

# QuickQ DXP

**Automatic Call Distributor**

**Software Revision 3.0**

## **System Manager's Guide**

**COMDIAL®**



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# ***Introducing The QuickQ System***

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## **Understanding 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. This manual is one of two manuals that comprise the system documentation

## **Becoming Familiar With Conventions Used in This Guide**

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

- Text that appears on the screen is shown as, `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, **Enter**.

*Note: On some keyboards, 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.

The word *message* is used exclusively when referring to text messages and the word *announcement* is used exclusively when referring to voice announcements.

The word *wallboard* is used exclusively when referring to the optional electronic display board. This device may be called *electronic message center*, *reader board*, *display*, *sign*, or other names in related literature.

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, and provide quick feedback to agents on system status via optional electronic displays called wallboards.

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 agent 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:

- moving, adding and deleting Agents required for the call 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.

## ***How This Version Of QuickQ Is Improved Over Earlier Versions***

The version of *QuickQ* covered in this manual uses software release 3.0. Several improvements over earlier versions were incorporated in this software that are outlined below.

### ***Selecting Reports To Be Printed Automatically***

This version of *QuickQ*, allows you to program the system so that certain reports, that you select, will automatically print at the times you specify. These reports can be real time or historical. For example, you may want a traffic analysis report to print just before a shift change. As an example, you could program *QuickQ* to print this report at 15:45 every weekday, or any other time you would like.

### ***Scheduling The Night Mode Operations***

With this version of *QuickQ*, it is now possible for each group to choose different night modes of operation for different nights of the week instead of having just one night mode for every night.

### ***Transferring External Calls To A Subgroup—Group-To-Group Transfer***

Earlier versions of *QuickQ* would not allow the transfer of an external call from one subgroup to another. With this version, you can now transfer these calls to a similar subgroup residing in the target group. (Subgroup use defined by line programming.)

### ***Calls In Queue Button Available***

You can program a spare D.S.S. Button (*Calls In Queue*) on your LCD phone to provide the number of calls waiting in the queue. When the agent presses this button, the number of calls waiting in the agent's group is displayed for three seconds on the top line of the phone's LCD. After three seconds, the display returns to its previous state. This feature is not available on the Scout phone.

### ***Group Supervisor's Real Time Screen Enhanced***

The group supervisor's screen is now enhanced to provide more information. With this version of *QuickQ*, this screen shows incoming, outgoing, and busy times for each agent.

### ***Call Routing And Reporting Functions Available From Calling Line I.D.***

This version of *QuickQ* can take advantage of calling line identification codes. The system can route incoming calls from preferred customers to certain agents for special handling. Additionally, by using the calling line I.D. features, the system will generate a preferred customer call report and/or an abandoned call report on the preferred customer.

### ***Exporting Reports In ASCII Format***

The system provides an option that will allow you to export reports in ASCII format. This is a common format used by many computer applications. By selecting the ASCII format, you can export your system statistical and performance data directly into many popular spread sheet programs. Once the data is entered into one of these programs, you can then customize your reports any way you choose.

### ***Setting The All Agent Busy Alarm***

An option is available on this version of *QuickQ* to allow a group supervisor to set the *all agent busy* alarm.

### ***Forcing Account Code Entry***

The group supervisor can optionally select a feature that will force agents to enter an account code at the completion of every call. While the time to do this is collected as wrap-up time, the agent cannot enter the wrap-up state until he or she enters an account code when this feature is set.

## ***Using The Scout Cordless Phone***

This version of *QuickQ* allows the use of up to nine Scout cordless phones by group supervisors or agents. This limitation of nine is based on simultaneous conversations and not equipment configuration. By using cordless phones, call center personnel have a lot more freedom to move about in their areas. The Scout phones should be programmed by the installer so that the F1 button can be used to access the *QuickQ* system while buttons F2, F3, and F4 correspond to the three interactive buttons on the proprietary 12-button and 24-button phones.

## ***Wallboards Are Optionally Available***

Wallboards, now available as a *QuickQ* option, use LEDs for displaying *QuickQ* messages.

There are two different wallboard models—mono and color. The mono wallboard has one message field consisting of 20 characters and uses red LEDs. The color wallboard contains two message fields of 20 characters each and uses tri-colored (red, green, and yellow) LEDs.

Up to 16 wallboards can be networked together in any combination of mono and color types, and they can all display a different message or the same message.

The wallboards can display static messages created by the group supervisor; for example, HAVE A GOOD DAY!; or, they can display system status messages on a real time basis; for example, INCOMING CALLS RECEIVED THIS HOUR IS nn. In the last example, nn represents a parameter that is updated automatically by the system. The group supervisor can set threshold points that will trigger alarms when parameters reach or exceed the preset thresholds.

Up to 32 messages can be stored in a message library. Each message can have a message length of 70 characters. When messages contain more than 20 characters, they will scroll on the wallboard. Summary messages display each pair of four pairs of parameters for six seconds, and the word SUMMARY will appear centered on the top line of the color wallboard in green letters. On the mono wallboard, summary will appear as SUM followed by a pair of parameters—all in red letters.

Messages are initiated in any one of three ways: manually from the processor's keyboard, by preset time, or on an event basis such as when a preset threshold is reached.

The wallboards interface with a RS-485 serial data network. The RS-232 serial data output from the *QuickQ* processor is translated by a converter box to RS-485. Wireless transmitters and receivers are also available as an option.

## ***Expanding The System***

This *QuickQ* version is initially available in three different packages (A, B, and C) that differ by their amount of agent capacity. Two of these packages (B and C) can be expanded in increments of 12 agents up to a total of 24 additional agents. The method used for expanding the system is by the technician entering a unique and volatile password in the technician's *upgrade* screen. The password is provided verbally by Comdial upon proof of payment for the desired upgrade.

## ***Calls Returned From An Overflow Extension***

Calls that the system sends to an overflow extension, after a specified period of time, now return to their original queue if they are not answered by the overflow extension after a system time-out occurs. Once the overflowed call returns to the queue, the regular overflow threshold counter starts counting again and the process is repeated until the call is answered.

## ***Programming The Abandon Call Timer***

Earlier versions of *QuickQ* counted any call that lasted less than nine seconds as an abandoned call. This version has a feature that allows the technician to program the abandon call timer for any value from 0 to 99 seconds. This is done by programming an external switch in the ACD command line in the DOS batch file.

## **Describing The System Components**

*NOTE: You can ensure continuous QuickQ operation by adding an uninterruptible power source to both the digital voice announcer and central call processor, and an optional battery backup assembly to the DXP or DXP Plus digital communications system. Wireless devices may need additional backup.*

### **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 call center.

### **Digital Voice Announcer**

The Digital Voice Announcer (DVA) is a stand-alone voice processing system designed to directly interface with the DXP or DXP Plus digital communications system. Two models are available—the DVA01 can store up to four digitized voice announcements for playback under control of the central call processing unit while the DVA16 can store up to 16 announcements. In a busy call center when all Agents are busy, the DVA intercepts incoming calls and plays prerecorded voice announcements.

When using the DVA01 with QuickQ, the following limitations apply.

1. QuickQ cannot support more than two DVA01 units.
2. You can record only four messages and they must be assigned to message numbers 44 through 47. These message numbers are reserved for QuickQ.
3. QuickQ cannot support both DVA16 and DVA01 at the same time.
4. You must control all DVA01 functions, like recording or deleting messages, from the attendant's station (station 10).
5. You can record messages on the DVA01 while QuickQ is active; however, if you are recording at the same time the system is receiving a call, the caller may not hear any recorded message.
6. The installer must know where the QuickQ messages reside and program the appropriate extension numbers using the voice port programming screen.
7. Neither the QuickQ technician nor the supervisor can record or play messages on the DVA01 using the QuickQ message playback/record.
8. QuickQ cannot display message limits for the DVA01.
9. The DVA status, displayed in the CLOCK window, always shows **Disabled** when the system is using the DVA01.
10. The announcement (message) backup feature is disabled.

### **Telephone Extensions**

The Agent's and Supervisor's stations are typical proprietary telephones (12 or 24 Button Display Sets) or optionally Scout cordless phones can be used by Supervisors.

## ***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.

| <b>Answer Bin</b> | <b>Number of Calls</b> | <b>Time</b> | <b>Definition</b>                                                 |
|-------------------|------------------------|-------------|-------------------------------------------------------------------|
| 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.

| <b>Abandoned Bin</b> | <b>Number of Calls</b> | <b>Time</b> | <b>Definition</b>                                             |
|----------------------|------------------------|-------------|---------------------------------------------------------------|
| 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 ensures 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:

| <i>Code</i> | <i>Call Category</i>      |
|-------------|---------------------------|
| 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. Account codes can be optional, forced and verified. This is a *QuickQ* feature, not a DXP feature.

### ***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 and supervisors' wallboards.

### ***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 3 minutes, 30 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). If all agents in Group Two are busy, the system can "look back" to Group One and direct calls there as agents become available.

## 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 network 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.

*This page remains blank intentionally.*

# ***Using the Mouse and Keyboard***

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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

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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 using the windowing graphic environment with either the mouse or the keyboard. If you are not familiar with using a mouse or the keyboard in a windowing graphic environment, refer to Appendix A.

## Understanding System Startup

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

The system begins operation with the following default settings:

|                         |             |                                  |             |
|-------------------------|-------------|----------------------------------|-------------|
| • 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**

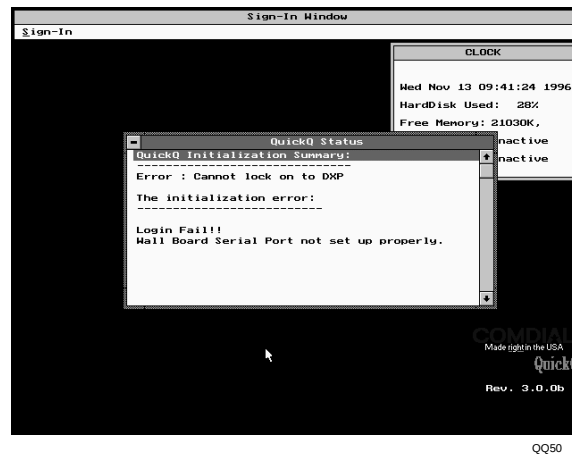
Prepare the system manager's programming worksheet before you actually begin configuring the system at the console, and use this worksheet as a reference to assist you in entering the information required. There is an example worksheet in Appendix B.

## **Programming The System Level Configuration**

### **Performing Initial Sign In**

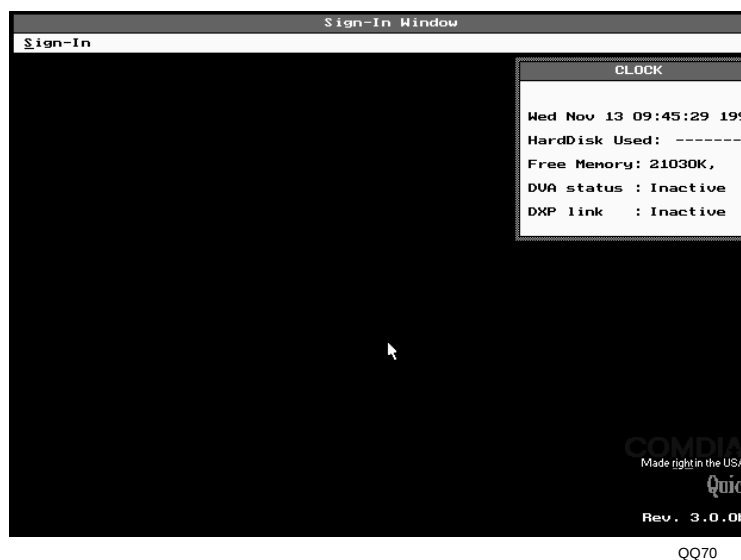
Use the following steps to gain access to the system.

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 **S i g n - I n** 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).

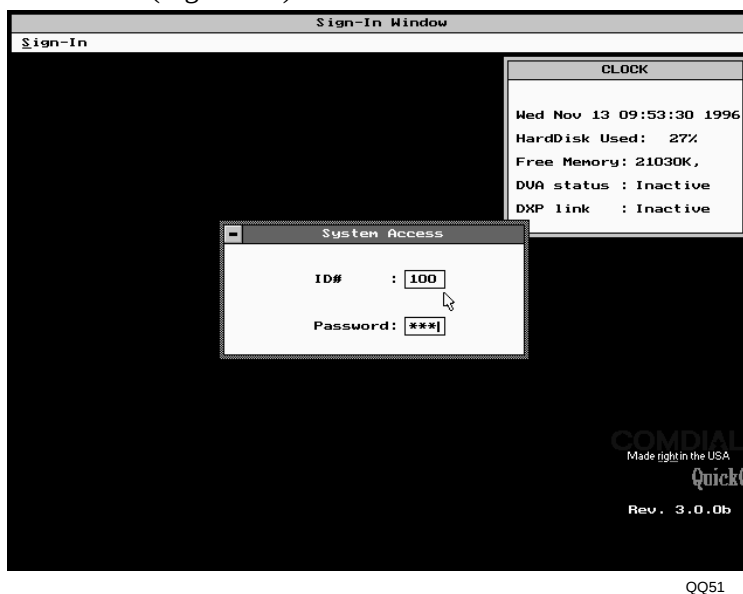


Figure 3-3 ID and Password

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. Select the Manager line (Figure 3-4). Press Enter using the keyboard.

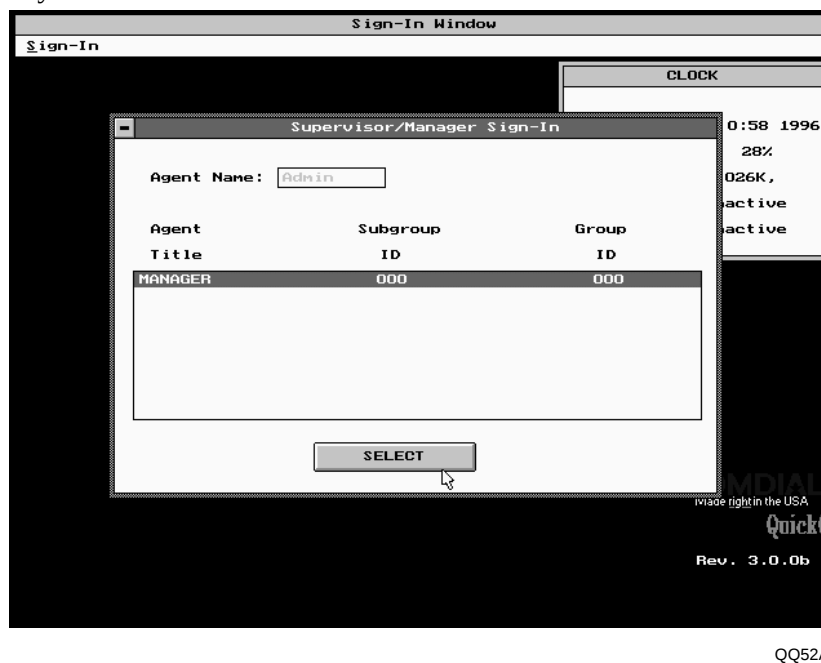


Figure 3-4. Supervisor Sign In Window

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.

After ten minutes of inactivity, the screen saver will turn on with a moving COMDIAL logo and the clock update on the screen disappears. Moving the mouse or pressing a key disables the screen saver and the previous windows appears, along with the clock. (Screen saver will not turn off if on a real time window).

## **Setting Up The System**

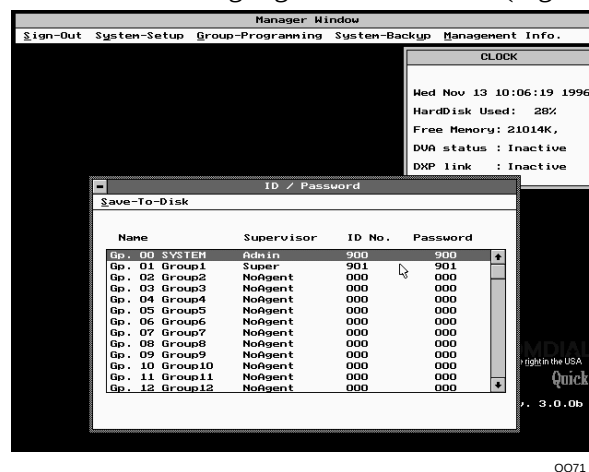
### **Setting the Company Name**

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
  - Wallboard
2. Select the Company Name option. The Company Name window appears. Type in the desired company name.
3. To save the change, 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 pressing **Alt Y** prompts the system to save the changes and to close all windows automatically. Selecting **NO** or pressing **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).



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Figure 3-5. IDs/Passwords

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

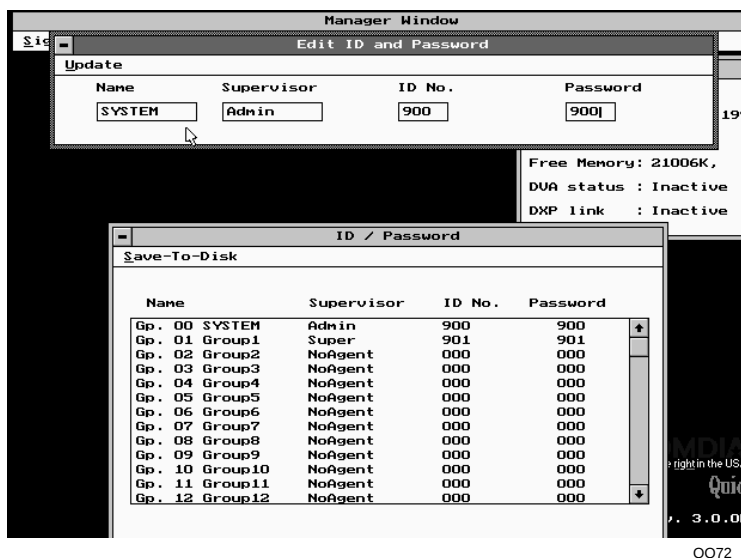


Figure 3-6. Edit ID and Password Window

*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.*

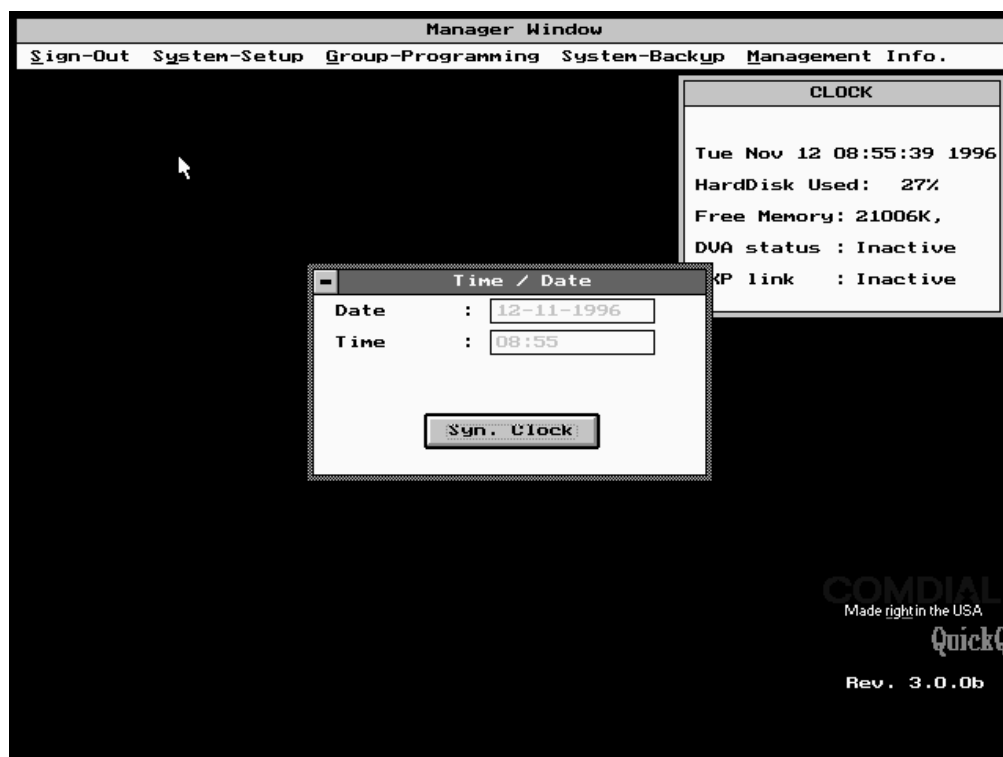
- If you wish to change the name, type in the new name at the highlight. To move to the Supervisor box, press the **Tab** key or click on the box with the mouse.
- If you wish to change the name of the Supervisor, type in the new name. To move to the ID# box, press the **Tab** key or click on the box with the mouse.
- Type in the ID# you wish to use (you can use only numeric digits for the ID# and password, with a range of 100 to 999).
- Move to the **Password** box and type in the password you wish to use (you can use only numeric digits for the ID# and a password of 100 to 999).
- When you have entered the details in the boxes to your satisfaction, select the **Update** option from the menu bar or press **Alt U** to save your new details.
- The **Save Changes** window appears. If you select **YES** or press **Alt Y**, the system saves the changes and closes the **Save changes** window automatically. If you select **NO** or press **Alt N** the system 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.
- 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 you select **Y e s** or press **Alt Y**, the system saves all changes made and all windows closes automatically. If your option is **N O** 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 **S y s t e m   S e t u p** menu.
2. Select **T i m e / D a t e**. A small Time/Date window appears.
3. If the displayed time and date are incorrect, click on the **S y n . C l o c k** 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.



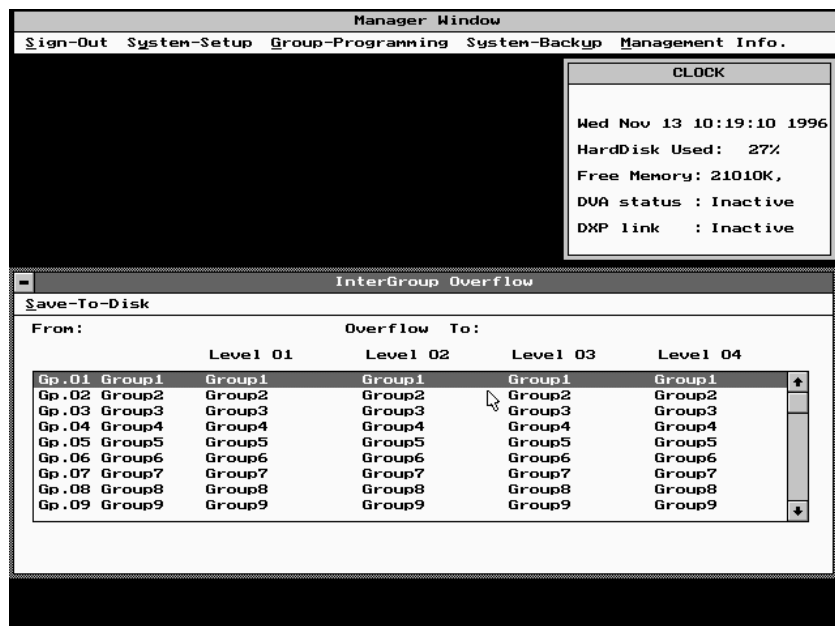
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Figure 3-7. Synchronizing The Clock

## 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).



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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 **Update** 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 close 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 pressing **Alt Y** to save the changes and close the windows automatically. Press the **Esc** key or double click on the close box to exit.

### Setting Announcement Titles

The integrated Digital Voice Announcer (DVA) provides storage for voice announcements. The DVA16 model provides storage for 16 messages (total 5 min. 20 sec. recording time). If you are using a DVA01 model, you can store four messages (total 2 min. 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.*

When using the DVA16, use the following procedures to set the Announcement Titles:

1. Pull down the **S y s t e m - S e t u p** menu and select the **A n n o u n c e m e n t** option.
2. The Message window appears (Figure 3-9) to provide information.

|                      | Description | Current | Limit |
|----------------------|-------------|---------|-------|
| 1                    |             | 00:00   | 00:00 |
| 2                    |             | 00:00   | 00:00 |
| 3                    |             | 00:00   | 00:00 |
| 4                    |             | 00:00   | 00:00 |
| 5                    |             | 00:00   | 00:00 |
| 6                    |             | 00:00   | 00:00 |
| 7                    |             | 00:00   | 00:00 |
| 8                    |             | 00:00   | 00:00 |
| 9                    |             | 00:00   | 00:00 |
| 10                   |             | 00:00   | 00:00 |
| 11                   |             | 00:00   | 00:00 |
| 12                   |             | 00:00   | 00:00 |
| 13                   |             | 00:00   | 00:00 |
| 14                   |             | 00:00   | 00:00 |
| 15                   |             | 00:00   | 00:00 |
| 16                   |             | 00:00   | 00:00 |
| Total Message Length |             | 00:00   | 02:40 |

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**Figure 3-9 Message Window**

3. Use the **Tab** key or click on the mouse to move the highlight in the Description field to 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 informational purposes and does not include an 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.

When the Forced Account Codes feature is selected (see **Configuring The Group Parameters**), agents are not able to enter the wrap-up mode until they enter an account code.

1. Pull down the **S y s t e m - S e t u p** menu and select the **A c c o u n t   C o d e** option. The Account Code Range window appears.
2. Click on the **O k** 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 **O k** button.*

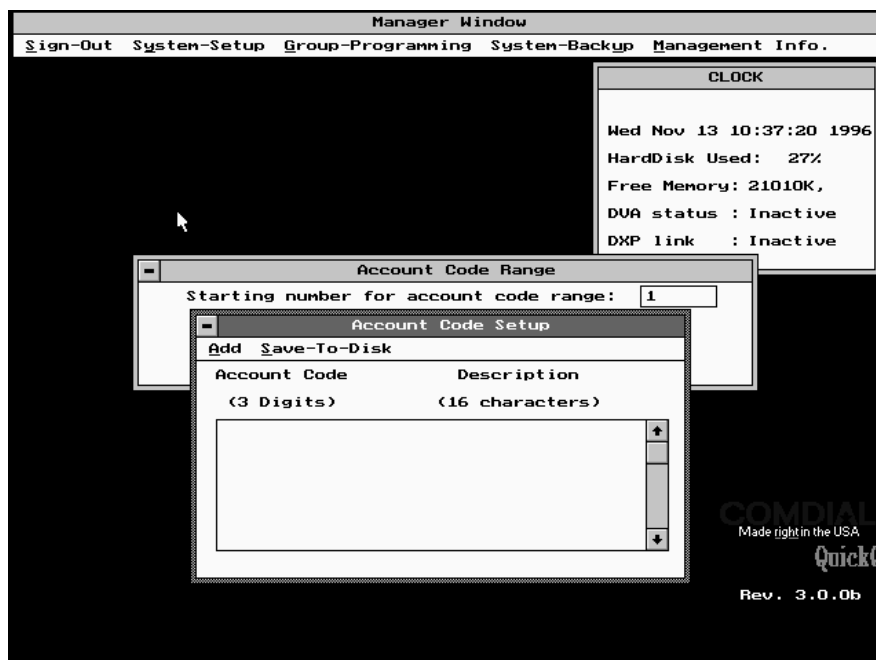
3. To add new account codes, select **A d d** from the menu bar or press **Alt A**. The Add Account Code Setup window appears.
4. Enter the new three digit code and press **Enter**. Type a description of the account code in the **D e s c r i p t i o n** area. Click on the **Create Account** menu bar or press **Alt C**. The Add Account window appears.

*NOTE: The account 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** to save all changes made to the code. The Edit Account Code Setup window & Save Changes to Account window closes 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** to delete the highlighted account code. The Edit Account Code Setup window and Delete Account confirmation window closes automatically. Click on **NO** or press **Alt N** to close the Delete Account confirmation window. You are now returned to the Edit Account Code Setup window. If no further changes are desired, press **Esc** or double 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** to 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 its description appear in the Account Code Report.*



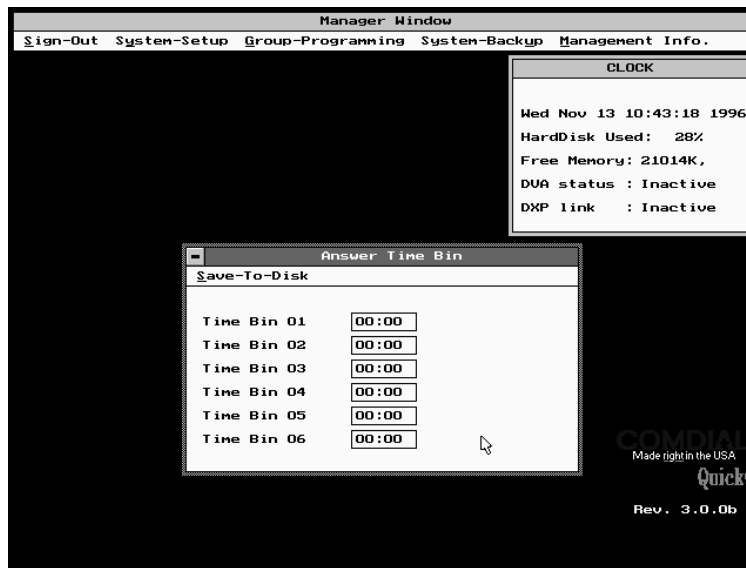
QQ76

**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 and Abandon Bin.



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Figure 3-11. Answer Time Bin Window

3. Select Answer Bin and the Answer Time Bin window appears with the Time Bin 01 box highlighted (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** to save the data entered and close all windows. Click on NO or press **Alt N** to close the Save Answer Time Bin window and return 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** to save the data entered and close all windows. Click on NO or press **Alt N** to close the Save Abandon Time Bin window and return to the Abandon Time Bin window. Press **Esc** or double click on the close box to exit this window.

## Understanding The Wallboards

QuickQ can support up to 16 optional wallboards. Even though parameters for both mono-color and tri-color wallboards are shown in the program, only tri-color wallboards are functional in QuickQ, version 3.0. The tri-color wallboards have a 40-character display (two rows of 20 characters) consisting of red, yellow, and green LEDs.

### Modes Of Operation

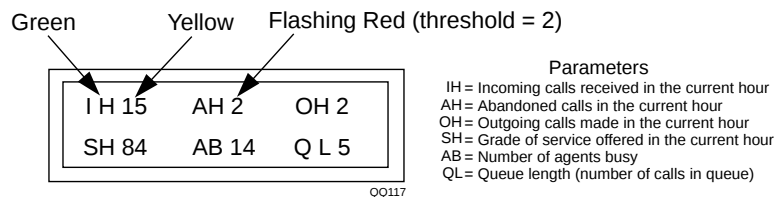
QuickQ wallboards are allowed two modes of operation—parameter mode and text mode. In the parameter mode they display operational parameters and in the text mode they display text messages.

#### Parameter Mode

Color wallboards display up to six parameters as shown in the example below. When the first agent signs in, the wallboard is initiated into the day mode.

When a summary is selected, every hour the wallboard displays the totals for the past hour and the totals of the day up to display time. When the system goes into the night mode, the totals for the past hour (or part of an hour) together with the final totals for the day are displayed. For 24-hour sites, QuickQ is reset to a new day at 00:00 (midnight). As a result, the last summary of the day is displayed at 00:00 (midnight).

When an alarm condition is met, the wallboard either displays a scrolling message or it flashes the display parameters in red. The audible alarm (buzzer) will also sound, if that option is programmed.

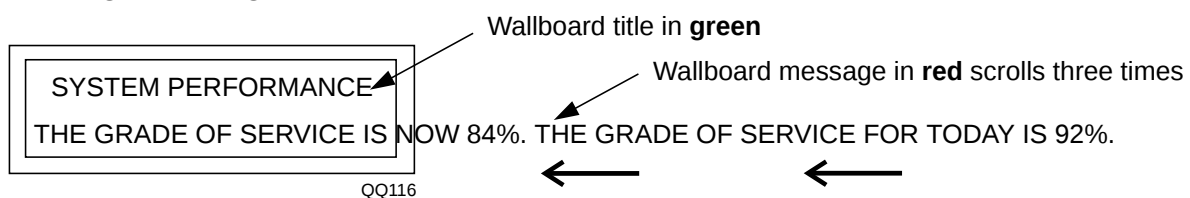


#### Text Mode

A total of 32 messages can be stored in the QuickQ message library. Each message can contain a maximum of 70 characters with up to six parameter tokens (see Table 3-1). A parameter token is a two-letter abbreviation, enclosed in brackets, representing a parameter; for example, [IH] means *incoming calls received in the current hour*. The tokens are embedded within the text and are replaced at display time by the actual value. Invalid parameters will be displayed as text on the wallboard.

A text message can be initiated by a manual request via the keyboard of the QuickQ's PC. Alternately, users can program the wallboard to display messages at a specified time of the day and on a specified day of the week. Text messages can also be initiated on an event basis, as when a threshold condition is met.

Scrolling text messages always appear in red with their titles (if used) in green. Text messages scroll continuously for three times. To alert agents of a new text message, users can activate the audible alarm option. The example below illustrates how parameter tokens SH and SD are converted to actual values in the scrolling text message.



## Priorities

When more than one message is sent to a wallboard or a group of wallboards at the same time, priorities are used to determine the sequence in which these messages will be displayed. The order of priority to display messages are as follows:

1. Scheduled messages (triggered by time).
2. Alarm messages (triggered by an alarm threshold).
3. General messages (manually sent).
4. Parameter mode information (parameters and group titles).

Parameters are the only kind of displayed information that can be over-written. All other messages will remain on the wallboard until their preset duration expires. Not until then will another set of messages appear on the wallboard.

## Setting Up The Optional Wallboards

The following steps outline the procedure for setting up the optional wallboards.

1. Pull down the System-Setup menu and select the Wallboard option.
2. A pull-down menu appears with Setup and Parameter.
3. Select Setup and the Wallboard Setup window appears (Figure 3-12).
4. Press the up or down arrow key to highlight the wallboard you want to setup or change.
5. Press the **Enter** key with the appropriate wallboard highlighted. The Wallboard Setup-Edit Wallboard XX window appears (XX = your selection from step 4).
6. Select the group to which the wallboard is assigned by pressing the down arrow in the Group box. A pull-down menu appears with group options. Select the proper group by using the up and down key and the **Enter** key or clicking your selection with the mouse.
7. Press the **Tab** key to move to the Type field. Press the down arrow for a pull-down menu showing Mono and Colour.
8. Select the proper wallboard type by alternately highlighting the Mono and Colour selections using the up or down key and the **Enter** key or clicking on your choice using the mouse.

*NOTE: If you selected "Mono" in step 8, skip steps 9 and 10 because titles are not used on Mono wallboards.*

9. Skip this step if you selected Mono in step 8. Press **Tab** to move to the Title field. Click on the down arrow box and select YES or NO.
10. Skip this step if you answered NO in step 9. If you answered YES, move to the Title Display field by pressing the **Tab** key. Type the title you want to use for the selected wallboard. You can use any title up to 20 characters in length.

*NOTE: The title you enter here will appear centered on the top row of the wallboard in green*

characters. This is for the text mode only.

11. Press the **Tab** key to move to the SUMMARY field. Press the down arrow box to show the YES or NO options. Make your selection by pressing the **Enter** key or clicking on your choice with the mouse.

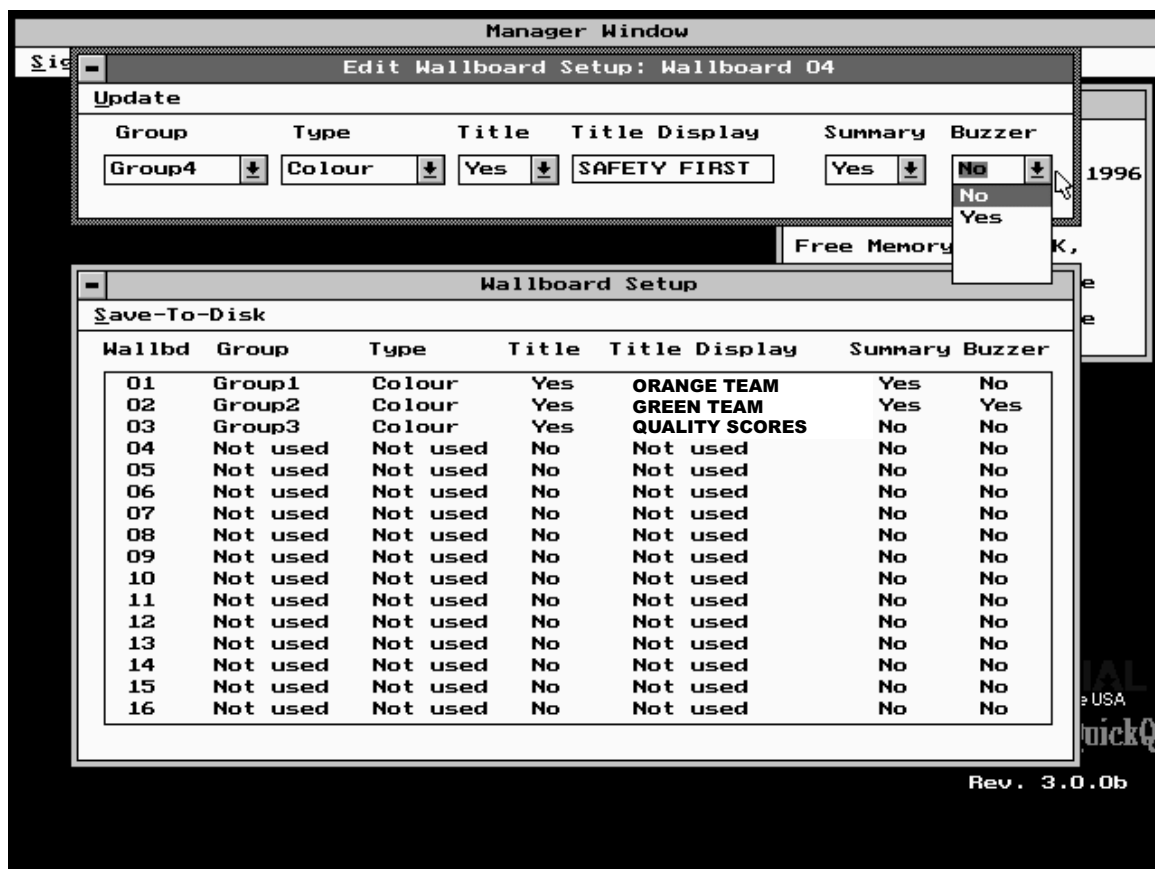
*NOTE: When you enable the summary option, the word "SUMMARY" will appear centered on the top row of the wallboard in green letters. The summary displays parameter pairs and occurs hourly and when the group or system goes to night mode.*

12. Press the **Tab** key to move to the BUZZER field. Press the down arrow box to show the YES or NO options. Make your selection by pressing the **Enter** key or clicking on your choice with the mouse.

*NOTE: When enabled, the buzzer sounds whenever a new text message is being displayed on the wallboard.*

13. After you have set up all wallboards, save your changes by clicking on Save-To-Disk.

14. The Save Wallboard Setup confirmation window will appear with YES and NO options. Click on YES or press **Alt Y** to save the data entered and closes all windows. Click on NO or press **Alt N** to close the Save Wallboard Setup window and return to the Wallboard Setup window. Press **Esc** or double click on the close box to exit this window.



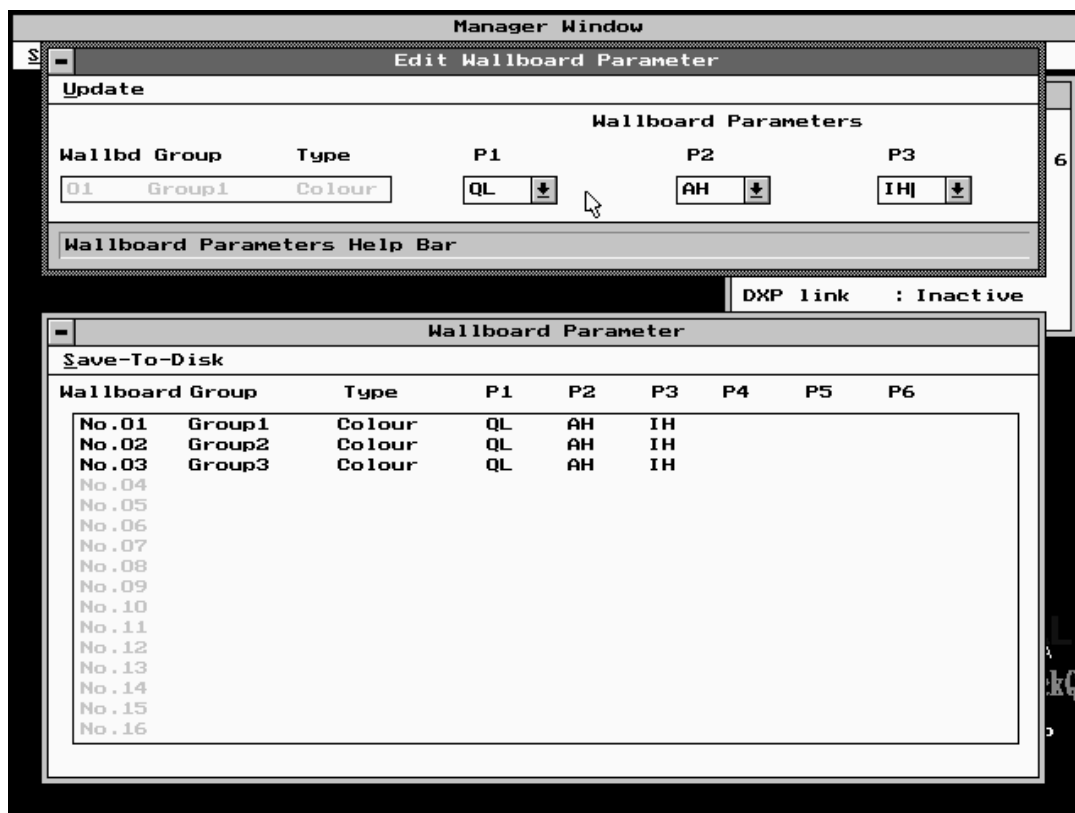
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Figure 3-12. Wallboard Setup Window

## Setting Up The Wallboard Parameters

You can select parameters for displaying call center status on a real time basis. You can only select three parameters when you are using the mono wallboard because those wallboards have only a single row available for characters. However, when you are using the color wallboard, you can use either three or six parameters depending on how you have it set up. If you enabled a wallboard title on a color wallboard, you will not have the top row available, so you can use only three parameters.

1. Pull down the System-Setup menu and select the Wallboard option.
2. A pull-down menu appears with Setup and Parameter.
3. Select Parameter and the Wallboard Parameter window appears.
4. Highlight the wallboard you want to assign parameters to by pressing the up or down arrow keys. Press the **Enter** key. The Wallboard Parameter-Edit window appears.
5. Press the **Tab** key to highlight the parameter (P1–P6) you want to change.
6. Press the down arrow box to display a menu showing all of the parameter types you may select. See Table 3-1 for a description of the parameter types.



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Figure 3-13. Wallboard Parameters Window

**Table 3-1. Wallboard Parameters**

| Parameter | Description                                                      | Digit Range |
|-----------|------------------------------------------------------------------|-------------|
| ID        | Incoming calls received in the current day                       | 1-4         |
| IH        | Incoming call received in the current hour                       | 1-4         |
| AD        | Abandoned calls in the current day                               | 1-3         |
| AH        | Abandoned calls in the current hour                              | 1-3         |
| OD        | Outgoing calls made in the current day                           | 1-4         |
| OH        | Outgoing calls made in the current hour                          | 1-4         |
| SH        | Grade of Service offered in the current hour                     | 1-2         |
| SD        | Grade of Service offered in the current day                      | 1-2         |
| AO        | Number of Agents on outgoing calls                               | 1-2         |
| AI        | Number of Agents on incoming calls                               | 1-2         |
| AF        | Number of Agents free to receive calls (idle)                    | 1-2         |
| AB        | Number of Agents busy                                            | 1-2         |
| AL        | Number of Agents logged on to the QuickQ                         | 1-2         |
| QL        | Queue length, number of calls in the queue                       | 1-2         |
| QT        | Queue time (waiting time of the longest waiting call in seconds) | 1-3         |

7. Highlight the parameter you want to select and press **Enter**. Repeat this procedure for all parameters until you have defined all of them.

*NOTE: Each parameter type (when active) is defined in the Wallboard Parameters Help Bar at the bottom of the Wallboard Parameter–Edit window. See Figure 3-13.*

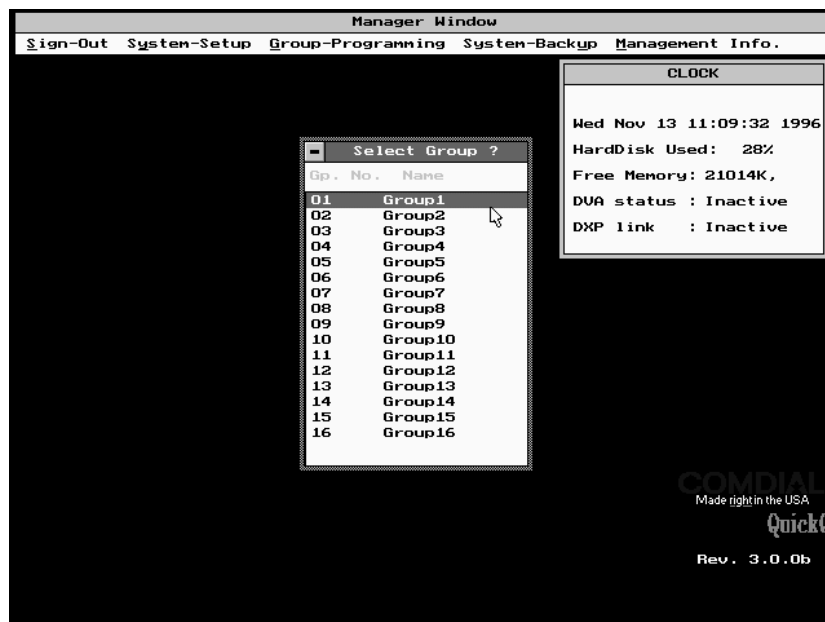
8. When you finish defining all parameters, press Update. The Save Wallboard Parameters window appears with YES and NO options. Click on YES or press **Alt Y** to save the entered data and close all windows. Click on NO or press **Alt N** to return to the Wallboard Parameters window.

## 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 **Group Programming** from the Manager window menu bar. A pull-down menu appears with the names of all the groups on the system (Figure 3-14).



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**Figure 3-14. 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** or 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 four 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.

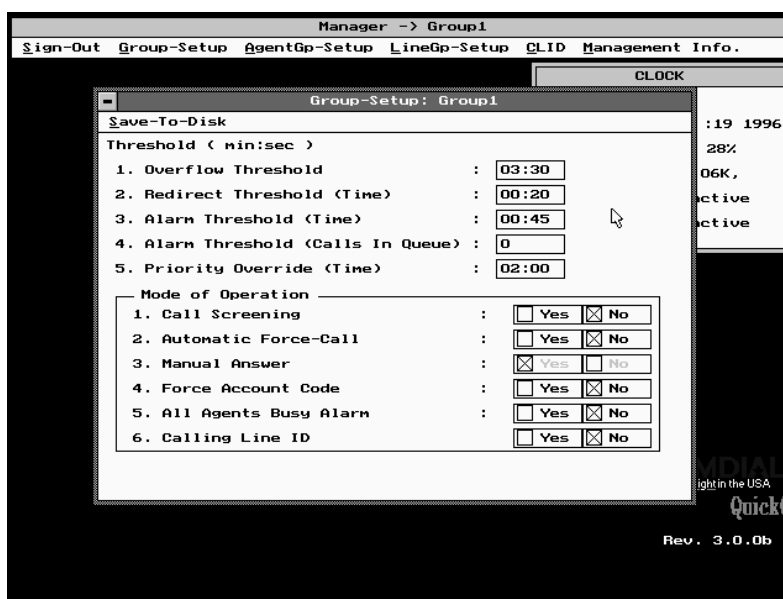
### ***Preparing The Group Layout / Worksheet***

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 Parameters

Use this procedure to configure your group parameters:

1. Select **Group - Setup** from the menu bar. The Parameter Setup and Day to Night Schedule options appear. Select **Parameter Setup** and the Group Setup window (Figure 3-15) 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.



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**Figure 3-15. 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. When the **Force Account** mode is set, the system will prevent the agent from going into the wrap-up mode until he/she has entered the account code for which that call is to be assigned.
11. Set the **All Agents Busy Alarm** when you want the system to notify the supervisor and agents of this condition.
12. To receive information on incoming calls like the caller's telephone number for example, turn the **Caller Line ID** on.
13. After finishing with the Group Setup window, use the Save-To-Disk option on the menu bar before you close the window.
14. 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 Group Day To Night Schedule

Use this procedure to specify whether the system will automatically switch to night mode at the specified Day-to-Night mode time. Every group can set its own unique seven-day schedule.

1. Select **Group-Setup** from the menu bar. The **Parameter Setup** and **Day to Night** schedule options appear. Select **Day to Night Schedule** and the **Day to Night Schedule** window appears (Figure 3-16).
2. Select the days you want to schedule by clicking on the down arrow box in each of the boxes on the left side of the window. For example, if your site operates Monday, Tuesday, Thursday, Friday, and Saturday, your schedule would be arranged as follows:
 

Monday

Tuesday

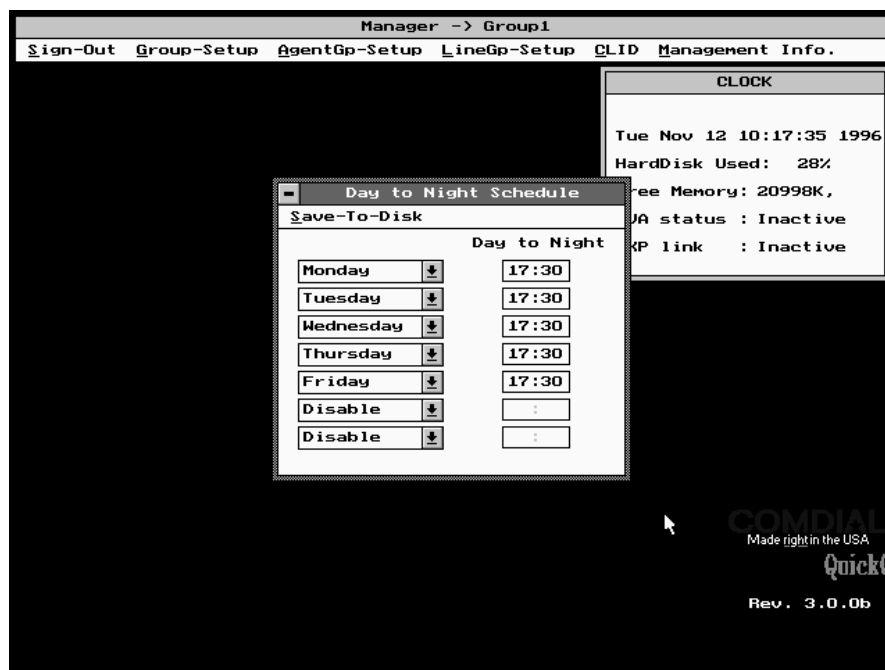
Disable

Thursday

Friday

Saturday

Disable
3. Set the time for each day by using the 24-hour format (example, enter 15:30 to set 3:30 in the afternoon) to correspond with each day on the left of the window. This is the time of day that the system will go to the night mode for the active group.
4. When you have finished with the schedule, press **Save-to-Disk**. The **Save Day to Night Setup** window appears with **Yes** and **No** options. Click on **Yes** or press **Alt Y** to save the data entered and close all windows. Click on **No** or press **Alt N** to close the **Save Day to Night Setup** window and return to the **Day to Night Schedule** window. Press **Esc** or double click on the close box to exit this window.



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Figure 3-16. Day To Night Schedule

## 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 statistical 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 a 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 3-17).

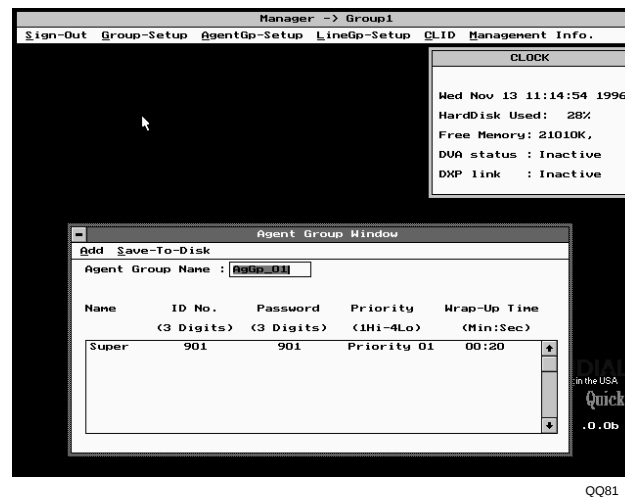


Figure 3-17. Agent Group Window

2. If the selected subgroup does not exist, the Add Agent Group Window will appear. Select Yes or press **Alt Y** to create the subgroup and open 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 3-18).

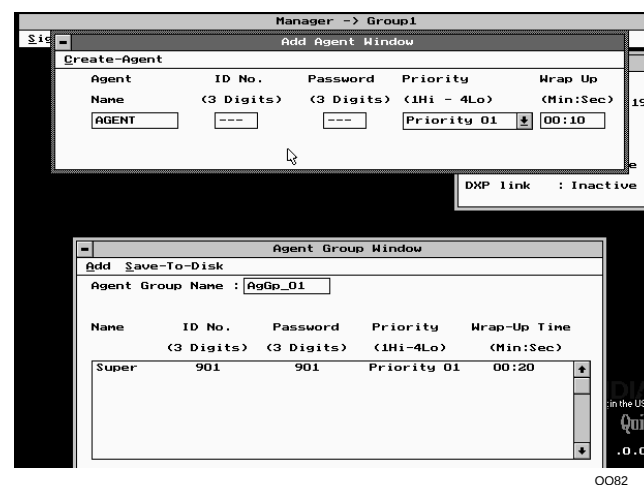


Figure 3-18. Add Agent Window

4. Type the name of the Agent at the AGENT default entry. Eight character spaces are provided for the agent's name.

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 their paper work before they are assigned another call).
6. After you have entered all Agent details, select **Create-Agent** from the menu bar. The **Add Agent Window** appears prompting you with YES or NO. Select YES or pressing **Alt Y** will add to the agent list and return to the **Add Agent Window**. When you are finished making entries, 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, **Update** and **Delete**. After changing the agent information, select **Update** or press **Alt U**. The **Update Agent Information** window appears with the YES and NO options. Select YES or press **Alt Y** to save the changes made. The **Edit Agent Setup** window and the **Update Agent Information** window closes automatically. Select NO or press **Alt Y** to close the **Update Agent Information** window and return to the **Edit Agent Setup** window.

NOTE: Press **Enter** to move the cursor from the Agent Group Name to the Agent in the scroll area.

8. If you wish to delete the agent from the sub-group, click on the **Delete** option or hold down the **Alt** key and the **D** key at the same time. The **Delete agent from sub-group** window appears. Select YES or press the **Alt** key and the **Y** key at the same time to delete the agent from the Agent Group list. The **Delete agent from sub-group** window and the **Edit Agent Setup** window close 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 prompts. Select YES or press **Alt Y** to save all information to the hard disk and close the windows automatically. Select NO or press **Alt N** to close the **Save Agent Group** window and return 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. For example, local lines will be grouped in one Subgroup and Inwats 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 LineGroup-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 3-19). 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.

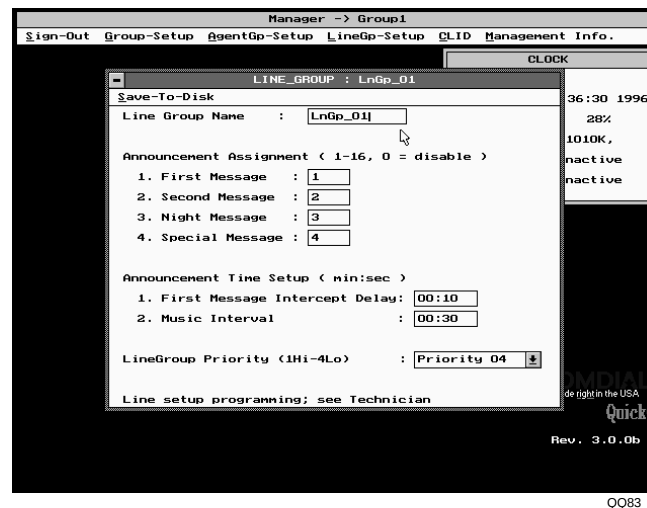


Figure 3-19. Line Group Window

*NOTE: If you open a non-existing Line Group by mistake, always select NO or hold down, the **Alt** key and the **N** key together. Once you create a new Line Group, it cannot be removed—if the line Group created will appear on all 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 if 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 puts customers on hold. The second message reassures customers that an agent will be with them shortly. The default is messages 1 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 this 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 a power failure or a bomb threat), or if the office has to close early. When the system switches to night mode, the special

message changes to the 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 if 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 is 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 Inwats lines to cut down on long distance costs.
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 **Alt Y** to save your data and close the windows.

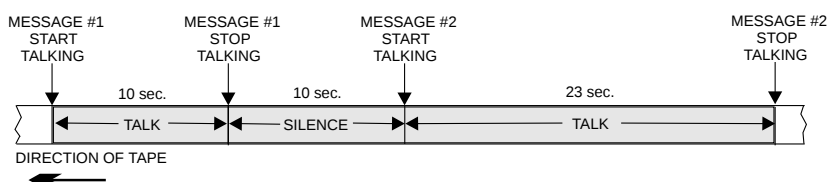
## Understanding the Messages

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.

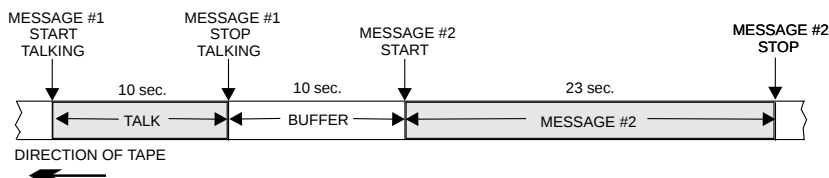
The Current setting shows the length of the message in minutes and seconds. The Limit setting shows the time available for the message. *QuickQ* allows a total of 320 seconds of message recording time.

The recording medium is a random access memory (RAM) chip; however, a cassette tape was used in the following figures to illustrate for you the recording technique you can use to create buffers. These buffers allow you to replace messages with new ones of longer length without disturbing other stored messages.

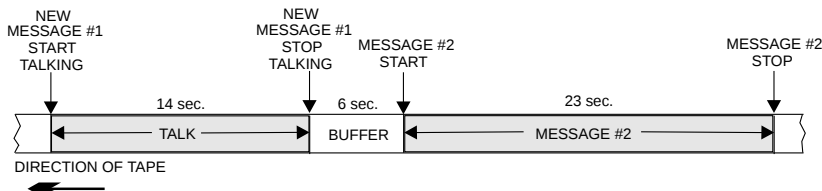
### Step 1 - Original recording



### Step 2 - Re-record message #1 to create a 10-second buffer



### Step 3 - Use original 10 seconds plus 4 seconds of buffer to record new message #1



QQ112

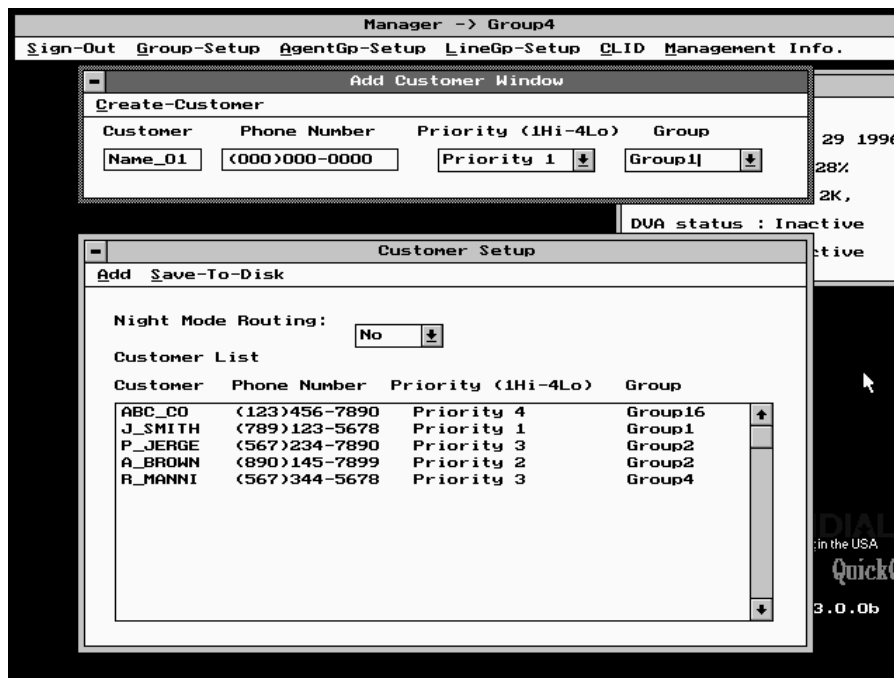
## Using The Calling Line Identification (CLID) Feature

The QuickQ system supports preferred customer routing based on Calling Line ID network digits. It provides a method of call routing that can handle a preferred customer list of up to 50 preferred customers per group. The system can also route a total of 320 preferred customers to agents within specific agent subgroups. Calls from preferred customers are routed to agents in a specified sub-group. Each group supervisor has the option to activate this feature for his or her group. When this feature is activated, two additional reports are available, on demand or at programmed intervals—

- *Abandoned Call Record* (a printed list of all preferred customers that hang up during a call),
- *Preferred Customer Report* (a printed report displaying group statistics on abandoned calls and telephone numbers of preferred customer calls that were abandoned).

## Adding Customers To The Preferred Customer List

1. Select **CLID** from the menu bar, a pull-down menu appears with two selections. Click on **customer Setup** and the **Customer Setup** window appears.
2. To add a customer to the preferred customer list, click on **Add**. The **Add Customer** window appears.
3. Type the customer's name in the **Customer** field. Press **Tab** to move to the **Phone Number** field and enter the customer's telephone number. Press **Tab** to move to the **Priority** field. Press the down arrow box for a pull-down menu showing the priority choices. Use the **up** or **down** arrow key and the **Enter** key to select the priority or click on the priority with the mouse to select it. Press **Tab** to move to the **Group** selected. Press the down arrow box for a pull-down menu listing the group choices. Use the **up** or **down** arrow key and the **Enter** key to select the group or click on the group with the mouse to select it. (x is a wild card; for example, (xxx)555-xxxx is all 555 calling area.)
4. Add this preferred customer data to the preferred customer list by clicking on **Create-Customer**. The **Yes or No Add Customer** window appears. Select **Yes** or press **Alt Y** to save the data entered and close the **Add Customer** window. Click on **NO** or press **Alt N** to return to the **Customer Setup** window. Exit this window by pressing **Esc** or double clicking on the close box.
5. When you have finished adding preferred customers, press **Save-To-Disk**. The **Save Customer Setup** window appears with **Yes** and **NO** options. Select **Yes** or press **Alt Y** to save the data entered and close the **Save Customer Setup** window. Click on **NO** or press **Alt N** to return to the **Customer(s)** window.
6. Close the **Customer Setup** window by pressing **Esc** or double clicking on the close box.



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Figure 3-20. Adding A Preferred Customer To The Preferred Customer List

### Updating Or Deleting Preferred Customers

1. Select CLID from the menu bar, a pull-down menu appears with two selections. Click on customer Setup and the Customer Setup window appears.
2. Select the customer's name by using the **up** and **down** key to highlight the name and then press **Enter** or use the mouse to click on the customer's name you want to delete or update. The Edit Customer window appears (Figure 3-20).
3. Make changes as needed in the preferred customer entry. Click on Update and the Update Customer window appears with YES and NO options. Select YES or press **Alt Y** to save the data entered and close the Edit Customer window. Click on NO or press **Alt N** returns to the Customer Setup window.
4. Delete a preferred customer's name by repeating step 2 above. When the Edit Customer window appears, click on Delete and the Delete Customer window appears with YES and NO options. Select YES or press **Alt Y** to delete the customer's name and close the Edit Customer window. Click on NO or press **Alt N** to return to the Edit Customer window. Return to Customer Setup window by pressing **Esc** or double-clicking on the close box.
5. After you have made all changes to the preferred customer list, press Save-To-Disk. The Save Customer window appears. Select YES or press **Alt Y** to save the data entered and close all windows. Click on NO or press **Alt N** to return to the Customer Setup window.

## Setting Up The Abandoned call Record

1. Select CLID from the menu bar, a pull-down menu appears with two selections. Click on the Abandoned Call Report and the Abandoned Call Report window appears (Figure 3-21).
2. Select the day or days of the week you want the abandoned call report printed by clicking on the corresponding buttons. Report opens on screen with the options print export.
3. To set up the automatic printing interval, click on the down arrow box and a pull-down menu appears with several interval choices. Press the **up** and **down** arrow key to highlight your interval choice and press **Enter** or click on your choice with the mouse.
4. After entering your choices, press **Save-To-Disk** and the Save Automatic Printing Interval? window appears with Yes and No options. Select Yes or press **Alt Y** to save the data entered and close all windows. Click on NO or press **Alt N** to return to the Abandoned Call Report window. Exit by pressing **Esc** or double clicking the close box.

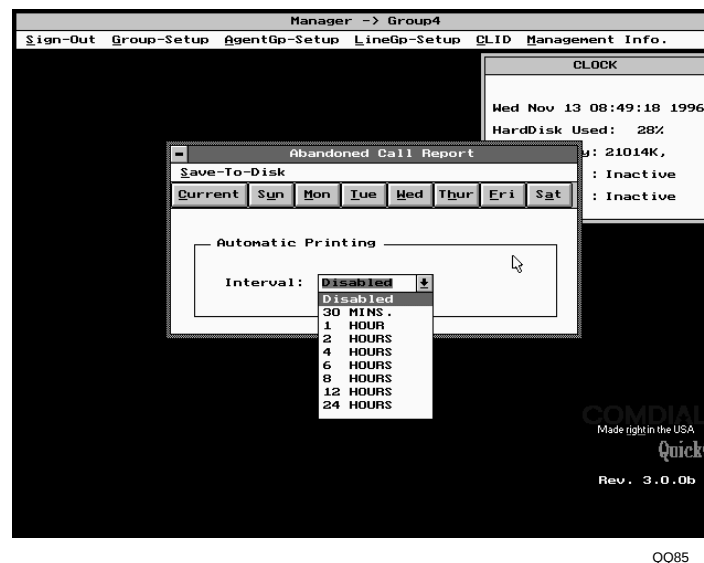


Figure 3-21. Preferred Customer Abandoned Setup Window

## 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 Reports
- Current Reports
- Report Schedule
- Wallboard Message
- Wallboard Schedule
- Wallboard Alarm
- Configuration

Refer to Section 5, Management Information for further details.

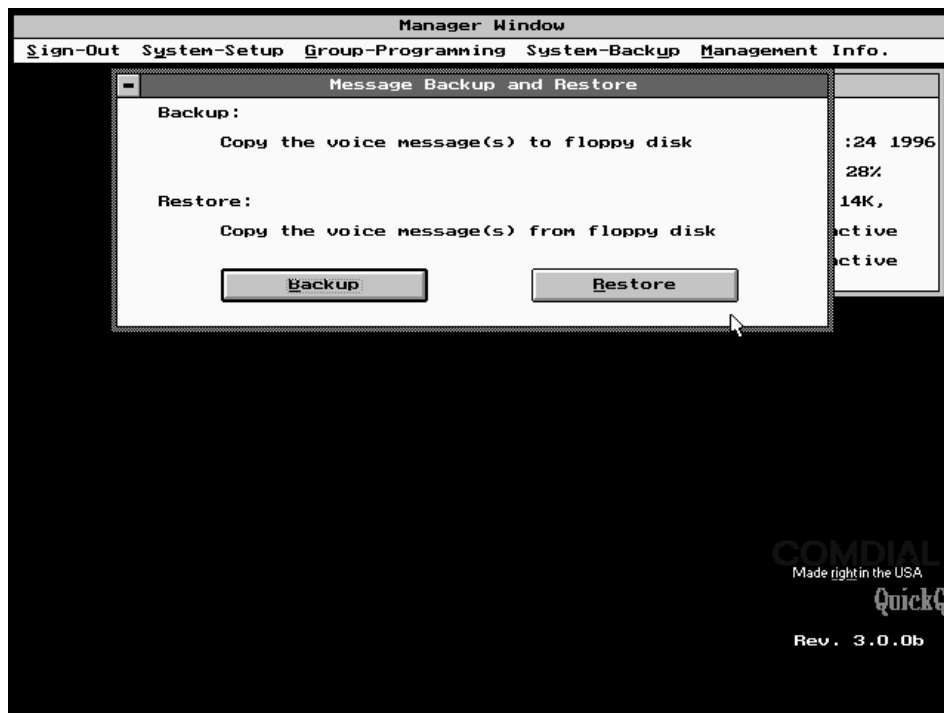
## **System-Backup (Manager Level)**

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 any 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 that 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 Announcement Backup and the Message Backup and Restore window appears (refer to Figure 3-22).



QQ86

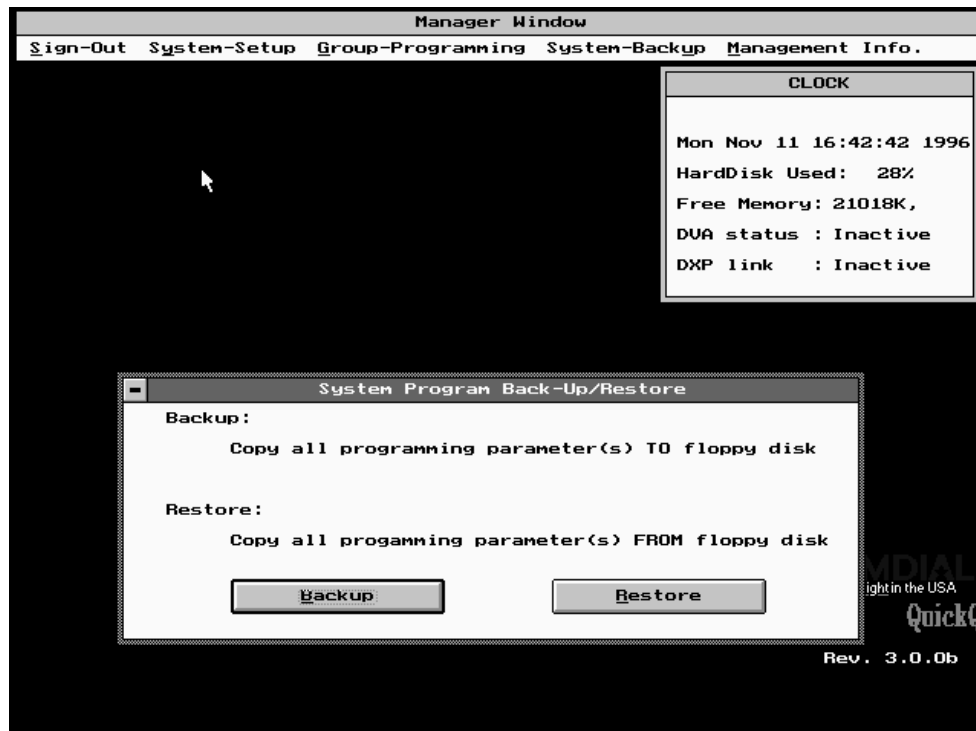
**Figure 3-22. Message Backup and Restore Window**

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 Restore Button. The messages are backed up to the 3.5-in. 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. Use a standard DOS-formatted 1.44MB disk.*

### Configuration Backup

1. Select Configuration Backup on the System-Backup pull down menu. The System Program Back-up/Restore window appears. Refer to Figure 3-23.
2. Select the Backup button to send the current System Programs to the floppy, disk. The Backup 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.



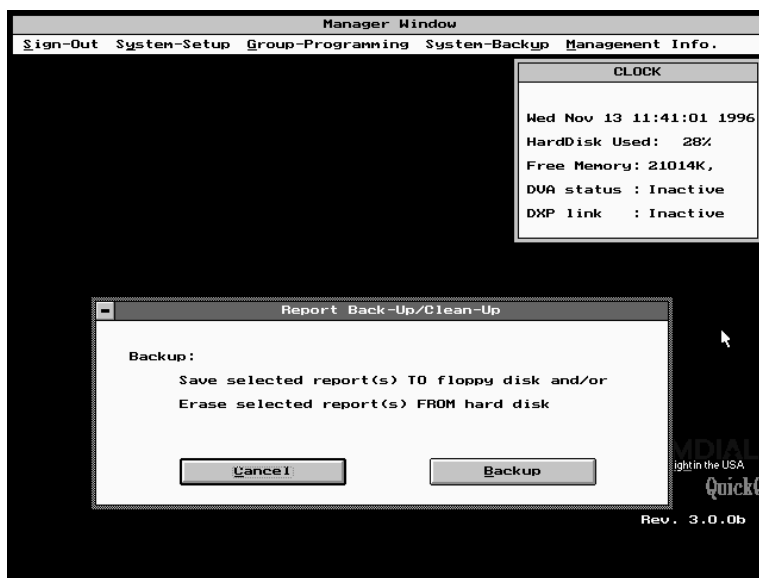
QQ87

**Figure 3-23. System Program Backup/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 3-24.

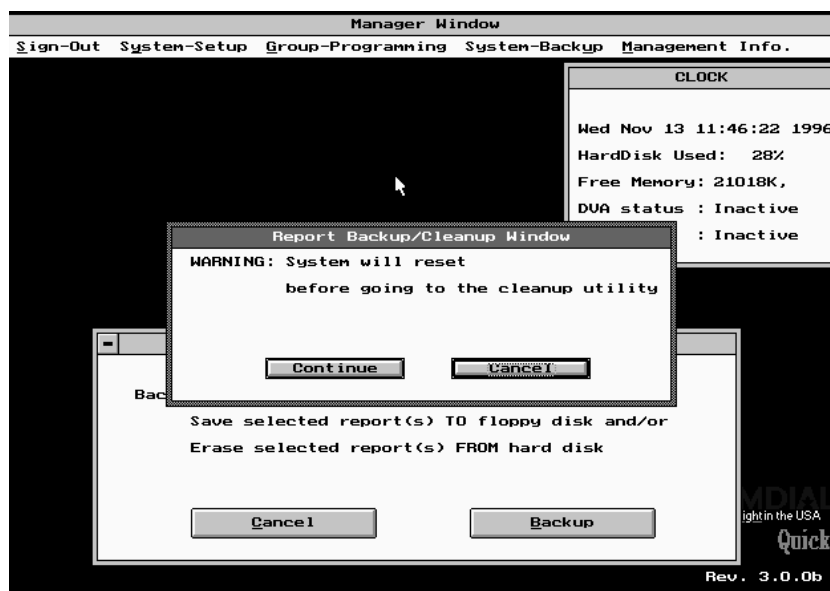


QQ88

**Figure 3-24. Report Backup/Cleanup Window**

2. Use the **Tab** key to move from the **Cancel** button to the **Backup** button. Select **Cancel** to exit this function and close the **Report Back-Up/Clean-Up** window. When selecting **Backup**, another **Report Backup/Cleanup** window appears. Refer to Figure 3-25. Select the **Continue** button to initiate the **Report Back-Up** function. Refer to Appendix E, **Backup Utility** section for details.

*NOTE: QuickQ does not function during backup.*



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**Figure 3-25. Report Backup/Cleanup Confirmation Window**

# Operating the QuickQ System

The screens illustrated on the following pages are typical for telephones having a 32-character display (16 characters x 2 lines). Because the Scout cordless phone, which can optionally be used by QuickQ supervisors, has a 20-character display (10 characters x 2 lines), many of the messages must be abbreviated. These are illustrated on the following pages adjacent to the 32-character displays.

## 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*.



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.



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



4. **For Agents:**

The system asks the agents to log into the appropriate group. If the supervisor 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.

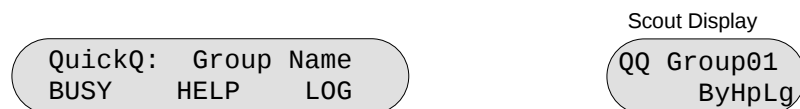


**For Supervisors:**

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.



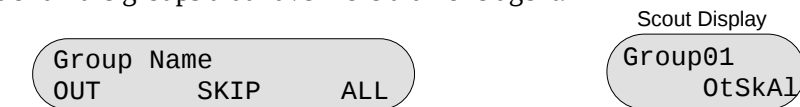
5. The following screens indicates you are now ready to accept ACD calls:

**For Agents:****For Supervisors:****6. For Agents logged into one group:**

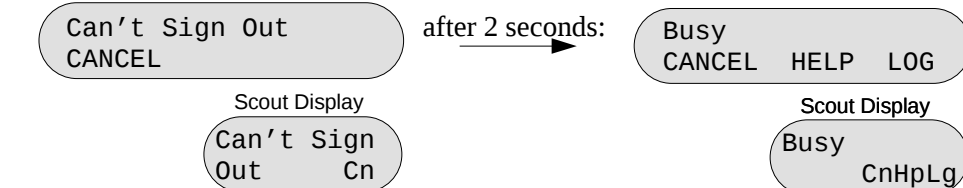
You can log out from *QuickQ* while in the Ready, Busy or Wrap-up modes. To do this, press the **LOG** interactive button. You are now in the Log Procedure, press the **OUT** interactive button to log out.

**For Agents logged into multiple groups:**

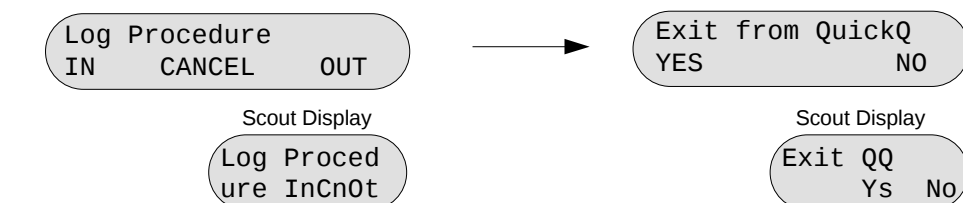
After you press the **OUT** interactive button from the Log Procedure, the system asks which group you wish to log out from. You can press the **OUT** interactive button to log out of the group shown on the display. You can press the **SKIP** interactive button to display the next group. Press the **ALL**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



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

**For Supervisors:**

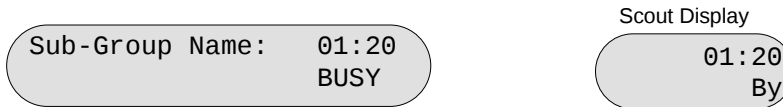
Press the **LOG** interactive button to take you to the Log Procedure. Then press the **OUT** interactive button. The screen will ask whether you want to exit *QuickQ*. Press the **Yes** interactive button to exit.



## 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.



### **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.



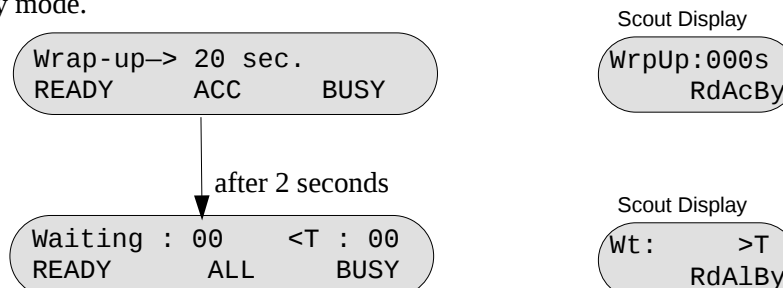
- When a call has reached the preset redirect threshold time, the system will forward the call to another agent and will make your set **BUSY** at the same time.



### **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.

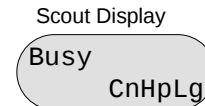
- When you disconnect the call, the wrap-up timer starts and the display shows the wrap-up time, the number of calls in queue, and the number of those calls that have waited beyond the alarm threshold.
- Either remain in wrap-up mode until the wrap-up timer expires or press the **READY** interactive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



## Making Your Telephone Busy

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

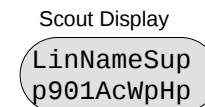
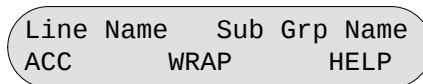
- To make your telephone busy, press the **BUSY** interactive button.
- To return to the ready mode, press the **CANCEL** interactive button.



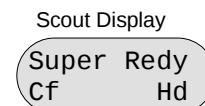
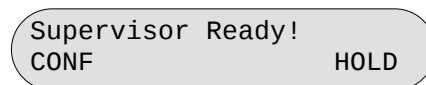
## Requesting Help

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

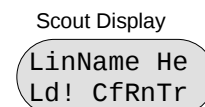
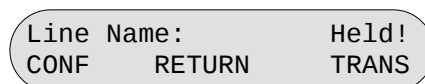
1. While engaged on a call, press the **HELP** interactive button. If the Supervisor is busy or unavailable (after 5 seconds of prompting) your telephone display shows **Supervisor Busy!**. You can either retry or cancel the request.



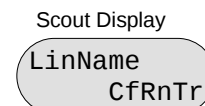
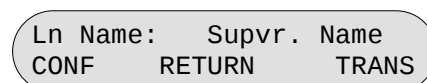
2. When the Supervisor calls you, you can either bring him or her into the call (conferencing) or put the caller on hold and speak to the Supervisor in private.



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.



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



## 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.



## 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.



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.



## Operating As A Supervisor

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

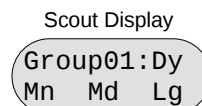
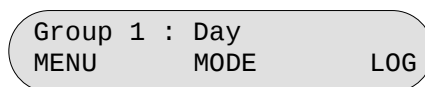
### Changing the Mode of Operation

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

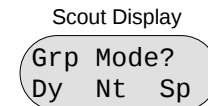
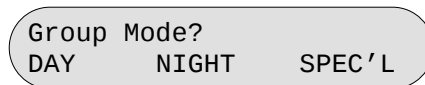
- **Day Answering Mode**—The system answers with the day message, places calls on hold and distributes incoming calls to the next available Agent. The call distribution is based on the longest idle time, or the priority of the Agent or incoming line.
- **Night Answering Mode**—The system answers with 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.



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.



## Recording And Playing Back The Announcement Message On The DVA16

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* operations 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

Scout Display  
Wt : >T  
Ms Rp Ag

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

Scout Display  
Msg#:  
RtCrQt

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

Scout Display  
Msg01:000s  
RcPyQt

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

Recording Msg 01  
STOP

Scout Display  
Record Msg  
01 St

*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

Scout Display  
Accept Msg  
YsNoPy

7. The system plays the message through the handset.

Playing Msg 01  
STOP

Scout Display  
Play Msg01  
St

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

Accept Message?  
YES NO PLAY

Scout Display  
Accept Msg  
YsNoPy

## 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

Scout Display  
Group01:Dy  
MnMdLg

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

Waiting:02 >T:00  
MSG REPORT AGENT

Scout Display  
Wt:00 >T00  
MsRpAg

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

Scout Display  
Agt Id:\_\_\_\_  
SnRtQt

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

Agent Name :Incall  
SCAN SELECT QUIT

Scout Display  
Agnt Name:  
SnSeQt

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

Agnt101:Idle  
SCAN SELECT QUIT

Scout Display  
Agnt101:Id  
Le SnSeQt

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

Scout Display  
Wt >T  
MsRpAg

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

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

Ans: 123 Lost: 4  
QUIT

Scout Display  
A:123L:4  
Qt

## ***Additional QuickQ Displays For Scout Telephones***

You may encounter some Scout telephone displays that are not included in the illustrations in the previous section. To interpret the interrupt button abbreviations used on these displays, refer to the abbreviations in Table 4-1.

Figure 4-1. Interrupt Button Abbreviations Used on the Scout Display

| <b>Scout Display</b> | <b>Standard Display</b> | <b>Scout Display</b> | <b>Standard Display</b> |
|----------------------|-------------------------|----------------------|-------------------------|
| Ab                   | ABORT                   | Ok                   | OK                      |
| Ac                   | ACC                     | Ot                   | Out                     |
| Ag                   | AGENT                   | Py                   | PLAY                    |
| Al                   | ALL                     | Qt                   | QUIT                    |
| As                   | ANSWER                  | Rd                   | READY                   |
| By                   | BUSY                    | Rc                   | RECORD                  |
| Cn                   | CANCEL                  | Rj                   | REJECT                  |
| Cr                   | CLEAR                   | Rs                   | RELEASE                 |
| Cf                   | CONF                    | Rp                   | REPORT                  |
| Dy                   | DAY                     | Rt                   | RETRY                   |
| Ex                   | EXIT                    | Rn                   | RETURN                  |
| Hp                   | HELP                    | Sn                   | SCAN                    |
| Hd                   | HOLD                    | Se                   | SELECT                  |
| In                   | IN                      | Sk                   | SKIP                    |
| Lg                   | LOG                     | Sp                   | SPEC'L                  |
| Lg                   | Logout                  | St                   | STOP                    |
| Mn                   | MENU                    | Tr                   | TRANS                   |
| Md                   | MODE                    | Vc                   | V OICE                  |
| Ms                   | MSG                     | Wp                   | WRAPUP                  |
| Nt                   | NIGHT                   | Ys                   | YES                     |
| No                   | NO                      |                      |                         |

# Management Info.

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

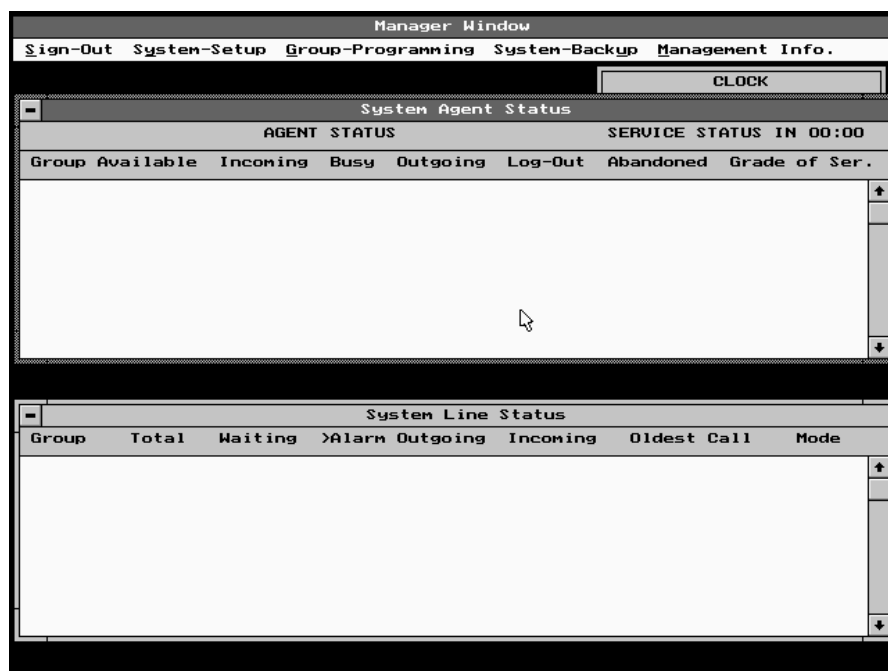
When someone selects the Management Info. menu bar option in the manager window, the system presents a menu that has several options. The menu offers the following options:

- Real Time-Setup (available in group level only)
- Real Time
- Historical Reports
- Current Reports
- Report Schedule
- Wallboard Message
- Wallboard Schedule
- Wallboard Alarm
- 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 updates these windows in approximately 3 second intervals so that they reflect current activities and statistics of both the Agents and the lines.



QQ90

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.

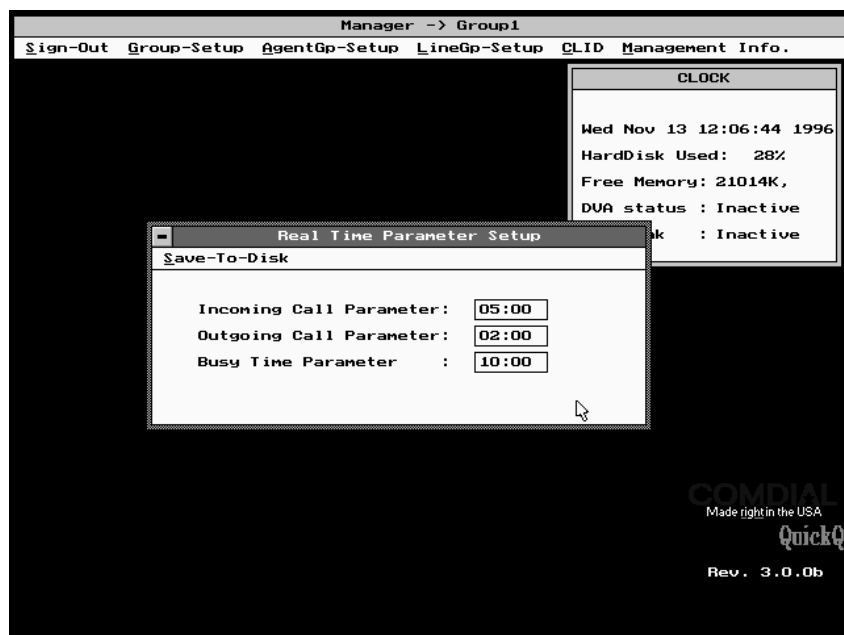
The System Line Status window shows the following items:

- 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 (Group Level)

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 Setup 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.



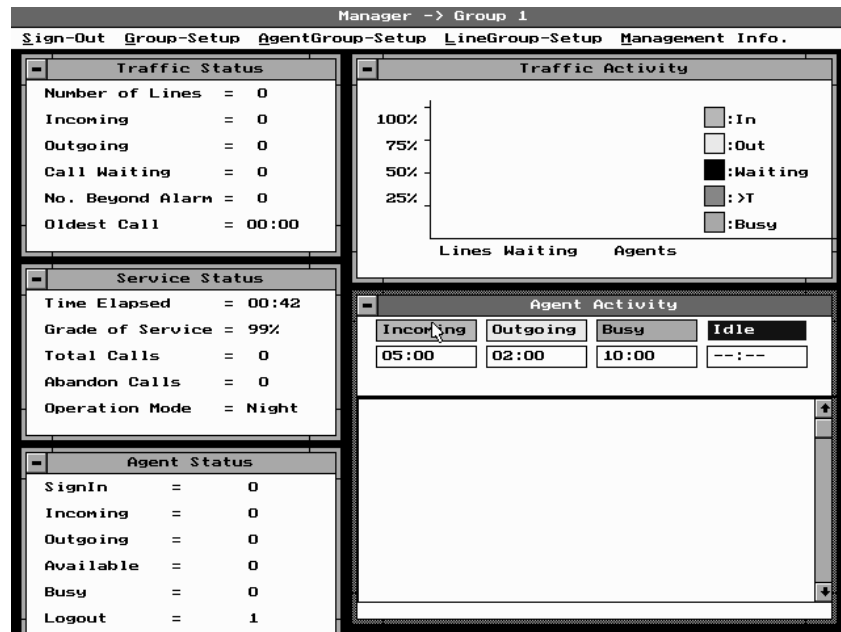
QQ91

Figure 5-2 . Real Time Parameter Setup

## Viewing The Supervisor's Real Time Report (Group Level)

The system updates the Supervisor's real time report (refer to Figure 5-3) in approximately 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).



QQ114

Figure 5-3. Supervisor's Real Time Report

### Traffic Status Definitions

1. Number Of Lines = lines 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 = amount of time that the 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 explanation under Figure 5-16
3. Total Calls = total calls serviced in current window time
4. Abandoned Calls = calls dropped by caller, or connected for less than nine seconds (or a predetermined time)
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 calls and the Agent. The Lines column indicates the percentage of activity on the lines assigned to group. The activity for the lines can be green for incoming calls or yellow for outgoing calls. The Waiting column 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 column 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 calls and yellow for outgoing calls.

**Agent Activity** — The Real Time Agent Activity window shows the current state of each agent signed into 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 preset threshold time for each state is shown under the heading. The list of names under each possible state is shown based on the longest time in the activity state. The time spent by the agent in that state is also displayed beside the agent's name except for idle state because management has little control over how long an agent stays in the idle state. The agent's name box may change to red under the possible states, if the time in that state has exceeded the preset time for the 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 (Figure 5-4). 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 hour 1 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.

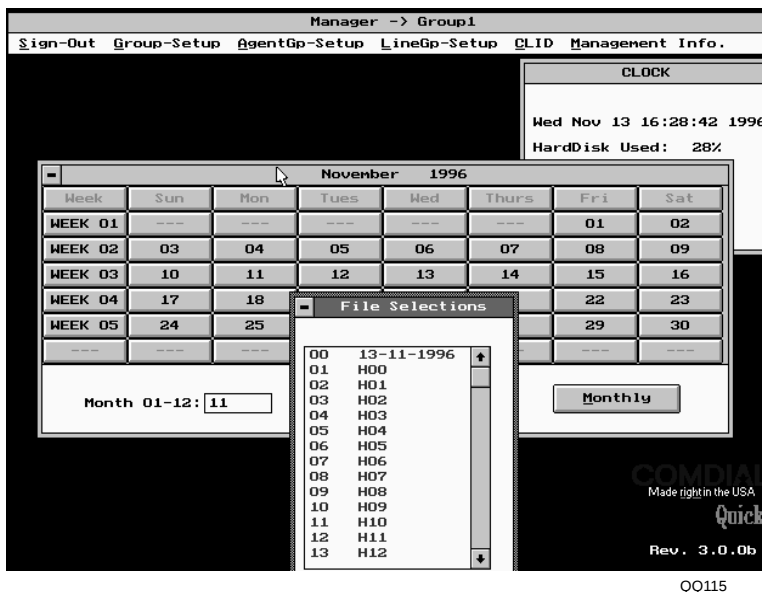


Figure 5-4. Historical Report Window

### Exporting Reports in ASCII Format

There is an option available under the Historical Reports screen that allows you to export system and group reports in the ASCII format. This allows you to import these reports into standard spreadsheet programs so that you can customize the data. Use the following procedure to export your reports.

1. Insert a disk into floppy disk drive A on your QuickQ computer.
2. Select **Historical** from **Management Info** to obtain the window illustrated in Figure 5-4.
3. Sign through to the month of your choice. The export function is the last item on the title bar. Click on this item and a small window appears called **Export Report**. This window contains the **START** and **CANCEL** button, and the file name of the report which you cannot change. The file name is broken down by month, year and group number. For example, file name A:\M1196.G06 means this file contains monthly data for Group 6, for November, 1996. G00 is used to identify system reports.
4. Press the **START** button and the following sentence appears on your screen: *Exporting Report - - Do Not Take Out Diskette.*
5. If you forgot to insert a new disk in drive A, the following window appears when you press the **START** button: *Error, Floppy drive is not ready. Please insert disk in Drive A. OK.*

### 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 Report Schedule

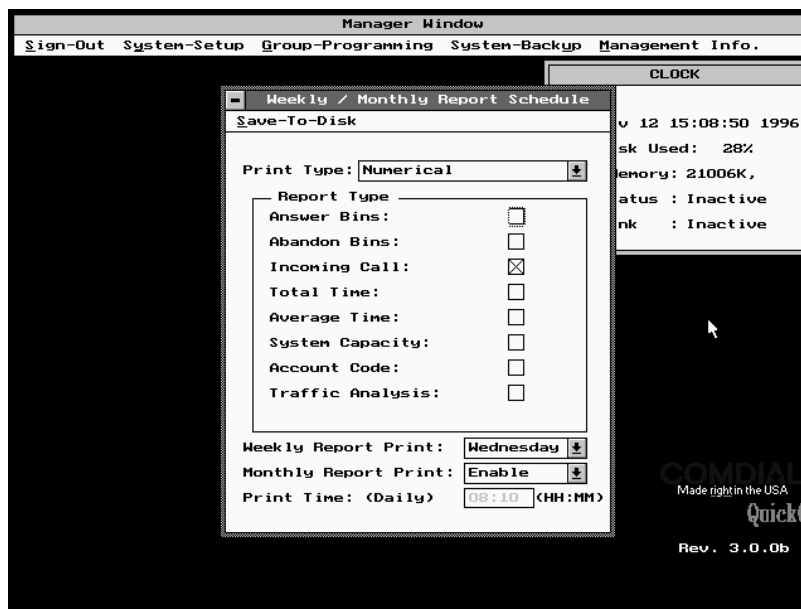
Selecting the Report Schedule from the Management Info menu causes a pulldown menu to appear with two choices—Daily and Weekly/Monthly.

Select Daily and the Daily Report Schedule window appears. You use this window to select reports that you want to print daily by clicking on the appropriate boxes in the Report Type area of the window. Also, you use this window to enter the print time (in 24-hour format) for any reports you want to print—daily, weekly, or monthly. When entering the printing time, do not select any time between 23:45 and 00:15 as QuickQ is updating reports at this time and cannot print.

Select weekly/monthly and the Weekly/Monthly Report Schedule window appears (Figure 5-5). Use this window to select weekly and/or monthly report printing. Note that in the Figure 5-5 example, the Incoming Call report will print every Wednesday morning at 08:10, and also at this time on the first day of every month. If you want this report to print every day at 08:10 instead of just on Wednesday mornings and the first day of the month, you must select the Incoming Call box on the Daily Report Schedule. Unless you would want some other reports printed weekly and/or monthly, you would select “disable” for both weekly and monthly times.

Print time for all scheduled reports is set in the Daily Report Schedule. This time also applies to weekly and monthly reports.

Select the print type for reports on each of the two schedules by pressing the down arrow box beside Print Type. Print types are Numerical, Graphical, and Numerical/Graphical. Highlight your choice by clicking it with the mouse or by using the **Up** and **Down** arrow keys and the **Enter** key.



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Figure 5-5. Weekly/Monthly Report Schedule Window

## **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
- Prefer Customer (Group Supervisor only)

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 **Graphical** 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 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 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 **Abort** button (does not save your changes), or the **Save** option (saves all changes). Both of these options close the window.

**Print**—To print your report, select the **P r i n t** menu bar option. The system drops a menu down that offers you the choice of printing the **N u m e r i c a l** report, **G r a p h i c a l** report, or **P r i n t A l l**.

Choose one of the three options and the Print Report window appears offering a list of nine report types for group. Use the **Tab** key to cycle from the **S t a r t** 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 **S t a r t** button or press **Alt S**.

**Copy**—To copy the current opened report to diskette in binary format, select the copy menu bar option. Click on Floppy A to display a configuration window. Press **OK** to complete the task or **CANCEL** to abort the selection.

**Delete**—Select this option to delete the current opened report from memory. A window will come up to confirm your selection. Choose **DELETE** to proceed or **CANCEL** to abort this selection.

**IMPORTANT:** *Make sure you really want to delete the selected report. Once a report is deleted, it is erased from memory.*

**Export**—Refer to *Exporting Reports in ASCII Format* section on page 5-5.

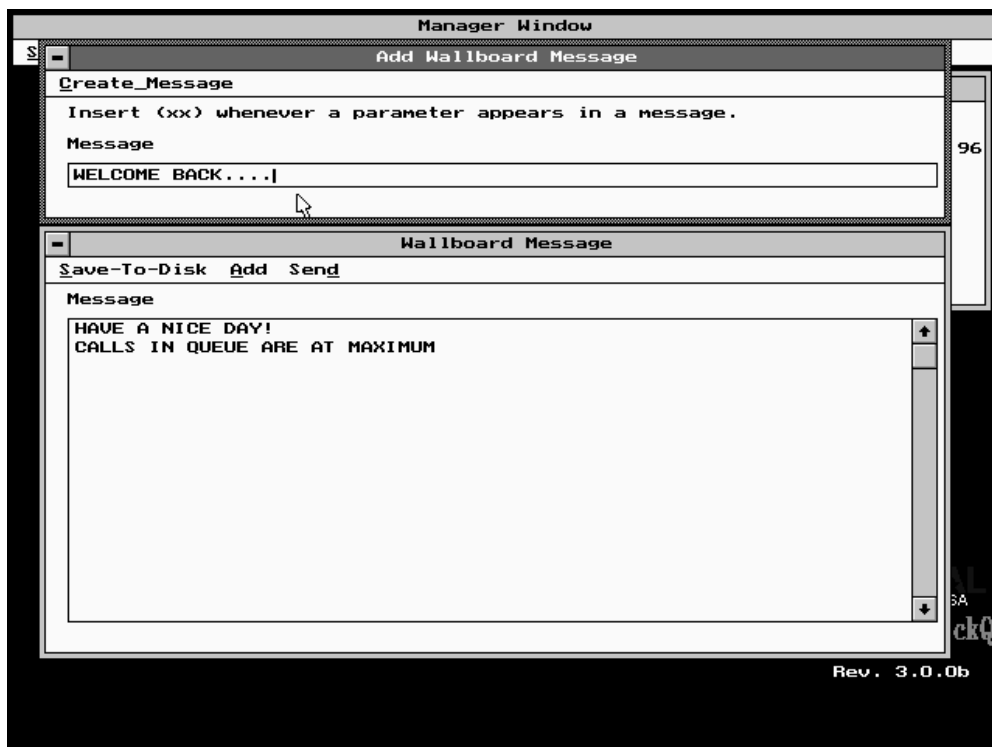
## **Selecting Wallboard Message Report**

This report gives you a list of the wallboard messages stored. You can create and store new messages or update existing ones, and select messages to send to wallboards.

1. Select **Wallboard Message** from the **Management Info** pull-down menu. The **Wallboard Message** window appears (Figure 5-6).
2. Use the **Up** and **Down** arrow keys to cycle through the message titles. Your choice will be highlighted.
3. To add a new message, click on **Add** and the **Wallboard Message-Add** window appears. Type your message in the box provided. You can use up to 70 characters. Save the message and add it to your message list by clicking on **Create Message**. The **Create Wallboard** window appears with **Yes** and **No** options. Click on **Yes** or press **Alt Y** to save your data and close the windows or click on **No** or press **Alt N** to return to the **Message Add** window.

*NOTE: Messages longer than 20 characters will scroll on the wallboard.*

4. To send or edit a message, press the **Up** and **Down** keys to highlight the message and press **Enter** or click your selection with the mouse. The **Wallboard Message Send or Edit** window appears. To edit the message, select **Edit** and the **Wallboard Message-Edit** window appears. From this window, you can either change or delete the displayed message. To exit this menu, press **Esc** or double click the close box.
5. After editing the wallboard messages, select **Update** or press **Alt U**. 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.



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Figure 5-6. Adding A Wallboard Message

## Opening The Wallboard Schedule Report

This report provides information on when certain messages will be sent to the wallboards based on time. Also, this screen allows you to update or delete any of the existing schedules, or create new schedules as needed.

1. Select **Wallboard Schedule** from the **Management Info** pull-down menu. The **Wallboard Schedule** window appears (Figure 5-7).
2. Use the **Up** and **Down** arrow keys to cycle through the message schedules. Your choice will be highlighted.
3. To add a new message schedule, click on **Add** and the **Add Wallboard Schedule** window appears. Select the day of the week by pressing the **down** arrow box under **Day**. A pull-down menu appears with several choices. Highlight the day you want and press **Enter** or click on it with the mouse. Press **Tab** to move to the **Time** block, and enter the time of day in 24-hour format that the message will appear. Press **Tab** to move to the message block and press the down arrow box to display the messages. Select the message that you are scheduling by highlighting it and pressing the **Enter** key or clicking on it with the mouse.
4. Save the message schedule by clicking on **Create Schedule**. The **Create Wallboard** window appears with **YES** and **NO** options. Click on **YES** or press **Alt Y** to save your data and close the windows or click on **No** or press **Alt N** to return to the **Schedule Add** window.
5. To edit a schedule, press the **up** and **down** keys or use the mouse to highlight the message and press **Enter** or click your selection with the mouse. The **Wallboard Schedule** window appears. From this window, you can either change or delete the displayed schedule. To exit this menu, press **Esc** or double click the close box.
6. After editing the wallboard messages schedules, 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.

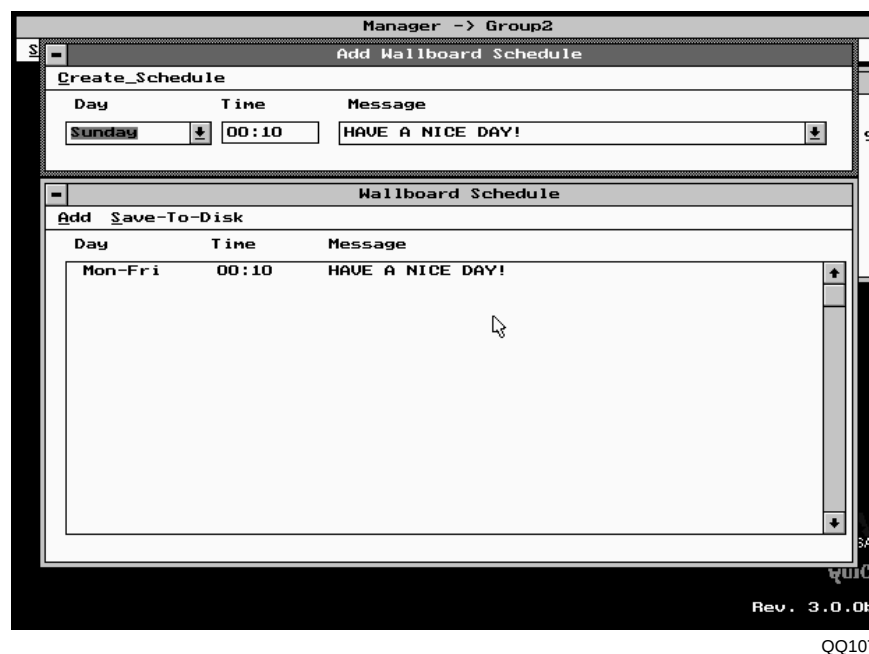


Figure 5-7. Adding A New Wallboard Schedule

## Selecting The Wallboard Alarm Report

This report provides information on when certain message threshold values will cause a wallboard alarm condition. When a wallboard alarm condition occurs, the parameter value will be displayed in red on the wallboard. The Wallboard Alarm screen allows you to update or delete any of the existing alarms, or create new alarms as needed.

1. Select **Wallboard Alarm** from the **Management Info** pull-down menu. The **Wallboard Alarm** window appears (Figure 5-8).
2. Use the **Up** and **Down** arrow keys to cycle through the alarms. Your choice will be highlighted.
3. To add a new alarm, click on **Add** and the **Add Wallboard Alarm** window appears. Select the parameter by pressing the down arrow box under **Parameter**. A pull-down menu appears with all of the parameter choices. Highlight the parameter you want and press **Enter** or click on it with the mouse. Description of the parameter highlighted is shown on the bottom of the screen. Press **Tab** to move to the **Function** field, and press the down arrow box. A pull-down menu appears with the function choices. Highlight the function you want and press **Enter** or click on it with the mouse. Press **Tab** to move to the **Threshold** field and type in the threshold value. Highlight the message you want to go with the alarm. If no message is associated with an alarm, no message will be displayed during the alarm condition, but the alarm parameter changes to red with a warning audible sound.
4. Save the alarm data by clicking on **Create Alarm**. The **Create Alarm** window appears with **Yes** and **No** options. Click on **Yes** or press **Alt Y** to save your data and close the windows or click on **No** or press **Alt N** to return to the **Add Wallboard Alarm** window.
5. To edit a message, press the **Up** and **Down** keys to highlight the message and press **Enter** or click your selection with the mouse. The **Edit Wallboard Alarm** window appears. From this window, you can either change or delete the displayed message. To exit this menu, press **Esc** or double click the close box. After editing the wallboard messages alarms, select **Update** or press **Alt U**. 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.
6. After editing the wallboard messages schedules, 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.

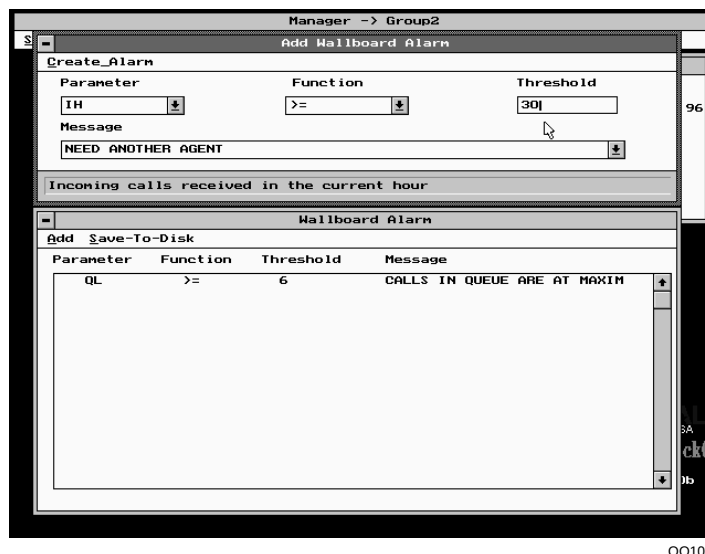


Figure 5-8. Adding A New Wallboard Alarm

## **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 **C o n f i g u r a t i o n** from the **M a n a g e m e n t I n f o** 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 **R e p o r t T y p e s** to the **G r o u p** 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 **P r i n t** button and press **Enter** or click on the **P r i n t** 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 graphical 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 5-9)
- abandon bins (Figure 5-10)
- incoming call (Figure 5-11)
- total time (Figure 5-12)
- average time (Figure 5-13)
- system capacity (Figure 5-14)
- account code (Figure 5-15)
- traffic analysis (Figure 5-16)

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|-------------------------------------------|---------------|--------|--------|--------|--------|--------|--------|--------|
| ANSWER BINS REPORT //current daily report |               |        |        |        |        |        |        |        |
| Report-Type                               | Report-Format | Note   | Print  |        |        |        |        |        |
| LINE ACTIVITY                             |               |        |        |        |        |        |        |        |
| .                                         | CALLS         | <00:00 | <00:00 | <00:00 | <00:00 | <00:00 | <00:00 | >00:00 |
| System                                    |               |        |        |        |        |        |        |        |
| Total                                     | 0             | 00%    | 00%    | 00%    | 00%    | 00%    | 00%    | 00%    |
| GROUP                                     |               |        |        |        |        |        |        |        |
| AGENT ACTIVITY                            |               |        |        |        |        |        |        |        |
| .                                         | CALLS         | <00:00 | <00:00 | <00:00 | <00:00 | <00:00 | <00:00 | >00:00 |
| System                                    |               |        |        |        |        |        |        |        |
| Total                                     | 0             | 00%    | 00%    | 00%    | 00%    | 00%    | 00%    | 00%    |
| GROUP                                     |               |        |        |        |        |        |        |        |

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Figure 5-9. Answer Bins

**Answer Bins**

Show percent of answered calls within the 7 programmable time bins.

Shows supervisors the response rates of their departments.

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|--------------------------------------------|---------------|--------|--------|--------|--------|--------|--------|--------|
| ABANDON BINS REPORT //current daily report |               |        |        |        |        |        |        |        |
| Report-Type                                | Report-Format | Note   | Print  |        |        |        |        |        |
| LINE ACTIVITY                              |               |        |        |        |        |        |        |        |
| .                                          | CALLS         | <00:00 | <00:00 | <00:00 | <00:00 | <00:00 | <00:00 | >00:00 |
| System                                     |               |        |        |        |        |        |        |        |
| Total                                      | 0             | 00%    | 00%    | 00%    | 00%    | 00%    | 00%    | 00%    |
| GROUP                                      |               |        |        |        |        |        |        |        |
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Figure 5-10. Abandon Bins

**Abandon Bins**

Show percent of abandoned calls within the 7 programmable time bins.

Shows supervisors the tolerance of callers.

| INCOMING CALL REPORT //current daily report |               |                |                |       |                |       |     |     |
|---------------------------------------------|---------------|----------------|----------------|-------|----------------|-------|-----|-----|
| Report-Type                                 | Report-Format | Note           | Print          |       |                |       |     |     |
| LINE ACTIVITY                               |               |                |                |       |                |       |     |     |
| .                                           | TOTAL         | INCOMING_CALLS |                |       | ANSWERED_CALLS |       | ANS | GOS |
| .                                           | I/C.          | ANS.           | ABD.           | NIGHT | DIR.           | ANNC. | >T  | %   |
| System                                      |               |                |                |       |                |       |     |     |
| Total                                       | 0             | 0              | 0              | 0     | 0              | 0     | 0   | 99% |
| GROUP                                       |               |                |                |       |                |       |     |     |
| AGENT ACTIVITY                              |               |                |                |       |                |       |     |     |
| .                                           | TOTAL_CALLS   |                | ANSWERED_CALLS |       | HELP           |       |     |     |
| .                                           | ANS.          | O/G.           | DIR.           | ANNC. | REQ.           |       |     |     |
| System                                      |               |                |                |       |                |       |     |     |
| Total                                       | 0             | 0              | 0              | 0     | 0              |       |     |     |
| GROUP                                       |               |                |                |       |                |       |     |     |

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Figure 5-11. 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                           |
| 8. GOS %                | = grade of service (see explanation under Figure 5-16)                      |

***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      |

| TOTAL TIME REPORT ///current daily report                |               |          |          |         |         |         |
|----------------------------------------------------------|---------------|----------|----------|---------|---------|---------|
| Report-Type                                              | Report-Format | Note     | Print    |         |         |         |
| Note: Sign-In and Idle time updated when agent sign out. |               |          |          |         |         |         |
| .                                                        | SIGN_IN       | INCOMING | OUTGOING | WRAP_UP | BUSY    | IDLE    |
| .                                                        | TIME          | TIME     | TIME     | TIME    | TIME    | TIME    |
| System                                                   |               |          |          |         |         |         |
| Total                                                    | 0:00:00       | 0:00:00  | 0:00:00  | 0:00:00 | 0:00:00 | 0:00:00 |
| GROUP                                                    |               |          |          |         |         |         |

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### Figure 5-12. 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—updated only if agents have signed out  $[(1 - 2 - 3 - 4) = 6]$

| AVERAGE TIME REPORT //current daily report |                    |         |                    |         |                     |         |
|--------------------------------------------|--------------------|---------|--------------------|---------|---------------------|---------|
| Report-Type                                | Report-Format      |         | Note               | Print   |                     |         |
| LINE ACTIVITY                              |                    |         |                    |         |                     |         |
| .                                          | WAITING_TIME       |         | INCOMING_CALL_TIME |         | ABANDONED_CALL_TIME |         |
| .                                          | CALLS              | AVERAGE | CALLS              | AVERAGE | CALLS               | AVERAGE |
| System                                     |                    |         |                    |         |                     |         |
| Total                                      | 0                  | 0:00:00 | 0                  | 0:00:00 | 0                   | 0:00:00 |
| GROUP                                      |                    |         |                    |         |                     |         |
| AGENT ACTIVITY                             |                    |         |                    |         |                     |         |
| .                                          | INCOMING_CALL_TIME |         | OUTGOING_CALL_TIME |         | WRAP_UP_TIME        |         |
| .                                          | CALLS              | AVERAGE | CALLS              | AVERAGE | CALLS               | AVERAGE |
| System                                     |                    |         |                    |         |                     |         |
| Total                                      | 0                  | 0:00:00 | 0                  | 0:00:00 | 0                   | 0:00:00 |
| GROUP                                      |                    |         |                    |         |                     |         |

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Figure 5-13. 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  $[(5) \div (1+3) = 6]$

| SYSTEM CAPACITY REPORT //current daily report |                     |         |            |
|-----------------------------------------------|---------------------|---------|------------|
| Report-Type                                   | Report-Format       | Note    | Print      |
| LINE ACTIVITY                                 |                     |         |            |
| .                                             | ALL_LINES_BUSY      | NUMBER  | TOTAL_TIME |
| System                                        |                     |         |            |
| Total                                         | 0                   | 0:00:00 |            |
| GROUP                                         |                     |         |            |
| AGENT ACTIVITY                                |                     |         |            |
| .                                             | NO_AGENTS_AVAILABLE | NUMBER  | TOTAL_TIME |
| System                                        |                     |         |            |
| Total                                         | 0                   | 0:00:00 |            |
| GROUP                                         |                     |         |            |

QQ98

Figure 5-14. 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 agents were available and the total time in hours, minutes and seconds.*

| ACCOUNT CODE REPORT //current daily report |               |            |              |
|--------------------------------------------|---------------|------------|--------------|
| Report-Type                                | Report-Format | Note       | Print        |
| ACCOUNT CODE                               | DESCRIPTION   | # OF CALLS | AU.TALK TIME |
| ---- No Account Code Information ----      |               |            |              |

QQ99

Figure 5-15. 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 call.*

| TRAFFIC ANALYSIS REPORT //current daily report |               |      |                |      |              |           |     |
|------------------------------------------------|---------------|------|----------------|------|--------------|-----------|-----|
| Report-Type                                    | Report-Format | Note | Print          |      |              |           |     |
| LINE ACTIVITY                                  |               |      |                |      |              |           |     |
|                                                | TOTAL_CALLS   |      | INCOMING_CALLS |      | AVERAGE_TIME |           | GOS |
|                                                | I/C.          | O/G. | ANS.           | ABD. | WAITING      | ABANDONED | %   |
| SYSTEM                                         |               |      |                |      |              |           |     |
| Total                                          | 0             | 0    | 0              | 0    | 0:00:00      | 0:00:00   | 99% |
| HOURS                                          |               |      |                |      |              |           |     |

QQ100

### Figure 5-16. 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 × 100%

*This page remains blank intentionally.*

# 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 to make 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 window (for example, the Group Setup window) on the screen to give yourself a better view of system set-up parameters. Drag real-time windows to see more agents.

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 windowing 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 on which you enter your password or the one that shows line group data. You can move, resize, 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 resize corner. If your windows are overlapping, the active window is always the one on top of all the others (the frontmost 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 letter key on the menu to activate 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.

**Resize Edges**—All four extreme edges of a window are the resize edges. You can drag any edge to make the window larger or smaller.

# Appendix B

## System Layout / Worksheet

### System Setup

*(Note: Copy pages as required for customer records)*

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**

| 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 |

**Abandon Bins**

# 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

---

---

---

---

## Preferred Customer Abandoned Call Record Setup

Select the day or days of the week to print the Preferred Customer Line Abandoned Report (check appropriate box or boxes).

- ☐ Sunday
- ☐ Monday
- ☐ Tuesday
- ☐ Wednesday
- ☐ Thursday
- ☐ Friday
- ☐ Saturday

Set up the automatic printing interval (check the appropriate box).

- ☐ Disabled
- ☐ 30 Minutes
- ☐ 1 Hour
- ☐ 2 Hours
- ☐ 4 Hours
- ☐ 6 Hours
- ☐ 8 Hours
- ☐ 12 Hours
- ☐ 24 Hours

## Wallboard Setup Record

| Wallboard | Group | Type  | Title | Title Display   | Summary | Buzzer |
|-----------|-------|-------|-------|-----------------|---------|--------|
| Example 1 | 2     | Color | Yes   | HAVE A GOOD DAY | No      | Yes    |
| Example 2 | 4     | Color | No    | Not used        | Yes     | No     |
| 1         |       |       |       |                 |         |        |
| 2         |       |       |       |                 |         |        |
| 3         |       |       |       |                 |         |        |
| 4         |       |       |       |                 |         |        |
| 5         |       |       |       |                 |         |        |
| 6         |       |       |       |                 |         |        |
| 7         |       |       |       |                 |         |        |
| 8         |       |       |       |                 |         |        |
| 9         |       |       |       |                 |         |        |
| 10        |       |       |       |                 |         |        |
| 11        |       |       |       |                 |         |        |
| 12        |       |       |       |                 |         |        |
| 13        |       |       |       |                 |         |        |
| 14        |       |       |       |                 |         |        |
| 15        |       |       |       |                 |         |        |
| 16        |       |       |       |                 |         |        |

## Wallboard Parameter Setup

| Wallboard      | P1        | P2        | P3        | P4        | P5        | P6        |
|----------------|-----------|-----------|-----------|-----------|-----------|-----------|
| <i>Example</i> | <i>IH</i> | <i>ID</i> | <i>OH</i> | <i>OD</i> | <i>SH</i> | <i>SD</i> |
| 1              |           |           |           |           |           |           |
| 2              |           |           |           |           |           |           |
| 3              |           |           |           |           |           |           |
| 4              |           |           |           |           |           |           |
| 5              |           |           |           |           |           |           |
| 6              |           |           |           |           |           |           |
| 7              |           |           |           |           |           |           |
| 8              |           |           |           |           |           |           |
| 9              |           |           |           |           |           |           |
| 10             |           |           |           |           |           |           |
| 11             |           |           |           |           |           |           |
| 12             |           |           |           |           |           |           |
| 13             |           |           |           |           |           |           |
| 14             |           |           |           |           |           |           |
| 15             |           |           |           |           |           |           |
| 16             |           |           |           |           |           |           |

NOTE: When a title is used, P4–P6 are not available because the top line of the wallboard is used to display the title.

## Wallboard Messages

| Wallboard        | Text (up to 70 characters for scrolling messages)                          |
|------------------|----------------------------------------------------------------------------|
| <i>Example 1</i> | <i>TEAM 1 RECEIVED (ID) CALLS TODAY AND GRADE OF SERVICE WAS (SD). . .</i> |
| <i>Example 2</i> | <i>WORK SAFELY TODAY!</i>                                                  |
| 1                |                                                                            |
| 2                |                                                                            |
| 3                |                                                                            |
| 4                |                                                                            |
| 5                |                                                                            |
| 6                |                                                                            |
| 7                |                                                                            |
| 8                |                                                                            |
| 9                |                                                                            |
| 10               |                                                                            |
| 11               |                                                                            |
| 12               |                                                                            |
| 13               |                                                                            |
| 14               |                                                                            |
| 15               |                                                                            |
| 16               |                                                                            |

NOTE: Insert up to six tokens (xx) to identify parameters in a message (see example 1).

[illegible]

Time choices: 0001–2400 (24-hour format)

**A-12**

## Wallboard Alarms

[illegible]

*This page remains blank intentionally.*

# Appendix D

## Reviewing The Programming Road Map

### Start-up, Technician's, And System Manager's Screens

#### 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  
 Overflow Extension Setup  
   1st Overflow Extension -----  
   2nd Overflow Extension -----  
   3rd Overflow Extension -----  
   4th Overflow Extension -----

##### Password

Technician Password  
 Old Password XXX  
 New Password XXX

##### Diagnostic

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

##### Upgrade

ID #       XXX  
 Password   XXX  
 Agent Size  
 Wallboard

#### System Manager's Screens

##### System Setup

Company Name  
 ID Password  
 Group Name       XXXXXXXXXX  
 Supervisor Name   XXXXXXXXXX  
 ID #           XXX  
 Password       XXX

##### Time/Date

Date   dd-mm-yyyy  
 Time   HH:MM

##### 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  
 Account Code  
   Starting Number Range   X  
   Account Code       XXX  
   Description

##### 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  
   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

##### Wallboard

Setup  
 Wallboard 01-16  
 Group 01-16  
 Type   Mono/Color  
 Title   Yes No  
 Title Display  
 Summary   Yes No  
 Buzzer   Yes No  
 Parameter  
 Wallboard 01-16  
 Group 01-16  
 Type   Mono/Color  
 P1-P6

##### Group Programming

Group 01-16  
 (Link to Group Supervisor Screens)

##### System Backup

Announcement Backup  
   Backup  
   Restore  
 Configuration Backup  
   Backup  
   Restore  
 Stats Backup  
   Cancel  
   Backup

#### System Manager's Screens

.... (continued)

##### Management Info

Real Time  
 System Agent Status  
 System Line Status  
 Historical Reports  
   Daily  
   Weekly  
   Monthly  
 Current Reports  
   Hourly  
     Report Type  
     (see note)  
   Report Format  
     Numerical  
     Graphical  
   Note  
     Abort  
     Save  
   Print  
     Print Numerical  
     Print Graphical  
     Print All

Daily  
   Report Type  
   (see note)  
 Report Format  
   Numerical  
   Graphical  
 Note  
   Abort  
   Save  
 Print  
   Print Numerical  
   Print Graphical  
   Print All

Report Schedule  
   Daily  
     Print Type  
     Numerical  
     Graphical  
     Numerical/Graphical  
   Report Type  
   (see note)  
   Print Time   HH:MM  
 Weekly/Monthly  
   Print Type  
     Numerical  
     Graphical  
     Numerical/Graphical  
   Report Type  
   (see note)  
   Weekly Report Print  
     Disable  
     Day of Week  
   Monthly Report Print  
     Disable  
     Enable  
 Wallboard Message  
   Add  
   Send  
 Wallboard Schedule  
 Wallboard Alarm  
 Configuration  
   Group  
   System  
   Technician  
   Group 01-16  
 Print

**Note:** Report Types are—  
 Answer Bins  
 Abandon Bins  
 Incoming Call  
 Total Time  
 Average Time  
 System Capacity  
 Account Code  
 Traffic Analysis

SEE NEXT PAGE FOR GROUP SUPERVISOR'S SCREENS

## Reviewing The Programming Road Map (continued)

### Group Supervisor's Screens

#### Access Group Supervisor's Screens as follows:

1. Select *MANAGER* from the Sign-in Screen.
2. Select *Group Programming* from the Manager Screen.
3. Select a Group (01-16) from the Group Programming Screen.
4. Answer Yes to the question, Sign Through?

#### Group Setup

Parameter 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  
 Force Account Code Yes No  
 All Agents Busy Alarm Yes No  
 Calling Line ID Yes No  
 Day to Night Schedule  
 Monday HH:MM  
 Tuesday HH:MM  
 Wednesday HH:MM  
 Thursday HH:MM  
 Friday HH:MM  
 Disable

#### 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  
 Announcement Assignment  
 First Message X  
 Second Message X  
 Night Message X  
 Special Message X  
 Announcement Time Setup  
 First Msg Int. Delay MM:SS  
 Music Interval MM:SS  
 Line Group Priority 01-04

#### CLID

Customer Setup  
 Add  
 Customer XXXXXXXX  
 Phone Number XXXXXXXXXXXXX  
 Priority 1-4  
 Group 1-16  
 Night Mode Routing  
 No  
 Yes  
 Abandoned Call Report  
 Current  
 Sunday  
 Monday  
 Tuesday  
 Wednesday  
 Thursday  
 Friday  
 Saturday  
 Interval  
 Disabled  
 30 Min.  
 1,2,4,6,8,12,24 Hrs

#### Management Info.

Real Time Setup  
 Incoming Call Parameter  
 Outgoing Call Parameter  
 Busy Time Parameter  
 Real Time  
 Historical Reports  
 Daily  
 Weekly  
 Monthly  
 Current Reports  
 Hourly  
 Report Type (see note)  
 Report Format  
 Numerical  
 Graphical  
 Note  
 Abort  
 Save  
 Print  
 Print Numerical  
 Print Graphical  
 Print All  
 Daily  
 Report Type (see note)  
 Report Format  
 Numerical  
 Graphical  
 Note  
 Abort  
 Save  
 Print  
 Print Numerical  
 Print Graphical  
 Print All  
 Report Schedule  
 Daily  
 Print Type  
 Numerical  
 Graphical  
 Numerical/Graphical  
 Report Type (see note)  
 Print Time HH:MM  
 Weekly/Monthly  
 Print Type  
 Numerical  
 Graphical  
 Numerical/Graphical  
 Report Type (see note)  
 Weekly Report Print  
 Disable  
 Day of Week  
 Monthly Report Print  
 Disable  
 Enable

#### Management Info.

... (continued)  
 Wallboard Message  
 Add  
 Send  
 Wallboard Schedule  
 Add  
 Day  
 Time MM:SS  
 Message (70 chars.)  
 Wallboard Alarm  
 Add  
 Parameter  
 Function  
 Threshold  
 Configuration  
 Group  
 System  
 Technician  
 Group 01-16  
 Print

#### Note: Report Types are—

Answer Bins  
 Abandon Bins  
 Incoming Call  
 Total Time  
 Average Time  
 System Capacity  
 Account Code  
 Traffic Analysis  
 Prefer Customer

# ***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.

1. 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.
2. 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.
3. 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 `S y s t e m   B a c k u p` option from the menu bar. A menu with two options on it will appear. Select the `R e p o r t   B a c k u p` option.

A dialogue box will appear with two buttons on it. If you select the one marked `C a n c e l` the dialogue box will close and nothing will happen. If you select the button marked `B a c k u p` a further, smaller dialogue box will appear, with buttons marked `C o n t i n u e` and `C a n c e l`.

Selecting the **C a n c e l** button will take you back to the previous dialogue box. **C o n t i n u e** 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.*

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.

### ***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 **Esc** key.

You can also select the **H e l p** menu option from the main menu to access the Help system menu, where you will find help on the help system itself, on how to use the menus and how to use the mouse.

Selecting and using menu options is 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, 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 keyboard 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 **F i l e   T y p e** menu option, you could just press the **F** key on the keyboard.

Some menu options lead to other, smaller menus, like the **H e l p** option or the **Q u i t** option.

To leave a sub-menu like these and to return to the previous menu, you can either press the **Esc** 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 **B a c k u p** 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.

### **Delete**

Before you can use the **D e l e t e** 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 **D e l e t e** 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 **A l l   D a t a   F i l e s** which will cause the Backup or Delete operation to work with all files of all types, and there is an option labeled **A l l   ( N o t   H o u r l y )**.

*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 01/09/1994 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 **R e m a i n** and **Q u i t**.

**R e m a i n** will keep you in the Backup Utility (in case you have selected **Q u i t** from the main menu in error), and the **Q u i t** option will leave the Backup Utility, and the ACD system will restart.

*NOTE: Remember that 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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# Appendix F

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## ***Understanding Emergency Operations***

*QuickQ* contains built-in protection to minimize operational problems that could occur as the result of system interruptions such as power failures. This appendix outlines actions that *QuickQ* causes when these emergencies occur.

### ***Notifying Agents***

Whenever normal operation is interrupted, *QuickQ* notifies all of the active (signed-in) agents for five seconds. The message, *System Rebooting* is displayed on each agent's display telephone along with an audible tone.

### ***Rebooting The QuickQ System***

Within the first 10 seconds, the System Manager can reboot the system manually. After 10 seconds of idling, following a system interruption, the system will reboot itself automatically. Rebooting normally takes a maximum of two minutes.

**Note:** *You cannot reboot directly in QuickQ if you are using a swap file.*

The following actions occur during system rebooting:

- All relevant files are closed.
- Calls that are engaged with agents will remain connected with those agents.
- When the system is using DVA-01 units, all calls in the ACD queue will be dropped.
- When the system is using DVA-16 units, all calls in the ACD queue will be dropped except those that are queued in the music state. Those calls will hear music continuously until they hang up.
- All Do Not Disturb (DND) conditions will be cleared on the active agents' telephones. This affects DND conditions that are either set manually or automatically. (The system automatically sets the DND condition on agents' telephones during call transferring.)

### ***Signing-In Agents***

Agents are signed-in automatically up to 30 minutes following a system interruption. Agents will be signed-in in the busy state. If the interruption lasts longer than thirty minutes, the agents are not signed-in automatically.

Also, if the automatic day-to-night mode is selected by the group, and the time that the system was rebooted is later than the time set for the day-to-night mode to occur, agents are not signed-in automatically.

### ***Printing Screen Information***

At the time the system operation is interrupted, the system registers along with other information is written to the screen directly. The system manager can print this information.

### ***Saving Call Statistics***

All call statistics are saved during a system interruption except for the accumulated current Hourly report up to the time of system reboot. For example, if the system is rebooted at 11:30 and the hourly call statistics are collected on the hour, then no call statistics are saved for the period from 11:00 to 11:30. However, the hourly report will include call statistics for the period from 11:30 to 12:00.

# ***Appendix G***

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## ***Detailing Comdial's Technical Assistance***

### ***Verifying Equipment Operation***

Comdial installation specialists strongly suggest that you temporarily install the equipment and test the system operation at your facility before you take it to the permanent installation site. When you do this, you ensure that the equipment is operational, and if it is not operational, you give yourself an opportunity to correct any problems that exist.

Follow the installation details closely in this manual and double check your work for mistakes. If you cannot resolve the operating failure, you may need the technical assistance that Comdial makes available.

### ***Explaining The Repair Service***

FCC regulations do not permit repair of customer owned equipment by anyone except the manufacturer or their authorized agent. Unless specifically detailed, Comdial policy does not warrant its equipment as field repairable items.

If the equipment needs repair subsequent to the warranty period, you may return it to Comdial for repair. Comdial repair personnel will, at their option, either repair the defective equipment or replace it with a remanufactured unit. This repair will be done at a fixed charge. For information on this charge, call or write to the following address:

**Comdial**  
**P.O. Box 7266**  
**Charlottesville, VA 22906-7266**  
**Attention: Repair Department**  
**Telephone: 1-800-877-4448**

When returning equipment for repair, pack it carefully to prevent damage. The purchaser is responsible for any damages during shipment. Ship the equipment freight or postage prepaid. The shipping address is as follows:

**Comdial**  
**1180 Seminole Trail**  
**Charlottesville, VA 22906-2829**  
**Attention: Repair Department**

### ***Upgrading Your System Knowledge***

From time-to-time, Comdial Engineers will enhance equipment software or add to the hardware capability. The technical publications personnel document these changes on Technical Advisory Bulletins that they make available to you in several ways:

- you may turn to the appropriate section in your system's instruction binder and find the TABs that are currently available,
- you may call the Technical Services facsimile (FAX) line at 1-800-266-3425, Extension 500 and obtain additional copies,
- you may call the bulletin board at 1-804-978-2583 and down-load the TAB information.

In addition to TAB information, the bulletin board also contains the latest Comdial manuals and system software that you can down-load.

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