pie graph



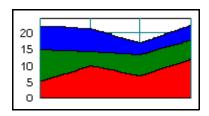
Pie graphs display a circle divided into "wedges". A wedge is drawn for each data item, representing the fractional contribution of that data item to the total. All the data items in the scope, regardless of group, make up one pie. Because negative values cannot be represented, a standard bar chart is drawn if the data contains any negative values. Choose **Pie chart** to display this type of graph.

12.8.15 Isographic Pie graph



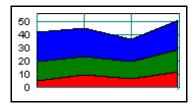
The Isographic Pie graph draws the pie from a 3-D perspective. The pie appears to have some thickness. Choose **3D Pie chart** to display this type of graph.

12.8.16 Area graph



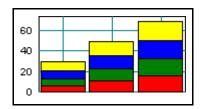
An Area graph is similar to a Line graph except the area below the data line is filled. If more than one group of data are plotted, they are drawn in order of decreasing average value so that the groups with smaller values are not obscured by the groups with larger values. Choose **Area under points** to display this type of graph.

12.8.17 Strata graph



A Strata graph is similar to an Area graph, but it shows the summed total of a particular index over all groups. The height of the combined area represents the total over all groups. Sub-areas show how much each group contributes to the total. Choose **Strata chart** to display this type of graph.

12.8.18 Strata Vertical Bar graph



A Strata Vertical Bar graph is what might be called a stacked bar graph. It shows the summed total of a particular index over all groups. The length of the combined bar represents the total over all groups. Areas within the bar show how much each group contributes to the total. Because negative values cannot be represented, a standard bar chart is drawn if the data contains any negative values. Choose **Strata, with vertical bars** to display this type of graph.

12.8.19 Strata Horizontal Bar graph

A Strata Horizontal Bar graph could also be called a stacked bar graph. It shows the summed total of a particular index over all groups. Because negative values cannot be represented, a standard bar chart is drawn if the data contain negative values. Choose **Strata**, **with horizontal bars** to display this type of graph.

MIS Procedures

Reports

Reference

Chapter 11 CallCenter WorX Online Help

Describes the ACD and MIS online Help systems and tells how to access and print Help topics.

Chapter 12 MIS Statistical Definitions and Methods

Lists the terms and operations used to calculate statistical information in MIS reporting.

Chapter 13 MIS Error Messages

Defines possible error messages from the CallCenterWorX MIS system and suggests remedial procedures.

Chapter 14 Terms and Concepts

Includes a glossary of basic terminology and concepts used in the CallCenterWorX program.

CHAPTER 11 CallCenter WorX Online Help

1. Online Help Features

CallCenterWorX includes individual Help systems for CallCenterWorX ACD and CallCenterWorX MIS. The features include:

- Context-sensitive help for every dialog, button, and field within the programs.
- Step-by-step procedures for programming the CallCenterWorX ACD and MIS.
- Comprehensive glossary in each program.
- ACD functionality with respect to supported MAT commands.
- Interactive headings in MIS statistical reports.
- ACD Troubleshooting tips.

2. Accessing the Online Help System

There are several ways to use the online Help system within CallCenterWorX ACD and MIS. You can display and work in the current ACD or MIS dialog while a Help window is open. You can also resize, move, tile, or cascade the online Help window to make it easier to display and follow the Help procedures while working in CallCenterWorX ACD or MIS.

To access Help, do one of the following:

- Select **Help Topic** from the **Help Menu** on the ACD or MIS console.
- Press **F1** to display Help for the current ACD or MIS dialog.
- On the ACD and MIS consoles, click on the **Help** button for help on a topic. Click the **What's This** Help button for context-sensitive Help, then select the item you are questioning.

In the ACD Online Help, terms shown in color (and possibly underlined) are **hot-spots**. When the mouse is held over them, the arrow changes to a pointing finger. Double-click on these hot-spots to open the text to a Note, Caution, Warning, definition, Before..., or Comments section. These areas offer additional information on the topic you are researching.

3. Navigating the Help System

The Help topics are grouped according to function and content within three tabs: Contents, Find, and Index. For example, when you open the MIS Help, the following Help Topics window displays:

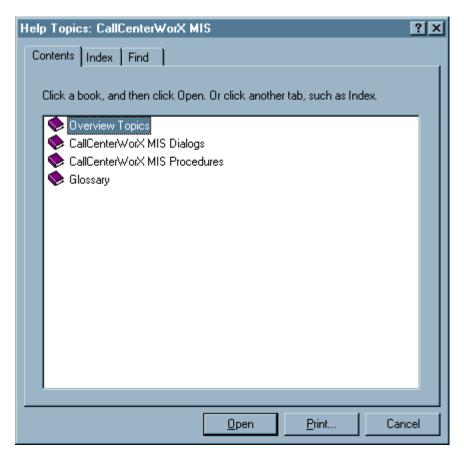


Figure 11-1 Help Topics Window - Contents Tab

3.1 Contents Tab

The Contents tab is intended to be used as an online Table of Contents. Figure 11-2 provides samples of the Closed Book, Open Book and Help Topic bullets:

- Double-clicking a Closed Book Bullet displays all the help topics contained within the book.
- Double-clicking an Open Book Bullet closes the book and all of its help topics.
- Double-clicking a Help Topic Bullet displays the Help topic window for that bullet

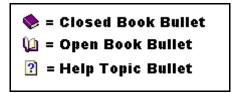


Figure 11-2 Content Tab Bullets

3.2 Index Tab

The Index tab (Figure 11-3) enables you to search for a help topic by alphabetical listing.

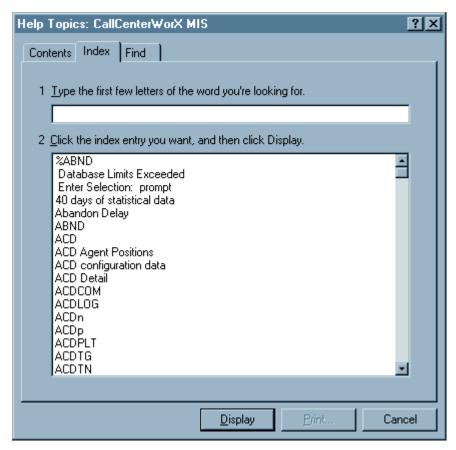


Figure 11-3 Help Topics Window - Index Tab

3.3 Find Tab

The Find tab (Figure 11-4) enables you to run a full text search for Help topics.

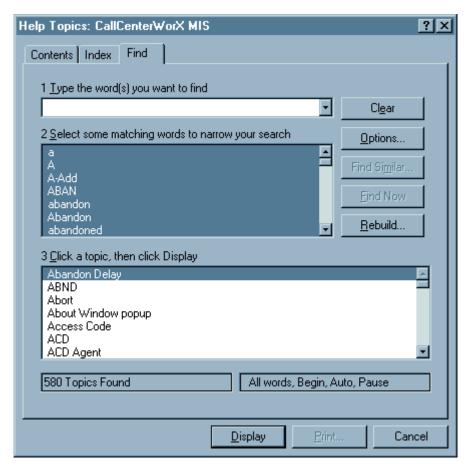


Figure 11-4 Help Topics Window - Find Tab

4. Printing Help Topics

CallCenterWorX Help is not available in hard copy, but you can print topics of interest to you from several places within the Help system. The following procedure explains the process of printing Help topics.

4.1 Printing from the Contents, Index or Find Tabs

- STEP 1: Highlight the Help topic you wish to print.
- STEP 2: Click the **Print button** at the bottom of the window. The Print dialog box displays (Figure 11-5).

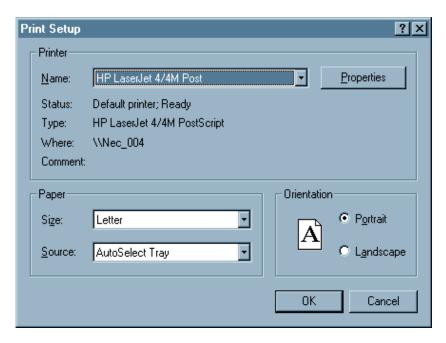


Figure 11-5 Print Dialog Box

- STEP 3: Choose one of the following in the Print Setup:
 - To print to a printer, click on the **Name** drop down box and select a printer.
 - To print to a file, click the **Print to file** check box.
- STEP 4: In your Print command, click the All radio button to print the entire report.
- STEP 5: Use the **up** and/or **down arrows** in the **Number of copies** field, or double-click in the field and enter a value.
- STEP 6: (Optional) Click the **Collate** check box in the Copies box.
- STEP 7: Click OK.

5. Tips

- Use the right mouse button to click inside the Help window, then click **Print Topic**. This also works for printing the contents of a pop-up window.
- Print a group of related topics by clicking a book in the Help Contents and then clicking the **Print** button.

CallCenterWorX Online Help

Tips

CHAPTER 12 MIS Statistical Definitions and Methods

(Notations beneath definitions indicate the method used to calculate the statistic shown.)

All Trunks Busy Time is the amount of time all circuits are in use in a trunk group.

Average ACD Busy Time is the average amount of time a trunk was in use for ACD calls. This includes all time the circuit was active (from the time the call queued until the time the call released).

Total Trunk Busy Time / Total ACD Calls Received

Average ACD Talk Time is the total amount of time spent talking on ACD incoming calls divided by the number of calls answered.

Total ACD Talk Time / Total ACD Calls Answered

Average Delay Time Abandoned is the average amount of time a caller waits before releasing without being answered.

Total Time In Queue for Abandoned Calls / Total Calls Abandoned

Average Delay Time Answered is the average amount of time a call waits prior to being answered.

Total Time In Queue for Answered Calls / Total Calls Answered

Average Speed of Answer is the average amount of time a call waits prior to being answered.

Total Time In Queue for Answered Calls / Total Calls Answered

Grade of Service is the percentage of calls answered within the user-defined service threshold (number of seconds).

(Number of Calls Answered Within Threshold / Total Calls Received) * 100

Longest Waiting Call is the longest time a call waited in queue before being answered or releasing. This time is kept for current waiting calls, and calls completed within this hour or within this day.

Within any hour it is possible for the longest waiting call to be reported as greater than one hour, due to calls being reported in the hour they were handled.

Number of Trouble Reports is the number of times the Trunk Trouble key was pressed while an incoming ACD call was active on this trunk.

Percentage Hold Time is the percentage of time an incoming ACD caller was placed on hold in relation to the total talk time.

(Total Hold Time / Total Talk Time) * 100

Percentage of Calls Abandoned is the percentage of incoming ACD calls which release before being answered.

(Total Calls Abandoned / Total Calls Received) * 100

Percentage Ready Time is the percentage of staffed time spent in the Ready mode.

(Total Ready Time / Total Staffed Time) * 100

Percentage Ring Time is the percentage of staffed time spent in the Ringing mode.

(Total Ring Time / Total Staffed Time) * 100

Percentage Talk Time is the percentage of staffed time spent in the Talk mode.

(Total Talk Time / Total Staffed Time) * 100

MIS Statistical Definitions and Methods

Percentage Work Time is the percentage of staffed time spent in the Work mode.

(Total Work Time / Total Staffed Time) * 100

Total ACD Busy Time is the total amount of time a trunk was in use for ACD calls. This includes all time the circuit was active (from the time the call queued until the time the call released).

Total ACD Calls Answered is incremented by one each time a call which has been distributed to an agent position is answered. If a call has been distributed to a position but abandons while ringing, this counter is not incremented.

Total ACD Calls Transferred is incremented by one when a call has been answered and is subsequently transferred to another position, split, or even outside of the ACD.

Total ACD Hold Time is the amount of time an ACD call was placed on hold.

Total ACD Talk Time is the amount of time from when an ACD incoming call is answered to the time the call is released. Time the call was placed on hold is included in this time.

Total All PBX Calls is the number of incoming calls received plus the number of outgoing calls made on an agent's PBX line.

Total Assist Requests is incremented by one when the Assist key of a position is pressed.

Total Break Time is the amount of time the agent spent in any of the Break mode types.

Total Calls Abandoned is the number of incoming ACD calls which are released prior to the call being answered by an agent. Calls which queue to multiple splits and abandon appear only in the statistics of the split to which the call initially queued.

Total Calls Overflowed is the number of incoming ACD calls which are subsequently queued to and answered in another split after being first queued to the split being measured.

Total Calls Received is the number of incoming ACD calls handled, including calls answered, abandoned, or overflowed.

- Calls which are transferred into a split are counted as received calls.
- Calls which are queued to multiple splits are counted in the original queued-to split as well as in the answering split in an overflow scenario.
- If the call does not overflow but is subsequently answered by the original queued split, then that split is the only one credited with a received call.

Total Calls Answered + Total Calls Abandoned + Total Calls Overflowed

Total PBX IN Calls Answered is incremented by one each time a call is answered on a position's PBX line.

Total PBX IN Talk Time is the amount of time from when a PBX line call is answered until it is released. Time the call was placed on hold is included in this time.

Total PBX OUT Calls Answered is incremented by one each time a call is placed on a position's PBX line.

Total PBX OUT Talk Time is the amount of time from when a PBX line call is placed until it is released. This includes time the caller heard ring back tones until the call was answered, plus time the call was placed on hold.

Total PBX Talk Time is the amount of time spent talking on incoming calls received plus the time talking on outgoing calls on an agent's PBX line.

Total Ready Time is the amount of time the agent was in Ready mode.

Total Ring Time is the amount of time the agent's position was ringing.

Total Staffed Time is the amount of time from agent log-in until log-out, minus any time spent in a Break mode of any type.

Total Trunk Usage (CCS) is the total time the trunk was in use for ACD calls expressed in Hundred Call Seconds.

Total ACD Busy Time / (Number of Trunks in the Group * 100)

Total Work Time is the amount of time from when an agent presses the Work key to enter the Work mode until the Work key is pressed again to exit Work mode.

- In the case of a Multi-Split Agent, this time is normally attributed to the split which is the agent's attribute split.
- Work time is attributed to a non-attribute split only when entering Work mode after answering a call for a non-attribute split.
- After exiting Work mode for the first time prior to a non-attribute split call, all subsequent Work mode time is returned to the attribute split.

CHAPTER 13 MIS Error Messages

This chapter contains a list of possible error messages. Although many are self-explanatory, a brief description is included to help determine the cause of the problem. If the suggested action does not correct the error, please contact NEC Technical Support.

ABORT

The requested configuration change under CallCenterWorX MIS is not supported by the ACD.

ACD Position Data not assigned

CallCenterWorX MIS attempted to modify or retrieve data for an agent position which is not assigned on the ACD. Check the input; if it is correct, check the position's assignment on the MAT.

ACD System has no Agents

The ACD does not have any agents assigned. Check the input; if it is correct, check the agent's assignment on the MAT.

ACD System has no Splits

There are no splits currently assigned on the ACD. Check the input; if it is correct, check the split's assignment on the MAT.

ACD System has no Trunk Groups

The ACD does not have any trunk groups assigned. Check the input; if it is correct, check the Trunk Groups assignment on the MAT.

Agent ?? already assigned

The Agent Logon ID Code has already been assigned to another agent. The question marks in the error message will be replaced with the Logon ID Code causing the error. Each agent must have a unique Logon ID Code. Use another Logon ID Code and try again.

Agent assigned by the parameter is out of range

The agent number input is not within the acceptable limits. An agent number is from one to nine numeric characters. The valid range of an Agent Logon ID Code is 1-999999999. Preceding zeros are not accepted. Use a valid Logon ID Code and try again.

Agent Group assigned by the parameter is out of range

The Agent Group number input is not within the acceptable limits. An Agent Group number is from one to two numeric characters. The valid range of an Agent Group number is 1-16. Use a valid group number and try again.

Agent Group No. %d has no Agents

The Agent Group number given does not have any agents assigned to it. Agent Groups are an MIS entity only, which means the ACD is unaware of these agent groupings. All agents originally reside in Agent Group 1 and must subsequently be moved to other groups by CallCenterWorX MIS. Check the Agent Group assignments and try again.

MIS Error Messages

Agent Group requested is not registered

The Agent Group requested has not been assigned. Agent Groups are an MIS entity only, which means the ACD is unaware of these agent groupings. All agents originally reside in Agent Group 1 and must subsequently be moved to other groups within CallCenter*WorX* MIS. Check the Agent Group assignments and try again.

Agent Position assigned by the parameter is out of range

The position number that was input is not within the acceptable limits. An Agent Position number is from two to four numeric characters. The valid range of an Agent Position number is 10-9999. Use a valid Agent Position number and try again.

Agent Position requested is not registered

The Agent Position requested is not registered in the ACD. Check the input; if it is correct, check the position's assignment on the MAT.

Agent requested is not registered

The Agent Logon ID Code requested is not registered in the ACD. Check the input; if it is correct, check the agent's assignment on the MAT.

Break Type Number is out of range

The Break type number input is not within the acceptable limits. Up to nine separate Break types may be defined. A Break type number is one numeric character, and the valid range of a Break type number is 1-9. Use a valid Break type number and try again.

Data cannot be written into memory

This indicates an ACD database problem. Check the input; if it is correct, try the database change from the MAT.

Data has been compromised

The MIS statistical data has become inconsistent with the current data. This can occur in the ACD Detail Report when an agent works in one split and then is reassigned to another. A report covering the time period including both split assignments will generate this message. Separate reports for each time period will produce correct data.

Data input format is incorrect

This can occur only if a transfer of data to the ACD is corrupted or somehow misread by the ACD. Check the input; if it is correct, try the database change from the MAT.

Database Limits exceeded

Upon entry of incorrect or unacceptable data, CallCenterWorX MIS generates an error message which appears in red at the bottom of the screen. Examples of such data would be exceeding the limit on the total quantity of entries received for one entity (defining 301 agent Logon IDs or 35 splits), or assigning an entry outside of the allowed range (such as trying to use split 104).

ID code already assigned

The Agent Logon ID Code has already been assigned. Each agent must have a unique Logon ID Code. Use another Logon ID Code and try again.

In the parameter, illegal characters appear

You entered an invalid character during input (such as an alphabetic character where only numerals are accepted). Check the input and try again.

Input data is incorrect

You entered a value that is out of acceptable range or contains invalid characters. Check the value entered and try again.

Invalid password

The password entered does not match the current system password. Check the input and try again.

New Split assigned is incompatible with current Agent

A position's split assignment cannot be modified to a split incompatible with the split assignment of the agent currently logged-on to that position. There are many ways to correct this conflict. The recommended procedure is to assign the position as an 'any split' position via the MAT and let the agent's Logon ID Code determine the splits for which the position may receive calls.

Night DN not assigned

CallCenterWorX MIS attempted to place a split in Night mode when no destination for the split's calls was assigned in the ACD database. Use the MAT to define the split's Night Destination and try again.

Parameter is out of range

The input is not within the acceptable limits. Check the input and try again.

Report schedule table entry is not assigned

You attempted to delete a report that is not registered. Check the report number entered and try again.

Report schedule table is empty

This indicates that there are no reports scheduled.

Report schedule table is full

There are already 50 reports scheduled for output. An existing report must be deleted before a new report can be scheduled.

Split assigned by the parameter is out of range

The split number input is not within the acceptable limits. A split number is from one to two numeric characters. The valid range of a split number is 1-30. Use a valid split number and try again.

Split No. ?? has no Agent Positions

The split number given does not have any positions assigned on the ACD. The question marks in the error message will be replaced with the split number causing the error. Use another split number and try again.

Split No. not assigned

CallCenterWorX MIS attempted to modify or retrieve data for a split which is not assigned on the ACD. Check the input; if it is correct, check the split's assignment on the MAT.

MIS Error Messages

Split requested is not registered

The split number input specifies a split number that has not been registered in the ACD. Check the input; if it is correct, check the split's assignment on the MAT.

Station No. not assigned

CallCenterWorX MIS attempted to modify or retrieve data for an agent position which is not assigned on the ACD. Check the input; if it is correct, check the position's assignment on the MAT.

Statistical data assigned by the parameter is not saved

You attempted to select a report time period for data that has not been saved in the CallCenterWorX MIS database. MIS data is saved for the past 38 days and 47 hours. Check the time period selected and try again.

System variable selected cannot be modified by the user

You attempted to modify a system parameter that is not displayed. Check the parameter selected and try again.

Tally Code Number is out of range

The Tally Code Number input by the user is not within the acceptable limits. A Tally Code Number is from one to two numeric characters, and the valid range of a Tally Code Number is 1-20. Use a valid Tally Code Number and try again.

Temporary Error: error no. =??

An error message to handle any unforeseen errors that are not covered by any other error code. Contact NEC Technical Support if this error should occur and supply them with the error number which appears in place of the question marks.

Tenant No. not assigned

CallCenterWorX MIS attempted to modify or retrieve data for a tenant which is not assigned on the ACD. Each CallCenterWorX MIS application supports only one tenant. A tenant number is one numeric character, and the valid range of a tenant number is 1-9. Use a valid tenant number and try again.

Time out

An attempted configuration change has failed due to a communication error with the ACD. Try again and if this fails, attempt the change from the MAT.

Trunk assigned by the parameter is out of range

The trunk circuit number input is not within the acceptable limits. A trunk number is from one to three numeric characters. The valid range of a trunk number is 1-127. Use a valid trunk number and try again.

Trunk Group assigned by the parameter is out of range

The Trunk Group number is not within the acceptable limits. A Trunk Group number is from one to two numeric characters. The valid range of a Trunk Group number is 1-63. Use a valid Trunk Group number and try again.

Trunk Group No. ?? has no Trunk

The Trunk Group entered does not have any circuits assigned on the ACD. The question marks in the error message will be replaced with the Trunk Group number causing the error. Use another Trunk Group number and try again.

Trunk Group No. not assigned

CallCenterWorX MIS attempted to modify a Trunk Group which is not assigned on the ACD. Check the input; if it is correct, check the Trunk Group's assignment on the MAT.

Trunk Group requested is not registered

The Trunk Group requested is not registered in the ACD. Check the input; if it is correct, check the Trunk Group's assignment on the MAT.

Trunk requested is not registered

The Trunk Group selected does not have a circuit number matching the circuit number requested. Check the input; if it is correct, check the Trunk's assignment on the MAT.

NEC Technical Support is your best resource in resolving problems that do not respond to these suggestions.

MIS Error Messages

CHAPTER 14 Terms and Concepts

Term	Definition
Abandon Delay Interval	The amount of time elapsed before a caller abandons. The abandon delay time is divided into 8 segments (or buckets) and these timing intervals can be modified within CallCenter <i>WorX</i> MIS.
ACD	See Automatic Call Distribution.
ACD Call	A call connected to the ACD through a pilot number or personal pilot number; an MIS report term for a call to an agent position.
ACD Computer (Client or Server) / Remote MIS PC	Terms used to distinguish the computer using the CallCenterWorX ACD program (and possibly the MIS program) from one or more remote computers using only the MIS portion of the program.
ACDp	An MIS report term for an ACD call to an agent's personal queue.
Agent	A person who operates an agent position. In order to use the ACD, an agent may be required to logon to an agent position by pressing the LOGON key and entering a valid agent ID code on the keypad (see Agent Logon ID Code).
Agent Group	A collection of agents grouped for comparative analysis, independent of the agents' assigned splits, in the MIS only. Agent groups can be created at any time by assigning agents to an agent group even though these agents may work in a variety of splits. All agents are originally in Group 1 and must be moved to other groups created via the MIS programming.
Agent Logon ID Code	The unique identification code assigned to each agent; a code using from one to nine numeric characters with a valid range from 1-99999999. Preceding zeroes (such as 00123) are not acceptable in Agent Logon ID Codes. Each split determines whether a Logon ID is required to logon to an agent position D ^{term} .
Agent Mode	The status of a logged-in agent in relation to her/his ability to receive a call. An agent able to receive an ACD call is in Ready mode. Work mode is a limited time following a call during which the agent's position will not receive calls, allowing the agent time for paperwork and follow-up to the previously completed call. Break mode is agent-initiated by pressing the Break key on the D ^{term} keyboard and can include up to nine Break types (such as Lunch, Coffee, and Personal).
Agent Personal Queue	A queue for calls directed specifically to an agent. Personal queued calls are the highest priority and an agent will always be assigned a call from her/his personal queue before taking a call from any other queue.

Term	Definition
Agent Position	A telephone set that is configured for use in handling ACD calls, with a number of keys for controlling ACD functions. Agent positions are typically equipped with two telephone lines: one is for incoming ACD calls; the other line (called the PBX line or My Line) is for non-ACD work or personal calls, and functions as a normal business station. An Agent Position number is from two to four numeric characters with a valid range from 10-9999.
Agent State	The current function being performed by an agent as displayed in an MIS report (such as whether they are taking an ACD or non-ACD call, or whether they are working within a primary split or on a multi-split basis).
Answer Delay Interval	The amount of time elapsed before a call is answered. The answer delay time is divided into 8 segments (or buckets). These timing intervals can be modified within CallCenter <i>WorX</i> MIS.
Argument	A quantity upon which another depends, such as the specification of a split number or a number of seconds, in a Call Control Vector step.
Assigned Names	Optional names (such as Tenant Name, Split Name, Agent Name, Pilot Name, Tally Name, Trunk Name) given to these entities to make them easier to remember than by their numbers alone.
Asynchronous	A method of data transmission which allows characters to be sent at irregular intervals (without a timing clock) by preceding each character with a start bit, and following it with a stop bit.
Attribute Split	The number of the preferred split in the list of allowable splits in which this agent will be working. This split sets up the agent's allowed break types, after call Work mode, and other parameters derived from the ACD settings for that split. See "Multi-Split Agent" in the "CallCenterWorX ACD Features and Specifications" manual for a detailed explanation.
Automatic Call Distribution (ACD)	The system responsible for accepting and evenly distributing incoming calls to available agents. An ACD allows calls to follow a user-defined route once the calls enter the system.
Baud Rate	A measure of transmission speed for data. The CallCenter <i>WorX</i> default baud rate setting is 9600.
Break Type	A staffing analysis statistic. Up to 9 break types (such as Lunch, Coffee, or Rest) can be configured and MIS reports generated.
Business Station	A regular (non-ACD) PBX telephone station.
Call Control Vectors (CCVs)	A user-defined set of call-handling instructions, producing a timed sequence of events which control incoming ACD calls prior to their connection to an agent. The instructions can include placing a call in the queue of a specific split, delivering an announcement to the calling party, pausing, placing the call under the control of another Call Control Vector, and many other actions. Up to 60 different sequences containing up to 20 steps per sequence provide great flexibility in call handling. See the "CallCenterWorX ACD Features and Specifications" for detailed information. See also this manual Chapter 9, Heading 7., Step 5, "CallControl Vectors."

Term	Definition
Configuration Fields	Allow on-the-spot program configuration changes in MIS. They are displayed in white until the information contained within the field is changed, when the field color changes from white to yellow.
Dialog (box)	A GUI object which is displayed in response to the selection of a menu command or an icon, offering one or more choices to determine the next activity.
D ^{term}	An NEC electronic phone/terminal that derives its intelligence from its own microprocessor, which detects events and accepts direction from the PBX.
Grade of Service Threshold	Specifies the percentage of calls answered within a specified amount of time in relation to the total number of calls received.
Graphical User Interface (GUI)	A development that uses icons representing actual desktop objects which the user can access and manipulate with a pointing device/mouse.
Help button/What's This button	Icons on the toolbar which allow the user to request additional information on a general topic (Help button) or a context-sensitive topic (What's This button).
Holiday Schedule	The programming determining how incoming calls are processed when a holiday is designated via the ACD Holiday Calendar dialog. The processing will be according to one of up to 30 Holiday Schedules for that tenant. Each Schedule entry has steps that determine which CCV action to perform for a particular holiday calendar.
Host / Host Name	The network name of the PBX which directs the CallCenterWorX system; the name given to the CallCenterWorX ACD computer when TCP/IP is selected as the communication type. A matching Host Name is required for communication between CallCenterWorX ACD and CallCenterWorX MIS.
I/O Ports	Input/Output connections on the PBX (see also Port).
Icon	A picture or symbol representing an object, task, command, or choice you can select from a piece of software. The CallCenterWorX consoles have toolbars showing icons in addition to having word-oriented menu choices.
Inflow Threshold	Specifies the threshold minimum number of Ready agents or the maximum queue depth permitted to allow inflow calls.
Infolink	Infolink data messages provide a two-way communications link between the ACD and external computer equipment, such as mini and mainframe host computers, desktop workstations, personal computers, and IVR. Three message sets have been designed for Infolink, providing a variety of applications using those messages. See the "CallCenterWorX ACD Features and Specifications" manual for more detailed information.
Interactive Voice Response (IVR)	A unit used by the ACD to provide customized announcements to the caller. It can provide voice menuing and display collected caller information (such as name, address, and account information) to the agent's terminal.

Term	Definition
Internet Protocol (IP)	A standard describing software that keeps track of the internetwork addresses for different nodes, routes, and outgoing messages, and recognizes incoming messages. It allows a data packet to traverse multiple networks on the way to its final destination.
IP Address	A 32-bit address, used in IP routing, which includes a Network address identifier assigned by a central authority, and a Host ID (an end station identifier) assigned by the LAN administrator. The network and the computer itself are both represented in a sequence of numbers.
Longest Waiting Call	The longest time a call waited in queue before being answered or releasing. This time is kept for current waiting calls, and calls completed within this hour or within this day. Within any hour it is possible for the longest waiting call to be reported as greater than one hour, due to calls being reported in the hour they were handled.
Maintenance Administration Terminal (MAT)	 A computer used for programming and maintenance of the NEAX2000 IVS; the man-machine interface with the PBX. A term referring to the ACD programming which determines the parameters and behavior of the ACD.
Major Categories	The first level of menu items (such as Agent Reports, Split Reports, Trunk Group Reports) which are displayed when you select one of the CallCenterWorX MIS main menus (such as Reports, Figure 8-45).
Management Information System (MIS)	Receives data from the ACD pertaining to system performance, compiles the data into meaningful statistics, and records and stores the data for historical reference and reports.
MAT	See Maintenance Administration Terminal
Minor Categories	The subdivisions (such as Summary or ACD Detail) of a major category (such as Agent Reports, Figure 8-46).
MIS	See Management Information System
MIS Status Screens (also referred to as Real-time screens)	 Provide color-coded, up-to-the-second views of the agent and queue activity at the system and split levels. Statistics on the call volume and the effectiveness of the agents handling those calls are computed in real-time and displayed for the current hour and day. These screens: Display the number of calls currently waiting in various queues of the ACD; Display the current function being performed by the agents assigned to handle the waiting calls; Have color-coded fields designed to provide an immediate perception of the current operation and to assist in spotting trouble at the earliest possible moment; and Can be viewed in either graph or table format by use of the Graph View or Text View icon buttons.

Term	Definition
Multi-split Agent	Mode which allows an agent to function in more than one split. An agent may logon to as many as 16 splits and will be able to receive calls from any of those splits, according to a customized preference algorithm programmed into the ACD Logon ID Data, and to the programming of a specific position. See the "CallCenterWorX ACD Features and Specifications" manual for a detailed explanation of the factors and variables involved.
NACD Call	An MIS report term for a non-ACD (PBX or My Line) call. This feature allows agents and supervisors to receive calls from and place calls to other ports in the system, and to place outgoing calls.
Overflow Delay Threshold	Specifies the threshold number of seconds a call waits for an agent in a primary queue before overflowing to a secondary queue.
Parity Bit	A bit appended by many asynchronous systems following data bits, used for error detection. A parity bit is a binary bit appended to an array of bits to make the sum of all the bits always odd or always even.
Personal Queue	A queue for calls that are directed specifically to an agent. See Agent Personal Queue .
Pilot Numbers	The access codes to the ACD functions. They are programmed into the PBX-side database according to the numbering plan in effect for the system. Pilot numbers do not correspond to any line appearances, either physical or virtual, in the system. Although pilot numbers are often thought of as ringing in to a particular split, pilot numbers are in fact associated with a Call Control Vector or a Week Schedule, which in turn controls the handling of the ACD call.
Port	A point in the computer or telephone system where data may be accessed; the interface between a process or program and a communications or transmission facility.
Position	A telephone set that is configured for use in handling ACD calls, with a number of keys for controlling ACD functions. Agent positions are typically equipped with two telephone lines. One is for incoming ACD calls. The other, called the PBX line or My Line, is receive calls from and place calls to other ports in the system, and to place outgoing calls; it functions as a normal business station.
Position Split Assignment	The assignment of a particular position (agent telephone) to be related to a particular split (set of agents).
Queue	 The step in which a call has been received and is on hold awaiting answer by an agent. An incoming call to the ACD system will be presented to a split in one of two ways: Standard Queuing always connects a call with an available agent or queues the call according to its priority, limited only by the split's specified maximum depth. Up to 250 different priorities are available to determine placement of an incoming call. Conditional Queuing checks pre-programmed conditions (minimum agent availability and maximum queue depth) before a call is either connected to an agent or queued.

Term	Definition
Real-time Screen	A display which reflects the activity of the call center on an up-to-the-second basis (see also MIS Status Screens).
Remote MIS PC / ACD Computer (Client or Server)	Terms used to distinguish the computer (Client or Server) using the CallCenterWorX ACD program (and possibly the MIS program) from one or more remote computers using only the MIS portion of the program, possibly serving multiple supervisors in a call center.
RS-232	A standardized serial interface between Data Communications Equipment (DCE) and Data Terminal Equipment (DTE), employed as one of the communication interfaces for personal computers.
Security Key	A 25-pin plug-in device which attaches to the printer port of a computer using CallCenter <i>WorX</i> , enabling the program to function properly.
Select / click (item)	Procedure used to activate a selection. When you click or double-click on an icon with a mouse or other pointing device, CallCenter <i>WorX</i> opens the related dialog or performs an operation.
Service Modes	Conditions of operation for an agent position (such as Night mode, Break mode, Work mode, Ready mode).
Split	A collection of agents who perform a common function. A tenant usually consists of several splits performing different functions within the call center. A split number is from one to two numeric characters with a valid range from 1-30. CallCenter <i>WorX</i> supports a total of 30 splits for all tenants.
Split Inflow & Overflow Thresholds	An ACD feature which allows calls to be handled quickly when a split receives a large number of calls. If a call waits for a certain time without being passed to an agent, it can be routed to another split. When this routing occurs, the call also remains in the original queue, so that it is effectively "in two places at once," and can be answered by the first available agent in either split. Overflow handling is controlled by three parameters: Overflow threshold Overflow destination Inflow threshold prevents a split from being overloaded by another split's overflowing calls.
Split Level	An MIS report view which shows the activity of an individual split, as opposed to System Level, which summarizes activity over all splits.
Stop Bit	An interval at the end of each asynchronous character that allows the receiving computer to pause before the start of the next character. The Stop Bit is always a 1.
System Level	An MIS report view which summarizes activity over all splits, as opposed to Split Level, which views activity of an individual split.

Term	Definition
Tally Code or Count	A feature which allows agents to register the occurrences of several specific events using the dial keypad (the Tally key). The events may be responses to various advertising methods, sales campaigns, or calls from particular locations. The MIS reports on Tally Code use by Split(s) and by Pilot(s).
Tally-Oh codes	A key sequence which is entered by an agent or supervisor in the ACD system and is not reported to the MIS. These codes invoke various actions, such as statistical displays and mode changes. This key sequence always begins with the digit zero, "0."
TCP/IP	A set of protocols to link dissimilar computers across many kinds of networks; a set of protocols to provide end-to-end connectivity between a data source and a destination on a network.
Tenant	An organization of users who form a customer group; a business group consisting of many agents (possibly organized into smaller groups called splits) performing a variety of functions.
Trace Destination	A file or a screen display on the ACD console designated to receive information from a trace or debugging operation.
Trunk	A circuit that carries a call between the NEAX2000 and the telephone company's central office / trunk group. A Trunk circuit number is from one to three numeric characters with a valid range from 1-255.
Trunk Group / Trunk Route	A collection of trunk circuits. A Trunk Group has a common set of characteristics for each of its member circuits. Common names which refer to trunk groups are DID, DOD, WATS, and FX. A Trunk Group number is from one to two numeric characters with a valid range from 1-63.
Variable Depth Queuing	A feature which allows an ACD call to be queued to a split, depending on the number of working agents (logged on and not in Break mode) at the time that the ACD call is presented to the split. This percentage is programmed in the Split Data screen at maximum queue depth. Example: Maximum Queue Depth 150% 1.50 Number of working agentsx 4 Number of calls allowed in queue 6.00
Wall Message Board	An LED display board that receives statistical information from the CallCenterWorX MIS and displays the information according to a programmed pattern.
Week Schedule	The name of an ACD MAT command used to select the Call Control Vector(s) by which all incoming calls are handled on a 24-hour basis. Each schedule can be used as a routing destination for pilot numbers.
What's This button / Help button	Icons on the toolbar which allow the user to request additional information on a general topic (Help button) or a context-sensitive topic (What's This button).

Note 1: Some statistical terminology is defined in Chapter 12, "MIS Statistical Definitions and Methods."

Note 2: More detailed information on many of the above terms and concepts can be found in the "CallCenterWorX ACD Features and Specifications" manual.