QuickQ DXP

Automatic Call Distributor

System Manager's Guide

COMDIAL®

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Introducing The QuickQ System

Using This Guide

This manual will assist you in using your *QuickQ* automatic call distributor. It provides a complete description of the *QuickQ* features, a detailed outline of the system configuration, and general operating instructions.

Certain typographical conventions appear throughout this guide to simplify the instructions. These are explained below:

- Text that appears on the screen is shown as, for example, `Enter your password`.
- Text that you have to type is shown in two different ways:
  - ‘type **Albert Smith** at the appropriate box’ means that you should type the characters exactly as shown, but
  - ‘type your password’ means that you should type the actual digits of your password.
- Keys that you are required to press are shown as, for example, **Enter**.

Note: On some keypads, the Enter key may be called Return.

The word *select* is used to describe the use of either the mouse or the direction arrow keys to highlight an option on the screen.

Notes bring your attention to a particular item. ***Notes*** are given between paragraphs of text, and are shown in the following form:

Note: If you are using the keyboard use the Tab key to move from field to field. If you are using the mouse, click on the field you wish to work with.

Understanding *QuickQ*

QuickQ is an Automatic Call Distribution (ACD) system designed to handle incoming calls as efficiently and economically as possible. It answers calls by distributing the workload equally among the Agent staff. Typically, *QuickQ* speed, efficiency and management control usually results in a 20–40 percent increase in the productivity of the Agent force and a 10 to 20 second decrease in the average call answer time. The four primary functions of the *QuickQ* are as follows:

- provide a waiting queue to increase the effective arrival rate of the incoming calls, and to allow more productive time for the Agent,
- play prerecorded announcements when no Agents are available thus encouraging the caller to wait in a queue,
- automatically distribute the workload among the Agents to allow an equal distribution of duties, effecting greater productivity,
- provide comprehensive statistical management reports that allow rational and efficient allocation of the call center's resources.

Any corporation or company that answers incoming telephone calls with a staff of Agents or trained people is a potential candidate for the considerable cost savings and service benefits of the *QuickQ*.

In an automatic call distribution (ACD) application, a calling customer needs to reach a service person in a particular area but does not need to reach a specific individual. For example, the customer may be calling a company to place an order, check a reservation, or talk to a support or help desk. In all cases, it is important that the call be answered as quickly as possible by any service person in that area.

It is statistically proven that a single large group of agents is more productive than an equal number of agents in several smaller groups provided that the calls are homogeneous.

Calling traffic is considered homogeneous when anyone within a group of trained representatives can effectively handle the call; however, this uniformity does not imply that ACD systems can handle only one type of call. Many successful operations exist where different types of calls reach specially trained operators in a busy call center. However, it is more efficient to separate different types of calls into groups. *QuickQ* has the ability to configure the ACD operation into 16 groups, each of which can have four sub-groups.

Organizing The Call Center Staff

An ACD center requires specialized personnel. If the department is large enough, an effective ACD staff will consist of the following personnel:

- System Manager,
- Group Supervisors,
- Telephone Agents.

The System Manager is directly responsible for the day-to-day operation and maintenance of the ACD center. In smaller systems, the System Manager's task may be combined with the Group Supervisor's responsibilities. The System Manager can monitor the overall performance of the ACD center and has several responsibilities including the following items:

- control of systems configuration, such as the number of groups and overflow between groups,
- effectively balance the staffing of the ACD center according to the traffic demands of the various groups.

The Group Supervisor is directly responsible for the following responsibilities:

- Move, add and delete Agents required for the ACD center.
- the telephone service provided by Agents in their respective groups,
- monitoring the activity of the Agents,
- evaluating the performance of the Agents,
- providing assistance on calls beyond the capability or training of the Agents.

The Telephone Agent is often referred to as a Customer Service Representative (CSR) and is mainly responsible for a particular group of telephone lines or a certain type of call; however, the system allows assignment of multiple group agents that are a part of more than one group.

Describing The System Components

NOTE: You can ensure continuous QuickQ operation by adding an uninterruptable power source to both the digital voice announcer and central call processor, and an optional battery backup assembly to the DXP digital communications system.

Call Processor

The call processor is the brain of the *QuickQ*. It consists of the *QuickQ* software and a personal computer. The call processor monitors and controls all activities within the boundaries of the ACD.

Digital Voice Announcer

The Digital Voice Announcer (DVA) is a stand-alone voice processing system designed to directly interface with the DXP digital communications system. It provides storage for up to 16 digitized voice announcements for playback under control of the central call processing unit. In a busy call center when all Agents are busy, the DVA intercepts incoming calls and plays prerecorded voice announcements.

Telephone Extensions

The Agent's and Supervisor's stations are typical DXP proprietary telephones (12 or 24 Button Display Sets).

Describing QuickQ System Features

Answer Bin

An Answer bin is the length of time between when a call arrives in the queue and when it is answered by an Agent. There are six answer bins in the system. The system answer bin default time is zero. By setting the time frames in the answer bins, the Manager can look at one factor in the total customer service picture. An example of a typical answer bin record is shown below.

Answer Bin	Number of Calls	Time	Definition
Bin 01	0	00:20	The number of calls answered between 0 and 20 seconds, (0)
Bin 02	5	00:40	The number of calls answered between 20 and 40 seconds, (5)
Bin 03	2	01:00	The number of calls answered between 40 seconds and 1 minute, (2)

Abandoned Bin

Abandoned bin is the time between when a call arrives in the queue and when the caller hangs up without being connected to an Agent. There are six abandoned bins in the system. The system abandoned bin time defaults are zero. By setting time frames in the abandoned bins, the Manager can determine how tolerant customers are of the waiting time to which they are being subjected. An example of a typical abandoned bin is shown below.

Abandoned Bin	Number of Calls	Time	Definition
Bin 01	0	00:10	The number of calls abandoned between 0 and 10 seconds, (0)
Bin 02	11	00:30	The number of calls abandoned between 10 and 30 seconds, (11)
Bin 03	15	00:50	The number of calls abandoned between 30 and 50 seconds, (15)

Call Queuing

The *QuickQ* manages incoming calls in a logical sequence. The number of incoming calls arriving at a call center at any one time is random. The calls are queued on a first in first out principle. Call queuing ensures that calls are handled in a timely and efficient manner. Priority can be assigned to preferred lines such as Inwats (800 lines).

Even Distribution

The *QuickQ* effectively shares the incoming call workload evenly among agents. This ensure the optimum productivity of all agents by distributing calls to the longest idle agent.

Delay Announcements

Delay announcements are important money-saving features that help keep the queue working in an efficient manner. Since telephone traffic is random, there will be occasional bursts of calls to any ACD. Such sporadic increases in volume may force callers to wait for connection longer than they would like. By recording delay announcements (such as, Hello you have reached XYZ Company. All of our operators are busy at the moment, but please hold and our next available operator will be with you momentarily.) you assure the callers they are important and that their call will be answered in sequence, and that they should wait and not hang up. Without this announcement most people will hang up after five or six rings.

Note: Be creative with your messages, provide important information, advertise special promotions, and in general, keep your customers entertained and informed while they are waiting.

Management Information System (MIS) Reporting

The *QuickQ* system provides both real time and historical statistical information on the performance of the call center (Agent or line activity).

- Real-time screens are shown for System Managers and for Groups in Section 5 under the heading Selecting The Real Time Report.
- Historical information is described in details in Section 5 under the heading Selecting Historical Reports.

Describing QuickQ Agent Features

Account Codes

The system can provide a table of account codes arranged so that a unique number corresponds to a specific call type (for example, call content, product type, and so forth). For example, a software help desk may wish to use account codes to categorize its calls as follows:

Code	Call Category
100	Help with Set Up
200	Help with MS DOS
201	Help with Networked DOS
300	Help with Word Processing
301	Help with Databases
302	Help with Spreadsheets

Agents can enter the account code that corresponds to the type of call they have just dealt with. This information is stored in the systems statistics. System Managers can use the Management Information Report System to analyze the types of traffic and the topics of that traffic use the Management Information Report System.

Calls Waiting Indication

The calls waiting indication details the number of calls waiting in the queue. The system displays this information on both the Agents and Supervisors telephones. The calls waiting indication prompts Agents to quickly complete their present activity and answer the calls waiting in the queue. It alerts Supervisors to release available Agents who had been assigned to other tasks.

Log-in / Log-out

Agents move in or out of the system on an individual basis. Each Agent has his or her own three-digit user ID and password. Agents log into the system at the start of their day and log out of the system at the end of their day. When they take lunch or coffee breaks, they use the make set busy feature.

Make Set Busy

An Agent can manually make their telephone busy by pressing the **BUSY** interactive button. This allows the Agent to temporarily leave the system (during lunch or breaks).

Supervisor Help and Monitoring

The Supervisor uses the help and monitoring capabilities to provide expert advice to Agents on difficult calls. Supervisors can listen to Agent/customer conversations to ensure courteous and efficient service. The Help function allows the Agents to request the Supervisor's help without interrupting the call in progress.

Wrap-up Time

Immediately after he or she terminates a call, the system places that Agent's telephone into the wrap-up mode. During this wrap-up time, the agent will not be presented any calls. Usually the Agent will take this time to finish any paperwork associated with the call just completed. The Group Supervisor programs the wrap-up time for each individual Agent. Experienced Agents may require less time to wrap up a call than less experienced Agents.

An Agent can shorten a call's wrap-up time by pressing the **READY** interactive button, and similarly can extend a call's wrap-up time by pressing the **BUSY** interactive button.

Describing QuickQ Group Features

Each Group Supervisor can program these features independently for each group to meet its specific requirements.

Alarm Threshold (Time)

Alarm Threshold (Time) is a preprogrammed time parameter to monitor the number of calls waiting in queue (default period is 45 seconds).

Alarm Threshold (Calls in Queue)

Provides an indication to Agents & Supervisors that the number of calls waiting in queue has gone beyond the Alarm Threshold (Time). If the Alarm Threshold (Calls in Queue) is set to a number higher than zero (0), an audible tone will go off at all Agent's telephones when that preset number of calls has reached the Alarm Threshold (Time). If the Alarm Threshold (Calls in Queue) is set equal to zero (0), the alarm will not go off even if calls have reached the Alarm Threshold (Time). Statistics will still be collected for MIS Reports.

Automatic Day-to-Night Mode

Each Group Supervisor can set their group to automatically switch from day mode to night mode.

- In night mode, the system answers the incoming calls, plays the prerecorded night announcement, and releases the call.
- The system will automatically log all agents out when all calls holding, prior to night mode are answered.

Automatic Night-to-Day Mode

QuickQ switches from night mode to day mode when the first Agent of the group logs into the system to take calls. This ensures there is always someone logged in to take calls before the system accepts them.

Automatic Answer Mode

An Agent that operates in the automatic answer mode wears a head set. For incoming calls, the system rings the agent's telephone and connects the call directly to it.

Manual Answer Mode

An Agent in manual answer mode chooses to answer the incoming call or to reject it using the interactive buttons on his or her telephone.

Overflow Group

The overflow group is a secondary group of Agents to whom the system will direct calls after the overflow threshold time-out occurs (default is 210 seconds). The overflow group allows agents in more than one group to handle calls. By handling calls from other groups, Agents increase the overall call handling efficiency of the system. The system allows 4 overflow groups for each group. The overflow groups are set by the System Manager.

Note: Overflow level 4 can be set to a specific Non-ACD extension.

Example:

Agents in Group Two will receive calls from Group One when the preprogrammed period of time (default is 210 seconds) has gone beyond the overflow threshold (preset depending on the Group's requirements).

Overflow Threshold

The overflow threshold is the period of time that the system holds a call before it transfers it to an overflow group.

Priority Call Handling

There are four call handling priority levels (01 is the highest priority and 04 is the lowest priority). System Managers can assign a priority status to sub-groups of telephone lines. The system will queue the calls that arrive on those lines ahead of the calls that arrive on non-priority lines.

Example: Assign 800 numbers a priority of 01 so Agents will answer these calls before they answer any other call. This is important, as billing starts as soon as the *QuickQ* answers the call.

Individual Agents can have a priority status (01 to 04). The system assigns calls to Agents with the highest priority before it assigns calls to lower priority Agents.

Example: Assign Agent 200 a priority of 01 and Agent 209 a priority of 04. Agent 200 will receive incoming calls before Agent 209 receives any regardless of idle time. This allows Agent 209 to be available for calls yet be less likely to be interrupted from any other assigned work. This means Agent 209 can do assigned paperwork during a known slack period and still be available to answer calls if all other Agents are busy.

Redirect Threshold

If a call is not answered by an Agent (for example, the Agent forgot either to log-out or to make their telephone busy before leaving their desk) for a period of time defined as the redirect threshold time, the system will redirect the call to another Agent or group and automatically make the Agent's telephone busy. This occurs only in Manual Answer Mode.

Call Screen Mode

This mode of call routing sends all calls to the digital voice announcer. Callers hear the complete initial delay announcement before their call is directed to an Agent. Usually the message is used to provide the caller with certain information (promotional information or instructions such as "Please have your credit card number ready") prior to talking to an Agent.

Using the Mouse and Keyboard

You can use the *QuickQ* system with either the mouse pointing device or the standard keyboard. Employ the method with which you feel most comfortable

If you are unsure how to navigate the *QuickQ* menus and enter data or select items, refer to Appendix A for a description of the *QuickQ* graphical windowing environment, and details for using the mouse and keyboard.

If you are confident that you can use these techniques adequately, go on to *QuickQ* programming.

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Programming QuickQ

You can program the *QuickQ* features by any of the following parameters:

- System,
- Group,
- Sub-group,
- Agent.

You must program *QuickQ* from the system console windows graphic environment using either the mouse or the keyboard. If you are not familiar with using a mouse or the keyboard in a windows graphic environment, refer to Appendix A.

Understanding System Startup

At initial installation, the installer performs system startup and programs the DXP digital communications system and the *QuickQ* to work together.

The system begins operation with the following default settings:

• Technician ID #	832	• Technician Password	832
• System Manager ID #	900	• System Manager Password	900
• Group Supervisor ID #	901 to 916	• Group Supervisor Password	901 to 916
• Agent's ID #	No default	• Agent Password	No default
• Overflow Threshold	210 seconds	• Overflow Group	No overflow
• Alarm Threshold	45 seconds	• Redirect Threshold	20 seconds
• Priority Override	2 minutes	• Alarm Threshold Calls in Queue	0
• Automatic Force Call	No	• Call Screening	No
• Day to Night Mode	Yes	• Manual Answer	Yes
• Agent Priority Level	01	• Time for Day to Night Mode	5:30 p.m.
• First Message	1	• Agent Wrap-up	10 seconds
• Night Message	3	• Second Message	2
• First Message Delay	10 seconds	• Special Message	4
• Line Priority Level	01	• Music Interval	30 seconds

To determine which settings are applicable to you, refer to the relevant headings on the following pages.

Preparing System Layout / Worksheets

Prepare the system manager's programming worksheet before you actually configuring the system at the console, and use this worksheet as a reference to assist you in entering the information required over the following pages. There is an example worksheet in Appendix B.

Programming The System Level Configuration

Performing Initial Sign In

Use the following steps to gain access to the system.

1. Press **Esc** to close the QuickQ Status window (Figure 3-1).

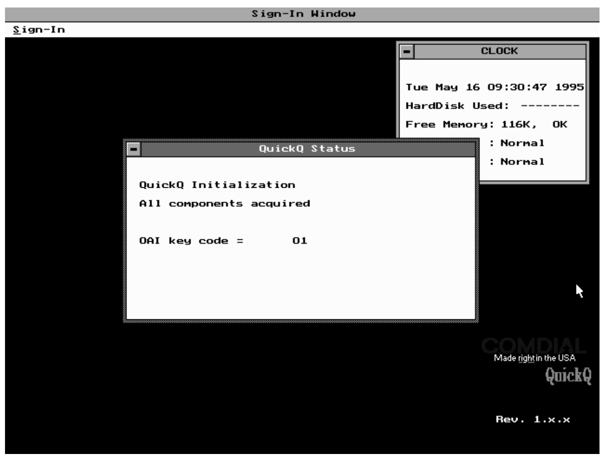

Figure 3-1 QuickQ Status Window

2. On the main system window, select the `Sign-In` menu bar option. Either move the pointer to it and click the left mouse button, or hold down the **Alt** key and press the **S** key (Figure 3-2).

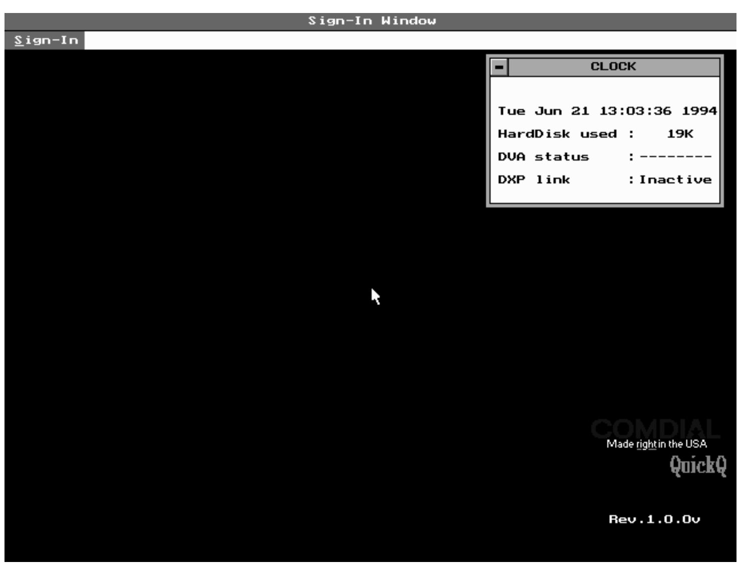

Figure 3-2 Sign In Window

3. The System Access window appears, and the `ID#` box will display 100. You can type without having to first clear this value (Figure 3-3).

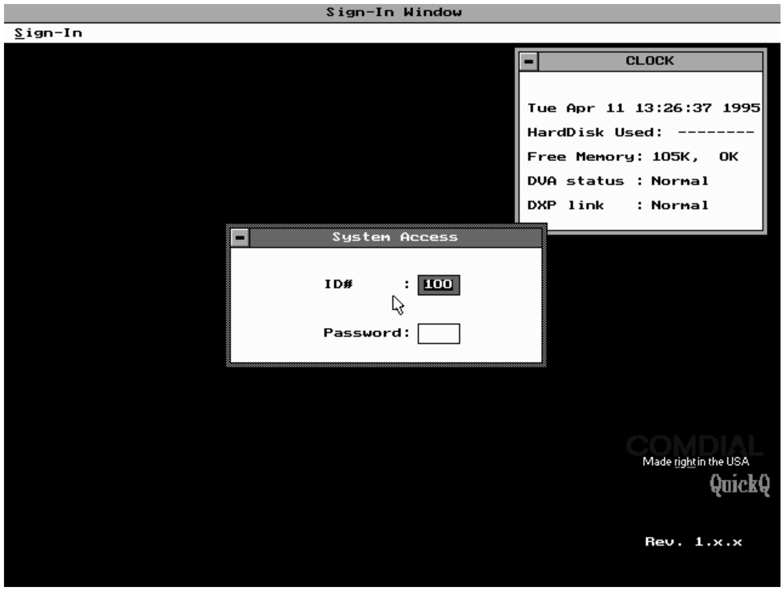

Figure 3-3 ID and Password

4. The System Manager ID# and the password both default to 900. Type **900** at the ID# box and press **Enter**. The highlight moves to the Password box. Type **900** again and press **Enter**.

5. The Supervisor/Manager Sign In window appears. Highlight the `Manager` line and press **Enter** (Figure 3-4).

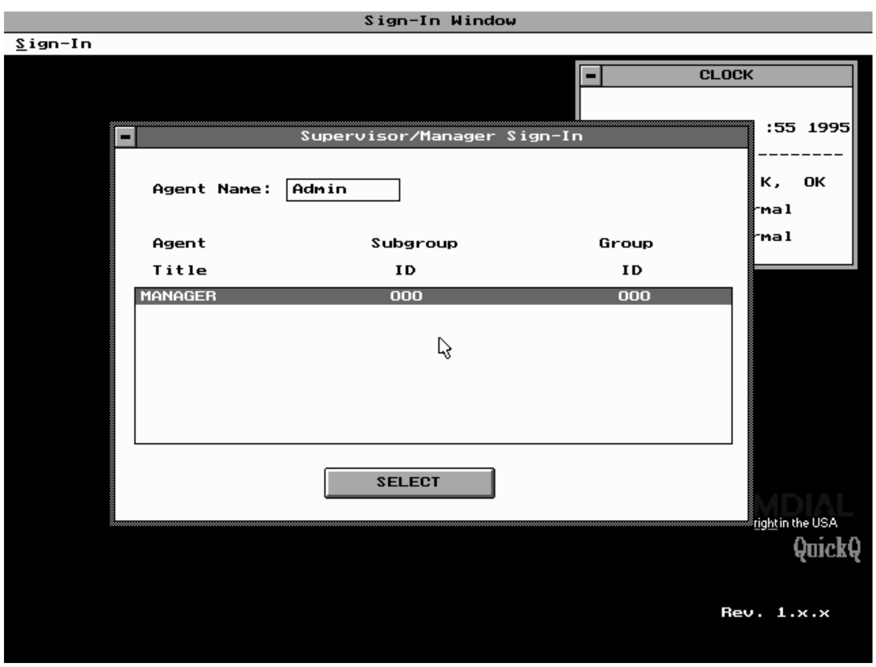

Figure 3-4. Supervisor Sign In Window

6. The screen display changes to show the Manager window, and the menu bar will now display a series of five options:
   - `Sign-out`
   - `System-Setup`
   - `Group-Programming`
   - `System-Backup`
   - `Management-Info`

You are now signed in to the *QuickQ* system. For security reasons you may wish to change your ID# and password at this time.

Setting Up The System

Setting the Company Name

1. Select `System Setup` from the menu bar. This will display a menu containing seven options:
   - `Company Name`
   - `ID/Password`
   - `Time/Date`
   - `Intergroup Overflow`
   - `Announcement`
   - `Account Code`
   - `Stat-Bin`

2. Select the `Company Name` option. The Company Name window appears. Type in the desired company name.

3. To save the changes, click on `Save-To-Disk`, or hold down the **Alt** key and the **S** key at the same time.

4. The Save Company Name window appears. Selecting `Yes` or press **Alt Y** prompts the system to save the changes and to close all windows automatically. Selecting `No` or press **Alt N** returns to the Company Name window. You can now close this window by pressing **Esc** or double clicking on the close box.

Changing Passwords and ID's

Using the following procedure, select the group of your choice from the ID/Password window, change the group names, change the Supervisor names, and change the ID# and passwords of the Supervisors of all groups.

1. Pull down the `System Setup` from the menu bar and select ID/Password from the second line of the menu.

2. The menu closes and the ID/Password window appears with the highlight bar over the `Gp. 00 SYSTEM` line. Press **Enter** or click on the highlight with the mouse (Figure 3-5).

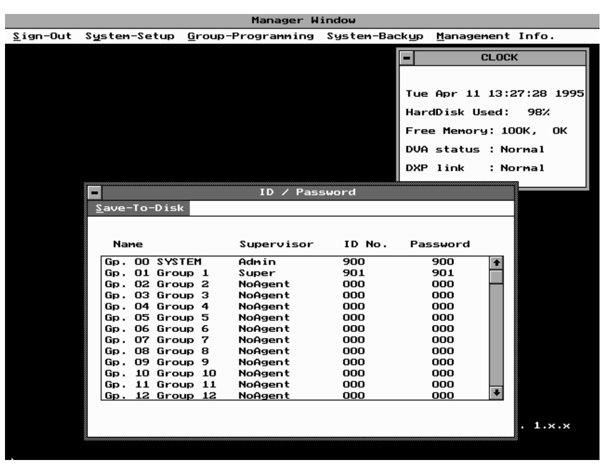

Figure 3-5. IDs/Passwords

3. The Edit ID and Password window appears as shown in Figure 3-6.

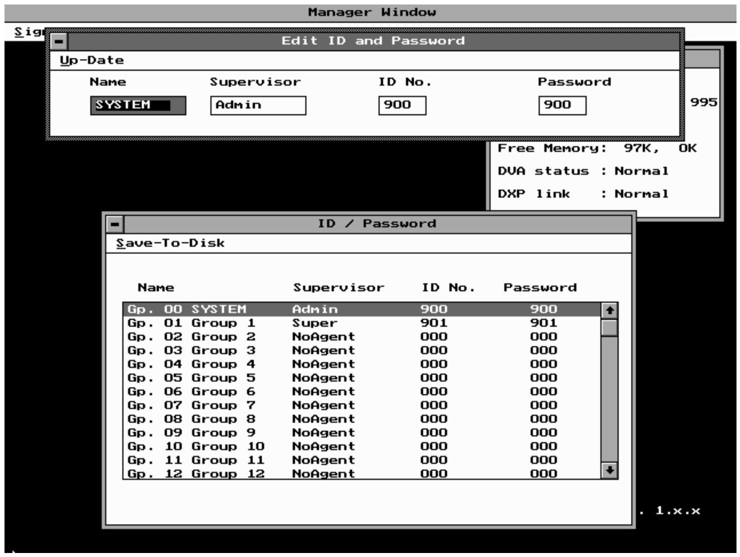

Figure 3.6. Edit ID and Password Window

Note: Group 00 refers to the Manager's Password/ID. This does not refer to one of the call processing groups. For Groups 01 - 16, enter the name of each department that will be processing ACD calls.

4. If you wish to change the name, type in the new name at the highlight. To move to the Supervisor box, press the **Tab** key or click on the box with the mouse.

5. If you wish to change the name of the Supervisor, type in the new name. To move to the ID# box, press the **Tab** key or click on the box with the mouse.

6. Type in the ID# you wish to use (you can use only numeric digits for the ID# and password, Range 100 to 999).

7. Move to the `Password` box and type in the password you wish to use (you can use only numeric digits for the ID# and password 100 to 999).

8. When you have entered the details in the boxes to your satisfaction, select the `Up-date` option from the menu bar or press **Alt U** to save your new details.

9. The Save Changes window appears. If select `Yes` or press **Alt Y**, the system saves the changes and closes the Save changes window and the Edit ID and Password windows automatically. Select `No` or press **Alt N** returns to the Edit ID and Password window. Press **Esc** or double click on the closebox to exit the Edit ID and Password window. You can now set or change other system parameters.

10. After making all necessary changes, select the `Save-To-Disk` option on the menu bar or press **Alt S** to save the changes to the hard drive.

11. The Save ID / Password window appears. If select `Yes` or press **Alt Y**, the system saves all changes made and all windows closes automatically. If your option is `No` or if you press **Alt N**, the Save ID / Password window closes. You will return to the ID / Password window. You can now exit this window by pressing **Esc** or double click on the close box.

Setting the Time and Date

The time and date are set within your telephone system (refer to your Telephone User Manual). This option is used to synchronize the QuickQ time and date to the Phone system. This function is performed automatically every hour, but can be performed manually as follows:

1. Pull down the `System Setup` menu.

2. Select `Time/Date`. A small Time/Date window appears.

3. If the displayed time and date are incorrect, click on the `Syn. Clock` box, or press **Enter.** This synchronizes the clock with the clock in the DXP (Figure 3-7) and closes the window automatically.

4. If no changes are necessary, close the window by double clicking on the close box or pressing the **Esc** key.

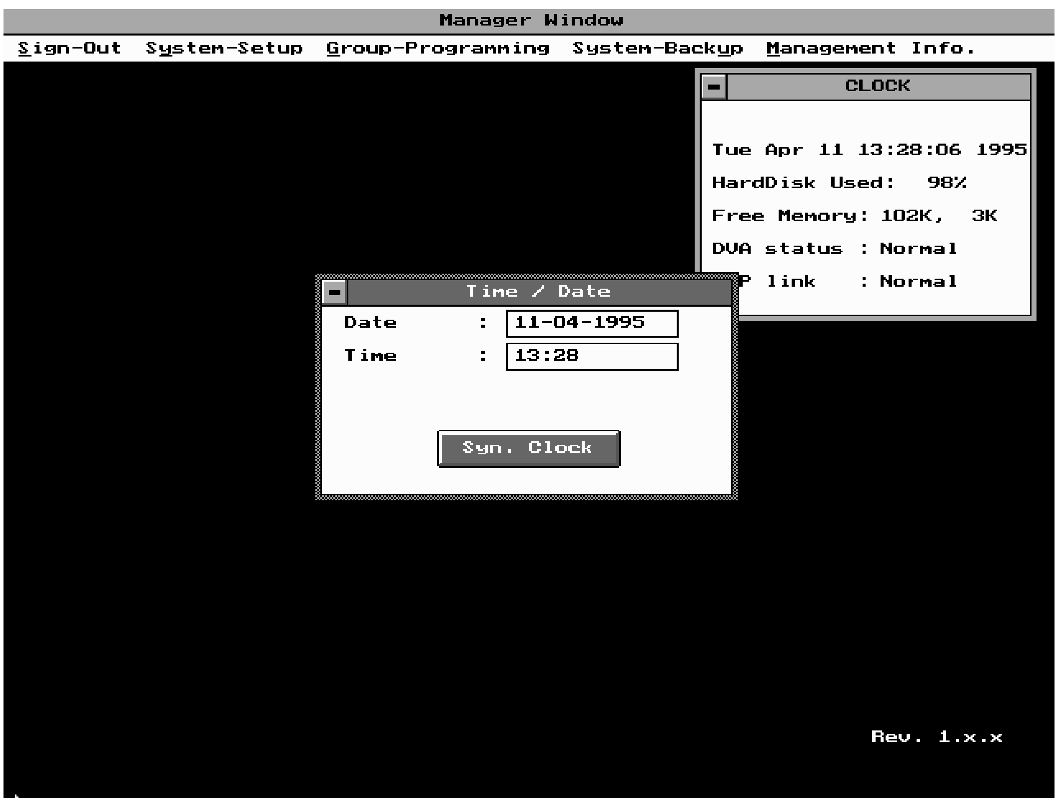

Figure 3-7. Synchronizing The Clock

Setting the Intergroup Overflow

Intergroup overflow improves the effectiveness of a Call Center by utilizing additional groups (departments) as back-up to answer calls, if the primary group is busy beyond the set time parameters. Once the overflow timer has been exceeded, the system presents the call to the first available of the five groups (primary and four overflow). For calls to overflow to the appropriate groups, you must set the overflow patterns using the following procedure:

1. Pull down the `System-Setup` menu and select the `Intergroup Overflow` option. The InterGroup Overflow window appears with a list of each group and their respective overflow levels (Figure 3-8). Overflow level 4 should display four extension numbers.

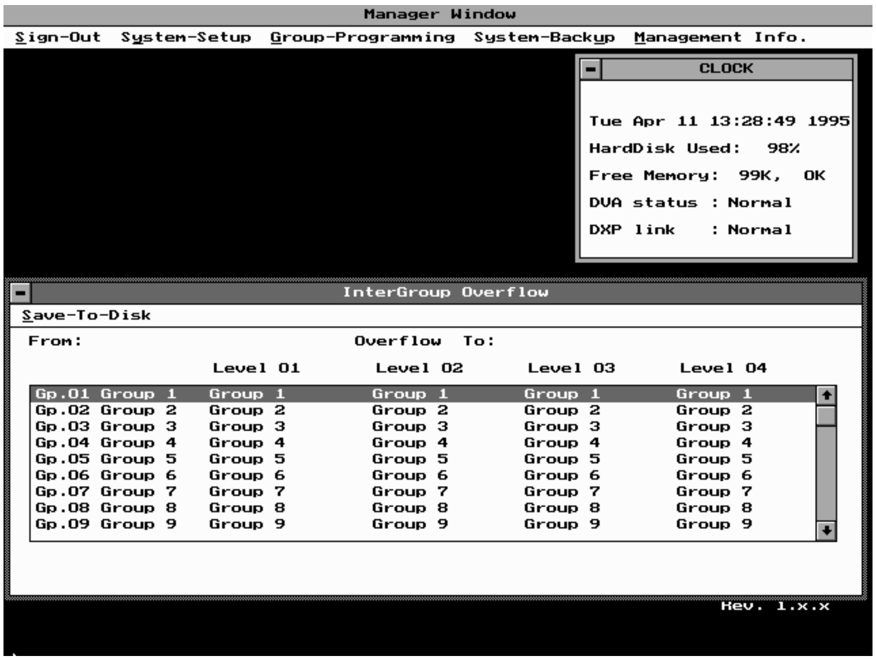

Figure 3-8. InterGroup Overflow Window

2. Use the Up and Down arrows and the **Page Up** and **Page Down** keys to highlight the group for which you wish to set the overflow parameters, and either press **Enter** or click on it with the mouse to select it.

3. The Edit *ACD* InterGroup Overflow window appears.

4. Press the Up/Down arrow keys to change between groups. Alternately, you can press the **Enter** key on a highlighted field to cause a pull-down menu to appear, then highlight the overflow option for that field. Press **Enter** again to insert the highlighted setting in the field and close the menus. To set the four overflow levels, use **Tab** to move from field to field. With the mouse, click on the down arrow at the end of the field to display the same menu. Click on a menu option to select it. This action automatically closes the menu.

5. When you have set the four overflow levels to your satisfaction, use the mouse to click on the `Up-Date` menu bar option and close the box or Press **Alt U.**

6. The Save Intergroup Overflow window with `Yes` and `No` option appears. Use the mouse to click on `Yes` or press **Alt Y** to save changes and automatically closes the menu. Click on `No` or press the **Alt N** key to return to the Edit ACD Intergroup Overflow window. If, at this point, you wish to exit the window, double click on the close box with your mouse or press the **Esc** key.

7. When you have set the overflow patterns for all of the groups that you will use, use the mouse to click on the `Save-To-Disk` option on the menu bar or press **Alt S**. The Save Intergroup Overflow window appears. Select `Yes` or press **Alt Y** saves the changes and closes the windows automatically. Press the **Esc** key or double click on the close box to exit.

Setting Announcement Titles

The integrated D.V.A. provides voice storage for 16 messages (total 5 min. 20 sec. recording time). These messages are recorded from any telephone set logged in as a supervisor.

Note: Describing the content of these messages can be added to the P.C. by the manager.

Use the following procedures to set the Announcement Titles:

1. Pull down the `System Setup` menu and select the `Announcement` option.

2. The Message window appears (Figure 3-9) to provide information.3.Use the **Tab** key or click on the mouse to move the highlight to the D e s c r i p t i o n field ofthe message that you wish to title. Type a reminder note to help you identify and locate the various messages.

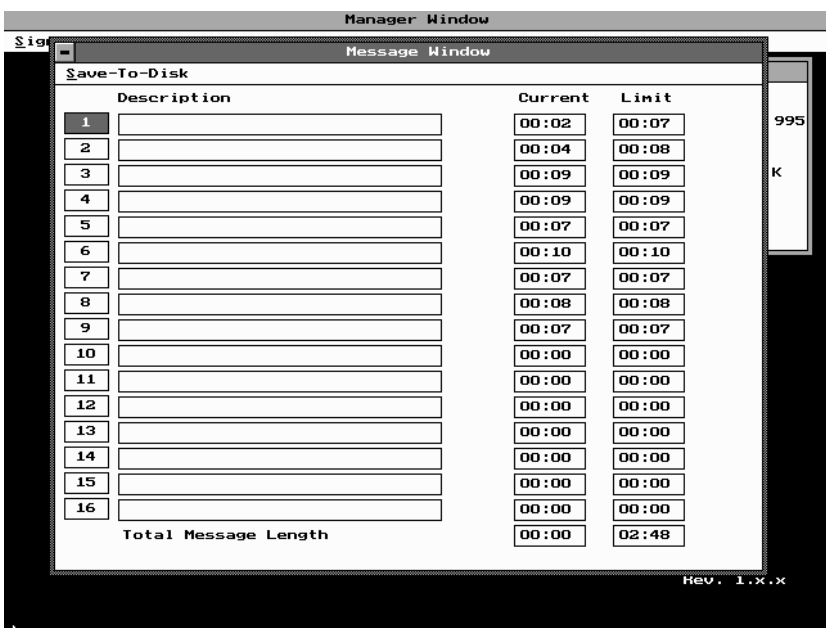

Figure 3-9 Message Window

3. Use the **Tab** key or click on the mouse to move the highlight to the D e s c r i p t i o n field of the message that you wish to title. Type a reminder note to help you identify and locate the various messages.

Note: The times shown beside the descriptions detail both the total time allocated to the message (that is, the length of time occupied by the,first version of the message) and the amount of recording time that the current message occupies.

4. If a number is selected by clicking on the mouse or pressing Enter, it will open the Message Information window indicating which group and subgroup is assigned the message. It also indicates whether the message is a first, second, night or special message. This window is mainly for information purpose and does not include editing function. Press Esc or double click on the close box to exit.

5. After updating the reminder notes for different messages, select Save-To-Disk. The Save Changes window will appear. Select **Yes,** or press **Alt Y** to save the changes and close both windows. Select **No** or press **Alt N** to return to the Message window. Press **Esc** or double click on the close box to exit.

Assigning Account Codes

QuickQ enables you to classify calls into various categories by assigning account codes to the calls. Agents classify each call from their telephone using the account codes that the System Manager assigns with this procedure.

1. Pull down the `System-Setup` menu and select the `Account Code` option. The Account Code Range window appears.

2. Type the appropriate account code range and click on the `Ok` button. The Account Code Setup window appears (Figure 3-10).

Note: The Account Code Range window allows you to select a range of account codes from a long list. If you only have a few account codes, you can bypass this screen by clicking on the Ok button.

3. To add new account codes, select `Add` from the menu bar or press **Alt A.** The Add Account Code Setup window appears.

4. Enter the new three digit code and press Enter. Type a description of the account code in the `Description` area. Click on the Create Account menu bar or press **Alt C.** The Add Account confirmation window appears.

Note: The code and description appears in the Account Code Report.

5. Click on **YES** or press **Alt Y** to add the information that you have just entered onto the Account Code Setup list. The system returns to the Add Account Code Setup window for another entry. If no further account is to be entered, press Esc or double click on the close box to close this window. You will return to the Account Code Setup window.

6. To edit an existing code, highlight the code and press **Enter** or click on the code with the mouse. The Edit Account Code Set up window appears.

7. After making the necessary changes, select `Update` from the menu bar or Press **Alt U. The Save** Changes to Account window appears. Click on `Yes` or press **Alt Y** saves all changes made to the code. The Edit Account Code Setup window & Save Changes to Account window disappears automatically. You will return to the Account Code Setup window.

8. To delete an Account Code, highlight the code and press **Enter** or click on the code with mouse. Select `Delete` from the menu bar or Press **Alt D** on the Edit Account Code Setup window. The Delete Account confirmation window appears. Click on `Yes` or press **Alt Y** will delete the account code highlighted. The Edit Account Code Setup window and Delete Account confirmation window closes automatically. Click on `No` or press **Alt N** closes the Delete Account confirmation window. You are now returned to the Edit Account Code Setup window. If no further changes is desired, Press Esc or click on the close box to exit.

9. After you finish setting up your account codes, select `Save-To-Disk` on the menu bar or Press **Alt S.** The Save Account Code(s) confirmation window will appear. Click on **Yes** or press **Alt Y** to save the changes to the hard disk and to close the window automatically. Click on **No** or press **Alt N** will return to the Account Code Setup window. If you do not want to save the changes previously entered, press **Esc** or double click on the close box to exit. Repeat the same steps to exit the Account Code Range window.

Note: The Account Code and description appears in the Account Code Report.

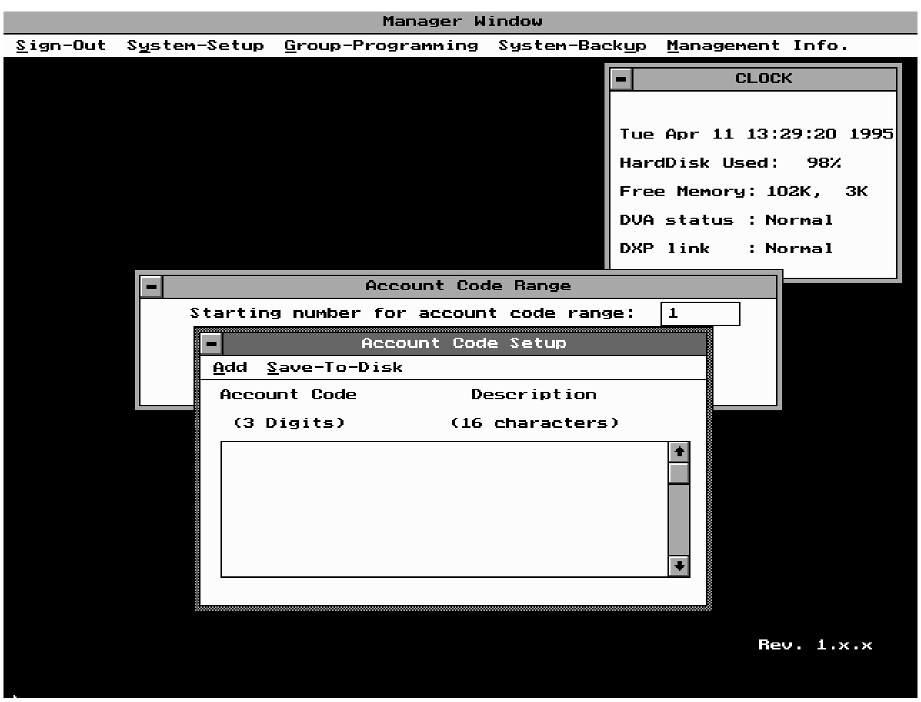

Figure 3.10. Account Code Setup Window

Arranging The Stat-Bins

QuickQ has six levels of stat-bins for answered and abandoned call statistics. Use the following procedure to setup the time bins that are used to collect the system statistics.

1. Pull down the `System-Setup` menu and select the `Stat-Bin` option.

2. A pull down menu appears with `Answer Bin` *&* `Abandon Bin`**.**

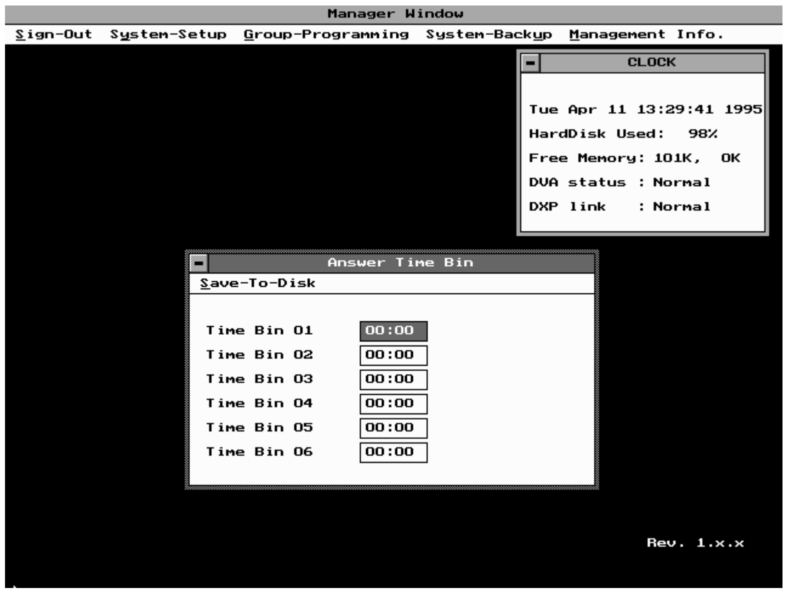

Figure 3-11. Answer Time Bin Window

3. Select *`Answer Bin`* ***a**nd th**e*** Answer Time Bin window appears. Highlight the Time Bin 01 box (Figure 3-11).

4. Type the time bin parameters in minutes and seconds. Repeat for all remaining time bins. You can move from one time bin to another by pressing Enter. Save the newly entered data by clicking on the `Save-To-Disk` menu bar item.

5. The Save Answer Time Bin window with `Yes` and `No` option appears. Click on `Yes` or press **Alt Y** saves the data entered and closes all windows. Click on `No` or press **Alt N** closes the Save Answer Time Bin window and returns to the Answer Time Bin window. Press **Esc** or double click on the close box to exit this window.

6. Pull down the `Stat-Bin` menu and select `Abandon Bin` option. Repeat step 4. The Save Abandon Time Bin window appears after selecting `Save-To-Disk` on menu. Click on `Yes` or press **Alt Y** saves the data entered and closes all windows. Click on *No* or press **Alt N** closes the Save Answer Time Bin window and returns to the Answer Time Bin window. Press **Esc** or double click on the close box to exit this window.

Programming Group Levels

By System Manager

Group Supervisors can only alter the parameters for their particular group but System Managers can use this procedure to change any of the settings for any of the groups.

1. Select the `Group Programming` from the Manager window menu bar. A pull-down menu appears with the names of all the groups on the system (Figure 3-12).

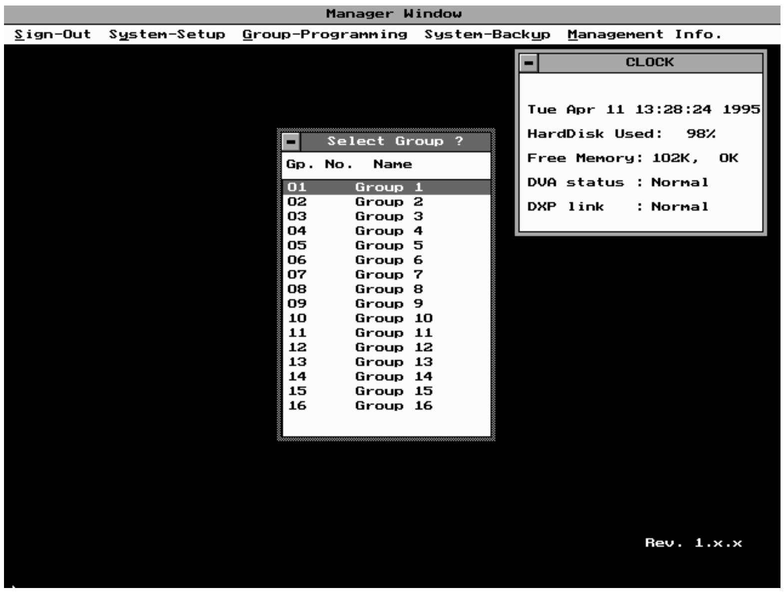

Figure 3-12. List of System Groups

2. Select the group you require (either highlight it and press **Enter** or click on it with the mouse). A small window appears offering you the chance to either sign through to that group or to abandon the action. Select the action you wish to perform by clicking on the appropriate button.

3. No further action takes place if you select `No`; however, you can choose another option from the Manager window menu bar.

4. If you select `Yes`, the system puts you at the Manager/Supervisor level. The screen will change to the Supervisor screen where you will have access to all of the group Supervisor facilities. (These are described in the Group Level Programming By Supervisor).

5. When you sign out from the Manager/Supervisor level, the system returns to the normal Manager level. To log out from the system, make sure you are at the Manager window (and not at the Manager/Supervisor window), and select the `Sign Out` option from the menu bar. The system then displays the Sign In window showing the `Sign In` option menu bar. The system is now ready for the next person to sign into the *QuickQ* system.

By Group Supervisor

As a Group Supervisor, you must sign into the system using the following procedure.

1. On the main system window, select the Sign-In menu bar option. The system Access window appears. The Group Supervisor's default ID# and password are follows: 901 for group 1, 902 for group 2, and so on through 916 for group 16. If you experience difficulty, verify ID and password numbers with the System Manager.

2. Press Enter of click on Select at the Supervisor/Manager Sign-In Window.

3. Once you have signed into the system, the Supervisor window appears and the main menu bar displays five options:

- Group Setup
- Agent Group Setup
- Line Group Setup
- Management Info.

From here, you can set certain parameters for your group and examine the Management Information System reports.

Preparing The Group Layout / Worksheet

Always prepare your Group Supervisor's programming worksheet before you begin configuring the group at the console. Refer to Appendix C of this publication for the Group Supervisor's Programming Worksheet.

Configuring The Group

Use this procedure to configure your group parameters:

1. Select `Group Setup` from the menu bar. The Group Setup window (Figure 3-13) appears and shows the group name in the title bar. The screen also displays the default settings for a variety of parameters. Continue with step 2.

2. To change the overflow threshold, move the highlight to the top box, and enter the new time in place of the old time. This programming action sets the time that a call waits before the system transfers it to the overflow groups.

3. Repeat step 2 to set the Redirect Threshold (Time). Always set this time to less than one minute (the default time is 20 seconds). If a call is ringing beyond the Redirect Threshold time, the system will transfer the call to another agent. At the same time, it will also make the previous agent Busy, so calls will not be directed to this agent.

4. The Alarm Threshold (Time) is a preprogrammed time parameter to monitor the number of calls waiting in queue (default period is 45 seconds). When the Alarm Threshold (Time) works together with the Alarm Threshold (Calls in Queue), the audible alarm will trigger on the Agents' sets.

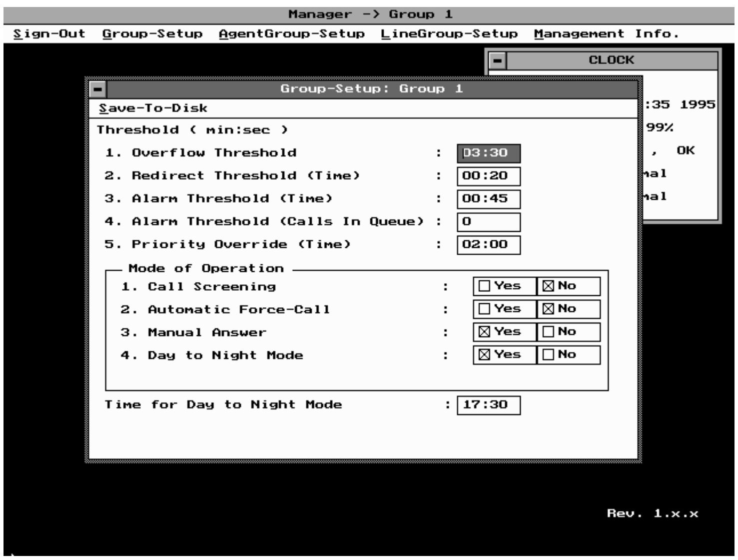

Figure 3-13. Group Setup Window

5. The `Alarm Threshold (Calls In Queue)` specifies the number of calls exceeding the Alarm Threshold Time before the audible alarm is triggered. To disable the audible alarm, set this parameter to 0. If you wish to primarily use the `Alarm Threshold (Time)` to trigger the alarm, set this parameter to 1.

6. The `Priority Override` time determines how long a low priority call remains in queue before the system promotes it to the highest priority. This is useful when a number of high priority calls are coming in and a low priority call has been waiting for some time.

7. If you set the `Call Screening` field to `Yes`, the system forces all callers to listen to the entire first message. This action reduces the number of calls that require personal assistance by providing the information on the first message.

8. Use the `Automatic Force Call` field when the Agents are using a headset. The system sounds a tone in the Agent's headset and connects the call. The default setting is `No`. The action provided by this feature is the opposite of `Manual answer`**.** Therefore, if you set this option to `No`**,** the system automatically changes `Manual answer` ***to*** `Yes`**.**

9. `Manual Answer` mode is used when agents have to answer calls with the handset. When the `Automatic Force-Call` is changed to `No`**,** this option will be set to `Yes` ***automatically.***

10. `Day to Night` Mode specifies whether the system will automatically switch to night mode at the specified `Day-to-Night` Mode time.

11. Enter the time for `Day-to-Night` Mode in the last box. This time is based on a 24-hour clock.

12. After finishing with the `Group Setup` window, use the `Save-To-Disk` option on the menu bar before you close the window.

13. The `Save Group Setup` window appears. Select `Yes` or press **Alt Y** to save and close the windows automatically. Select `No` or press **Alt N** to close the `Save Group Setup` window and return to the `Group Setup` window. Press **Esc** or double click on the close box to exit**.**

Configuring the Agent Group-Setup

Use this Agent group setup procedure to assign agents to the Agent sub-groups, to remove Agents from a group, and to set or change Agents' ID#, password, priority and wrap-up times. Agents may be assigned to one of four Sub-groups. These Sub-groups are used for statistic purposes only. (For example: Subgroup 1 contains all full-time staff, subgroup 2 are all part-time staff, etc.) Calls will be distributed to all agents in all subgroup evenly.

1. Select Agent Group Setup from the menu bar, a pull down menu appears with 4 Agent Groups. Select the sub-group you wish to work with and the Agent Group Window appears. The scrollable area (the area with scroll bar on the right edge) contains the Agent details. If there are no agents in the group, this area is blank (Figure 3-14).

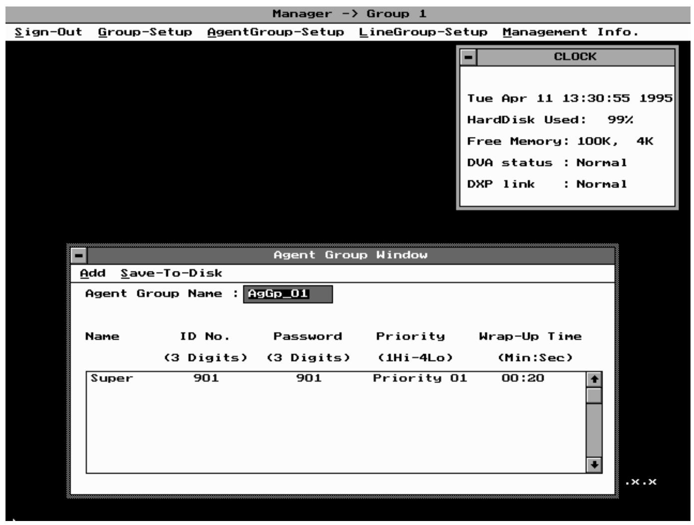

Figure 3-14. Agent Group Window

2. If the selected subgroup does not exist, the Add Agent Group Window will appear. Select Yes or press **Alt Y** creates the subgroup and opens the Agent Group Window.

3. To add an agent, select Add from the menu bar. The Add Agent Window appears at the top of the screen (Figure 3-15).

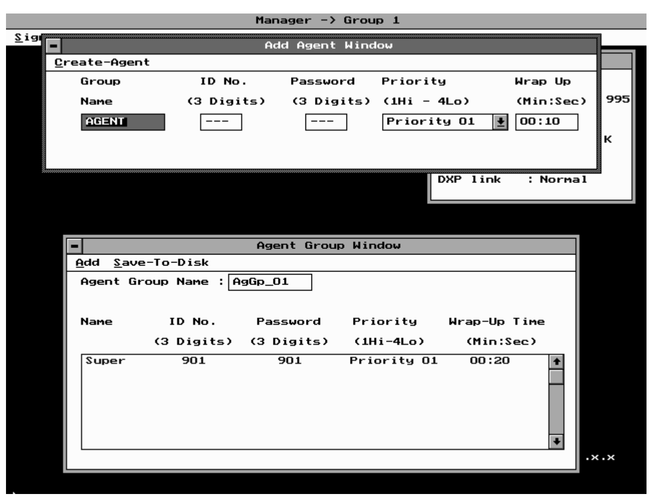

Figure 3-15. Add Agent Window

4. Type the name of the Agent at the AGENT default entry.

Note: If you are using the keyboard, use the **Tab** *key to move from field to field. If you are using the mouse, click on the field you wish to work with.*

5. Enter the `ID#` ***and*** `password` for the Agent. When you are in the `Priority` field, press **Enter** or click on the arrow icon, and a drop-down menu appears. From this menu, select the priority for the Agent (Priority 01 is the highest and 04 is the lowest. When a call comes in, it will first be sent to agents with the highest priority). Enter the wrap-up time (in minutes and seconds) in the Wrap Up field (Wrap-up time provides the agents a short break to finish off their paper work before they are assigned another call).

6. After you have entered all Agent details, select the `Create-Agent` from the menu bar. The Add Agent Window appears prompting you with `Yes` or `No`**.** Select `Yes` or press **Alt Y** will add to the agent list and return to the Add Agent Window. If there is no more entry, press **Esc** or click on the close box to exit the Add Agent Window.

7. If you wish to change or delete an Agent entry from the sub-group, highlight it and press **Enter** or click on it with the mouse. The Edit Agent Setup window appears, and provides two options on the menu bar, `Up-Date` and `Delete`**.** After changing the agent information, select `Update` or press **Alt U.** The Update Agent Information window appears with `Yes` and `No` option. Select `Yes` or press **Alt Y** saves the changes made. The Edit Agent Setup window and the Update Agent Information window closes automatically. Select `No` or press **Alt Y** closes the Update Agent Information window and returns to the Edit Agent Setup window.

Note: Press `Enter` *to move the cursor from the* `Agent Group Name` *to the Agent in the scrollable area.*

8. If you wish to delete the agent from the sub-group, click on the `Delete` option or press the **Alt D** key. The Delete agent from sub-group window appears. Select `Yes` or press the **Alt Y** to delete the agent from the Agent Group list. The Delete agent from sub-group window and the Edit Agent Setup window closes automatically.

9. After entering all agent information, select `Save-To-Disk` on the menu bar or press **Alt S.** The Save Agent Group window appears with `Yes` and `No` prompt. Select `Yes` or press **Alt Y** saves all information to the hard disk and closes the windows automatically. Select `No` or press **Alt N** closes the Save Agent Group window and returns to the Agent Group Window. Press **Esc** or click on the close box to exit.

Configuring the Line Group-Setup

During installation, the technician assigns the lines to different Subgroups e.g. local lines will be grouped in one Subgroup and In wats lines will be grouped into another Subgroup**.** `LineGroup-Setup` is used to set up various parameters for the line groups. It provides end users flexibility of assigning different messages and priority levels to the different Subgroups. Use this `LineGroup-Setup` procedures to configure parameters for the installer-assigned line groups

1. Select `Line Group-Setup` from the menu bar, and select one sub-group from the drop-down menu. The Line Group window opens with the title of the line group in the title bar (Figure 3-16). If the selected Line Group does not exist, the Add Line Group Window appears. Select Yes or Press Alt Y to create a Line Group and the Line Group Window appears.

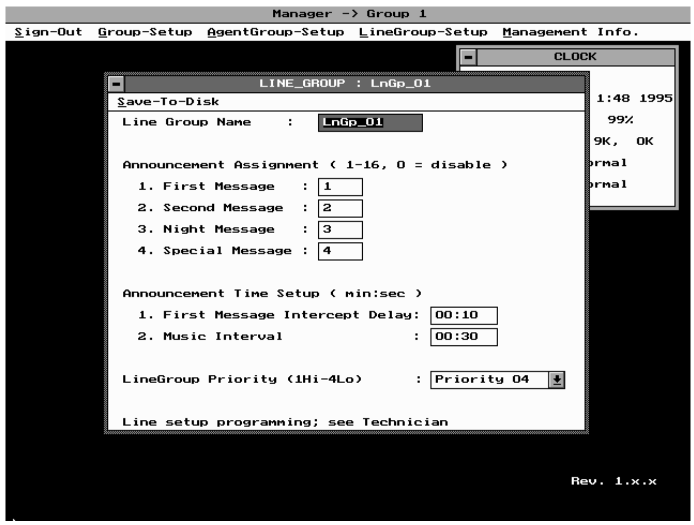

Figure 3-16. Line Group Window

Note:If you open a non-existing Line Group b by mistake,always select **No** *or press* **Alt N**. *Once you create a new Line Group,it cannot be removed-lf the line Group created will appear on aIl Line Group reports. However, this will not affect normal operation.*

2. To change the name of the line group, highlight the Line Group Name box and begin typing.

Note: If you are using the keyboard, use the **Tab** *key to move from field to field and you are using the mouse, click on the field you wish to work with.*

3. You can specify which messages (16 available messages)the system will use. If all agents are busy, the first message offers an introductory message and put customers on hold. The second message reassures customers that an agent will be with them shortly. The default is messages I and 2 respectively.

4. The system plays the night message while *QuickQ* is in night mode, and disconnects the caller at the end of the message. The default for &s message is 3.

5. The system plays the special message in unusual circumstances and disconnects the caller at the end of the message. Special message can be used in emergency situations such as power failure, bomb threat if the office has to close early. When the system switches to night mode, the special message or system switch automatically changes to night message.

6. The First Message Intercept Delay is the time between when *QuickQ* answers the call and plays the first message to the caller since all agents are busy. Enter this time in minutes and seconds (default equals 10 seconds).

7. The Music interval is the time between messages(between the first and second. and between repeats of the second message). Enter this time in minutes and seconds (default equals 30 seconds).

8. Establish the line group priority. Click on the arrow icon or press Enter to open a drop-down menu. Use this menu to choose a priority level (01 is the highest priority and 04 is the lowest priority). Priority lines are usually assigned to in wats lines to cut down long distance cost.

9. When you have finished setting the parameters, save your changes by selecting the save-To-Disk option from the menu bar. The Save Line-Group Changes window appears. Select **Yes** or press **Aft Y** to save and close the windows.

Understanding the Messages

The *QuickQ* system can store up to 16 messages. The Message window (refer to *Setting Announcement Titles* on Page 3-9) allows you to view the length and number of these messages. You can enter a description to label each one if you wish.

The Current setting shows the length of the message in minutes and seconds. The Limit setting shows the time available for the message. *QuickQ* allows a total of 320 seconds of message recording time.

If you plan to frequently change the messages, record a blank message with enough recording time for future changes. Refer to the discussion titled *Recording Announcement Message and Playback* in the *QuickQ* operation section of this guide for message recording and playback information.

Management Information

QuickQ provides both real time and historical statistical information on the performance of the call center. Supervisors can select `Management Info.` from the menu bar and a drop down menu with the following 5 options appears:

- Real Time-Setup
- Real Time
- Historical
- Current
- Configuration

Refer to Section 5, Management Information for further details.

System-Backup

The *QuickQ* automatically stores all Programming changes and Statistical Data to the P.C.'s hard disk. The System - Backup option provides a method to back-up data, onto floppy disk. This ensures safe storage of the Digital Announcement Messages, the Configuration Parameters and the Statistical Reports. It is a good practice to always back-up an), changes to messages and configuration programming-, thus., protecting against interruptions in power, hardware failures and inadvertent deletion of information, QuickQ is equipped with sufficient memory to store several years of Statistical Reports. However, Statistical Reports should be backed-up every 3-4 months. Delete all unwanted reports and save to floppy disk important data for storage. This will ensure optimum efficiency of the hard disk, protect important data and ensure the hard disk has sufficient space to store future data.

Announcement Backup

To back up the messages, perform the following procedure-

1. Select `System-Backup` from the Manager Window main menu and a drop down menu with the following three options appears:

Announcement Backup

Configuration Backup

Stats Backup

2. Select A n n o u n c e m e n t B a c k u p and the Message Backup and Restore window appears (refer to Figure 3-17).

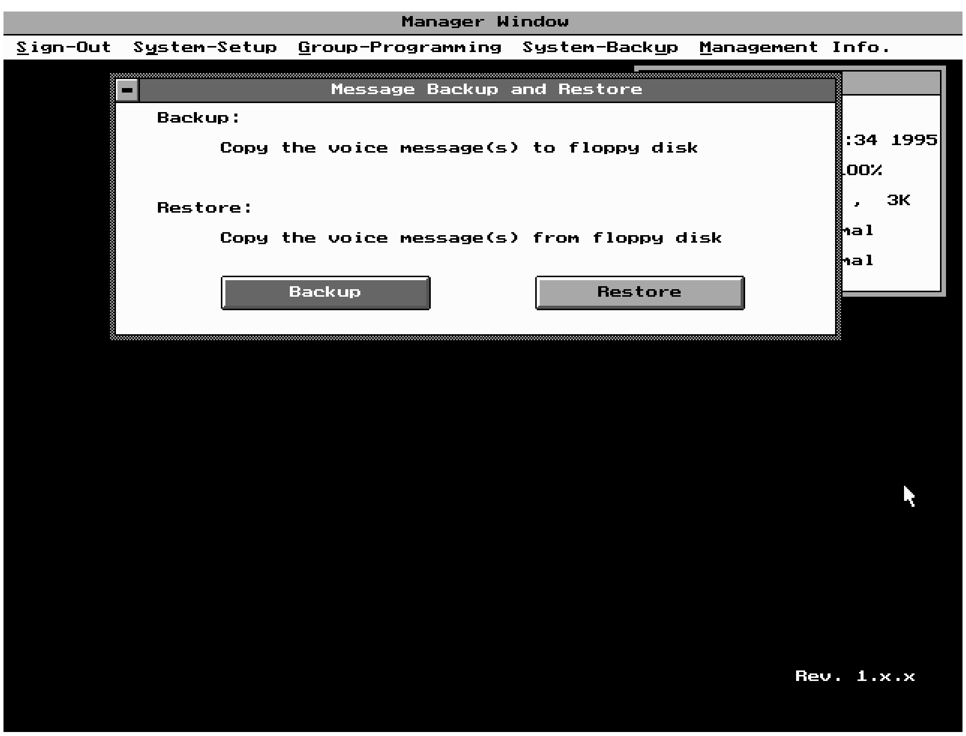

Figure 3-17. Message Backup and Restore Window

3. Use the Backup button to send the current DVA messages to the floppy disk. The Restore button retrieves the DVA messages from the floppy disk to the hard drive.

Note: Use the **Tab** *key to move from the Backup button to the R e s t o r e Button. The messages are backed up to the 3.5–inch.floppy disk drive in the DVA, not the floppy disk drive in the call processor-Install the correct floppy disk in the DVA drive before you start a backup or restore action.*

Configuration Backup

1. Select `Configuration Backup` on the System-Backup pull down menu. The System Program Back-up/Restore window appears. Refer to Figure 3-18.

2. Select the B a c k up button to send the current System Programs to the floppy, disk. The Back up to Floppy window appears with Yes and No option. To initiate the backup process, press **Alt Y** or use your mouse to click on **Yes**.

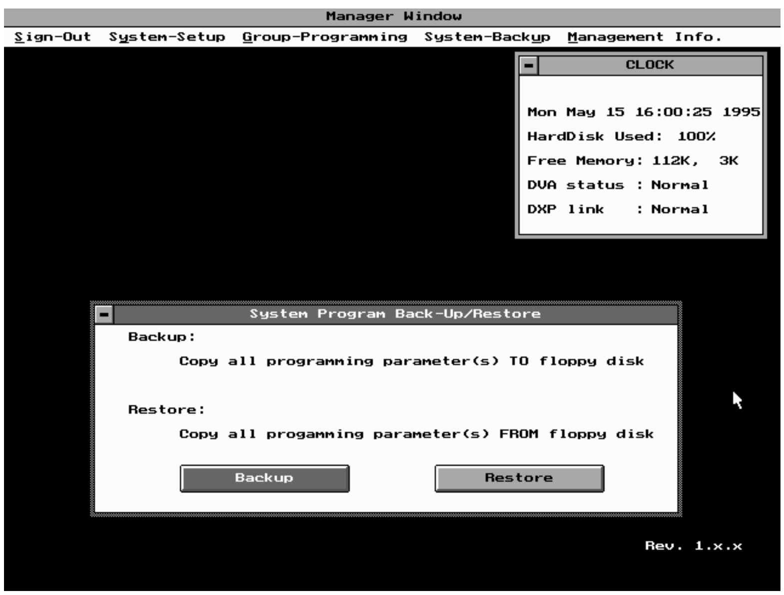

Figure 3-18. System Program Back-up/Restore Window

3. To restore System Programs, select the Restore button. The Restore Window, appears with two options: Continue and Cancel. Selecting `continue` resets the system before the data is restored.

Stats Backup

1. Select `Stats Backup` from the `System-Backup` pull down menu, the Report Back-Up/Clean-Up window appears. Refer to Figure 3-19.

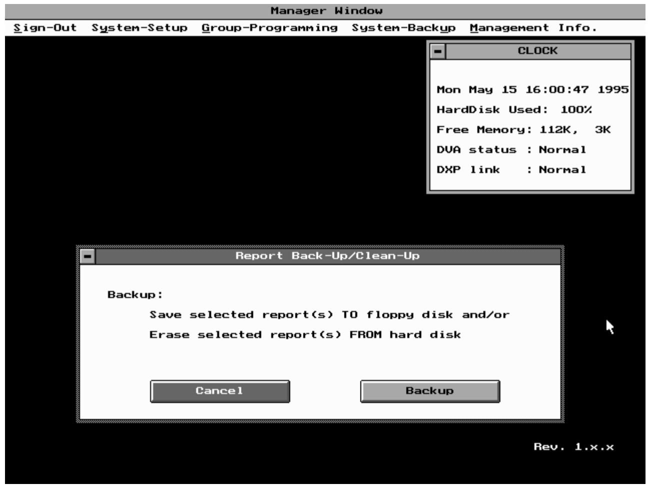

Figure 3-19. Report Back-Up/Clean-Up Window

2. Use the **Tab** key to move from the `Cancel` button to the `Backup` button. Select `Cancel` exits this function and closes the Report Back-Up/Clean-Up window. When selecting `Backup`, the Report Backup/Cleanup window appears. Refer to Figure 3-20. Select the `Continue` button to initiate the Report Back-Up function. Refer to Appendix E, Backup Utility section for details.

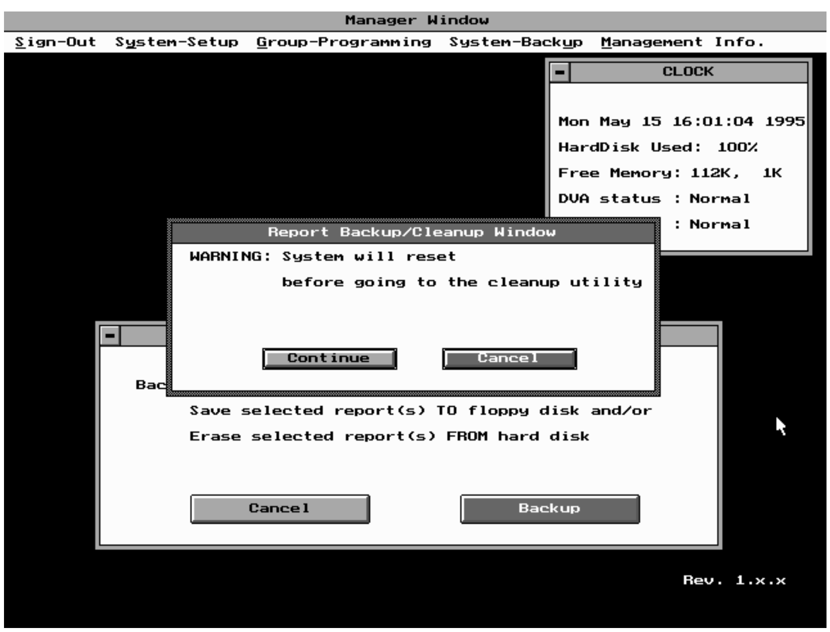

Figure 3-20. Report Backup/Cleanup Confirmation Window

This page remains blank intentionally.

Operating the QuickQ System

Logging In and Out of QuickQ

The following Log-In and Log-Out procedures apply to both Agent and Supervisor. They differ in the following areas:

- ID# and password are different,
- Agents can log into several groups at once,
- Supervisors can choose whether to receive calls or not.

Follow this procedure to log into the system.

1. Press the `QuickQ` button on the telephone and the following screen will appear. This display notifies you that you are about to log into *QuickQ*.

```
Welcome - > QuickQ
```

2. Type your three digit Agent ID number. If you enter an incorrect Agent ID number, press the **RETRY** interactive button and enter the correct ID number, or use the **QUIT** interactive button to exit the Log-In procedure.

```
Agent ID:_
RETRY                    QUIT
```

3. Type your Agent `password.` Remember, use **RETRY** or **QUIT** if necessary.

```
Password:
RETRY                    QUIT
```

4. ***For Agents***:
   The system asks the agents to log into the appropriate group. If the supervisors has assigned you to multiple groups, use the displayed screen to locate the group into which you wish to log. Press the **IN** interactive button to log into the displayed group. The system displays your next group. You can press the **IN** interactive button to log into that group or press the **SKIP** interactive button to display the next group after that and so on. Alternately, press the **ALL** interactive button and log into all of the groups at once.

```
Group 1?
IN      SKIP      ALL
```

For Supervisors:
The system presents supervisor with a screen that asks if they wish to accept calls or not. Respond by pressing either the **YES** or **NO** interactive button.

Answer Call?
YES NO

5. The following screens indicates you are now ready to accept ACD calls:

For Agents:

QuickQ: Group Name
BUSY HELP LOG

For Supervisors:

Group Name :Day
MENU MODE LOG

6. ***For Agents logged into one group:***
You can log out from *QuickQ* while in the Ready, Busy or Wrap-up modes. To do this, press the **LOG** interactive button. You are now in the Log Procedure, press the **OUT** interactive button to log out.

Log Procedure
IN CANCEL OUT

For Agents logged into multiple groups:
After you press the **OUT** interactive button from the Log Procedure, the system asks which group you wish to log out from. You can press the **OUT** interactive button to log out of the group shown on the display. You can press the **SKIP** interactive button to display the next group. Press the **ALL** interactive button to log out of all the groups that have more than one agent.

Group Name
OUT SKIP ALL

The last agent cannot log out of *QuickQ* if the group is in day mode. The following screens will appear:

Can't Sign Out
CANCEL

after 2 seconds: →

Busy
CANCEL

For Supervisors:
Press the **LOG** interactive button will bring you to the Log Procedure. Then press the **OUT** interactive button. The screen will ask whether you want to exit *QuickQ*. Press the **Yes** interactive button to exit.

Log Procedure
IN CANCEL OUT

→

Exit from QuickQ
YES NO

Operating As An Agent

Answering Automatically

In the automatic answer mode, with a headset enabled, when a call arrives at your telephone, you receive a warning tone and the system automatically connects the call. Speak into the mouth-piece of the headset. The display shows the call sub-group and the length of time the caller waited to be connected.

```
Sub-Group Name:   01:20
                  BUSY
```

Answering Manually

In the manual answer mode when a call arrives at your telephone, the telephone will ring.

- ***Lift the handset or press the SPEAKER button to answer the call. The LCD display shows the call sub-group and the length of time the caller waited to be connected.***

Note: *Use the speakerphone option with discretion as it creates noise in the office and subjects your caller to background noise as well.*

- You may choose not to answer the call by pressing the **BUSY** interactive button. *QuickQ* will either redirect the call to another Agent, or it will show `All Agents Busy!` on the display if no one is available to take the call. If the display shows `All Agents Busy!,` you cannot make your telephone busy.

```
All Agents Busy!
          BUSY
```

- When a call has reached the preset redirect threshold time, the system will forward the call to another agent and will make your set **BUSY** at the same time.

```
Busy
CANCEL   HELP   LOG
```

Wrapping Up A Call

At the end of each call the system sets aside an installer-programmed time (individually programmable for each Agent in minutes and seconds) before presenting the next call. This time allows you to finish any processing or paperwork associated with the call you just completed.

- When you disconnect the call, the wrap-up timer starts and the display shows the wrap-up time, the number of calls in queue, and the number of those calls that have waited beyond the alarm threshold.
- Either remain in wrap-up mode until the wrap-up timer expires or press the **READY** interactive button to return to Ready mode.

```
Wrap-up—> 20 sec.
READY    ACC    BUSY
```

↓ after 2 seconds

```
Waiting : 00    <T : 00
READY    ALL    BUSY
```

Making Your Telephone Busy

You can arrange your telephone to be unavailable to answer calls (for such times as lunch and breaks).

- To make your telephone busy, press the **BUSY** interactive button.
- To return to the ready mode, press the **CANCEL** interactive button.

Busy
CANCEL HELP LOG

Requesting Help

When necessary, you can use this procedure to request help from your Supervisor.

1. While engaged on a call, press the **HELP** interactive button. If the Supervisor is busy or unavailable (after 5 seconds of prompting) your telephone display shows `Supervisor Busy!`. You can either retry or cancel the request.

Line Name Sub Grp Name
ACC WRAP HELP

2. When the Supervisor calls you, you can either bring him or her into the call (conferencing) or put the caller on hold and speak to the Supervisor in private.

Supervisor Ready!
CONF HOLD

3. If you choose to speak to the Supervisor with the call on **HOLD**, you have the option of bringing in the customer into the conversation later by pressing the **CONF** soft key. Alternately, you can press **TRANS** to transfer the call to the Supervisor, or press **RETURN** to get back to the caller after receiving assistance from the Supervisor.

Line Name: Held!
CONF RETURN TRANS

4. While conferencing with the Supervisor, you can press the **RELEASE** interactive button to drop the Supervisor from the call or transfer the call to the Supervisor.

Ln Name: Supvr. Name
CONF RETURN TRANS

Transferring Calls In or Out of QuickQ

Use this procedure to transfer calls.

1. While on a call, press the telephone's **TRANS** button.

2. Dial the intercom number of the station to receive the transfer. The system will transfer the call. After the station receiving the transfer answers the call, the system will place your station in the wrap-up mode.

Making an Outgoing Call

To make an outside call, press the **LINE GROUP** button to connect your telephone to an outgoing line, and make your call in the normal way. While on an outgoing call, you can either request help from your Supervisor, enter an account code for the call, or wrap-up the call in the same way as on an incoming call.

Outgoing
ACC WRAP-UP HELP

Entering Account Codes

You can use any screen that has the ACC option to enter an account code to categorize the call according to the call type.

1. Press the **ACC** interactive button at any time during the call or during wrap-up mode. Enter the three digit account code (the System Manager manages the account codes). If you enter an incorrect account code, press the **RETRY** interactive button and enter the correct account code or exit to abandon and return to the original screen.

Acc Code:___
RETRY EXIT

2. Press **OK** to verify the code or **RETRY** if you enter an incorrect account code. If the code is invalid, the system prompts you to re-enter the code.

Account Description
RETRY OK

Operating As A Supervisor

As a Supervisor, you can log in at either the *QuickQ* console or the DXP telephone.

Changing the Mode of Operation

There are three distinct answering modes—Day, Night and Special.

- Day Answering Mode—The system answers with the day message, places calls on hold and distributes incoming calls to the next available Agent. The call distribution is based on the longest idle time, or the priority of the Agent or incoming line.
- Night Answering Mode—The system answers with the night message then disconnects the caller. This mode is enabled automatically at a preset time. The system automatically logs out all agents when calls in queue have been cleared. Supervisor can change the state manually.
- Special Mode—The Group Supervisor initiates the special mode for unique situations (for example, network problems). During this mode of operation, the system answers callers with the special message and disconnects them. When the preset night mode time is reached, the system will automatically switch from special mode to night mode.

Use the following procedure to select the required mode of operation:

1. From the Supervisor's telephone, press the **MODE** interactive button.

```
Group 1 : Day
MENU          MODE          LOG
```

2. Select the mode of operation from the following displayed options: DAY, NIGHT, SPECIAL. After you make your selection, the display returns to the Supervisor main menu and shows the new mode at the top right corner.

```
Group Mode?
DAY           NIGHT         SPEC'L
```

Recording And Playing Back The Announcement Message

You can use your telephone to review and change any announcement message. For messages that are to be changed frequently, record your message with a buffer. For instance, record message #1 which takes up 10 seconds, follow by 10 seconds of silence. Go ahead and record message #2. After finished recording message #2, go back to record message #1 again. In this way, customers will only hear the message, and not the blank silence following it. The blank time will be saved as a buffer for future usage. If there is a change in message #1, it can be 10 seconds longer than the original message. Refer to the discussion titled Recording Announcement Message and Playback in the QuickQ operation section of this guide for message recording and playback information.

Use the following procedure to record a message.

1. Press the **MENU** interactive button .

2. Press the **MSG** interactive button.

```
Waiting:02 > T:00
MSG            REPORT          AGENT
```

The system displays the total time remaining for the new messages.

3. Dial the number of the message that you wish to record or change. For numbers lower than 10, dial a leading 0 (for example, 01–09). Press **RETRY** if you enter an invalid number, Press **CLEAR** to clear all message or **QUIT** to return to the main menu.

```
Message #:
RETRY          CLEAR           QUIT
```

4. The display shows the message length in seconds (it shows 0 seconds for new messages). Press the **REC** interactive button, a tone will alert you to start recording, speak the message into the telephone handset.

```
Message01:    00sec
REC            PLAY            QUIT
```

5. When you have finished, press the **STOP** interactive button, a tone indicates the end of the recording.

```
Recording Msg 01
          STOP
```

Note: If possible, record all of the messages as a group. If you do re-record a message, the new message must be the exact length as it was before or you will record over the next message. For example, if you replace a 15 second message with a 20 second message, you will record over the next message.

6. To review the message, press the **PLAY** interactive button.

```
Accept Message?
YES            NO            PLAY
```

7. The system plays the message through the handset.

```
Playing Msg 01
                             STOP
```

7. Press **YES** to accept the message or **NO** to re-record the message.

```
Accept Message?
YES            NO            PLAY
```

Monitoring The Agents

You can monitor an Agent's activity status or telephone conversation. The activity status names the Agent and details the following status items:

- engaged on an incoming call,
- engaged on an outgoing call,
- engaged in Make Busy Mode,
- idle
- ready to receive a call.

Use this procedure to monitor a particular Agent:

1. Press the **MENU** interactive button.

```
Group 1 : Day
MENU           MODE           LOG
```

2. Press the **AGENT** interactive button.

```
Waiting:02 >T:00
MSG            REPORT       AGENT
```

3. Dial the `ID#` of the Agent you wish to monitor or press **SCAN** and let the system select an Agent number for you.

```
Agent Id: ___
SCAN           RETRY         QUIT
```

4. Press the **SELECT** interactive button to monitor the Agent's call.

Agent Name :Incall
SCAN SELECT QUIT

5. Press the **SCAN** interactive button to monitor another system selected Agent or press **QUIT** to return to step 3.

Agent2 Name :Idle
SCAN SELECT QUIT

6. Press **QUIT** again to return to the Supervisor's menu.

Viewing The Current Call Statistics

QuickQ causes your LCD speakerphone to display the current number of answered and abandoned (lost) calls within a group.

Use this procedure to view the call statistics.

1. Press the **MENU** interactive button.

2. Press the **REPORT** interactive button.

Waiting: 02 >T:00
MSG REPORT AGENT

Your LCD speakerphone displays the number of answered and abandoned calls.

3. Press **QUIT** to return to Supervisor menu.

Ans: 123 Lost: 4
QUIT

This page remains blank intentionally

Management Information

The System Manager can obtain a detailed printout of the system configuration for the manager level, the technician level, the supervisor level, or for each individual group.

When someone selects the `Management Info.` menu bar option, the system presents a menu that has several options. The menu offers the following options:

- `Real Time-Setup` (For Supervisor)
- `Real Time`
- `Historical`
- `Current`
- `Configuration`

Selecting The Real Time Report

Viewing The System Manager Real Time Report

The System Manager's real time report shows information in the System Agent Status window and the System Line Status window. Refer to Figure 5-1. System Manager Real Time Report. The system continually updates these windows in approximately 3 second intervals so that they reflect current line activities and statistics of both the Agents and the lines.

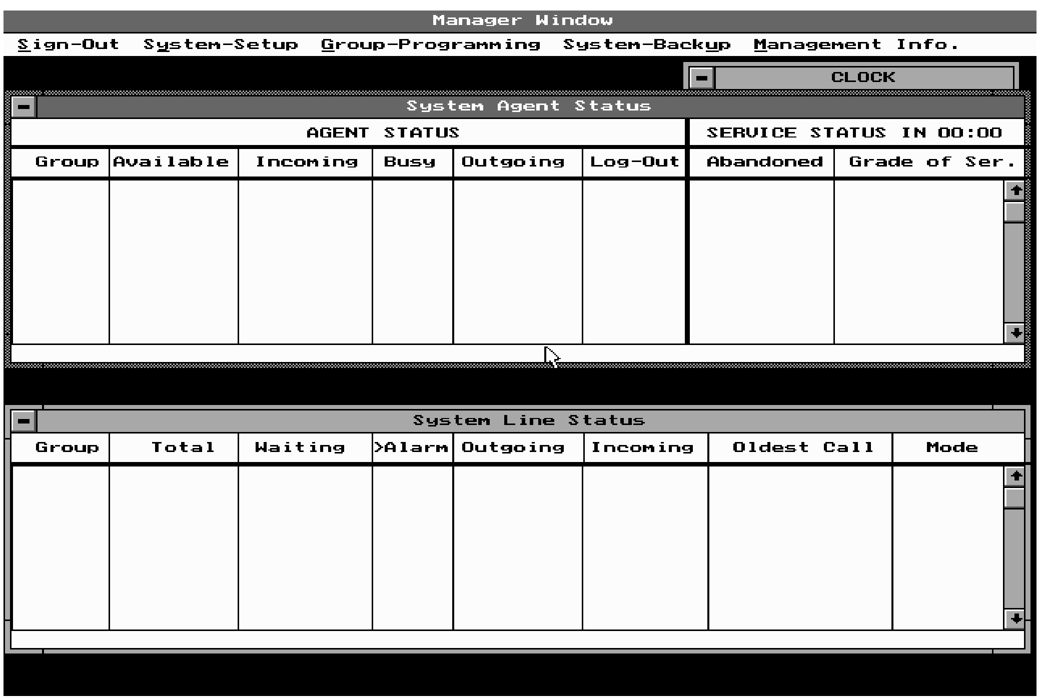

Figure 5-1. System Manager's Real Time Report

The System Agent Status window shows the following items:

- group number,
- Numbers of Agents in that group currently available,
- number of Agents on incoming calls,
- number of busy Agents,
- number of Agents on outgoing calls,
- number of Agents who are logged out from that group,
- number of abandoned calls,
- grade of service being offered to callers.

The System Line Status window shows the following items:

- group number,
- number of available lines,
- number of calls waiting on the lines for the group,
- number of calls which are over the alarm threshold,
- number of outgoing calls,
- number of incoming calls,
- oldest call in the system,
- mode of operation.

Selecting The Real Time Set Up Parameters

The system also makes a real time setup option available. With it, Group Supervisors can set a threshold time for incoming calls, outgoing calls, and busy status. When an Agent exceeds the threshold time, the system highlights his or her name with the color red on the real time report screen.

1. Pull down the `Management Info`. menu and select the `Real Time Set-up` option. The Real Time Parameter Set up window appears (Refer to Figure 5-2). To move from field to field, use the **Tab** key or press `Enter`. After editing the parameters, select `Save-To-Disk` or press **Alt S**. The system saves the changes and closes the window automatically. If no changes are necessary, press `Esc` or double click on the close box to exit.

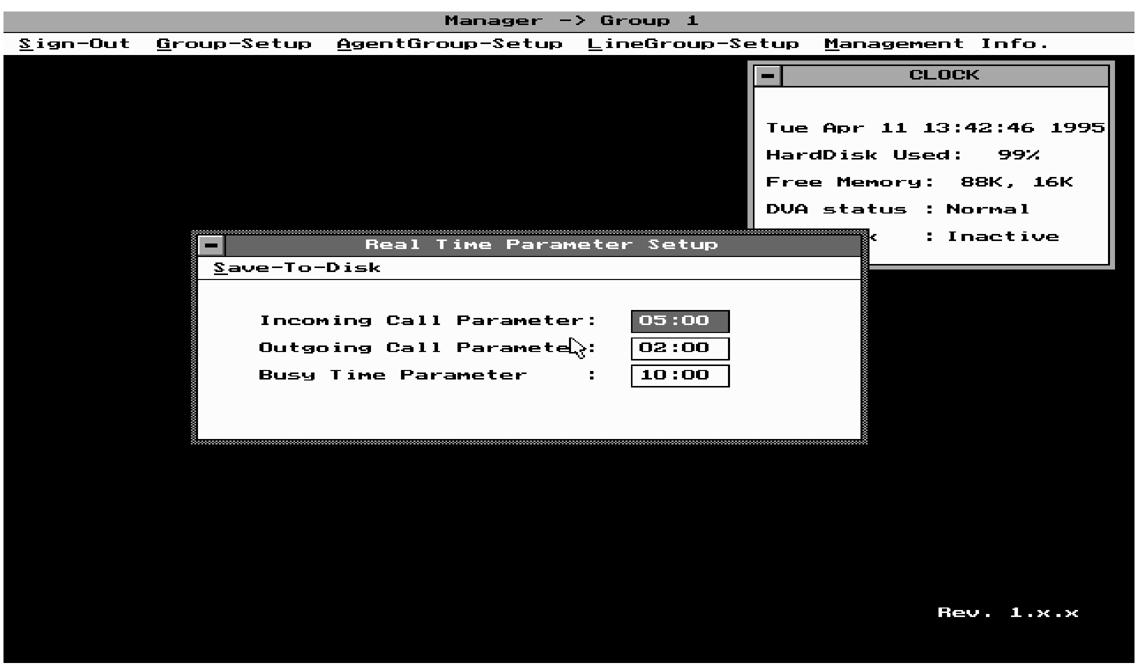

Figure 5-2. Real Time Parameter Setup

Viewing The Supervisor's Real Time Report

The system updates the Supervisor's real time report (refer to Figure 5-3) in approximtely 3-second intervals so that the report continually monitors the group's current call activities and statistics. In addition to continually updating the service status window, the system restarts that service window's status totals every 15 minutes. The report windows show the following items

- traffic status,
- service status,
- agent status,
- traffic activity (explanation on page 5-4),
- agent activity (explanation on page 5-4).

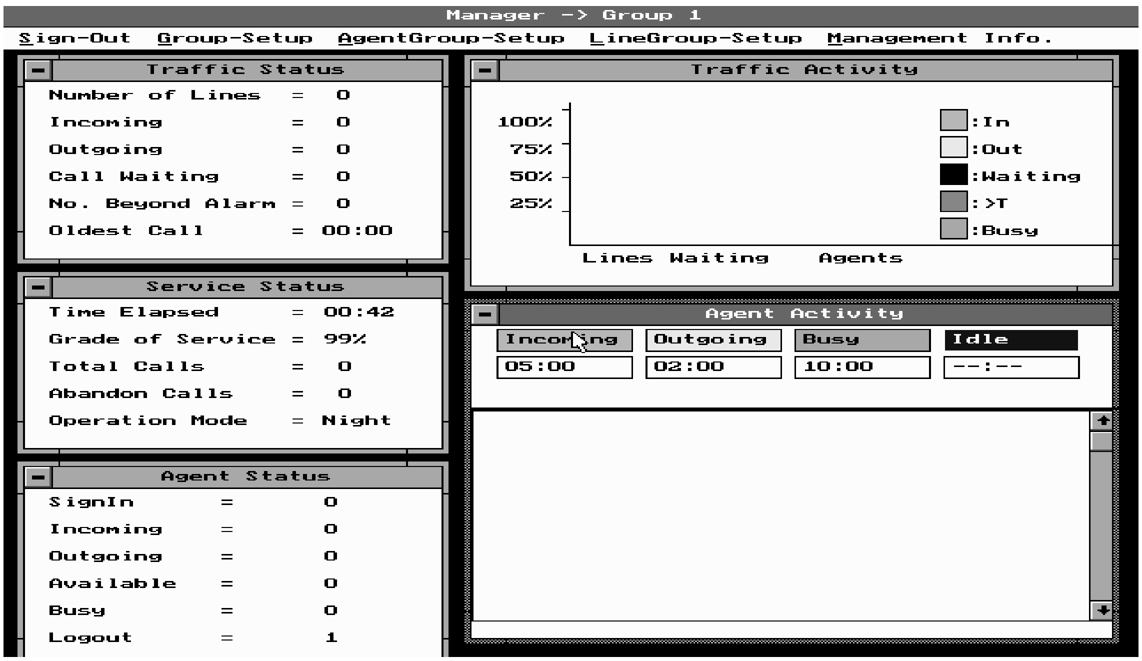

Figure 5-3. Supervisor's Real Time Report

Traffic Status Definitions

1. Number Of Lines	= line available for calls
2. Incoming	= active incoming calls (includes calls answered and waiting)
3. Outgoing	= active outgoing calls
4. Call Waiting	= calls waiting to be answered
5. No. Beyond Alarm	= calls waiting beyond alarm threshold time
6. Oldest Call	= time oldest call has waited to be answered

Service Status Definitions

1. Time Elapsed	= elapsed time since the window restarted (window details status in 15 minute blocks)
2. Grade Of Service	= see the chart on page 5-13
3. Total Calls	= total calls serviced in current window time
4. Abandoned Calls	= calls dropped by caller or connected for less than nine seconds
5. Operating Mode	= day mode , night mode or special mode of operation

Agent Status Definitions

1. Sign In	= agents signed in
2. Incoming	= agents on incoming call
3. Outgoing	= agents on outgoing call
4. Available	= agents idle
5. Busy	= make busy agents
6. Logout	= agents out of service

Traffic Activity — The Real Time Traffic Activity window shows the activity percentage for the Lines, Waiting call and the Agent. The Line indicates the percentage of activity on the lines assigned to group. The activity for the lines can be green for incoming call or yellow for outgoing call. The Waiting indicates what percentage of the incoming calls are actually waiting for an agent. The activity for the waiting call can be red for the calls past the alarm threshold (>T) or black for the calls below alarm threshold. The Agents indicates the percentage of active agents in the possible activity states. The activity for the agents can be gray for agents in Busy state, green for agents on incoming call and yellow for outgoing call.

Agent Activity — The Real Time Agent Activity window shows the current state of each agent signed in to the group. The agent's name programmed in the QuickQ is displayed in one of the four possible states. The agent can be in blue for idle state, gray for Busy state, yellow for Outgoing state or green for Incoming state. The list of names under each possible state is shown based on the longest time in the activity state. The agent's name box may changed to red under the possible states, if the time in that state has exceeded the acceptable time set for that state.

Selecting Historical Reports

Use this procedure to obtain historical reports.

1. Select `Management Info`. on the menu bar and click on the `Historical` option. The calendar appears, showing the current month, with each day represented by a button. At the bottom of the calendar window are boxes in which you can specify a new month (0 to 12) and a new year. This allows you to call up any stored data by specifying that period.

2. Select the appropriate year and month and press **Enter**. As you specify new months and new years, the calendar changes to show the month you have selected.

Note: Use the **Tab** *key to move from* `Month` *to* `Year` *and to the calendar.*

3. Select a single day within that month either by using your `Up` and `Down` arrow key to move between days, and pressing **Enter**, or clicking on it. Alternatively, you can choose a complete week by using one of the `WEEK 01`, `WEEK 02` to `WEEK 06` buttons on the left side of the calendar, or you can choose the report on the whole month by clicking on the `Monthly` button at the bottom of the calendar or press **Alt M**. If you select a single day, a File Selections window appears. Line 00, indicated by a date, allows you to choose reports for the entire day. H00 means hour 0 and H01 means hour1 and so forth. To select numbers 01 and onwards will provide you with a report for a single hour out of that day.

4. After you choose your report period, the system shows the Main Report screen. To continue, refer to The Main Report Screens.

Selecting Current Reports

Selecting the `Current` option from the `Management Info.` menu causes the Current Report window to appear. This window features two buttons allowing you to select a series of reports for the current hour (`Hourly`) or the current day (`Daily`). After you choose your report period, the system shows the main report screen.

Selecting The Main Report Screens

The Main Report screens are the same for the daily, weekly and monthly analysis periods. While the hourly report menu lacks some of the report types offered by the other reports. The menu bar offers the report type, report format, note, and print options.

Report Type—Selecting this option from the menu bar causes a `Report-type` menu to drop down. The reports type consists of the following options:

- `Answer Bins`
- `Abandon Bins`
- `Incoming Call`
- `Total Time`
- `Average Time`
- `System Capacity`
- `Account Code`
- `Traffic Analysis` (Current Daily Report)

Highlight the desired report type and press **Enter**, or click on it with the mouse.

Report Format—Selecting this option causes a small two-option menu to drop down that allows you to specify whether you wish to view the currently selected report in either `Numerical` or `Graphic` format. Highlight the format you wish to use and press **Enter**, or click on it with the mouse.

Note—Selecting this option from the menu bar opens up a small window that allows you to enter free-form text. Use this opportunity to enter as a reminder of the circumstances during which the data was compiled. This is useful when you are looking at historical data and you find something unusual about the reports. Always review at the note for the old report as it may present an important message (for example, *Phone company came in to upgrade system - phones off for two hours*).

Use the ***Tab*** *key to cycle through the buttons until the highlight is in the main text window of the Note Window, or click on the* `Text` *area with the mouse then type your notes.*

To exit from the Note window, highlight and select the `Abandon` *button (does not save your changes), or the* `Save-To-Disk` *option (saves all changes). Both of these options close the window.*

Print—To print your report, select the `Print` menu bar option. The system drops a menu down that offers you the choice of printing the `Numerical` report, `Graphic` report or `Both`.

Choose one of the three options and the Print Report window appears offering a list of seven report types. Use the **Tab** key to cycle from the `Start` button to the Report Types. To select the type of report, press **Enter** and your option will be highlighted with an "X" on the left hand side. Use the **up** and **down** arrow keys to move between fields. To start printing, use the mouse to click on the `Start` button or press **Alt S**.

Selecting Configuration Reports

The configuration report provides a method to produce a hard-copy (printout) of all system parameters. Using this option, System Managers and Supervisors can review programmed parameters including Technician's Programming, Manager's Programming and All Group Supervisors' Programming. This feature is useful in providing Supervisors and Agents a listing of all Account Codes programmed by printing the Managers configuration.

1. Select `Configuration` from the `Management Info.` pull down menu. The Configuration Report window appears with three report types:
   - Group
   - System
   - Technician
2. Use the **Up** and **Down** arrow keys to cycle through the Report Types, your option will be highlighted on the left hand side.

Note: Only one type of report can be selected each time.

3. **Tab** to move from the `Report Types` to the `Group` field. Press **Enter** or use the mouse to click on the arrow icon on the side. A drop-down menu appears from which you can select a specific group. Again, use the `Up` and `Down` arrow keys to move between groups. Press `Enter` or click on the mouse to highlight your choice.
4. To start printing Configuration Reports, use the **Tab** key to move to the `Print` button and press **Enter** or click on the `Print` button with your mouse.

Selecting QuickQ MIS Reports

The QuickQ provides comprehensive Management Information System (MIS) reports that you can either view on the call processor computer screen or print as a hard copy. The system updates and automatically stores all reports and can present the data in both graphic and numerical formats. This reported information assists the System Manager in making efficient use of lines and agents.

The system collects over 63,000 different statistics and presents them in 80 different MIS reports. The system reports are related to the following time periods:

- hourly,
- daily,
- weekly,
- monthly.

The system reports are categorized for the following four operational levels:

- The **System level** reports show data for all lines and agents on the system
- The **Group level** reports provide data for each group programmed on the system.
- The **Line level** reports provide data for each telephone line within a specific group.
- The **Agent level** reports show data for each agent in a specific group.

Viewing Typical MIS Reports

The system provides the following report formats:

- answer bins (Figure 5-4)
- abandon bins (Figure 5-5)
- incoming call (Figure 5-6)
- total time (Figure 5-7)
- average time (Figure 5-8)
- system capacity (Figure 5-9)
- account code (Figure 5-10)
- traffic analysis (Figure 5-11)

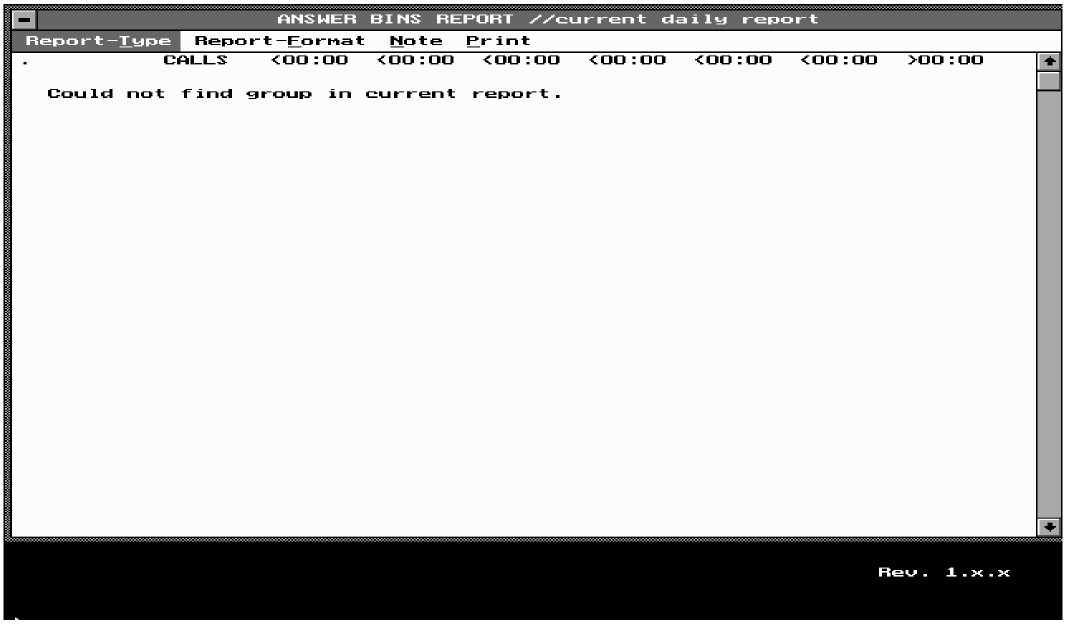

Figure 5-4. Answer Bins

Answer Bins
Show percent of answered calls within the 7 programmable time bins.
Shows supervisors the response rates of their departments.

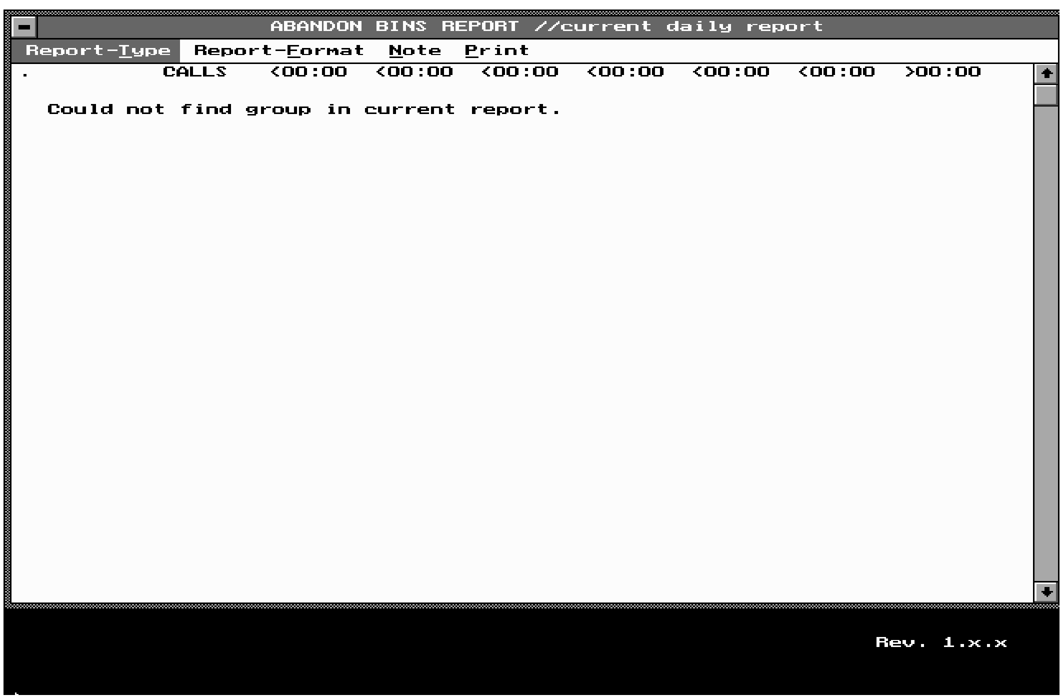

Figure 5-5. Abandon Bins

Abandon Bins
Show percent of abandoned calls within the 7 programmable time bins.
Shows supervisors the tolerance of callers.

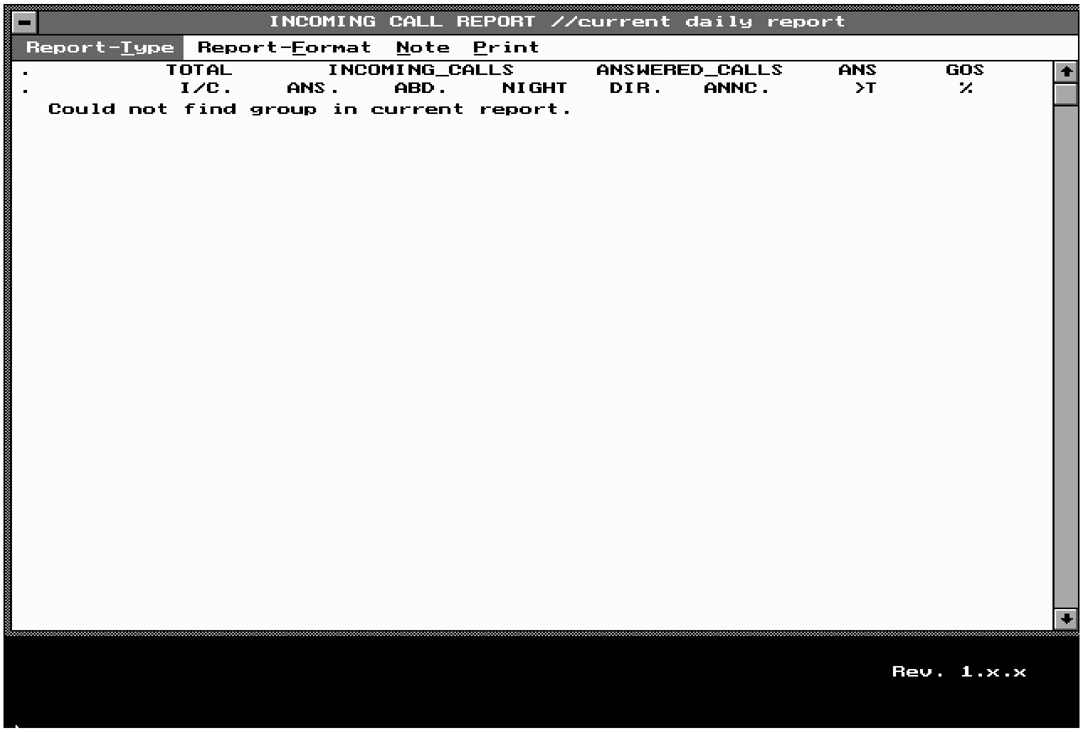

Figure 5-6. Incoming Call Report

Incoming Calls—Line Report Definitions

1. Total I/C	**= total incoming calls**
2. Incoming Calls–ANS	= answered incoming calls
3. Incoming Calls–ABD	= abandoned calls dropped by caller or connected for less than nine seconds
4. Incoming Calls–NIGHT	= any calls at night mode (ans, abn, msg)
5. Answered Calls–DIR	= calls answered before announcement
6. Answered Calls–ANNC	= calls answered after announcement
7. Ans>T	= calls answered after programmed alarm threshold

Incoming Calls—Agent Report Definitions

1. Total Calls–ANS	= total incoming calls answered by agent
2. Total Calls–O/G	= total outgoing calls placed by agents
3. Answered Calls–DIR	= calls answered before announcement
4. Answered Calls–ANNC	= calls answered after announcement

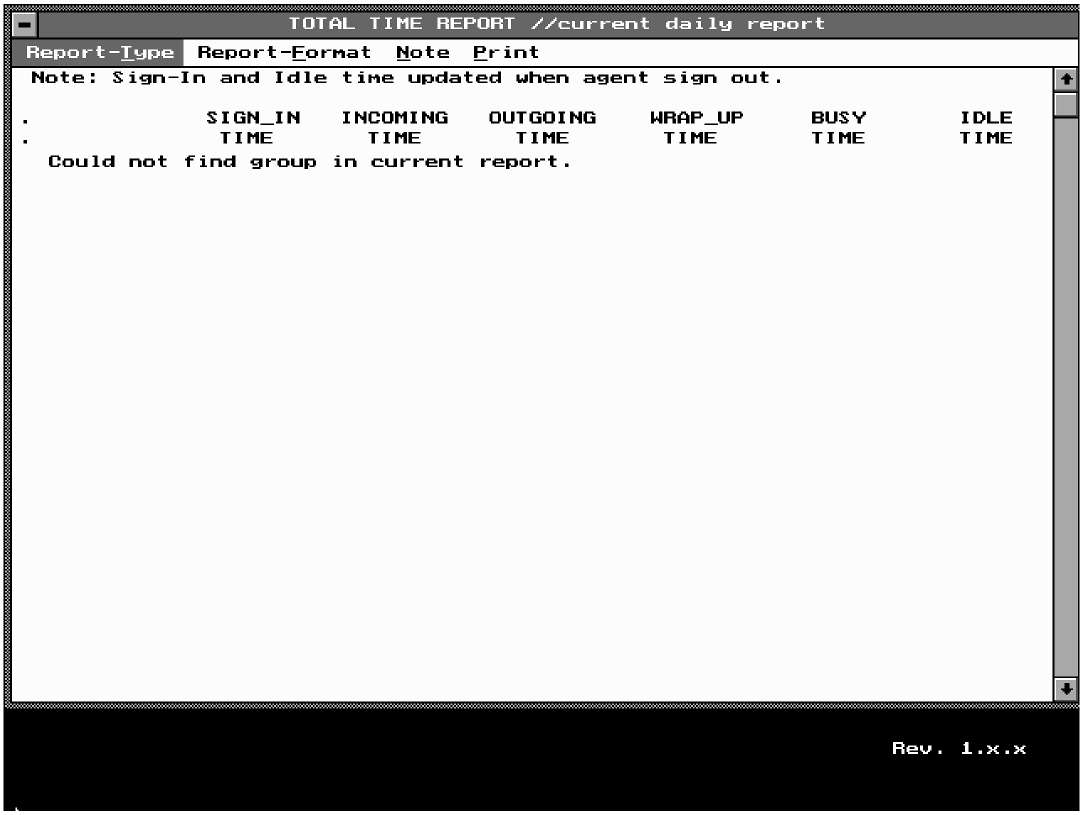

Figure 5-7. Total Time Report

Total Time Agent Report Definitions

1. Sign In Time = total agent sign in time–updated only if agent has signed out
2. Incoming Time = total time agents are engaged in incoming calls
3. Outgoing Time = total time agents are engaged in outgoing calls
4. Wrap Up Time = total time agents are in wrap-up state
5. Busy Time = total time agent set busy (agent press busy & auto busy due to redirect)
6. Idle Time = total time agents are in idle state –up dated only if agents has signed out [(1 - 2 - 3 - 4) = 6]

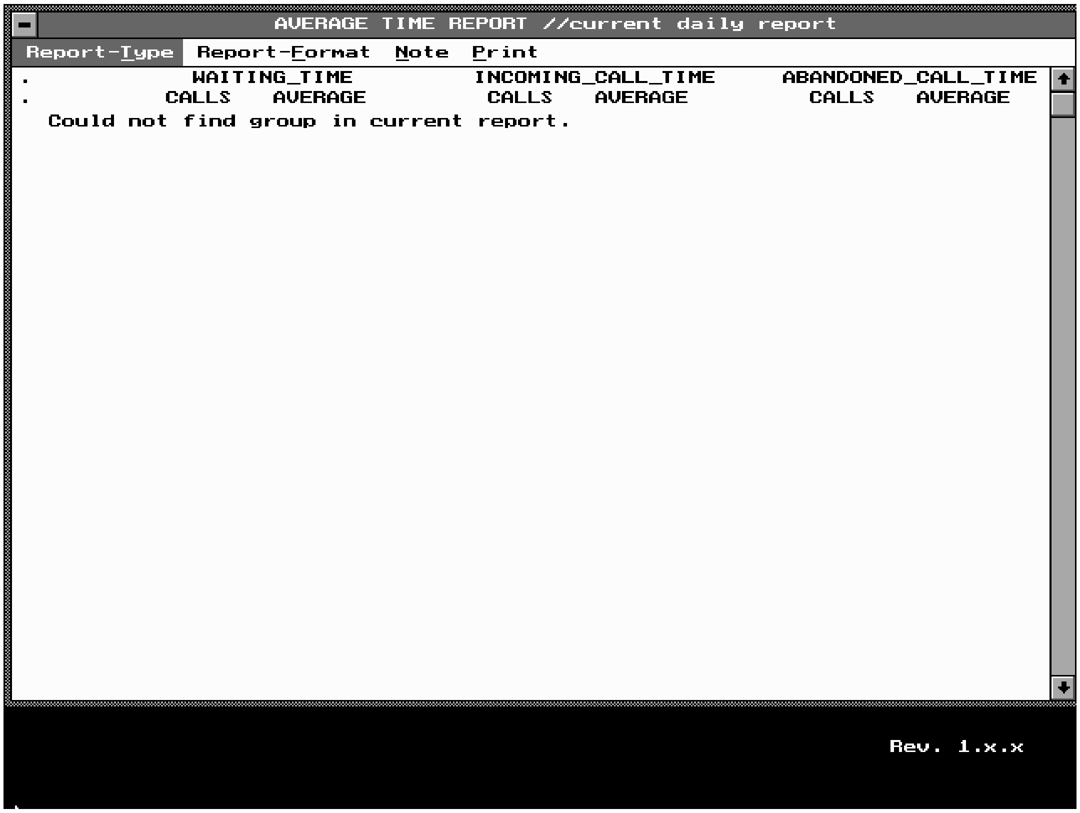

Figure 5-8. Average Time Report

Average Time Line Report Definitions

1. Waiting Time–Calls = number of incoming calls answered
2. Waiting Time–Average = average waiting time for each answered incoming call
3. Incoming Call Time–Calls = number of incoming calls answered
4. Incoming Call Time–Average = average connection time for each answered incoming call
5. Abandoned Call Time–Calls = number of calls abandoned–includes calls connected for less than nine seconds
6. Abandoned Call Time–Average = average waiting time for each abandoned call

Average Time Agent Report Definitions

1. Incoming Call Time–Calls = number of agent answered incoming calls
2. Incoming Call Time–Average = average connection time for each agent answered incoming call
3. Outgoing Call Time–Calls = number of agent placed outgoing calls
4. Outgoing Call Time–Average = average time for each agent placed outgoing call
5. Wrap Up Time–Call = number of times that agents are in wrap-up state [(1+3) = 5]
6. Wrap Up Time–Average = average time agents are in wrap-up state [(5) ÷ (1+3) = 6]

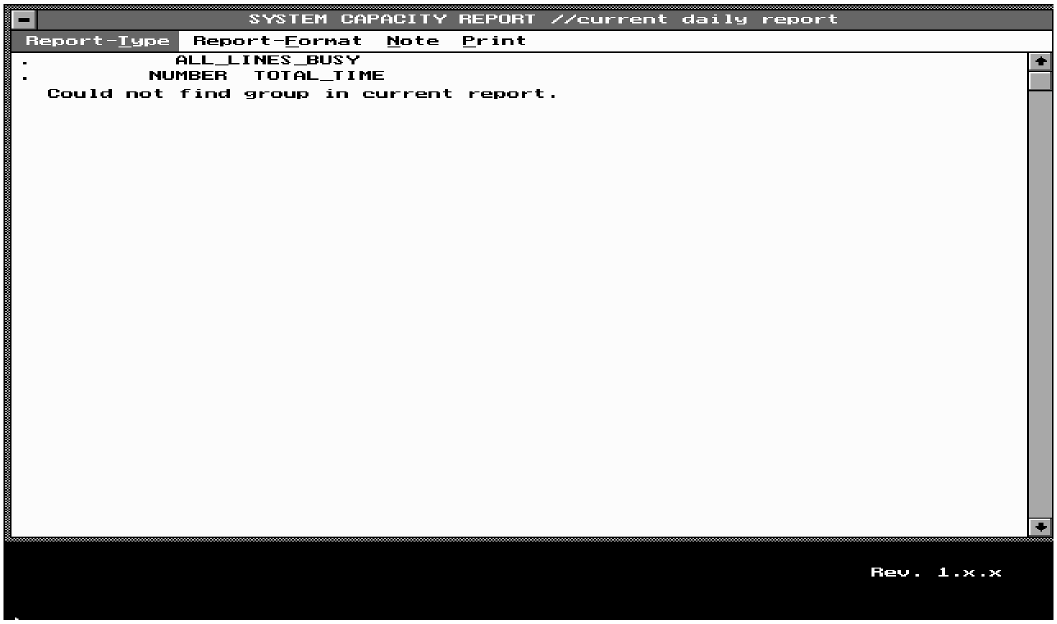

Figure 5-9. System Capacity Report

System Capacity Report shows the total number of times all lines were busy and the total time in hours, minutes, and seconds. It also shows the total number of times that no agent was available and the total time in hours, minutes and seconds.

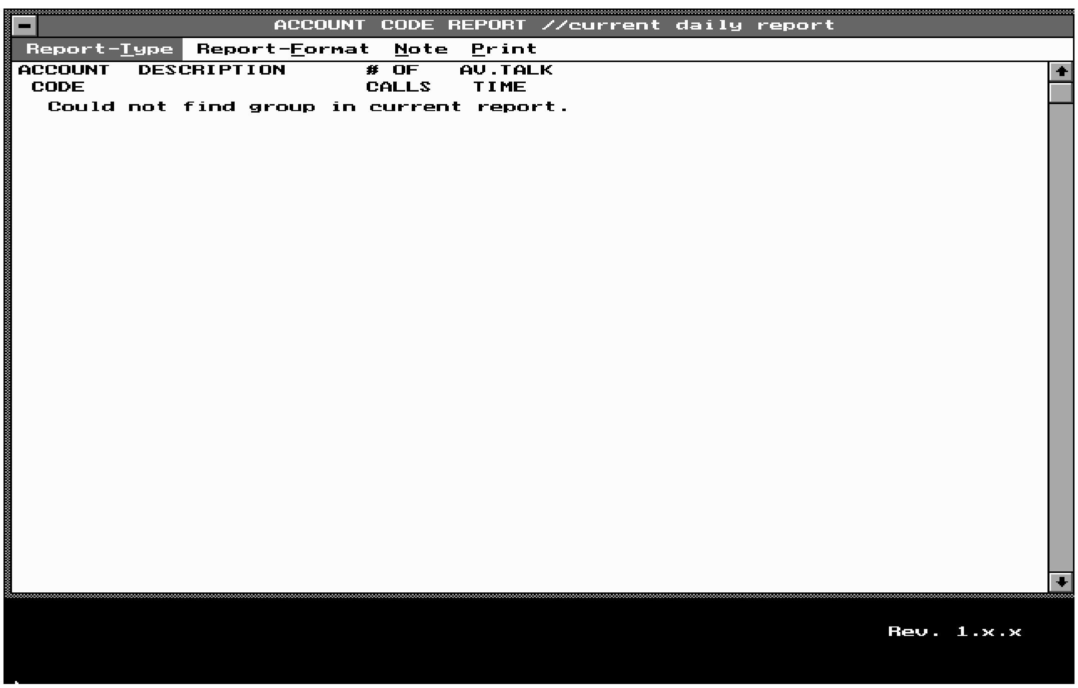

Figure 5-10. Account Code Report

Account Code Report lists the account codes with their descriptions. It also shows the number of calls logged by the agents for each Account code and the average duration of that code.

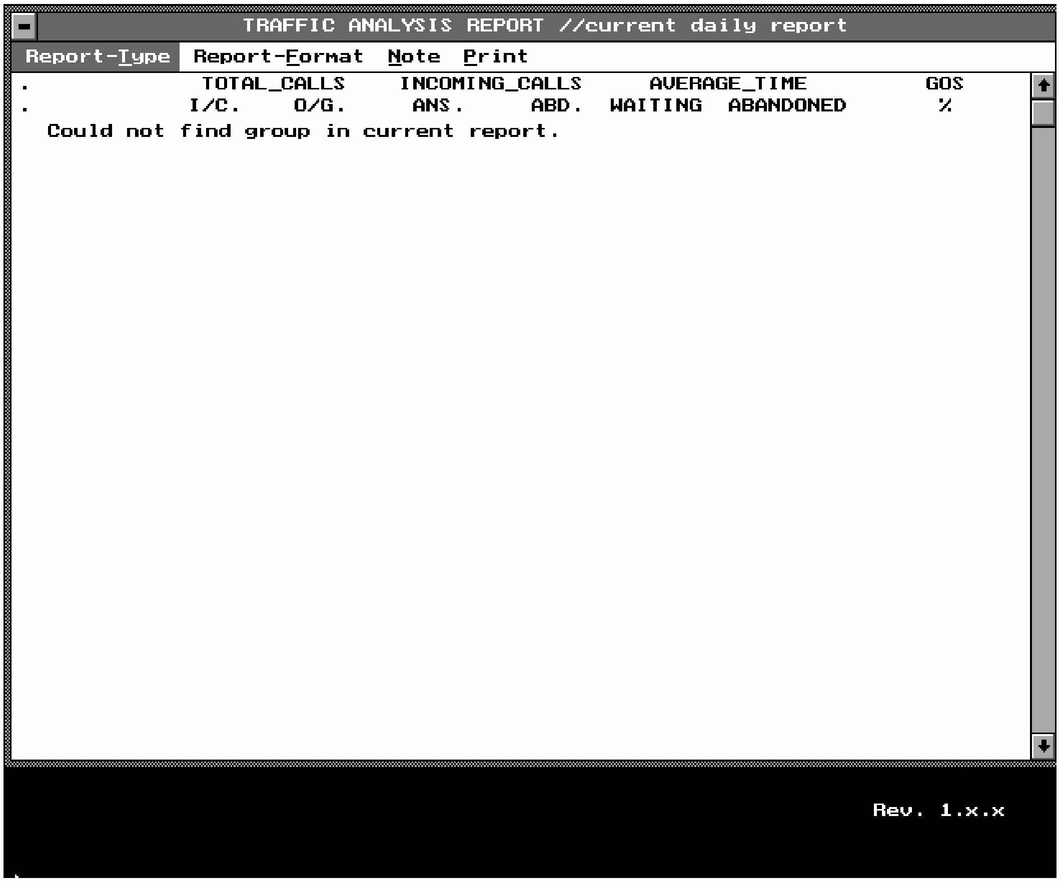

Figure 5-11. Traffic Analysis

Traffic Analysis Line Report Definitions

1. Total Calls–I/C = total incoming calls
2. Total Calls–O/G = total outgoing calls
3. Incoming Calls–ANS = answered incoming calls
4. Incoming Calls–ABD = abandoned calls–calls dropped by the caller or connected for less than nine seconds
5. Average Time–Waiting = average waiting time for each answered incoming call
6. Average Time–Abandoned = average waiting time for each abandoned call
7. GOS = grade of service [(3) - (number of calls answered after alarm threshold has expired, obtained from incoming call line report,)]÷ (3+4) = 7 x 100%

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Appendix A

Using QuickQ With a Mouse

A mouse is a device that allows you to move a cursor on the computer screen to specific points for data entry, and other menu selections. An arrow image, called the mouse pointer, moves on the screen when you move the mouse. Practice moving the pointer. Stay away from the menu bar at the top of the screen. (If you accidentally make a menu appear, you can make it disappear by moving the pointer out of the menu and pressing and releasing the left mouse button.)

Occasionally the pointer might seem to disappear. Usually it is just off the screen. To make the pointer reappear, move the mouse in a circle a few times.

To move the mouse without moving the pointer, lift up the mouse. The pointer does not move while the mouse is in the air.

Most of the time, you use one of the following two mouse button techniques:

- clicking,
- dragging.

Clicking (Selecting an Item)

To click, press the left button and immediately release it. By clicking, you can select an item, such as a menu or an icon.

Note that the top left corner of the screen has a Sign-In label. Use it to perform the following exercise. Place the pointer at the Sign-In title and click the mouse button. The QuickQ opens the Sign-In window.

Dragging (Moving a Window)

Dragging consists of the following three steps:

- pressing and holding the left mouse button,
- moving the mouse,
- releasing the mouse button.

Dragging allows you to move the position of a Group Setup window on the screen to give yourself a better view of system set-up parameters (for example, the window and the line group window). By having both windows appear at the same time, you can identify the timing parameters that is relative to the line groups.

To move the sign-in window, place the pointer on the title bar, and drag. As you drag, an outline of the window moves with the pointer (note that the pointer changes to a hand icon). Practice moving the sign-in window on the screen.

Understanding QuickQ Window Graphics

If you are familiar with a window environment, you can skip this discussion.

QuickQ is easy to use. Most of what you see and do in the *QuickQ* console happens in a window. A window is a screen area that the *QuickQ* system uses to exchange information with you. There are many *QuickQ* windows, such as the one with which you enter your password or the one that shows line group data. You can move, re-size, overlap, close and open one or more windows in one screen. While you can have any number of windows opened, only one window can be active at a time. The active window is the one that you are currently working in. Any command you choose or text you type generally applies only to the active window. The active window may have a close box, scroll bars, and a re-size corner. If your windows are overlapping, the active window is always the one on top of all the others (the foremost one).

All windows in *QuickQ* have the following things in common:

- title bar,
- close box.
- selection key

Title Bar—The topmost horizontal bar of a window contains the name of the window. You can drag the title bar to move the window around.

Close Box—This is the box in the upper left corner. You double click on this box to quickly close the window.

Selection key —Press the **Alt** key with the underlined alphabet on the menu activates the function.

Some of the more complex windows have these additional features:

- scroll bar,
- re-size edges.

Scroll Bar—The scroll bar appears in the right side of the window. Use this bar with a mouse to scroll the contents of the window. Click the arrow at either end to scroll one line at a time (keep the mouse button pressed to scroll continuously). You can drag the scroll box at any spot on the bar to quickly move to a spot in the window relative to the position of the scroll box.

Re-size Edges—All four extreme edges of a window are the re-size edges. You can drag any edge to make the window larger or smaller.

Appendix B

System Layout / Worksheet

System Setup

Company Name

ID# and Password

	Grp. Name	Supv. Name	ID#	Password
Grp 00				
Grp 01				
Grp 02				
Grp 03				
Grp 04				
Grp 05				
Grp 06				
Grp 07				
Grp 08				
Grp 09				
Grp 10				
Grp 11				
Grp 12				
Grp 13				
Grp 14				
Grp 15				
Grp 16				

Intergroup Overflow

	Level 1	Level 2	Level 3	Level 4
Grp 01				
Grp 02				
Grp 03				
Grp 04				
Grp 05				
Grp 06				
Grp 07				
Grp 08				
Grp 09				
Grp 10				
Grp 11				
Grp 12				
Grp 13				
Grp 14				
Grp 15				
Grp 16				

Note: Group 00 refers to the System Manager's ID and Passwords, this is not one of the call processing Groups.

Announcements

Note - Space is provided on the Group Layout / Worksheet for the scripting of messages.

	Description	Group	Line Sub-group
01			
02			
03			
04			
05			
06			
07			
08			
09			
10			
11			
12			
13			
14			
15			
16			

Account Codes

Code	Description

Stat-Bins

Answer Bins **Abandon Bins**

	Time		Time
Time Bin 01		Time Bin 01	
Time Bin 02		Time Bin 02	
Time Bin 03		Time Bin 03	
Time Bin 04		Time Bin 04	
Time Bin 05		Time Bin 05	
Time Bin 06		Time Bin 06	

Appendix C

Group Layout / Worksheet

Note - Make additional copies of the Group Layout / Worksheet for each of your system groups.

Group Setup

Thresholds

Overflow Time
Redirect Time
Alarm Time
Alarm (# of Calls)
Priority Override Time

Mode

Call Screening (Yes / No)
Automatic Force Call (Yes / No)
Manual (Yes / No)
Day to Night (Yes / No)

Time for Day to Night Mode (24 hr)

Agent Group Setup

Grp 01

Group Name

Agent Name	ID#	Password	Priority	Wrap-up

Grp 02

Group Name

Agent Name	ID#	Password	Priority	Wrap-up

Grp 03

Group Name

Agent Name	ID#	Password	Priority	Wrap-up

Grp 04

Group Name

Agent Name	ID#	Password	Priority	Wrap-up

Line Group Setup

Note - Space is provided on the next page for the Scripting of messages

	Grp 01	Grp 02	Grp 03	Grp 04
Group Name				
First Message #				
Second Message #				
Night Message #				
Special Message #				
Message Delay				
Music Interval				
Priority				

Management Information

Real Time Parameter Setup

Incoming Call Parameter Time	
Outgoing Call Parameter Time	
Busy Call Parameter Time	

Message Scripts

Line Group 01

First Message

Second Message

Night Message

Special Message

Line Group 02

First Message

Second Message

Night Message

Special Message

Line Group 03

First Message

Second Message

Night Message

Special Message

Line Group 04

First Message

Second Message

Night Message

Special Message

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Appendix D

Reviewing The Programming Road Map

Start-up Screens

Sign-In
ID # XXX
Password XXX

Technician's Screens

System Setup
QuickQ Master Setup
Master Extension
Master 2 Extension
QuickQ OAI Key Code
QuickQ Line Setup
Name
Group
Subgroup
Line No.
Voice Port Config.
Voice Port No.
Station
Type
Printer Setup
Printer Type
Other
Epson LQ
HP Laser
HP DJ 500
HP DJ 550C
Printer Port
LPT 1

Integration Setup
External Overflow

Password
Old Password XXX
New Password XXX

Diagnostic
QuickQ Status
Agent Status Scan
Line Status Scan
Voice Port Status Scan

System Manager's Screens

System Setup
Company Name
ID Password
Group Name XXXXXXXX
Supervisor Name XXXXXXXX
ID # XXX
Password XXX
Time/Date
Date dd-mm-yyyy
Time HH:MM
Group Programming
Group 01-16
(link to group supervisor screens)
Intergroup Overflow
Group 01-16
Level 01
Level 02
Level 03
Level 04
Announcement
Message
Message 1-16
Description
Current Time MM:SS
Limit Time MM:SS
Backup
Account Code
Starting Number Range X
Account Code XXX
Description
System Backup
Stat Bin
Answer Bin
Time Bin 1 MM:SS
Time Bin 2 MM:SS
Time Bin 3 MM:SS
Time Bin 4 MM:SS
Time Bin 5 MM:SS
Time Bin 6 MM:SS
Abandon Bin
Time Bin 1 MM:SS

Management Info.
Real Time
System Agent Status
System Line Status

Historical

Current
Hourly
Report Type
Answer Bins
Abondon Bins
Incoming Calls
Total Time
Average Time
SystemCcapacity
Traffic Analysis
Account Code
Report Format
Numerical
Graphical
Note
Print
Daily
Report Type
Answer Bins
Abondon Bins
Incoming Calls
Total Time
Average Time
SystemCcapacity
Traffic Analysis
Account Code
Report Format
Numerical
Graphical
Note
Print
Configuration
Group
System
Technician
Print

Group Supervisor's Screens

Group Setup
Overflow Threshold MM:SS
Redirect Threshold MM:SS
Alarm Threshold MM:SS
Alarm Threshold Calls in Queue
Priority Override MM:SS
Call Screening Yes No
Automatic Force Call Yes No
Manual Answer Yes No
Day To Night Mode Yes No
Time For Day To Night Mode HH:MM

Agent Group–Setup
AgGp_01
AgGp_02
AgGp_03
AgGp_04
Agent Group Name XXXXXXXX
Agent Name XXXXXXXX
ID # XXX
Password XXX
Priority 01-04
Wrap-Up MM:SS

Line Group Setup
LnGp_01
LnGp_02
LnGp_03
LnGp_04
Line Group Name XXXXXXXX
First Message X
Second Message X
Night Message X
Special Message X
First Message Delay MM:SS
Music Interval MM:SS
Line Group Priority 01-04

Management Info
Real Time Setup
Incoming Call Parameter MM:SS
Outgoing Call Parameter MM:SS
Busy Call Parameter MM:SS
Real Time
Traffic Activity
Agent Activity
Traffic Status
Service Status
Agent Status
Historical
Current
Hourly
Report Type
Waiting Time
Abandon Call
Incoming Call
Agent Activity
Average Time
System Capacity
Report Format
Numerical
Graphical
Note
Print
Daily
Report Type
Waiting Time
Abandon Call
Incoming Call
Agent Activity
Average Time
System Capacity
Call Profile
Account Code
Report Format
Numerical
Graphical
Note
Print
Configuration
Group
Print

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Appendix E

Backup Utility

What is it?

The Backup Utility allows you to make security Backup copies of the statistical data (i.e. the report files) gathered by the ACD. These copies are made to standard 3.5" high-density floppy disks.

Once these Backup copies have been made the Backup Utility can then be used to Delete the old copies of these files from the Hard Disk of the ACD.

Why should you use it?

As well as providing a measure of security for your data, using the Backup Utility will free up space for the ACD to re-use, and will prevent the ACD from slowing down due to congestion of the Hard Disk with old files.

How often should you use it?

Typically, you should use the Backup Utility at least once every three months.

How Do You Use it?

There are three simple steps.

You must tell the system which period you wish to Backup or Delete from. For example you might wish to work with last months files, or the previous quarters files, or files from any arbitrary period, such as the 15th of January to the 15th of March.

You then tell the Backup Utility which file types you wish to work with: these may be the Hourly, the Daily, the Weekly or the Monthly files, or all of them.

You then tell the Backup Utility to either perform a Backup or a Delete on those files for that period.

Using the Backup Utility

Running the Backup Utility

The Backup Utility is accessed as follows. Sign in at the ACD Call Processor as the System Manager, and then select the System Backup option from the menu bar. A menu with two options on it will appear. Select the Report Backup option.

(diagram 1 - acd system manager screen with report menu)

A dialogue box will appear with two buttons on it. If you select the one marked Cancel the dialogue box will close and nothing will happen. If you select the button marked Backup a further, smaller dialogue box will appear, with buttons marked Continue and Cancel.

(diagram 2 - acd system manager screen, with dialogues)

Selecting the Cancel button will take you back to the previous dialogue box. Contineu will close down the ACD and will start the Backup Utility Program.

Note: The ACD will cease to function whilst you are using the Backup Utility - make sure you are certain that you want to close down the ACD operation before you go to the Backup Utility, and remember to invoke the Norstar BACKUP service mode.

When the Backup Utility starts you will see the screen change to display the following.

(diagram 3 - Backup Utility welcome screen)

Press any key or click the left mouse button to remove the welcome window, and to make the menu at the top of the screen appear, as shown below.

(diagram 4 - Backup Utility main menu)

The Backup Utility Help System

The Backup Utility contains help screens that can be accessed at any time by pressing the F1 key. This will cause a help screen to appear that will either describe the operation you are currently performing, or the currently highlighted menu option.

Help screens can be closed by pressing the Escape key.

(diagram 5 - help screens)

You can also select the Help menu option from the main menu to access the Help system menu, where you will find help on the help system istelf, on how to use the menus and how to use the mouse.

Selecting and using menu options in described in the next section.

Interacting with the Backup Utility

You interact with the Backup Utility in the same manner as you do with the rest of the ACD system - you can use the keyboard or the mouse, or a mixture of both.

When you move the mouse around the mouse mat a block will move over the screen. This is the mouse cursor. To select a menu option for example, you would position the mouse cursor over the option you wish to use and then click the Left mouse button.

To use the keyoard you can move the highlight bar along the menu by pressing the Left or Right Arrow keys to highlight the option you wish to use, and then press the Enter key to activate it, or you can just press the letter which is highlighted in yellow for each option. So, to access the File Type menu option,you could just press the F key on the keyboard.
Some menu options lead to other, smaller menus, like the Help option or the Quit option.

To leave a sub-menu like these and to return to the previous menu, you can either press the Escape key, or, with the mouse cursor positioned on the menu line, press the right mouse button.

The Backup Utility Main Menu Options

Backup

Before you can use the Backup option you must first tell the Backup Utility which type of Data Files you wish to Backup and also the Start Date and End Date of the period in which you wish to carry out the Backup.

When you have done that and then selected the Backup option the system will check which files are going to need to be copied, and will tell you how many disks you are going need.

Note: The disks that you use must be 1.44 Megabyte Hi-density disks, and they must be formatted. You can either buy the disks and format them yourself if you have access to a PC, or you can buy ready formatted disks. The disks must be blank—that is, containing no previous data or files.

You will be prompted to enter each disk as they are required.

The data files are put onto the disks in sub-directories, called BACK001 on the first disk, BACK002 on the next, and so on, for as many disks as it takes. You should label and date each disk as you remove it from the disk drive.

(diagram 5 - Backup Utility showing the user how many disks they are going to need)

Delete

Before you can use the Delete option you must first tell the Backup Utility which type of Data Files you wish to delete and also the Start Date and End Date of the period you wish to delete files in.

When you have done that and then selected the Delete option the system will check which files are going to be deleted, and will tell you how much disk space you will recover by deleting them.

Note: Make sure you are CERTAIN that you wish to delete the files before you do so - once they have been removed, if you haven't already made Backups of them, they will be gone forever!

Help

This option leads to a further menu offering access to Help screens on the Help system itself, the use of the Backup Utility menus and the use of the mouse.

Set File

Before you can use the Backup or Delete options, you must first tell the Backup Utility which type of Data Files you wish to work with, and also the Start Date and End Date of the period in which you wish to carry out the Backup or Delete operation.

If you select this option, you will be presented with a "popup menu". On the menu will be the file types you can choose from. There is also an option labeled `All Data Files` which will cause the Backup or Delete operation to work with all files of all types, and there is an option labeled `All (Not Hourly)`.

Note: Many users wish to set a Start date and an End Date and to then Backup all of the files from that period apart from the hourly ones, but wish to Delete all of the files in that period once the Backup is completed. The All data Files and the All (Not Hourly) options allow you to do this easily.

To select an option from the popup menu, you can either highlight the option using the **Home**, **End** and **Up** and **Down** Arrow keys and then press **Enter**, or you can use the hotkey method. The hotkey method allows you to choose an option by pressing the keyboard character which corresponds to the highlighted (yellow) letter in the option of your choice. The **Esc** key will close the popup menu without making a new selection.

Once you have selected a file type, it will be displayed on the bottom border of the main window.

The File Type that you pick dictates which files are operated on by the next Backup or Delete operation.

Once a File Type has been selected, it will stay set until you change it again. This means you can set the Start and End Dates, set the File Type and then do a Backup and then do a Delete with the same settings.

If you pick All Files, data files of all type (Hourly, Daily, Weekly and Monthly) are operated on at once, if you pick All (Not Hourly) the files types operated on will be the Daily, the Weekly and the Monthly files only.

Note: If Weekly or Monthly files are going to be included in the Backup or Delete operation, the Start Date must be the 1st of a month and the End Date must be the last day in a month (but the Start Date and End Date do not need to be in the same month, so 1/09/1994 and 31/10/1994 is a valid period).

This applies to the All Files setting too, as the All Files setting includes the Weekly and Monthly data files automatically.

Set Start

Before you can use the Backup or Delete options, you must first tell the Backup Utility which type of Data Files you wish to work with, and also the Start Date and End Date of the period in which you wish to carry out the Backup or Delete operation.

You enter the Start Date for the work period in the format DD/MM/YYYY, so that February 1st 1994 would be entered as 01/02/1994.

Dates are checked as they are entered to make sure that you haven't asked for the 32nd of a month, or a date next year and so forth.

Once you have set the Start Date and the End Date you can use them repeatedly. They stay set until you change them.

This means you can set the two dates and say, Backup the Hourly Files, then do a Delete on the Hourly Files in the same period, then do a Backup on the Daily Files and then Delete those too, all with one setting for the Start and End Dates.

Note: You can't enter a date in the current month, only full elapsed months can be worked on. Also, if you want to work with Weekly, Monthly or All Files the Start Date MUST be the first day in a month.

Set End

Before you can use the Backup or Delete options, you must first tell the Backup Utility which type of Data Files you wish to work with, and also the Start Date and End Date of the period in which you wish to carry out the Backup or Delete operation.

You enter the End date for the work period in the format DD/MM/YYYY, so that February 1st 1994 would be entered as 01/02/1994.

Dates are checked as they are entered to make sure that you haven’t asked for the 32nd of a month, or a date next year and so forth.

Once you have set the Start Date and the End Date you can use them repeatedly. They stay set until you change them.

This means you can set the two dates and say, Backup the Hourly Files, then do a Delete on the Hourly Files in the same period, then do a Backup on the Daily Files and then Delete those too, all with one setting for the Start and End Dates.

Note: You can’t enter a date in the current month, only full elapsed months can be worked on. Also, if you want to work with Weekly, Monthly or All Files the Start Date MUST be the first day in a month.

Set Path

You will not need to use this option, it is intended for future expansion and is not required in this release of the Backup Utility.

Info

This option provides a window which shows the Start and End Dates (if they have been set) spelled out with the names of the day and the month so that you can see exactly which two dates you have entered.

It also shows how many days there were between the two dates, so you can see how many days worth of data would be affected by a Backup or Delete action.

Quit

The Quit option from the main menu causes a sub-menu with two options on it to appear. These two options are `Remain` and `Quit`.

`Remain` will keep you in the Backup Utility (in case you have selected Quit from the main menu in error), and the `Quit` option will leave the Backup Utility, and the ACD system will re-start.

Note: Remember to put the Norstar back into the Normal service mode once the ACD system has reset itself, and if it is during your normal working hours, instruct your Agents to log back in.

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