Avaya™ Predictive Dialing System

User's Guide Volume 2

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Avaya Predictive Dialing System
User's Guide Volume 2

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Notice

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- Avaya provided telecommunications system and their interfaces
- Avaya provided software applications, as well as their underlying hardware/software platforms and interfaces
- Any other equipment networked to your Avaya products

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The "CE" mark affixed to the DEFINITY ONE equipment described in this book indicates that the equipment conforms to the following European Union (EU) Directives:

- Electromagnetic Compatibility (89/336/EEC)
  Low Voltage (73/23/EEC)
- Telecommunications Terminal Equipment (TTE) i-CTR3 BRI and i-CTR4 PRI

For more information on standards compliance, contact your local distributor.

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7 Job Monitor

About this information product

Purpose

The purpose of this guide is to provide detailed information about the operation of the Avaya^{TM} Predictive Dialing System (PDS).

Reason for reissue

The following list describes changes to the Avaya PDS User's Guide since the last release.

- This guide has been formatted for easier use.
- This guide has been branded to match the change of our product names.
- This guide contains two volumes - one for the graphical, Campaign Director interface, and the other for the Character-Based User Interface, which uses menus to navigate through the system (these two interfaces cannot be used simultaneously).
- This guide is arranged by task rather than by application. This allows the information to flow according to user task rather than individual tasks performed within certain applications.

Intended-Audience

The audience for this manual includes any user of the Avaya PDS. This includes, but is not limited to, system supervisors, integration consultants, application consultants, and customer support engineers.

Part I: Supervisor tasks in menus

1 Log in to the Avaya PDS menu system as a supervisor

Overview

Purpose Use the Supervisor menu system on the Avaya^{TM} Predictive Dialing System (PDS) to perform supervisor functions.

Contents This section contains the following topic:

Log in to the Avaya PDS menu system as a supervisor

Log in to the Avaya PDS menu system as Supervisor

Use the following procedure to log in to the Avaya PDS menu system as Supervisor.

1. Log on to the Avaya PDS as Supervisor, using the Supervisor login and password. The Supervisor menu appears.

2 User accounts

Overview

Purpose

User accounts are created for each agent that logs into the Avaya™ Predictive Dialing System (PDS). You add, edit, or delete user accounts depending on need. To use the user account commands, choose **Calling lists and users** from the Supervisor Main Menu.

Contents

This section contains the following topics:

User accounts and permission levels

User accounts

Use manage user accounts to add or delete users and set or change their access to the system. A user account consists of the user name, password, and permission level. The system determines the permission level based on the group you assign to the user. The permission level determines a user's access to system features. For example, you usually assign agents to the Agent group, which grants permission to the Agent Main Menu where they have access only to call handling; you assign system administrators to the system group, which grants permission to the Administrator Main Menu, giving them access to the system maintenance functions.

User account guidelines

Use the following guidelines when creating user accounts:

- User Name (also called login ID) should contain at least three but not more than eight alphanumeric characters. It's recommended that you use a letter as the first character of a user name. User names cannot contain spaces or special characters.
- Password should contain from six to eight characters. Passwords should contain at least two letters and one numeric or special character. Also, the password should not be the same as the user name or a variation of the user name.
- Group for Login The name of the group to which the user belongs.
- Description (optional) Not more than 30 characters and spaces.

Permission levels

The following table lists typical user levels, menu file names, and the corresponding system menus.

User type	Group name	Menu name
agent	agent	Agent Main Menu
supervisor	system	Supervisor Main Menu
analyst	cdwanal	PC Analysis main menu

Add user accounts

Add user accounts

Use the following procedure to add a user account.

1 Choose **Manage user accounts** from the Calling Lists and Users menu. The Manage User Accounts screen appears. The system lists the commands on the bottom of the screen.

2 Press Ctrl+L (Login).

3 Type the user name, password, group (agent, system, cdwanal), and an optional description. Remember, both user names and passwords are case sensitive.

4 Press Enter after you complete the last line. The system rewrites the screen and encrypts the password.

5 Press Ctrl+X (Exit).

6 Type Y to save the changes or N to abandon them.

Delete user accounts

Delete user accounts

Use the following procedure to delete user accounts.

1. Choose **Manage user accounts** from the Calling Lists and Users menu. The Manage User Accounts screen appears.

2. Press Ctrl+F (Find).

3. Type the user name for the account you want to delete. The matching account appears on the screen.

4. Press Ctrl+D (Delete).

5. Type Y at the prompt to confirm the deletion or N to cancel.

6. Press Ctrl+X (Exit).

7. Type Y to save the changes or N to abandon them.

Edit user accounts

Edit user accounts

Use the following procedure to edit user accounts.

1. Choose **Manage user accounts** from the Calling Lists and Users menu. The Manage User Accounts screen appears.

2. Press Ctrl+F (Find).

3. Type the user's name for the account you want to change. The matching account appears on the screen.

4. Move the cursor to the field you want to change and press Ctrl+C (Change).

5. Type the changes and press Enter after each change.

6. Press Ctrl+X (Exit).

7. Type Y to save the changes and exit or N to cancel and exit.

3 Calling lists

Overview

Purpose

After the customer records are downloaded from the host, the system adds several fields to each record to help track calling results. After the system adds the fields, it may check for and reject duplicate records and uncallable phone numbers. This process depends upon your system configuration. The Avaya™ Predictive Dialing System (PDS) refers to the modified records as the calling list.

Contents

This section contains the following topics:

Calling list

Overview

After the customer records are downloaded from the host, the Avaya PDS adds several fields to each record to help track calling results. After the system adds the fields, it may check for and reject duplicate records and uncallable phone numbers. This process depends upon your system configuration. The system refers to the modified records as the calling list.

The following table describes some typical added fields. You can see a complete list of all the calling list fields for your system by pressing F4 or Ctrl+V (View) when the cursor is in a calling list field on a screen.

Field name	**Description**
COUNTER	Record attempt counter. Number of times the system called the record.
AGENT	The agent who handled the call.
DTE	The date of the last attempt on the record.
TME	The time of the last attempt on the record.
CODE	Completion code.
STATUSFLAG	The status of the record. If blank, the record is available for calling. B = all bad numbers; the Reject Report lists the records rejected by the system because the system could not match them to a time zone or the number was not callable (bad number). C = received inbound call from account; so cancelled outbound call D = maximum days on the system E = manually deleted in Record Edit R = repeated (duplicate) account T = time zone could not be determined

Field name	Description
DAYSCNT	Days on the system calling lists (optional). The number of days a record has been on the system. The Days on the System Report lists accounts that the system has downloaded for a certain number of days.
ENTRYDATE	The date a record was first downloaded.
ZONEPHONE#	The time zone stamp of a phone number. (For example, Pacific, Mountain.) The system calls a record only during the recommended calling time for that record’s time zone. The system determines time zoning by the area code plus the phone number prefix.
DUPE	Indicates a duplicate record. The system can reject a record because there are two or more records in the calling list with the same phone number or account number, or any other field that you choose for duplicate checking. During system configuration, you choose whether you want to do duplicate checking, and if so, on which fields. The system lists these duplicate records on the Reject Report. Duplicate checking adds time to the processing time, but it eliminates unnecessary calls. An * in DUPE field tells you that there are duplicate records. The system places an R in the STATUSFLAG field of the second, third, and subsequent records to show that they are repeated records and won’t be called.

Standard Record Edit and Quick Search

Standard Record Edit

Record Edit allows you to access and edit a customer record within a calling list. Use the Record Edit menu to view a calling list record, change the contents of a field in an outbound calling list, or delete a record. Use Record Edit when you do not have access to the person's account on your host computer. If you upload data to the host computer, the changes are included in the upload. On some systems, the system uploads the changes to the host computer each night.

Many companies use Record Edit to correct a completion code when an agent entered an incorrect code. Record Edit is also useful to mark records that you do not want contacted during the current job.

You may have several fields available for standard search. (The fields were specified during the system configuration.) An advantage to standard search is the ability to use wild cards. For example, if you are unsure about the spelling of a name, you can search using the asterisk (*). An input of Wil* returns Williams, Williamsons, Willis, and so on.

Quick Search and Record Edit

The menu shows two ways to edit and delete records: standard search and Quick Search. Not all systems have both methods. The procedures for the two methods are similar except Quick Search finds the record faster. Quick Search is an indexed method that searches on a specific field. To use Quick Search, you need to know the exact information for the indexed field, and the search must return an exact match.

Record deletion

When you use Delete a record or Delete a record with standard Record Edit or Quick Search, the Avaya PDS does not actually delete the record. It marks it as deleted in the STATUSFLAG field. This keeps the system from calling the record. You can restore the record at any time.

Shortcut keys

Use the following shortcut keys when editing calling list records.

Actions	Keys
Done	F1
Search for a record	F10
Delete a record	Esc,D
Undelete a record	Esc,U

Delete a record

Delete a record Use the following procedure to delete a record.

1. Choose **Record Edit** from the Calling Lists and Users menu.

2. Choose **Delete a record** or **Delete a record with Quick Search**.

3. Type Y to continue or N to cancel.

4. If the system has more than one calling list, type the calling list number and press Enter. (If your system has only one calling list, the system skips this step.) The Record Search Criteria screen appears.

5. Type the search values in the screen field(s). (Quick Search screens have only one field.)

6. Press F10 (Search). If the system cannot find a match, the Record Search Criteria screen reappears. Type different criteria and press F10 (Search). If the system finds a match, the record appears on your screen. To see if there is more than one match, press F10 (Search) again.

7. When the record appears, press Esc,D (Delete) to mark it as “manually deleted in Record Edit.” The system enters an E in the STATUSFLAG field.

8. Press Y to confirm the deletion or N to cancel.

9. Press F1 (Done) and press Ctrl+X.

Edit a record

Edit a record Use the following procedure to edit a record.

1. Choose **Record Edit** from the Calling Lists and Users menu.

2. Choose **Edit a record** or **Edit a record with Quick Search**.

3. Type Y at the prompt to continue or N to cancel. The Record Search Criteria screen appears.

4. Type the search values in the screen field(s). (Quick Search screens have only one field.)

5. Press F10 (Search). If the system cannot find a match, the Record Search Criteria screen reappears. Type different criteria and press F10 (Search). If the system finds a match, the record appears on your screen. To see if there is more than one match, press F10 (Search) again.

6. Use the arrow keys to move to the field you want to change.

7. Press Ctrl+C (Change) and type your changes.

8. Press F1 (Done) to save your changes or Ctrl+X to abandon them. The system prompts you to confirm the command.

9. Press Y to save the changes or N to abandon them.

10. Press Ctrl+X to return to the Record Search Criteria screen.

Restore a deleted record

Restore a deleted record

Use the following procedure to restore a deleted record.

1. Choose **Record Edit** from the Calling Lists and Users menu.
2. Choose **Delete a record** or **Delete a record with Quick Search**.
3. Type Y to continue or N to cancel.
4. If the system has more than one calling list, type the calling list number and press Enter. (If your system has only one calling list, the system skips this step.) The Record Search Criteria screen appears.
5. Type the search values in the screen field.
6. Press F10 (Search). If the system cannot find a match, the Record Search Criteria screen reappears. Type different criteria and press F10 (Search). If the system finds a match, the record appears on your screen. To see if there is more than one match, press F10 (Search) again.
7. When the record appears, press Esc,U (Undelete). The system removes the E from the STATUSFLAG field.
8. Press F1 (Done) and press Ctrl+X.

Campaign Update

Overview

Use outbound Campaign Update to cancel a scheduled outbound call. This command marks a record as uncallable when an inbound call has come in from a customer whose record may be included in an outbound list. This is similar to deleting a record, except the system enters a C instead of an E in the STATUSFLAG field.

Outbound Campaign Update works with one outbound calling list. To use this feature with more than one outbound calling list, contact your system vendor.

If you have an Intelligent Call Blending system, the system automatically enters a C in a record's STATUSFLAG field, canceling the call, when an agent releases the inbound call with the appropriate code. (See your completion codes list for the codes used on your system.)

Campaign Update

If you have an Agent Blending system, the system updates all records at a predefined time, or you can perform the update manually using the following procedure.

1. Choose **Campaign Update** from the Record Edit menu.
2. Type the calling list number to update and press Enter.
3. Type the search criteria (for example, account number or phone number). Then press F10 to search for the record.
4. A message appears if there are no matching records. If the system finds a match, it enters a C in the STATUSFLAG field.

Create an outbound Campaign Update report

Create an outbound Campaign Update report

Use the following procedure to create a Campaign Update report.

1 Choose **Record Edit** from the Calling Lists and Users menu.

2 Choose **Create Outbound Campaign Update Rep** from the Record Edit menu.

3 Type a date in the format CCYYMMDD. For example, type 19990921 for September 21, 1999. A message appears confirming the report generation. Use the Reports menu to view or print the report.

Mark records as Do Not Call

Overview

Use mark calling list records as DO NOT CALL to tell the Avaya PDS not to call specific customers. After you mark a customer record, the system immediately searches the outbound calling lists specified in the Do Not Call group and marks all the customer's records. The system will not call a customer during any job if the customer's record is marked as do not call.

Mark records as do not call

Use the following procedure to mark records as DO NOT CALL.

1. Choose **Mark calling list records as DO NOT CALL** from the Calling Lists and Users menu. The Do Not Call menu appears.
2. Choose **Mark DNC Group**.
3. Type the item number for the Do Not Call group.
4. Type Y at the prompt to confirm your choice or N to cancel. The Set DO NOT CALL Status screen appears, which displays the selected group's unique identifier.
5. In the screen field, type the specific value for the customer whose record you want to mark as Do Not Call.
6. Press Enter.
7. Repeat steps 5 and 6 for each record you want to mark as Do Not Call.
8. Press Ctrl+X to exit the Set DO NOT CALL Status screen.

4 Phone strategy

Overview

Purpose

The Avaya™ Predictive Dialing System (PDS) uses phone strategies that you design to achieve your call center goals. One element of a campaign is a job. Multiple jobs can share screens if the jobs are based on the same calling list or calling list format.

Contents

This section contains the following topics:

Create a phone strategy

Create a phone strategy

Use the following procedure to create a phone strategy.

1. Choose **Create a phone strategy** from the Phone Strategies menu.
2. If the system has more than one calling list, type the calling list number and press Enter. (If you use only one calling list, the Avaya PDS skips this step.) The phone strategy name prompt appears.
3. Type a strategy file name (not more than 8 characters). Do not use special characters such as hyphens, slashes, or spaces.
4. Type Y at the prompt to process the changes or N to cancel. If you type Y, the Select Initial Phone screen appears.

Add an initial phone

Add an initial phone Use the following procedure to add an initial phone.

1. In the Phone column, type the phone type number (1, 2, 3, …) of the first phone number you want to call.

2. Select a field by typing the field name (uppercase letters) in the Field column or press F4 (View) to select the field from the calling list.

3. Type a value in the Value column. For help in setting values, see “To select field names and value criteria”.

4. To add a second field and value for this phone, type AND or OR in the And/Or column; then repeat steps 2 and 3.

5. Repeat steps 1 through 4 for each selected phone. After you enter all the fields and values for the initial phones, press F1 (Done). The Select Alternate Initial Phone screen appears.

Add an alternate initial phone (optional)

Add an alternate initial phone

Use the following procedure to add an alternate initial phone.

1. In the Phone column, type the phone type number (1, 2, 3, …) of the alternate phone number you want to call.

2. In the Time Zones column, type the uppercase letter assigned to the time zone or type an asterisk (*) for all time zones or press F4 (View) to select a time zone from a list.

3. In the Time column, type the time you want the Avaya PDS to start calling the alternate phone (24-hour clock). Use a period to separate hours and minutes. For example, type 17.10 to enter 5:10 PM.

4. Repeat steps 1 through 3 for each alternate initial phone. Press F1 (Done). The Select System Set Recalls screen appears.

Add ring count and call connect criteria

Add ring count and call connect criteria

Use the following procedure to add ring count and call connect criteria.

1. In the Phone Field column, type the phone type number (1, 2, 3, ...).
2. Type the number of rings to allow in the # of Rings column. (Low number recommended, such as 3.)
3. Type the letter(s) to designate the call detection mode in the Connect.
4. Repeat steps 1 through 3 for each initial phone type.
5. Press F1 (Done). The Record Selections menu reappears.

Add retries

Add retries Use the following procedure to add retries.

1. In the Phone Field column, type the phone type number (1, 2, 3, ...).
2. Press F4 (View) to view the completion codes list. Use the arrow keys to select a code, then press Enter. You can also type the call code directly in the Call Result column. It must match upper and lowercase characters.
3. Type the number of minutes between each calling attempts in the Min (Minutes) column.
4. Type the number of retries in the Number column.
5. In the Next Phone column, type the phone type number (1, 2, 3, ...). The Next Phone is the phone the Avaya PDS calls after it makes the last attempt to call the initial phone. If you leave this field blank, the system stops calling the record after the last retry.
6. Repeat steps 1 through 5 for each call result for which you want to schedule retries.
7. Press F1 (Done). The Select Ring Count and Call Connect Criteria screen appears.

Edit a phone strategy

Edit a phone strategy

Use the following procedure to edit a phone strategy.

1. Choose **Edit a phone strategy** from the Phone Strategies menu.
2. Type the item number for the strategy file you want to edit. The Select Initial Phone screen appears. Complete the following steps or, if the screen is correct, press F1 (Done) to move to the next screen.
3. Press down arrow to move to the field you want to change.
4. Type the new value.
5. Repeat steps 3 and 4 for each field you want to change.
6. Press F1 (Done) to continue to the next screen.
7. To edit the rest of the screens, follow the steps that begin with "Selecting Alternate Initial Phones".

Copy a phone strategy

Copy a phone strategy

Use the following procedure to copy a phone strategy.

1. Choose **Copy a phone strategy** from the Phone Strategies menu.
2. In the Enter Item Number field, type the item number of the phone strategy to copy.
3. Type Y at the confirmation prompt to continue or N to cancel.
4. Type a new file name (not more than 8 characters) at the file name prompt.
5. Type Y at the prompt to save the new file or N to cancel.

Delete an initial phone

Delete an initial phone

Use the following procedure to delete an initial phone.

1 Select the initial phone to delete.

2 Choose **Delete**.

Set recall times

Set recall times Use the following procedure to set recall times.

1. In the Phone Field column, type the phone type number (1, 2, 3, ...).

2. Press F4 (View) to view the completion codes list. Use the arrow keys to select a code, then press Enter. You can also type the call code directly in the Call Result column. It must match upper and lowercase characters.

3. Type the number of minutes between each calling attempts in the Min (Minutes) column.

4. Type the number of retries in the Number column.

5. In the Next Phone column, type the phone type number (1, 2, 3, ...). The Next Phone is the phone the system calls after it makes the last attempt to call the initial phone. If you leave this field blank, the system stops calling the record after the last retry.

6. Repeat steps 1 through 5 for each call result for which you want to schedule retries.

7. Press F1 (Done). The Select Ring Count and Call Connect Criteria screen appears.

   Note

   To keep job productivity high, select recall times that are appropriate for the initial call's result. For example, retry a BUSY result twice, after 15-minute intervals. Retry a NOANSWER result twice, after 60-minute intervals.

5 Record selection

Overview

Purpose

A record selection selects records that the Avaya™ Predictive Dialing System (PDS) calls during a job.

Contents

This section contains the following topics:

- Create a unit record selection
- Edit unit record selection
- Execute unit record selection

Record selection

Overview

A record selection tells the Avaya PDS which records to use to call customers. This feature gives you the ability to target specific customers for calling.

Use the following wildcard characters in record selections.

Actions	Keys
Done	F1
Move a line	F2
Group	F3
View calling list	F4
Previous page	F5
Next page	F6
View call detection modes or phone strategies	F10
Clear the field	Ctrl+E

Record selection screens

There are a series of screens to complete to create a record selection. the following briefly describes each screen.

Time zones

Use the Select Time Zones for Calling screen to select the time zones the Avaya PDS uses to call customers. The screen displays a list of all the time zones defined for the Avaya PDS. The time designated for the various zones is the local time of your Avaya PDS. An uppercase letter code in the Zone column designates the time zone code.

State laws differ about legal calling times. Therefore, your Avaya PDS may list numerous time zones. The screen also shows the recommended start and stop times for each of these zones.

Completion codes

Completion codes represent the result of the last completed call. Use the Select Call Completion Codes screen to select records based on completion codes. When the screen appears, the Avaya PDS positions the cursor in the first field

Field names and values

Use the Select Field Names and Values screen to target a specific group of customers for calling. Select records based on any field in the calling list and a value for that field.

Enter values as they would appear in the calling list records. Use expressions, wildcard characters, and logical operators as needed.

Phone strategy

Select a phone strategy file to tell the Avaya PDS how to call the selected records.

Sort field names and direction (optional)

Sorting records by field names is optional. If you choose to sort records, the Avaya PDS calls the records in the order you set. Otherwise, the system calls them in the order they appear in the calling list.

Ascending is the default sort order. If you want to sort in descending order, move the cursor to the Sort Direction column, type D and press Enter. To skip the Sort Field Names and Direction screen, press F1 (Done).

Recall field names and values

Use the Select Recall Field Names and Values screen to tell the Avaya PDS which agent set recalls to include in the record selection. If left blank, the system includes all agent-set recalls. To skip this screen, press F1 (Done).

Set ring count and call connect criteria

Use the Select Ring Count and Call Connect Criteria screen to specify the following settings:

- The number of rings to allow before the Avaya PDS records a NOANSWER.
- The call detection mode (Connect Criteria) to tell the Avaya PDS which calls to pass to agents.

Call detection modes are the type of response the system detects when it dials a number. Detection modes include voice, answering machine, and special information tones.

The type of connect criteria determines what type of connects the system will pass to an agent.

Group statements

When expressions and statements are grouped, the Avaya PDS supplies the closing parenthesis and inserts the double arrow to indicate the beginning of the next group. It also places an opening parenthesis on the next available line.

The closing parenthesis is on line 40 or the last line possible. Enter values on all the lines that you intend to put into the group and then create the group. You can also create groups (or subgroups) consisting of only one line. This allows you to differentiate one line from other groups.

Unit record selection

A unit record selection works with an outbound job that uses unit work lists. Unit work lists sort the calling list records into groups based on the value in the unit work list key field. In a unit work list job, agents handle calls from a specific set of records. Agents assigned to unit work lists type the Unit ID when they join the job. The unit IDs are unique values in the key field.

Creating a unit record selection is the same process as creating a standard record selection except for setting a key field for the unit work lists.

Create a record selection

Create a record selection

Use the following procedure to create a record selection.

1. Choose **Create a record selection** from the Record Selections menu.
2. If your system has more than one calling list, type the calling list number at the prompt.
3. Type a name for this file (not more than 8 characters). Do not use special characters such as hyphens, slashes, or spaces.
4. Type an optional report description (not more than 30 characters). The system names the report if you leave the field blank.
5. Type Y at the prompt to confirm the name or N to cancel. The Select Time Zones for Calling screen appears.

Select time zones

Select time zones

Use the following procedure to select time zones.

1. Type the Zone ID (uppercase letters only) in the Enter Time Zone Codes field. Press Enter after each Zone ID. You need to enter at least one time zone. To select all time zones, type an asterisk (*).

2. If you enter an incorrect letter or type a lowercase letter, an error message appears. Press the arrow keys to move to the error. Make the correction and press Enter. To clear an entry, press Spacebar.

3. Press F1 (Done). The Select Call Completion Codes screen appears.

Select completion codes

Select completion codes

Use the following procedure to select completion codes.

1. Press F4 (View) to see the Call Completion Code List.
2. To select additional codes, press Enter again. The cursor moves to the next blank field.
3. Repeat steps 1 through 3 as necessary.
4. Press F1 (Done). When the entries are correct, press F1 (Done). The Select Field Names and Values screen appears

Select field names and values

Select field names and values

Use the following procedure to select field names and values.

1 In the Name column, type the field name in uppercase letters or press **F4 (View)** to select a field from the calling list.

2 Type a value in the **Value column** and press **Enter**.

Note

You can have up to 40 fields on multiple screen pages. The Start Range column for the first row contains an opening parenthesis. The End Range column of row 40 contains the closing parenthesis.

Select a phone strategy

Select a phone strategy

Use the following procedure to select a phone strategy.

1 Type the **Strategy File Name** or press **F10 (Search)** to scroll through the available phone strategies. You can confirm that you are choosing the correct phone strategy by pressing **F4 (View)** to review the phone strategy parameters.

2 Press **(F1) Done**. The **Selection List Generation** screen appears.

3 From the **Selection List Generation** screen, start the record selection or exit without executing the record selection.

Sort field names and direction (optional)

Sort fields names and direction

Use the following procedure to sort field names and direction.

1. In the Sort Direction column, press Enter to leave the sort direction as Ascending or type D and press Enter to change to descending.

2. In the Field Name column, press F4 (View) to see a list of fields. Choose the sort field.

3. To add a subcategory to sort by, press Enter to move to the next line and repeat steps 1 and 2 for each subcategory. The Avaya PDS sorts first by the field in priority 1, then priority 2, and so on.

4. Press F1 (Done). The Select Recall Field Names and Values screen appears.

Select recall field names and values

Select recall field names and values

Use the following procedure to select recall field names and values.

1 In the Name column, type a field name or press F4 (View) to select a field name from the calling list.

2 Type a value in the Value column and press Enter.

3 Press Done (F1). The Select Call Strategy File screen appears.

Set ring count and call connect criteria

Set ring count and call connect criteria

Use the following procedure to set ring count and call connect criteria.

1. In the Phone Field column, type the phone type number (1, 2, 3, ...).
2. Type the number of rings to allow in the # of Rings column.
3. Type the letter to designate the call detection mode in the Connect Criteria column.
4. Repeat steps 1 through 3 for each initial phone type.
5. Press F1 (Done). The Record Selections menu reappears.

Group statements

Group statements Use the following procedure to group statements with and AND or OR.

1 Type all the statements that will go into a group and press F3 (Group). The following prompt appears at the bottom of the screen: `Group line # to line #`

2 Type the number of the first line in the first group and press Enter.

3 Type the number of the last line in the first group and press Enter. To create a group consisting of only one line, both numbers should be the same.

4 Repeat steps 1 through 3 to make more group statements.

5 Press F1 (Done) to move o the next screen. The Sort Field Names and Direction screen appears.

Move fields and values

Move fields and values

Use the move command to move an entire expression or statement to another location.

1. To move a field name and its value, press F2 (Move). The following prompt appears at the bottom of the screen: `Move line # to line #`
2. Type the number of the line to move and press Enter.
3. Type the number for the target line and press Enter.
4. To move to the next screen, press F1 (Done) and the Sort Field Names and Direction screen appears.

Edit a record selection

Edit a record selection

Use the following procedure to edit a record selection.

1. Choose **Edit a record selection** from the Record Selections menu.
2. Type the item number for the file you want to edit.
3. Type a report description.
4. Type Y at the prompt to confirm your choice or N to cancel.
5. Use the arrow keys to move to the value you want to change on the current screen and type the new value or press F1 (Done) to skip to the screen you want to edit.
6. Press F1 (Done).

Execute a record selection

Execute a record selection

Use the following procedure to execute a record selection.

1. Choose **Execute a record selection** from the Record Selections menu.

2. Type the item number for the record selection file you want to generate.

3. Type a report description.

4. Type Y at the prompt to confirm your selection or N to cancel.

5. The system generates the report and returns to the Record Selections menu.

Copy a record selection

Copy a record selection

Copy an existing file and assign a new file name. You can then edit the copied file. Use this procedure when an existing record selection meets most but not all of a campaign's goals.

1. Choose **Copy a record selection** from the Record Selections menu.
2. Type the item number of the file to copy.
3. Type Y at the prompt to confirm your choice or N to cancel.
4. Type the new file name at the prompt.
5. Type Y at the prompt to save the file or N to cancel.

Delete a record selection

Delete a record selection

Use the following procedure to delete a record selection.

1. Choose **Delete a record selection** from the Record Selections menu.

2. Type the item number of the file.

3. Type Y at the prompt to confirm the deletion or N to cancel.

Create a unit record selection

Create unit record selection

Use the following procedure to create a unit record selection.

1. Choose **Create a unit record selection** from the Record Selections menu.

2. To complete the screens, follow the steps in “Creating Record Selections”.

3. After you complete the Recalls screen, the Unit Work List Sort Field screen appears.

4. Type the field name in uppercase letters in the Key Field Name field or press F4 (View) to select a name from the list.

5. Press F1 (Done). The Select Phone Strategy screen appears.

6. Type the strategy file name or press F10 (Search) to scroll through a list of available strategy files.

7. Press F1 (Done). The Call Selection List Generation screen appears.

Edit unit record selection

Edit unit record selection

Use the following procedure to edit a unit record selection.

1 Choose **Edit a unit record selection** from the Record Selections menu.

2 Follow the steps in “Creating, Editing, and Executing Record Selections”.

Execute unit record selection

Execute unit record selection

Use the following procedure to execute a unit record selection.

1. Choose **Execute a unit record selection** from the Record Selections menu.

2. Type the item number for the unit record selection file you want to execute.

3. Type a report description (not more than 30 characters).

4. Type Y at the prompt to confirm your selection or N to cancel.

6 Jobs

Overview

Purpose

The objective of a job is to accomplish specific campaign goals. Campaigns can include one or more jobs. A job consists of a calling list, phone strategy, record selection, job definition, and job screens.

Contents

This section contains the following topics:

Create a job

Create a job Use the following procedure to create a job.

1. Choose **Jobs** from the Campaigns menu. The Jobs menu appears.
2. Choose **Copy a job** from the Jobs menu and press Enter. Type the item number for the job you want to copy and press Enter.
3. Type Y in response to the prompt.
4. Type a new name for the job.
5. On the Jobs menu, choose one of the following: **Edit and start an outbound job**, **Edit and start an inbound job**, **Edit and start a blend job**, **Edit and start a unit work list job**, or **Edit and start an infinite job**.
6. Type the item number of the job you want to edit. The Job Run Verification screen appears.

Edit an outbound job

Edit an outbound job

Use the following procedure to edit an outbound job.

1. Choose **Edit and start an outbound job** from the Jobs menu.

2. Type the item number for the job you want to edit. The Outbound Job Run Verification screen appears. The cursor is in the first field.

Edit a Managed job

Edit a Managed job

Use the following procedure to edit a Managed job.

1. Set Minimum hit rate to 100. Since the agents are previewing one record at a time, the hit rate must be set to 100. This forces the system to dial only one number per agent.

2. Leave Expert Calling ratio blank. The system sets it to the appropriate level after the first five minutes.

3. Type a Job description.

4. In the Start script label field, select a Managed Dialing script. The managed script tells the system to first pass the record to the agent for preview.

5. Set Managed Dialing to YES by pressing Ctrl+C to switch between NO and YES.

6. Set a Preview limit. The range is 0 seconds to 999 seconds. If the setting is 0, the agents have unlimited time to preview the record.

7. Set Allow agents to cancel calls to YES or NO. YES allows the agents to cancel the call.

Set up a source job for a Sales Verification job

Set up a source job for a Sales Verification job

Use the following procedure to set up a source job for a Sales Verification job.

1. On the Outbound Job Run Verification screen, verify that the Completion Code parameter is 93. If it isn't, press Ctrl+D and choose this code

Edit a Sales Verification job

Edit a Sales Verification job

Use the following procedure to edit a Sales Verification job.

1. Choose the outbound job named Verify as the job you want to copy.
2. Type a job name that identifies it as a verification job, such as verifyam.
3. Choose Edit and start an outbound job on the Jobs menu.
4. Choose the source job's calling list.
5. Press Ctrl+C to change the verification job setting to Yes.
6. Confirm that the setting on the main data process label is Verify. If it isn't, press Ctrl+C and choose Verify

Edit an Infinite job

Edit infinite jobs

Use the following procedure to edit an Infinite job.

1. Choose **Edit and start an outbound job** from the Jobs Menu.
2. Select the predefined infinite job (usually called infinity). Follow the steps in “Editing Outbound Jobs” for all parameters that are not specifically for infinite jobs.
3. Type infinity for the Job Description.
4. Set the End job when quota is met parameter to No.
5. Type Y at the prompt to continue or N to cancel. The system receives the new calling list records. An infinite job runs for long periods and must be shut down manually. If you need to restart the job, run the infinity record selection again before restarting. This ensures that the new list segments are properly incorporated into the calling list.

Create a Virtual job

Create a Virtual job

Use the following procedure to create a Virtual job.

1. Choose the outbound job named Virtual as the job to copy.
2. Type a job name that identifies it as a virtual job, such as virtpm.
3. On the Jobs menu, choose Edit and start an outbound job.
4. Press Ctrl+C to change the agent setting to No
5. Press Ctrl+D and select the record selection file to which you assigned the virtual phone strategy.
6. Press Ctrl+D and select the virtual job script label you want to use with this job.
7. Confirm that the main data process label setting is Virtual. If it isn’t, press Ctrl+D and choose this setting.

Edit an Inbound job

Edit an Inbound job (Intelligent Call Blending systems only)

Use the following procedure to edit an Inbound job.

1 Choose **Edit and start an inbound job** from the Jobs menu.

2 Type the item number for the job you want to edit or start. The Inbound Job Run Verification screen appears. The cursor is in the first value field.

Edit a Blend job

Edit a Blend job - Intelligent Call Blending systems only

Use the following procedure to edit a Blend job.

1 Choose **Edit and start a blend job** from the Jobs menu.

2 Type the item number for the job you want to edit. The Blend Job Run Verification screen appears. The cursor is in the first field.

3 If the value is correct, press Enter and go to the next field. If a value is incorrect, press Ctrl+C (Change). Type the new information and press Enter to move to the next field. If a field uses only a YES or NO response, use Ctrl+C to switch between YES and NO.

Copy a job

Copy a job Use the following procedure to copy a job.

1. Choose **Copy a job** from the Jobs menu.
2. In the Enter Item Number field, type the number of the job to copy.
3. Type Y at the prompt.
4. Type the new job name.
5. Type Y at the prompt to continue or N to cancel.

Delete a job

Delete a job Use the following procedure to delete a job.

1 Choose **Delete a job** from the Jobs menu.

2 Type the item number in the Enter Item Number field.

3 Type Y at the prompt to delete the job or N to cancel.

Create an Infinite record selection

Create an Infinite record selection

Use the following procedure to create an Infinite record selection.

1. Choose **Execute infinite record selection** from the Record Selections menu.

2. Type the item number for the infinite record selection file you want to execute.

3. Type a report description (not more than 30 characters).

4. Type Y at the prompt to confirm your selection or N to cancel.

Manage Job Linking

Job linking

Link jobs when you want the Avaya PDS to start a job as another job ends. When you link a job, the Avaya PDS transfers agents to the next job after they complete their calls and release the records. The system displays a screen message telling the agents that they are changing jobs. Before the new job begins, the agent receives a message on their screen saying, “You are now being transferred to Job Jobname.”

The second job begins as the Avaya PDS releases lines from the first job. You can link the selected job to any job that is not a unit work list or a managed job. For example, you realize that you have scheduled four small unlinked jobs. You can link the first job to the second job, then link the second to the third, and the third to the fourth.

Shut the job down

More than likely, jobs that run throughout the day will be configured to stop and start automatically through job linking. Also the last jobs to run for the day will be set to stop a few minutes before the latest guard time. This is to insure that the Avaya PDS does not call past the legal calling time. At this time the agents will be automatically logged off of the job as well.

Next linked job

If you want to link this job to another job, enter the job name in this field. When this job nears completion, the Avaya PDS starts up the next job and moves agents from one job to another.

7 Job Monitor

Overview

Purpose

This section describes the how to use Job Monitor to monitor and manage active jobs on the Avaya™ Predictive Dialing System (PDS).

Contents

This section contains the following topics:

- Change the maximum time a customer waits
- Change the maximum % of customers in the wait queue
- Change blend agent return time
- Change Minimum Hit Rate
- Change Expert Calling Ratios
- Change the preview length for Managed Dialing
- Change the cancel mode
- Change time zone ordering
- Change time zone status
- Unit Work List settings
- Set different quotas for each Unit Work List
- Change Unit Work List controls
- Change phone strategy detection mode
- Change phone strategy recall parameters
- Change alternate phone lines
- Job Activity screens

Open a job

Open a job Use the following procedure to open a job.

1. Open the Job menu.

2. Choose Open Job from the Jobs menu. A list of all active jobs appears. (If there is only one active job, the Avaya PDS automatically opens

3. Use the down arrow to choose the job you want to manage. A Job Activity Summary Statistics screen appears.

Close a job

Close a job Use the following procedure to close a job.

1 Open the Job menu.

2 Choose Close Job from the Jobs menu to stop managing a job. Choosing Close does not end the job.

3 Choose a different job to monitor, or press Q (Quit) and Enter to return to the Supervisor Main Menu.

Remove an agent

Remove an agent

Use the following procedure to remove an agent from a job.

1 Open the Job menu.

2 Choose Remove Agent from the Jobs menu. The Agent Selection screen appears.

3 Use the down arrow to choose the agent you want to remove. A countdown message appears. When the count reaches 1, the Avaya PDS has removed the agent.

View completion codes

View completion codes

Use the following procedure to view completion codes.

1 Open the **Displays** menu.

2 Choose **Completion Codes** from the Displays menu or press F3.

3 The Call Completion Code Results screen appears.

View phone line usage

View phone line usage

Use the following procedure to view phone line usage.

1. Open the **Displays** menu.

2. Choose **Phone Lines** from the Displays menu or press F4. The Phone Line Usage screen appears.

View call types

View call types Use the following procedure to view call types.

1. Open the **Displays** menu.

2. Choose **View Call Types** from the Displays menu.

3. If this is a unit work list job, the screen displays unit IDs. Choose a unit ID from the list, or choose **Summary** to monitor all IDs (ALLID)

4. If this is a blend job, you may choose to view the job's inbound or outbound call activity. The Job Statistics screen appears with data for the selected unit ID or detail for the outbound or inbound call activity of a blend job.

View agent screens

View agent screens

Use the following procedure to view agent screens.

1 Open the **Displays** menu.

2 Choose **Agent Screen** from the Displays menu.

3 Choose **Agent Screen** from the Displays menu.

Send a message to an agent

Send a message to an agent

Use the following procedure to send a message to an agent.

1 Open the **Displays** menu.

2 Choose **Single Agent** from the **Displays** menu. The text message box appears.

3 Type a message up to 40 characters.

4 Press Enter to end the message. The **Select Agent** screen appears. Use the down arrow to select an agent

Send a message to all agents

Send a message to all agents

Use the following procedure to send a message to all agents.

1 Open the **Displays** menu.

2 Choose **All Agent** from the Displays menu. the text message box appears.

3 Type a message up to 40 characters. Press Enter to end the message.

4 Use the down arrow to select an agent.

Shut down a job

Shut down a job Use the following procedure to shut down a job.

1 Open the Control menu

2 Choose Shutdown from the Control menu or press Ctrl + E.

3 Type Y at the prompt to confirm the shutdown or N to cancel.

4 Press Ctrl+X to return to the Job Monitor menu

5 Press Enter to end the message. The Select Agent screen appears.

6 Use the down arrow to select an agent.

Stop a job immediately

Stop a job immediately

Use the following procedure to stop a job immediately.

1. Open the **Control** menu
2. .Choose **Abort** from the **Control** menu.
3. Type Y at the prompt to confirm the shutdown or N to cancel. A
4. Press Ctrl + X to return to the Job Monitor menu.
5. Press Ctrl+X to return to the Job Monitor menu.
6. Press Enter to end the message. The Select Agent screen appears.
7. Use the down arrow to select an agent.

Link a job

Link a job

Use the following procedure to link a job.

1 Open the **Contro**l menu

2 Choose **Job Link Modification** from the Control menu. The Job Link screen appears.

3 Choose the job to link to.

4 Type Y to link to the designated job. A confirmation message appears at the bottom of the screen.

Monitor an agent

Monitor an agent

Use the following procedure to monitor an agent.

1 Open the Control menu

2 Choose Monitor Agent from the Control menu.

3 Choose the agent’s logon ID from the logon ID list.

Note

If the agent is talking with a customer, the Avaya PDS immediately connects your headset to the agent’s port. If the agent is not talking with a customer, a message appears to tell you the agent is not on a line.

When you finish listening to an agent’s conversation, choose Disconnect Agent from the Control menu.

Transfer an agent to another job

Transfer an agent to another job

Use the following procedure to transfer an agent to another job.

1 Open the **Control** menu

2 Choose **Transfer Agent** from the Control menu.

3 Choose yes to confirm the transfer or No to cancel.

Change phone line allocations

Change phone line allocations

Use the following procedure to change phone line allocations.

1 Open the **Control** menu.

2 Choose **Phone Line Allocation** from the Control menu.

3 Choose **Add** or **Delete**.

4 Type the name of the group of lines to acquire or release and press Enter.

Note

If your system uses line pooling, this feature affects only the inbound lines. If the lines are available, the system immediately assigns the lines to the active job and displays the number of lines it releases. However, if the lines are in use by another job or system, the system waits until the designated lines are available. The system displays a 0 if it is using all the phone lines and cannot release them.

Change the maximum time a customer waits

Change the maximum time a customer waits

Use the following procedure to change the maximum time a customer waits.

1. Open the **Control** menu.
2. Choose **Inbound Service Time** from the Control menu.
3. Type the number of seconds (5-999).

Change the maximum % of customers in the wait queue

Change the maximum % of customers in the wait queue - Intelligent Call Blending systems only

Use the following procedure to change the maximum % of customers in the wait queue.

1. Open the **Control** menu.
2. Choose **Queue Factor** from the Control menu.
3. Type a number of 100 or above.

Change blend agent return time

Change blend agent return time

Use the following procedure to change blend agent return time.

1. Open the **Control** menu.
2. Choose **Return Time** from the Control menu.
3. Type a number of seconds (0-999).

Change Minimum Hit Rate

Change Minimum Hit Rate

Use the following procedure to change the Minimum Hit Rate.

1. Open the **Settings** menu.

2. Choose **Minimum Hit Rate** from the Settings menu.

3. Type a Q, W, or U and a number between 1-100.

4. The new setting appears in the status field at the bottom of the **Job Activity** screen.

   Note

   Although the settings change immediately, allow a minimum of fifteen minutes to permit the new value to run and set its pace. Frequent changes to the Minimum Hit Rate setting can disrupt the calling pace.

Change Expert Calling Ratios

Change Expert Calling Ratios

Use the following procedure to change Expert Calling Ratios.

1 Open the **Settings** menu.

2 Choose **Expert Calling** from the Settings menu.

3 Type a number between 1-100.

4 The new setting appears in the status field at the bottom of the **Job Activity** screen.

Change the preview length for Managed Dialing

Change the preview length for Managed Dialing

Use the following procedure to change the preview length for Managed Dialing.

1. Open the **Settings** menu.

2. Choose **Preview Length** from the Settings menu.

3. Type the new preview length from 0 to 999 (seconds). Type 0 to allow unlimited preview time.

Change the cancel mode

Change the cancel mode

Use the following procedure to change the cancel mode.

1. Open the Settings menu.

2. Choose **Cancel Mode** from the Settings menu.

3. Choose **Activate to enable the Cancel key** or **Inactivate to disable the Cancel key.**

Change time zone ordering

Change time zone ordering

Use the following procedure to change time zone ordering.

1. Open the **Settings** menu.

2. Choose **Order Time Zone(s)** from the Settings menu.

3. Choose **Activate** to turn on time zone ordering or choose **Inactivate** to turn it off.

Change time zone status

Change time zone status

Use the following procedure to change time zone status.

1. Open the **Settings** menu.
2. Choose **Time Zone(s) Control** from the Settings menu. The Time Zone screen appears.
3. Choose the time zone and press Enter. Pressing Enter causes the status to switch between active and inactive.

Unit Work List settings

Overview

You can turn off unit work lists for the active job and change the quota for a completion code.

You cannot turn a job into a unit work list job by activating the unit work list control. You must first define a unit work list job with a unit work list record selection file.

Quotas

A quota is the designated number of calls with a particular a completion code. When a job or a unit ID reaches the quota, the system stops making calls. You have the following choices:

- Set no quota for the job. Leave the field blank or erase the existing entry by pressing Ctrl+E.
- Set one quota for the entire job. When the job meets the quota, the job ends.
- Set one quota to apply to all unit work lists. Each unit shuts down when the agent reaches the quota for that list. To do this, type the completion code number, a comma, and the quota. For example, type 16,4.

Set different quotas for each unit work list. To do this, set the quota as you did in the previous step; then, set individual quotas in the Settings menu.

Set different quotas for each Unit Work List

Set different quotas for each Unit Work List

Use the following procedure to set different quotas for each Unit Work List.

1. Open the Settings menu.
2. Choose **Quota** from the Settings menu.
3. Press Tab to move to the Quota column.
4. If you have multiple Unit IDs, use the arrow keys to move to the quota you want to change.
5. Type the new quota.

Change Unit Work List controls

Change Unit Work List controls

Use the following procedure to change Unit Work List controls.

1. Open the Settings menu.

2. Choose **Unit Work List(s) Control** from the Settings menu.

3. Choose **Activate** or **Inactivate**.

4. Choose the unit ID you want to activate or inactivate.

Change phone strategy detection mode

Change phone strategy detection mode

Use the following procedure to change phone strategy detection mode.

1. Open the Settings menu.
2. Choose **Detection Mode** from the Settings menu. The Select Ring Count and Call Detection Mode screen appears.
3. Use the down arrow to move to the line you want to change.
4. Press Tab to move across the line to the # of Rings column.
5. Type a new number; the new number replaces the old number.
6. Choose **Yes** to save your changes.

Change phone strategy recall parameters

Change phone strategy recall parameters

Use the following procedure to change phone strategy recall parameters.

1. Open the Settings menu.

2. Choose **Recalls** from the Settings menu. The Select System Set Recalls screen appears.

3. Type the phone type number (1, 2, 3 …) to recall in the Phone Field column. Press Enter to move to the Call Result field.

4. Press Enter to display the completion codes.

5. To choose the completion codes, use the arrow keys to move to a code and press Spacebar to mark it. Repeat the process until you have selected all the codes you want to include. Press Enter to return to the screen.

6. To change the time between retries, type a number in the Min (minutes) column and press Enter.

7. To change the number of retries, type a number in the Number column and press Enter.

8. To select a phone to call after the last retry, type a phone type number (1, 2, 3 …) in the Next Phone column. Leave Next Phone blank if you do not want the system to call an alternate phone.

9. Press Ctrl+X to exit the screen. Choose **Yes** to save your changes and return to the Job Activity screen.

Change alternate phone lines

Change alternate phone lines

Use the following procedure to change alternate phone lines.

1 Open the Settings menu.

2 Choose **Alternate** from the Settings menu. The Select Alternate Initial Phone screen appears. Use Overstrike edit mode because Tab does not work in Insert mode.

3 Type the phone type number (1, 2, 3 …) for the alternate initial phone in the Phone field and press Tab.

4 If the Time Zones column is blank, press Enter to display the time zones.

5 Move to the Time column and type the time (24-hour clock) to start calling that alternate initial phone. For example, type 18.00 for 6:00 PM.

6 Repeat steps 2 through 5 for each alternate initial phone you selected.

7 Press Ctrl+X to exit the screen.

8 Choose **Yes** to save your changes and return to the Job Activity screen.

Job Activity screens

Job Activity screens

The Job Activity screens display the activity status of outbound, inbound, and blend agents, the dialing statistics for outbound and inbound calls, and the operating status of each phone line. The system divides the screen into four sections: job information header, agent activity area, line usage area, and call activity area. The Job Activity Summary Statistics screen shows the activity for the current job, including information about agent activity, line usage, and record status. Press Tab to cycle through three additional screens: Call Completion Code Results, Phone Line Usage, and All Lines on All Jobs. You can also access these screens directly from the Displays menu.

Agent activity fields

The agent activity area provides information on how many agents you assigned to the job and how many have logged in and are on a call. This screen is particularly useful for blend jobs because it indicates the volume of outbound versus inbound calls.

Field	**Description**
Logged in	The number and type of agents logged in to the job
Assigned	Current agent assignments
All	Total number of agents working in the current job
Outbd	(Outbound) Agents handling calls made to the customers
Inbd	(Inbound) Agents receiving calls from customers
Blnd	(Blend) Agents handling both outbound and inbound calls
PTP	(Person to Person) Agents handling the overflow of outbound calls
On a Phone	The number of each type of agent currently handling calls

Line usage fields

The line usage area shows the status of each line group or line type. It compares the number of lines needed to the number of lines available. It displays only the lines with the label requested by the job. Line usage settings reflect the type of active job. For example, both outbound and inbound line usage appear only if a blend job is running.

Field	**Description**
Outbound Demand	The current, average, and peak number of lines needed to handle the current number of agents and the call activity. The average and peak statistics reflect job activity since you started the job monitor. system calculates the statistics in regular intervals.
Outbound Available	The current, average, and peak number of outbound lines that are available for calling. The system calculates the average and peak statistics during the last interval (usually 5 minutes).
Inbound Activate	The current number of lines activated for the job. The system activates lines based on the number of agents on the job and the job state.
Inbound Available	The number of inbound lines that are assigned to the job.

Calling activity fields for outbound calls

Calling Activities Fields for Outbound Calls

Field	**Description**
Records selected	The number of records available for calling based on the record selection and initial phone type selected in the phone strategy.
Phone calls made	The number of calls since the job began.
Cur/Run Hit Rate	The percentage of connects for the last five minutes and the percentage of dialing attempts resulting in connects since the job began.
Agent connects	The number of calls passed to agents.
Queue	The number of calls that are currently in the wait queue.

Field	Description
Recalls	The number of records that the system scheduled for recall.
Calls left	The number of records that the system has not called or the number of subsequently loaded records after the job began. It does not include the recalls.

Calling activities fields for inbound calls

Field	Description
Received	The number of calls received by the system.
Agents Connects	The number of calls handled by agents.
Queue	The number of calls in the wait queue.
Average Wait Time	The average time a caller was on hold.
Average speed to answer	The average number of seconds it takes for the system to answer a call.
Percent calls delayed	The total calls placed in wait queue divided by total calls received, converted to a percentage.
Percent abandoned	The total number of abandoned calls in the queue divided by the total calls received, converted to a percentage.

8 Reports

Overview

Purpose The purpose of this section is to explain the Avaya™ Predictive Dialing System (PDS) reports.

Contents This section contains the following topics:

- Move fields and values
- Clear fields and values
- Delete fields
- Change or delete a value
- Edit filters
- Copy a list distribution report
- Delete a list distribution report file
- Execute and print list distribution reports
- List distribution report analysis
- Calling list reports
- Generate calling list reports
- System reports
- Generate a system report

Agent history report fields

Overview

Agent history reports provide data on agent performance. The menu offers two types of reports: Agent History Reports (based on job type) and the Agent Activity Report. The following illustration shows the items on the Agent History Reports menu.

You have a choice of outbound, inbound, or blend reports. Each report shows data on all the jobs worked by the agent for a specified period. Information includes the total time an agent was on a job and how the agent spent the time.

The following list describes agent history report fields.

Name	Description
For the period...	Specifies the date or period when the system captured the report information.
Report date	Displays the date that the Avaya PDS created the report.
Time	Displays the time that the Avaya PDS created the report.
Agent name	Displays the agent’s logon ID.
Job information	Describes the job. The information includes job name, system identification number, job type, and the record selection file name. It displays the day and time the job started and finished.
Total Activity time on job (hh:mm)	Displays the total time the agent spent on each job. Active time is the time the agent worked with the customer record, was on the phone, or waited between calls.
Total inbound connects	Displays the total inbound calls passed to the agent.
Total outbound connects	Displays the total dialing attempts passed to the agent.

Name	**Description**
Total connects per active hour	Displays the average call connects made each hour. The system calculates the total call connects and divides by the total active time on the job. The Avaya PDS calculates the average hours to one decimal place.
Avg. Agent Related Time Intervals	Provides a heading for the report field that shows the average time the agent performed specific tasks on each job.
Time Agent Working with Record	Calculates the average work time the agent talked with a customer and worked on customer records. Time begins with the call connection and ends with record release. This is the total of Time Agent on Phone and Time Agent on Record After Call.
Time Agent on Phone	Calculates the average talk time the agent was on the phone with each job. Time begins with the call connection and ends with the phone line release.
Time Agent on Record After Call	Calculates the average time to update records. Time begins with the phone line release and ends when the record release
Time Waiting Between Calls	Calculates the average time the agent waited between calls. If this time is too long, you may want to change the Expert Dialing setting.

Sort field

Use the following table to determine how to fill in each field in an agent history report.

Field name	**Description**
Job Name(s)	Specify one job or a range of jobs.
Job Description Label	not more than 30 characters
Record selection file name(s)	Separate multiple files with a comma.
Phone Strategy file name(s).	Separate multiple files with a comma

Field name	Description
Job Start Date	The start date can be one day or a range of days. Type dates in the CCYY/MM/DD format. Separate a range with a comma or a hyphen. For example, to include jobs that started on June 14 and 15, 2002, type 2002/06/14-1999/06/15 or 2002/06/14, 1999/06/15.
Job Number(s)	Separate a range with a dash and multiple job numbers with a comma.
Agent Name	Include only one agent
Report Description	not more than 30 characters

Totalling strategy

The following table describes the totalling strategy.

Totalling strategy number	Description
0	Details by job
1	Details by job and totals for a selected period
2	Totals for a selected period
3	Totals for a selected period
4	Subtotals for each job type and totals for a selected period
5	Details by job, subtotals by job type, and totals for a selected period

Generate agent history reports

Generate agent history reports

Use the following procedure to generate agent history reports.

1. Choose **Agent history reports** from the Reports menu.
2. Choose **Outbound**, **Inbound**, or **Blend Agent History Report** from the **Agent History Reports** menu.
3. Type a Sort Field name. The sort name labels the columns in your report and organizes the information in alphanumeric order.
4. Type the number of the Totalling Strategy.
5. Type **Y** at the prompt if the entries are correct or type **N** to edit your selections. The cursor returns to the first field. Press Enter to move to the field you want to correct. When all the fields are correct, type **Y** and the **Agent History Reports** menu appears.
6. Choose **View or print reports** from the **Agent History Reports** menu.

View or print an agent history report

View or print an agent history report

Use the following procedure to view or print an agent history report.

1 Choose **Agent Activity Report** from the **Agent History Reports** menu. The Avaya PDS displays a prompt to tell you it’s generating the report. The **Agent History Reports** menu appears when the system completes the report.

2 Choose **View or print** reports from the **Agent History Reports** menu.

Job history report fields

Overview

The Job History Reports menu allows you to generate reports for outbound jobs, inbound jobs, blend jobs, or combination reports. The reports provide information on the selected job for a specific period. It includes the number of dials and connects, completion codes, agent work time, agent update time, and agent wait time between calls.

The job history reports provide data on job performance. The menu offers two types of reports: Job History Reports (based on job type) and the Previously Run Jobs Report. The following illustration shows the items on the Job History Reports menu.

Name	Description
For the period …	Specifies the date or period when the system captured the report information.
Report Date	Displays the date that the Avaya PDS created the report.
Time	Displays the time that the Avaya PDS created the report.
Job Information	Describes the job. The information includes job name, system identification number, job type, and the record selection file name. It displays the day and time the job started and finished.
Time System on Line (hh:mm)	Displays the active time for an outbound job. It does not include start up time and job suspension time.
Total Agent Hrs on Line	Displays the time agents were on the job.
Average Agents On line	Records the average number of agents logged into each job.
Total Number of Inbound Calls	Displays the total inbound calls received by the system.
Inbound Calls per System Hour	Displays the average number of inbound calls received per system hour.

Name	Description
Inbound Calls per Agent Hour	Displays the average number of inbound calls received per agent hour. (Total calls divided by total agent hours logged to the job)
Total Connects	Displays the total inbound calls passed to agents.
Total Number of Outbound Calls	Displays the total dialing attempts made by the Avaya PDS. It includes all attempts, including those not passed to agents.
Dials per System Hour	Displays the average call connects made each hour. The Avaya PDS calculates the total call connects and divides by the total active time on the job. The system calculates the average hours to one decimal place.
Dials per Agent Hour	Displays the average number of dial attempts per agent hour.
Total Connects	Displays the total outbound calls passed to agents.
Connects per System Hour	Displays the average number of connects for the time the job was active.
Connects per Agent Hour	Displays the average number of inbound calls received per agent hour.
Rate of Connects to Calls (inbound)	Displays a decimal amount based on the number of inbound calls passed to agents divided by the number of inbound calls received by the system.
Rate of Connects to Calls (outbound)	Displays a decimal amount based on the total number of connects divided by the total number of dial attempts received by the system.
Average Agent Related Intervals	Provides a heading for the report fields that classify the average time agents spent performing specific tasks on each job.
Time Agent on Record After Call	Calculates the average time to update records. Time begins with the line release and ends with the record release.

Name	Description
Time Agent Working with Record	Calculates the average time agents spent talking with a customer and working on the records. Time begins with the call connection and ends when the agent releases the record. This is the total Time Agent on Record After Call and Time Agent on Call.
Time Agent on Call	Calculates the average time agents spent on the phone for each job.
Time Waiting Between Calls	Calculates the average time agents waited between calls.
Queue Statistics	Displays the number of outbound and inbound calls that were placed in wait queue.
Connect Release Classification (Agent)	Displays the different completion codes and the corresponding number of calls released.
System Release Classification	Displays the number of calls released by the system according to standard release classifications or completion codes such as NOANSWER and BUSY.

Sort field Use the following table to determine how to fill in each field in a job history report.

Field name	Description
Job Name(s)	Specify one job or a range of jobs.
Job Description Label	not more than 30 characters
Record Selection file name(s)	Separate multiple files with a comma.
Phone Strategy file name(s).	Separate multiple files with a comma

Field name	Description
Job Start Date	The system retrieves job information based on this date. The start date can be one day or a range of days. Type dates in the CCYY/MM/DD format. Separate a range with a comma or a hyphen. For example, to include jobs that started on June 14 and 15, 2002 type 2002/06/14-2002/06/15 or 1999/06/14, 2002/06/15.
Job Number(s)	Separate a range with a dash and multiple job numbers with a comma.
Agent Name	Include only one agent
Report Description	not more than 30 characters

Generate job history reports

Generate job history reports

Use the following procedure to generate job history reports.

1 Choose **Job history reports** from the **Reports** menu.

2 Choose **Outbound**, **Inbound**, or **Blend Job Report** from the **Job History Reports** menu.

3 Type the name of the sort field.

4 To generate the report, type one or more of the report selection criteria.

5 Type the number of the **Totalling Strategy**.

6 Type **Y** at the prompt if the entries are correct or type **N** to edit your selections. The cursor returns to the first field. Press Enter to move to the field you want to correct. When the entries are correct, type **Y** and the **Job History Reports** menu appears.

7 Choose **View or print reports** from the **Job History Reports** menu.

Generate a previously run job history report

Generate a previously run job history report

Use the following procedure to generate a previously run job history report.

1 Choose **Job History Reports** from the **Reports** menu.

2 Choose **Previously Run Jobs Report** from the J**ob History Reports** menu. The system displays a confirmation prompt.

3 Type **Y** to generate the report or **N** to quit without generating a report.

List distribution

Overview

Although List Distribution is easy to use, it involves several words and ideas that may be new to you.

List Distribution is a reporting tool that helps you analyze the records in your outbound calling list. It creates reports that count the records in the categories (or distributions) you set. Using List Distribution allows you to focus on your campaign objective by assisting with the following topics:

Overview

Job planning By understanding how many accounts are in different categories, you can estimate the size of the record selection. If the selection is too large, you can change the record selection criteria to select fewer records. The information helps you design effective record selections.

Job analysis By viewing the results of call activity during a job, you can adjust your calling operations to get the best results.

The criteria you set for List Distribution reports do not affect the calling list. The settings only determine how the Avaya PDS displays the data in the reports.

Shortcut keys

Use the following shortcut keys when working with List Distribution.

Actions	Keys
Done	F1
Insert field	F2
Delete field	F3
View calling list	F4
Next page	F5
Previous page	F6
Change	F7
Filter	F8
Move	F9
Clear	F11

List Distribution guidelines

The following guidelines must be followed:

- Range sorts records into sets based on ranges. Use the following guidelines when using ranges to sort report data:
  - Ranges must be numbers.
  - Ranges cannot contain commas or decimals.
  - Ranges must be in ascending order (low to high).
- Item selects records to match a value. For example, you can search for area codes in the 206 region. Use the following guidelines when using Item to sort report data:
  - Items can be in ascending or descending order.
  - Items can be letters, numbers, or symbols.

List Distribution Filter Criteria

Use the List Distribution Filter Criteria screen to set List Distribution filters. Press F8 (Filter) with the cursor on any line in the List Distribution Field Selection screen to display the following screen.

When you specify criteria for a field in a filter, you use a wildcard character.

With List Distribution, use the following wildcard characters.

Wildcard characters	Description
>	greater than
<	less than
>=	greater than or equal to
<=	less than or equal to
=	equal to
~	not equal to
*	wild card character
-	range
,	or
!	list wild card

Calling list data

Overview

Each calling list record consists of fields containing data for each record. You can sort the calling list data by any field; then tell the Avaya PDS to give you totals for the records in ranges for each field. For example, you can ask for a count of records by balances in $1,000 increments. The system displays numbers of records in each incremental group in a row format.

You can further sort the information in the report by adding other criteria. For example, you can sort the records in each $1,000 group into subgroups by credit rating. The Avaya PDS displays the numbers of records that fall into each subgroup in a row and column format.

You can add other criteria sorting the numbers in the report by another calling list field. For example, you could add the type of account, personal or business to the previous example. The new report separates the totals into groups called tables.

Filter data

The Avaya PDS gives you the ability to further refine your selection by using filters. The use of filters is always optional. A filter is a set of requirements that eliminate records that don’t match the settings. Use filters to narrow your selection of records to specific values. You can also use a completion code filter to count the records based on completion codes. If you set filters, they apply to all the reports you generate from that List Distribution file.

For example, you can use filters to limit the report to customers in Colorado or Washington, and you can add a completion code filter that eliminates all records except those marked NOTCALLED.

List distribution report design

Overview

Now that you are familiar with the types of reports, let's take a look at how you design them. Your first decision is the type of report: row, row and column, or table.

- Design a row report if you want information from only one field.
- Design a row and column report if you want information from two fields.
- Design a table report if you want information from three fields.

When trying to decide which fields to use for the row, column, or table headings, use the following guidelines:

- When deciding between columns and rows, use the field name that has the largest number of categories for the row label. For example, you want to sort by AREA_CODE and the amount in the LAST_ORDER field. You have divided LAST_ORDER into four separate ranges, and the calling list has 50 area codes. Make AREA_CODE the row label because it has the largest number (50) of categories. Make LAST_ORDER the column label because it has the fewest number (4) of categories. You can add column criteria at the same time you are entering row criteria.
- When deciding between row, column, and table groups, use the field name with the fewest categories for the table groups.
- The Avaya PDS assumes a 0 (zero) for the first increment in a range of values. You do not have to enter 0.

There are spaces on the List Distribution Field Selection screen for entering many row and column criteria. We recommend keeping the list distributions simple and creating as many as you need to keep the reports simpler to read.

Generate a list distribution report

Generate a list distribution report

Use the following procedure to generate a list distribution report.

1. Choose **List Distribution** from the **Reports** menu.

2. Choose **Create a list distribution** from the **List Distributio**n menu.

3. Type the item number of the calling list.

4. Type a List Distribution file name (not more than 10 characters). It is helpful to give the file the same name as the record selection you create with the information.

5. Type an optional report title (not more than 30 characters). If you do not name it, the Avaya PDS names the report “List Distribution Report.”

6. Type **Y** at the prompt to continue or **N** to cancel. The List Distribution Field Selection screen appears.

Select list distribution fields

Select list distribution fields

Use the following procedure to select list distribution fields.

1. To select a row label, press F4 to see the list of fields. Type the number associated with the field.
2. To select the column label, press Enter to move the cursor to the blank cell under the Column heading.
3. To select a column label, press F4 to see the list of fields. Type the number associated with the field.
4. To select the table label, press Enter to move the cursor to the blank cell under the Table heading.
5. To select a table label, press F4 to see the list of fields. Type the number associated with the field.
6. When you complete your selection, move the cursor to the first field.
7. If you want to choose values for additional reports, complete the next line by following steps 1 through 6. You can design 15 reports for each List Distribution.
8. When you finish selecting fields, press F7 (Change). The List Distribution Field Value Selection screen appears.

Select list distribution field values

Select list distribution field values

Use the following procedure to select list distribution field values.

1. Type **R** for Range or **I** for Item (uppercase or lowercase) and press Enter. The cursor moves to the first blank line in the left column.

2. When you have entered all the values for the first field, press **Done**. The **List Distribution Field Selection** screen reappears.

3. Move to the next field and repeat steps 1 and 2.

4. Press Done when you have entered all the values or press F8 (Filters) to enter filters.

Select range in list a distribution report

Select range in a list distribution report

Use the following procedure to select range in a list distribution report.

1. Type the first value in the range. The cursor moves down to the next line. The number represents the upper limit of the first range. For example, to include all records from 0-500, type 500.
2. Type the next value.
3. Repeat until you have set all the values. If you want an unlimited upper value, type 9999999999 (ten nines).
4. Type the value for the item(s) you want to include in the list. The cursor moves down to the next line.
5. Type the value for the next item.

Set list distribution filters

Set list distribution filters

Use the following procedure to set list distribution filters.

1. In the filter screen, press F4 (View) to view the calling list fields. Then type a field number and press Enter.
2. Type a value for the field in the Value column.
3. To use completion codes as filters, position the cursor on the blank line beneath Completion Code Selections. Press F4 (View) to view the list of available codes. Then type a code number. To continue adding completion codes, press Enter to move to the next line and repeat steps 1 and 2.
4. Press F1 (Done) to return to the List Distribution Field Selection screen.
5. Press F1 (Done) again. The List Distribution Report Generation screen appears.
6. Type C and press Enter to generate the report, or press Ctrl+X to save the file and return to the List Distribution menu.

Change a list distribution report title

Change a list distribution report title

Use the following procedure to change a list distribution report title.

1 Choose **List Distribution** from the **Reports** menu.

2 Choose **Edit list distribution** from the **List Distribution** menu.

3 Type the item number of the List Distribution file.

4 Type the calling list name.

5 Type a new List Distribution report title (not more than 30 characters). The Avaya PDS names the report “List Distribution Report” if you do not name the report.

6 Type **Y** at the prompt to continue or **N** to cancel.

7 Press F1.

8 If you want to generate the report now, press **C** and press **Enter**; otherwise, press **Ctrl+X** to save the file and return to the **List Distribution** menu.

Move fields and values

Move fields and values

Use the following procedure to move fields and values.

1. On the **List Distribution Field Selection** screen, position the cursor on the field you want to move and press F9 (Move).
2. Type R to move the field to a row, C to a column, or T to a table; then press Enter.
3. Type the line number to which you want to move the field.
4. When you finish moving fields, press F1 (Done).
5. If you want to generate the report now, type C and press Enter; otherwise, press Ctrl+X to save the file and return to the List Distribution menu.

Clear fields and values

Clear fields and values

Use the following procedure to clear fields and values.

1. Open the List Distribution Field Selection screen.
2. Position the cursor on the field that you want to clear and press F11 (Clear).
3. Type Y at the prompt to remove the field and its value or N to cancel.
4. When you finish clearing fields, press F1 (Done).
5. Type C and press Enter to generate the report, or press Ctrl+X to save the file and return to the List Distribution menu.

Delete fields

Delete fields Use the following procedure to delete fields.

1. Open the List Distribution file you want to edit.
2. Position the cursor on the field you want to delete. Press F3 (Delete).
3. Press Y at the prompt to delete the field or N to cancel.
4. When you finish deleting fields, press F1 (Done).

Change or delete a value

Change or delete a value

Use the following procedure to change or delete a value.

1. Open the List Distribution file you want to change.
2. Move to the field whose value you want to change.
3. Press F7 (Change).
4. Position the cursor on the value. Press F3 (Delete).
5. Type a new value or go to step 6.
6. Press F1 (Done).

Edit filters

Edit filters Use the following procedure to edit filters.

1. Open the List Distribution file you want to edit.

2. On the List Distribution Field Selection screen, press F8 (Filter). The Distribution Filter Criteria screen appears.

3. Position the cursor on the line you want to edit, and press F3 (Delete) or F11 (Clear).

4. To add a filter, press F4 (View) to select a field from the list. Type the field number. Type a field value, if necessary.

5. Press F1 (Done) to return to the List Distribution Field Selection screen.

6. If you want to generate the report now, type C and press Enter; otherwise, press Ctrl+X to save the file and return to the List Distribution menu.

Copy a list distribution report

Copy a list distribution report

Use the following procedure to copy a list distribution report.

1. Choose List Distribution from the Reports menu.
2. Choose Copy a list distribution from the List Distribution menu.
3. Type the item number of a List Distribution file.
4. Type Y at the prompt to continue or N to cancel. The List Distribution Report Generation screen appears.
5. Type a new file name for the copy.
6. Type Y at the prompt to continue or N to cancel.
7. Press any key to return to the List Distribution menu.

Delete a list distribution report file

Delete a list distribution report file

Use the following procedure to delete a list distribution report file.

1. Choose List Distribution from the Reports menu.
2. Choose Delete a list distribution from the List Distribution menu.
3. Type the item number of the List Distribution file you want to delete.
4. Type Y at the prompt to continue or N to cancel.
5. Press any key to return to the List Distribution menu.

Note

After you delete a list distribution file, any report files generated from the file remain on the Avaya PDS until the end of the following day

Execute and print list distribution reports

Execute and print list distribution reports

Use the following procedure to execute and print list distribution reports.

1 Choose List Distribution from the Reports menu.

2 Choose **Execute a list distribution** from the List Distribution menu.

3 Type the item number for the file.

4 Type an optional report title (not more than 30 characters). The Avaya PDS names the report “List Distribution Report” if you don’t name the report.

5 Type Y at the prompt to continue or N to cancel. The List Distribution Report Generation screen appears.

6 If you want to generate the report now, press C and press Enter; otherwise, press Ctrl+X to store the List Distribution results and generate the report later.

7 Press any key to return to the List Distribution menu.

List distribution report analysis

Overview

The top portion of each report lists the Avaya PDS completion codes. It helps determine how many records you have left to call based on the last recorded calling result. These totals are independent of the list distribution criteria you enter. The totals may change if you have jobs running.

The bottom portion of each report displays how many records match the criteria you set when you defined your list distribution. The information will help you design your record selections. Once you've looked at the results, you may want to go back and change the criteria fields values you chose. For example, if you have a large number that appears between the balance ranges of $1000 and $5000, you can edit the criteria to add a $2500 range.

Calling list reports

Overview

During the download process, the Avaya PDS extracts the data for three calling list reports:

- Days on PDS Report shows the nonproductive contact records. Nonproductive contact records are records for which no customer contact has occurred within a certain time. The time is determined during the Avaya PDS configuration. The system marks these records and includes them on a report after the specified number of days. Depending on your system configuration, the system will either continue to call the records or not call those records again.
- Reject Report shows the records the Avaya PDS rejected due to duplicate account numbers, invalid telephone numbers, or time zone sorting failures.
- Release Code Report (completion codes) shows all records with a specific completion code. For example, you can request a report of all calls that resulted in a customer who has promised to make a payment.

During the Avaya PDS configuration, the intervals at which the system generates reports and the completion codes for the reports were set. The system generates calling list reports during the daily download process.

Generate calling list reports

Generate calling list reports

Use the following procedure to generate a calling list report.

1. Choose **Calling list reports** from the Reports menu.

2. Choose Days on PDS Report, Reject Report, or Release Code Report (Completion Code Report) from the Calling List Reports menu.

3. Type a report description (not more than 30 characters).

4. Type Y at the prompt to continue or N to cancel. The Avaya PDS generates the report.

5. Choose **View or print reports**.

System reports

Overview

The Avaya PDS generates four system reports:

- Agent Login Report shows the agent number, the login menu, and the agent ID.
- Multiple Call Report sorts records by phone numbers. It lists the number of times the Avaya PDS called the record, the date, the account number(s), completion code, agent, and calling list record number.
- Program Information File (PIF) Report shows a list of the previous data processing programs run on the Avaya PDS. Use this report to help troubleshoot system problems.
- Hourly Inbound Activity Report shows the number of inbound calls received as well as the number of inbound calls placed on hold or abandoned.

Generate a system report

Generate a system report

Use the following procedure to generate a system report.

1. Choose **System reports** from the Reports menu.
2. Choose A**gent Login Report, Multiple Call Report, Program Information File Report,** or **Hourly Inbound Activity Report** from the System Reports menu.
3. If you chose Multiple Call Report, type a phone number in the format NNN-NNN-NNNN.
4. Type a report description (not more than 30 characters).
5. Type Y at the prompt. The Avaya PDS generates the report.
6. Choose **View or print reports**.

9 PC Analysis

Overview

Purpose

The Avaya™ Predictive Dialing System (PDS) uses PC Analysis for reporting and troubleshooting.

Contents

This section contains the following topics:

- Execute an extract configuration file
- Display completion codes
- Display available calling lists
- Copy an extract print file
- Delete an extract print file
- View and print an extract file

PC Analysis

Overview

PC Analysis allows you to use data from the Avaya PDS to prepare reports, charts, mail merge letters, and spreadsheets using PC software.

Use PC Analysis to extract statistics from the following categories:

- job history
- agent history
- calling information
- calling transactions
- calling lists

The extract is in a comma delimited file without headings. In order to use the information, you need to import it into a PC program such as Excel, Lotus, a word processing merge file, or database. Then you can create reports, charts, letters, and spreadsheets from the PC program.

There can be a significant reduction in system performance if you choose to run PC Analysis during running jobs. We suggest that you run extracts when there are no active jobs.

Data sources

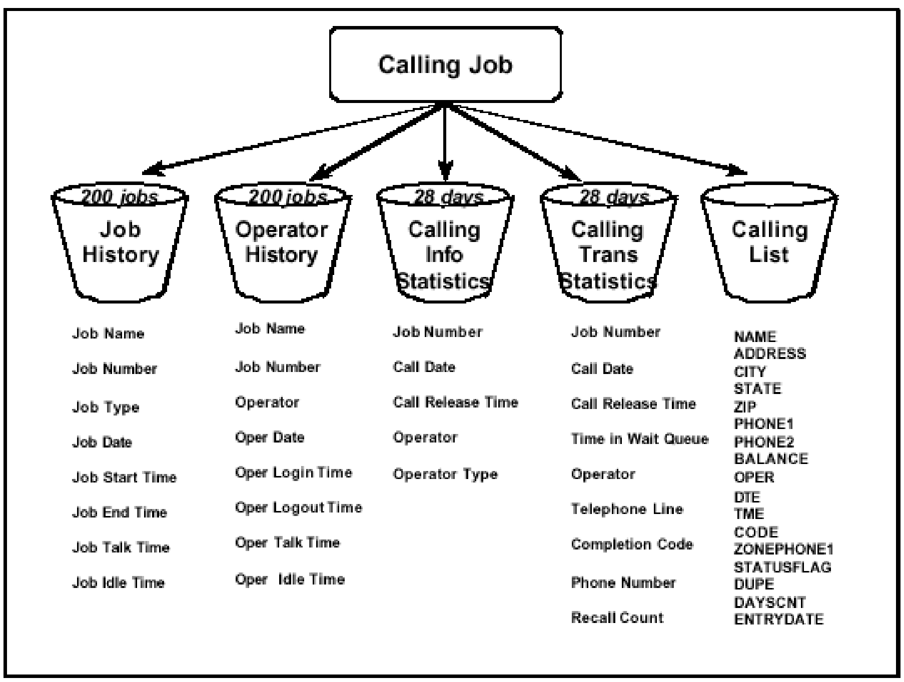
Overview

When the Avaya PDS places a call, information is put into “buckets” or files. A call’s outcome is written to the calling list (AGENT, DATE, TIME, and CODE) and to the statistics files.

When the job is complete, summary information is gathered and written to the job and agent files.

Data sources include Job History Files, Agent History Files, Calling Information Statistics, Calling Transaction Statistics, and Calling List Information.

Job history and agent history files are created by an Avaya PDS binary application that uses totals from the information and transaction statistics. Depending on what you want to do, you choose the file containing the information you need as your source file.



Important

You can take information only from one source file per extract. If you want information from more than one source file on your PC, create separate extracts and then combine the data in your PC application.

Job history

Overview

The job history file contains data on the last 200 completed jobs. The Avaya PDS separates the data into inbound and outbound job information. The information is taken from the information and transactions statistics files. Unlike the statistics files, the job history file provides averages and group totals.

Information in this file includes the following:

- Last 200 jobs
- Job start and stop times
- Number of connects
- Number of agents on the job at any given time
- Number of minutes the job was suspended

Job file information

The following table describes the fields in the job history file:

Name	Description
JOBNAME	Job name
JOBNUMBER	Avaya PDS identification number assigned to a job. The number increases each time Avaya PDS runs the job
JOBTYPE	Indicates the job type: inbound, outbound or blend
UNITID	Unit work list key value for a unit work list job. For example, if you base the unit work lists on ZIP codes, the field contains the ZIP codes used by that job
JOBDATE	Job start date
STARTTIME	Job start time
ENDTIME	Job stop time
ACTIVETIME	Total job call processing time. It does not include start time or suspension time

Name	**Description**
JOB_CLOCKTIME	Total agent hours on a job JOB_TALKTIME + JOB_UPDATETIME + JOB_IDLETIME
JOB_IDLETIME	Total time agents were idle. Does not include the time between an agent's login and the first call or the time between the release of an agent's final record and log off. For a blend job, it includes the transfer time between jobs.
JOB_TALKTIME	Total talk time for all agents on all job
JOB_UPDATETIME	Total update time for all agents on all jobs
JOB_WORKTIME	Total work time for all agents on all jobs. JOB_TALKTIME + JOB_UPDATETIME
JOB_IDLECOUNT	Number of times agents were idle
JOB_CALLSWORKED	Total calls handled by agents on all jobs
JOB_CALLSANSWERED	Total calls handled on inbound jobs
JOB_WAITQUEUETIME	Time (in seconds) customer spent in wait queue
JOB_CALLSINWAIT	Total calls placed in wait queue
OUT_CLOCKTIME	Total time agents were on outbound jobs
OUT_IDLETIME	Total idle time on outbound jobs
OUT_TALKTIME	Total talk time on outbound jobs
OUT_UPDATETIME	Total update time on outbound jobs
OUT_WORKTIME	Total work time on outbound jobs OUT_TALKTIME + OUT_UPDATETIME

Name	**Description**
OUT_IDLECOUNT	Number of times agents were idle on outbound jobs
OUT_CALLSWORKED	Total outbound calls handled by agents
OUT_CALLSANSWERED	Total outbound calls answered
OUT_WAITQUEUETIME	Total time outbound customer spent in the wait queue
OUT_CALLSINWAIT	Total number of outbound calls placed in the wait queue
OUT_CALLSPLACED	Total outbound calls placed
OUT_RECALLSPLACED	Total recalls placed
INB_CLOCKTIME	Total time on inbound calls INB_TALKTIME + INB_UPDATETIME + INB_IDLETIME
INB_IDLETIME	Total idle time on inbound calls
INB_TALKTIME	Total talk time on inbound calls
INB_UPDATETIME	Total update time on inbound calls
INB_WORKTIME	Total work time on inbound calls INB_TALKTIME + INB_UPDATETIME
INB_IDLECOUNT	Number of times agents were idle on inbound calls
INB_CALLSWORKED	Total inbound calls handled
INB_CALLSANSWERED	Total inbound calls received per job
INB_WAITQUEUETIME	Total time customer spent in the inbound wait queue
INB_CALLSINWAIT	Total calls placed in the inbound wait queue
XOUT_CLOCKTIME	Total time spent as Person to Person (PTP) agent

Name	Description
XOUT_IDLETIME	Total PTP idle time
XOUT_IDLECOUNT	Number of times PTP agents were idle
XOUT_CALLSWORKED	Total PTP calls
PREVIEWTIME	Total time agents spent previewing records during Managed Dialing
LISTNAME	Calling list name
JOBLABEL	Job description from job file
SELECTNAME	Record selection file name
STRATEGYNAME	Phone strategy file name
COMPCODE01-COMPCODE99	Completion codes 01-99

Agent history

Overview

The agent history file contains data on each agent's calling activity during the last 200 jobs. There is a file for each agent. Information within each file is separated for outbound and inbound calls.

The file provides the following data:

- Last 200 jobs
- Number of seconds an agent was online
- Number of seconds agent spent talking, idle, and updating records
- Number of calls the agent answered

Agent file information

The following table describes the fields in the agent history file:

Name	Description
JOBNAME	Job name
JOBNUMBER	The Avaya PDS identification number assigned to a job. It increases each time a job runs.
UNITID	Unit work list identification
JOBDATE	Job run date
STARTTIME	Job start time
ENDTIME	Job end time
LOGINTIME	Agent’s first log in time
LOGOUTTIME	Agent’s first log off time
AGENTNAME	Agent’s user name.
JOB_CLOCKTIME	Total agent hours on a job JOB_TALKTIME + JOB_UPDATETIME + JOB_IDLETIME

Name	Description
JOB_IDLETIME	Total agent idle time. Does not include time between an agent's login and the first call or time between the release of an agent's final record and log off. For a blend job, includes transfer time between jobs.
JOB_TALKTIME	Total talk time
JOB_UPDATETIME	Total update time
JOB_WORKTIME	Total work time JOB_TALKTIME + JOB_UPDATETIME
JOB_IDLECOUNT	Number of times agent was idle
JOB_CALLSWORKED	Total calls handled during a job
OUT_CLOCKTIME	Total time on outbound jobs
OUT_IDLETIME	Total idle time on outbound jobs
OUT_TALKTIME	Total talk time on outbound jobs
OUT_UPDATETIME	Total update time on outbound jobs
OUT_WORKTIME	Total work time on outbound jobs OUT_TALKTIME + OUT_UPDATETIME
OUT_IDLECOUNT	Number of times agent was idle on outbound jobs
OUT_CALLSWORKED	Total outbound calls handled
INB_CLOCKTIME	Total time on inbound calls INB_TALKTIME + INB_UPDATETIME + INB_IDLETIME
INB_IDLETIME	Total idle time on inbound calls
INB_TALKTIME	Total talk time on inbound calls
INB_UPDATETIME	Total update time on inbound calling
INB_WORKTIME	Total work time on inbound calls INB_TALKTIME + INB_UPDATETIME

Name	**Description**
INB_IDLECOUNT	Number of times agent was idle on inbound calls
INB_CALLSWORKED	Total inbound calls handled
XOUT_CLOCKTIME	Total time as Person to Person (PTP) agent
XOUT_IDLETIME	Total PTP idle time
XOUT_IDLECOUNT	Number of times PTP agent was idle
XOUT_CALLSWORKED	Total PTP calls
PREVIEWTIME	Total time agent spent previewing records during Managed Dialing
LISTNAME	Calling list name
OFFLINE	Total time spent off-line (i.e. logged in but not on a job)
RELEASE	Time spent released to the ACD in Predictive Blend
COMPCODE01-COMPCODE99	Completion codes 01-99

Calling statistics

Calling statistics

Calling information statistics provide information about the duration of certain events.

Avaya PDS stores the calling statistics in two files:

- Information Statistics
- Transaction Statistics

Reports from both of these files give you information about the job up to the time the Avaya PDS generates the report. The Avaya PDS uses the concept of a job as that day's calling activity and tracks it with the job number. Job numbers increase each time the Avaya PDS runs a job.

The *information statistics file* contains general data sorted by job number. The information statistics file provides information about the duration of certain events.

The *transaction statistics file* contains data about each call.

The Avaya PDS generates statistics for the events at different intervals. For example, the Avaya PDS generates hit rate statistics every ten minutes and line usage statistics every two minutes.

Information statistics file

The following table describes the fields in the information statistics file:

Name	Description
INF_JOBNUM	The Avaya PDS identification number assigned to a job. It increases each time Avaya PDS runs the job.
INF_DATE	Date the event occurred.
INF_TIME	Time the event occurred.
INF_EVENTLABL	The name of the event being reported; for example, line usage, hit rate, acquire, release, log on.
INF_FREE	Data for the event in the event label field. For example, hit rate would show the current hit rate; line usage would show the current line usage.
INF_AGENTNAME	Agent's user name.

Name	Description
INF_CLOCKTIME	Has several uses: For LOG OFF events it is the total work time for last assignment, not the time since log on. For JOBTIME, the last entry in the file, it is the total
INF_IDLETIME	Amount of idle time between calls of the same type.
INF_IDLETYPE	The job type to which the idle agent is assigned.
INF_CALLTYPE	The type of call: outbound, inbound, blend.
INF_UNITED	Unit work list identification.
INF_LOGTYPE	Agent’s log on type: outbound, inbound, blend, managed, PTP.

Note

If you transferred an agent from any other job, it would be the time on this job.

Transaction statistics

The transaction statistics file contains data about each call the Avaya PDS processed for a particular job. The Avaya PDS stores the record numbers, phone numbers, recall attempt counts, agent names, talk and work times, and calling results for each call. The following table describes the fields in the transactions statistics file:

Name	Description
TRN_JOBNUM	The Avaya PDS identification number assigned to a job
TRN_DATE	Date the event occurred
TRN_TIME	Time the event occurred
TRN_WAITTIME	Total time this customer was in wait queue
TRN_USERFIELD	User defined field
TRN_TELELINE	Line number used by this call

Name	Description
TRN_COMPCODE	Completion code entered by system for this call
TRN_RECNUM	Record number.
TRN_PHONENUM	Phone number (outbound)
TRN_AGENTNAME	Agent’s user name
TRN_RECALLCNT	Number of times Avaya PDS has recalled this record
TRN_TALKTIME	Agent talk time for this call
TRN_WORKTIME	Agent work time for this call
TRN_V_TO_HANG	Time from customer answer to line release
TRN_OFF_TO_HNG	Time from the Avaya PDS initiating call to line release
TRN_P_FIELDNUM	Phone number (inbound)
TRN_CONNECT	Connect flag
TRN_UNITID	Unit ID for this call
TRN_UPDATETIME	Agent update time for this record
TRN_PREVTIME	Time agent spent previewing record on a managed job
TRN_TRANSTYPE	Call type: inbound or outbound
TRN_AGCOMPCODE	Completion code entered by agent
TRN_LOGTYPE	Agent log on type: outbound, inbound, blend, managed, PTP

Calling list

Overview

If your agents update the host or you update information to the host, the calling list file contains information about your calling list for the past two days. The contents of your calling lists are unique to your installation.

Avaya PDS added calling list fields

The following table describes the Avaya PDS added calling list fields:

Name	**Description**
OPER	Agent that took call (left blank if no agent)
DTE	Date call was completed
TME	Time call was completed
CODE	Release code
ENTRYDATE	Date that the record first loaded on the system (consecutively downloads)
STATUSFLAG	Record status, if anything other than a “null” (might appear as a blank entry), then record is considered uncallable: • T = failed time zone • B = bad phone number • D = too many days on system • R = duplicate record • E = manual delete via record edit • C = call on inbound campaign, cancelled in outbound campaign • N = Do Not Call
RECALLDATE	Date set for agent set recall
RECALLTIME	Time set for agent set recall
RECALLPHONE	Phone to call for agent set recall
DAYSCNT	Number of days consecutively that the record has been loaded on system
PHONESTAT	System status of Phones (1 byte for each phone, position 1 for phone1 etc.) *
ZONEPHONE1	Time zone flag for PHONE1
ZONEPHONE2	Time zone flag for PHONE2
CURPHONE	Current active phone
PHONECNT1	Number of attempts on PHONE1
PHONECNT2	Number of attempts on PHONE2
DUR4	System talk time

Name	Description
DUPE	Duplicate flag (if field contains an * duplicate records exist)
FRSTDATE1	Date of first attempt on PHONE1
FRSTTIME1	Time of first attempt on PHONE1
FRSTSTAT1	Result of first attempt on PHONE1
FRSTDATE2	Date of first attempt on PHONE2
FRSTTIME2	Time of first attempt on PHONE2
FRSTSTAT2	Result of first attempt on PHONE2
JOBNAME	Name of job last attempting record
CALLTYPE	Type of call (I=inbound, O=outbound)

PHONESTAT field

PHONESTAT is initially set when setzones is executed during list preprocessing. PHONESTAT is constantly changing during daily processing. Each phone in the calling list will have a corresponding character in the PHONESTAT field. For example, if list1 has two phones, the PHONESTAT field will contain two characters. The first character corresponds to PHONE1 and the second character corresponds to PHONE2. Each character in the PHONESTAT field may contain one of five different characters:

- N = not called
- B = bad number
- C = called
- O = passed to agent
- A = active/set for recall

PHONESTAT is used by the Avaya PDS to determine which phone is bad. Phones that have a B in their corresponding PHONESTAT field will not be attempted. When a job is verified, PHONESTAT fields with C or O are reset back to N.

Function keys used with PC Analysis

You can use function keys and other key-combinations to work in PC Analysis.

Action	Keys
Toggle Help	Esc,H
Select a field	Esc,S
Select criteria	Esc,C
Quit without saving	Esc,Q
Change output file name	Esc,O
Change input file name	Esc,I
Toggle quoting on and off	Esc,T
Done	Esc,X
Run an extract	Ctrl+G

Extract file

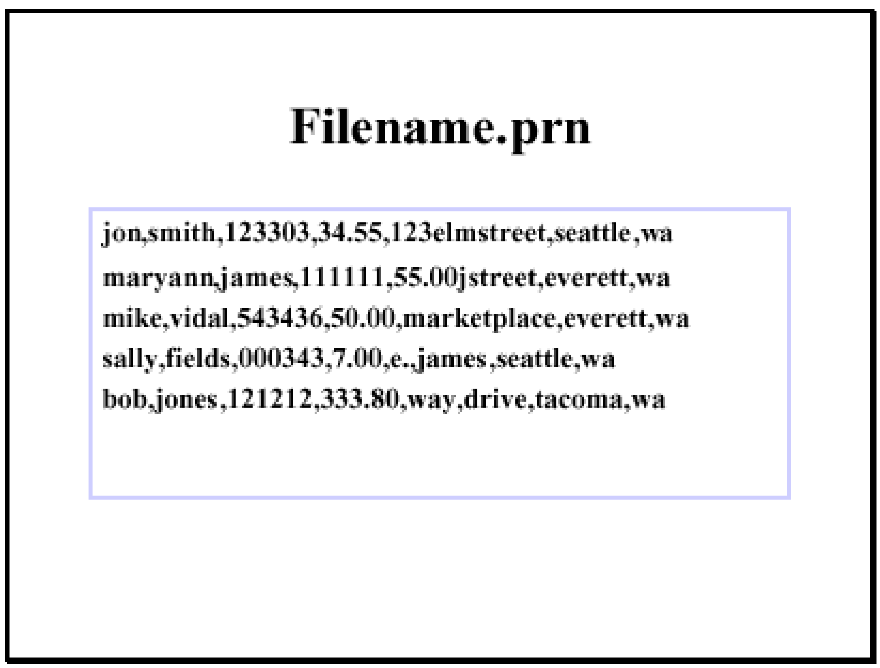
Overview

The PC Analysis download process includes the following:

- extract file
- download options
- download the output file

Use the PC Analysis extract

When you execute an extract configuration file, you create an output file with the extension .prn. PC Analysis lists the available files in the ITEMS column. You can download the file to a PC using the PC Analysis Telnet tool in Campaign Director.



All data will have quotes around the data unless Esc,T is used to remove them, otherwise the default is with quotes.

Using the executed letter generation extract

Some spreadsheet, database, and word processing applications require fields to be separated by quotation marks. PC Analysis allows you to separate by quotation marks. At the PC Analysis Extracts Menu, select item 5 to Execute a Letter Generation extract. The output file will have a .txt extension. Check with your administrator to ensure that your format is acceptable for your worksite.

Download extracts

PC Analysis creates files in standard ASCII file format. ASCII files are compatible with a wide range of PC software programs. The downloaded file contains one line per data record with fields separated by commas or quotation marks.

After you have downloaded your output file to your PC, you can manipulate your data by loading it into a PC program.

Log in to PC Analysis using cdwanal password

Log in to PC Analysis using cdwanal password

Use the following procedure to log in to PC Analysis.

1 At the Avaya PDS login prompt, type your login name.

2 Type a PC Analysis password (pcanal or cdwanal). Press the Enter key.

Log in to PC Analysis using supervisor password

Log in to PC Analysis using supervisor password

Use the following procedure to log in to PC Analysis using the supervisor password.

1 To use **PC Analysis**, select **Reports**.

2 From the **Reports** menu, the **PC Analysis Extracts** and **PC Analysis Tools** menu options are available.

Note

The following procedures assume that you are using this method.

Create an extract file

Create an extract file

Use the following procedure to create an extract file.

1 Select **PC Analysis extracts** from the **Reports** menu.

2 Select **Create an extract**.

3 Type **Y** at the prompt to continue or **N** to abandon.

4 Type a name for the extract file.

5 Select the type of extraction you desire to perform.

6 Type **Y** at the prompt to continue or **N** to cancel.

An Input and Output File Definition screen will appear for you to fill out. An input file is the information type and an output file is the filename (.cfg) of the configuration file to hold the extracted data.

7 Type the name of the output file to receive the data.

Extract selection information

Extract selection information

Use the PC Analysis Extraction Configuration Edit screen to select fields, determine their order, and define field value criteria for the extract file. Each file you create requires a list of fields arranged in a specific order. Adding criteria for fields is optional.

The available fields differ with the type of information you select. Generally, you need to page through two or more screens to see all the possible file selections. Use Ctrl+N to go to the next screen, and Ctrl+P to go to the previous screen.

If any of the fields contains commas, such as addresses, turn quoting on by pressing Esc,T. When quoting is turned on, Avaya PDS separates the fields with quote marks. When quoting is off, Avaya PDS separates fields with commas. This may cause a problem when importing the information into some applications that use commas as field separators.

Set up the extract file

Set up the extract file

Use the following procedure to set up the extract file.

1. Select the information fields by pressing the down arrow to move to the field you want to select and press Enter.

2. To set the extract order, press Esc,S to move to the Select column. Type a number for each chosen field in the Select column and press Enter. The cursor returns to the Field column.

3. If you don't want to specify an order, type 1 in all Select fields. The Avaya PDS processes the fields in the order they appear.

4. To select field values, press Esc,C to move to the **Criteria Column**. Type the desired value in the **Criteria column** then press Enter.

5. You can set values using commas as separators or set a range of values using a hyphen as a separator.

6. Repeat these steps for each field you want to use as a selection criteria.

7. Press **Done** to save the extract configuration file.

Edit an extract file

Edit an extract file

Use the following procedure to edit an extract file.

1. Choose **PC Analysis extracts** from the menu.
2. Choose **Edit an extract** from the **PC Analysis Extracts** menu.
3. Type the number of the extract file to edit.
4. Type **Y** at the prompt to continue or **N** to cancel. The **PC Analysis Extraction Configuration Edit** screen appears.
5. Press **Done** to save your changes and return to the menu.
6. Type **Y** at the prompt to continue or **N** to cancel.

Copy an extract file

Copy an extract file

Use the following procedure to copy an extract file.

1. Choose **PC Analysis extracts** from the menu.
2. Choose **Copy an extract** from the **PC Analysis Extracts** menu.
3. Type the extract file number to copy.
4. Type **Y** at the prompt to continue or **N** to cancel.
5. Type a name of the new output file.
6. Type **Y** at the prompt to continue or **N** to cancel.
7. Press any key to return to the menu.

Delete extract and output files

Delete extract and output files

Use the following procedure to delete extract and output files.

1 Choose **PC Analysis extracts** from the menu.

2 Choose **Delete an extract** from the **PC Analysis Extracts** menu.

3 Type the extract file number to delete.

4 Type **Y** at the prompt to continue or **N** to cancel.

5 Press any key to return to the menu.

Execute an extract configuration file

Execute an extract configuration file

Use the following procedure to execute an extract configuration file.

1 Choose **PC Analysis Extracts** from the menu.

2 Choose **Execute an extract**.

3 Type the number of the extract file to execute.

4 Type **Y** at the prompt to continue or **N** to cancel. The screen shows you the number of records selected and the number of records checked.

5 Press any key to return to the menu.

Display completion codes

Display completion codes

Use the following procedure to display completion codes.

1. Choose **PC Analysis extracts** from the menu.

2. Choose **Display Call Completion Codes** from the **PC Analysis Extracts** menu.

3. Type **Y** at the prompt to continue or **N** to cancel.

4. Type the name of the job whose completion codes you want to view and then press Enter.

5. Type **Y** at the prompt to continue or **N** to cancel.

6. Press any key to return to the menu.

Display available calling lists

Display available calling lists

Use the following procedure to display available calling lists.

1 Choose **PC Analysis extracts** from the menu.

2 Choose **Display available calling lists** from the **PC Analysis Extracts** menu.

3 Type **Y** at the prompt to continue or **N** to cancel.

4 The screen shows the current date and time along with a breakdown of space available on the calling area of the hard disk. Press any key to return to the menu.

Copy an extract print file

Copy an extract print file

Use the following procedure to copy an extract print file.

1. Choose **PC Analysis Tools** from the **Reports** menu.
2. Choose **Copy an extract print file** from the **PC Analysis Tools** menu.
3. Type the item number of the file to copy.
4. Type **Y** at the prompt to continue or **N** to cancel.

Delete an extract print file

Delete an extract print file

Use the following procedure to delete an extract print file.

1. Choose **PC Analysis Tools** from the **Reports** menu.
2. Choose **Delete an extract print file** from the **PC Analysis Tools** menu.
3. Type the item number of the file to copy.
4. Type **Y** at the prompt to continue or **N** to cancel.

View and print an extract file

View and print an extract file

Use the following procedure to view and print an extract file.

1 Choose **Analysis Tools** from the **PC Analysis** Main menu.

2 Choose **View** or **print** extracts.

3 Type the number of the output file to display. The Report Files Status Screen appears, press **F2** to print or **F4** to view the contents of the output file.

10 Screenbuilder

Overview

Purpose

The Avaya^{TM} Predictive Dialing System (PDS) uses Screenbuilder to create custom agent screens.

Contents

This section contains the following topics:

- Spell-check your screen
- Delete a screen from a job
- Change screen calling lists
- Change field appearance
- Set field edit capabilities
- Change field sequence order
- Field verification formats
- Set field verification formats
- Validate delimiters
- Set acceptable field entries
- Field reference information
- Set field reference information
- Create and view reports
- Print a Screenbuilder report

Screenbuilder overview

Overview

Screenbuilder is an optional Avaya PDS tool set that lets you change the information that agents see on their workstation screens. Use Screenbuilder to design up to 20 screens for each job. With Screenbuilder's tools, you can easily adapt your agent's screens to meet your changing needs.

Background information

Before you change or create a job screen, you need to understand how it fits into the Avaya PDS.

A campaign is a strategy that you design to achieve your call center goals. One element of a campaign is a job. It is a job's objective to accomplish specific campaign goals. Campaigns can include one or more jobs. A job consists of a calling list, phone strategy, record selection, job definition, and job screens. Multiple jobs can share screens if the jobs are based on the same calling list or calling list format.

Agents see job screens on their workstations when the Avaya PDS passes them a call. More than one job can use a screen. Before editing a screen, determine which jobs use the screen. If a job uses more than one screen, the agent uses the function keys to move to the subsequent screens. F2 moves to the second screen, F3 to the third, and so on. The Avaya PDS fills some of the fields with customer information from the calling list. The agents may complete additional information.

A job screen is always based on a specific calling list. The calling list determines the available fields for a screen. The Avaya PDS maintains a separate file, the calling list dictionary, with lists of the fields. The calling list dictionary also contains information about the size of each field and the kind of information in the field.

Screen information

Screens contain the following information for the agent:

- Fields contain information specific to the current record. The Avaya PDS may complete some of the fields and the agents may complete others.
- Field Labels give a brief description of the information in a field. For example, the label Last Name tells an agent that the information in that field is the customer's last name.
- Scripts contain the questions you want asked or the information you want the agents to distribute.

- General Information provides function key names and system instructions.

Field capabilities

The following table shows the different editing capabilities each field has.

Capability	Description
Accessible	The cursor does not automatically go to accessible fields. Agents can move the cursor to these fields but can't change the data.
Optional	Agents can choose whether to enter data. Comment fields are usually optional entry fields.
Protected	Agents cannot change protected fields.
Required	Agents must enter information into required entry fields before they can release a record.

Field sequence order

Field sequence is the order in which an agent's cursor moves. It does not have to move in the same order as the fields appear on a screen.

Screenbuilder has two field sequencing modes: auto-sequencing and manual-sequencing. You can turn auto-sequencing on or off by changing the default settings in the Command menu. When auto sequencing is on, the Avaya PDS displays fields from left-to-right, top-to-bottom. When it is off, the system determines the field order by the order in which you added the fields to the screen.

Each field has a sequence number. You can see the current field's sequence number in the status bar. It is the value that follows S-. When you rearrange fields on a screen with auto-sequencing turned on, Screenbuilder changes the field sequence to left-to-right, top-to-bottom. When you manually sequence fields, you determine the order in which you want agents to use the fields.

Acceptable field entries

The acceptable entry list limits agents' entries to specific choices. For example, limit a field to a Yes or No response.

You control which entries are acceptable in a field by creating a list of acceptable entries and assigning it to the field. The Avaya PDS assigns a number to each list. Multiple jobs can use the same list and you can edit the list as long as it is not being used by a current job.

Screen and calling list

The screen's calling list determines the screen fields. If the job's calling list changes, you need to update the screens. The following actions require that you change a screen's calling list:

- When you change a job's calling list(s)
- When you use a copied screen in a job that has a different calling list than the one used by the original screen
- When you change a calling list's name

Screenbuilder menus

Overview

Screenbuilder starts in menu mode with the menu bar across the top of the screen. It stays in menu mode until you open a screen, then you are in edit mode. (You are in menu mode if you can see the menu.) Switch between menu and edit modes by pressing Ctrl+X. Use edit mode to create, delete, or edit screens, and use menu mode to choose a menu command.

The Screenbuilder menu is a menu bar with drop-down menus for different tasks.

The top of the screen contains the menu bar. Below the menu bar is the information line which gives a brief description of the active menu item. The bottom of the screen displays a line of additional help, such as how to choose a command or a message responding to an action.

You can make the menu bar active from any screen in Screenbuilder by pressing Ctrl+X or F1. When the menu bar is visible, you are in menu mode. When it is not visible, you are in edit mode.

When you decide to create a screen, compare the new screen to existing screens. If the new screen does not resemble any of the screens on the system, create a screen to meet your needs. Otherwise, make a copy of an existing screen and edit the copy. You can often save time by copying a screen from another job, and copying helps to keep the screen design consistent.

Screenbuilder has two typing modes: Overwrite and Insert. There is an asterisk (*) on the lower right corner when the screen is in Overwrite mode. Press Ctrl+O to switch between Overwrite and Insert. The default edit mode is Overwrite. In Overwrite mode, the characters you type replace the existing text to the right of the cursor. Use Backspace to delete characters. Use Insert mode to type characters between existing characters, then switch back to Overwrite mode. In Insert mode, Screenbuilder moves existing text to the right as you type new characters. Use the arrow keys to move around the screen.

Action keys

Use the following action keys when using Screenbuilder.

Action Key	Function
Shift+F1	Open Screen
Shift+F3	Save Screen As

Action Key	**Function**
Shift+F4	Close Screen
F2	Insert line
F3	Delete line
F4	Save Screen
F5	Cut block
F6	Copy block
F7	Paste block
F8	Clear block
F9	Tag all fields
F10	Quit Screenbuilder
Ctrl+A	Add field
Ctrl+C	Clear all tags
Ctrl+D	Clear to end of line
Ctrl+O	Switch between insert and overwrite
Ctrl+X	Switch between menu and edit mode
Ctrl+Z	Undo edit
Tab	To move through the drop-down menus
Shift+F4	To close a screen

Field Attributes

Overview

Each field in a calling list has a set of properties known as attributes.

Changing a field's attributes changes the field's appearance on the screen, how the screen displays data, and what type of data the field accepts. The changes you make do not change the calling list fields; they change only the way the screen uses these fields.

Although the field attributes are predetermined and you do not need to change them, changes often enhance the screen's appearance and usability.

How field attributes work

Each field attribute affects one of four aspects of the screen:

- Appearance affects how the field appears on the screen. For example, do the blank spaces fill with dots?
- Use order affects the sequence in which agents use the fields.
- Acceptable entries limits agents' field entries three ways: edit capabilities, verification format, and acceptable entries. For example, you can require that certain fields always have an entry, accept only dates, or restrict entries to specific responses such as yes or no.
- Reference information contains the following information about the field: field name, maximum number of characters, field type, and field location on the screen.

Shortcut letter	Attribute	Value	Description
N	Name	Field names	The labels assigned to fields.
P	Position	1-23 rows 1-79 columns	Location on the screen.
C	Comment	1-256 characters	Clarifies the use of a field. If CP are the first two letters in a comment, the field is a cut-and-paste field.

Shortcut letter	**Attribute**	**Value**	**Description**
F	Edit format	Accessible Protected Optional Required	Determines if and how agents enter information in the field.
V	Verification format	Time Date Numeric	Verifies that fields contain valid entries.
A	Acceptable entry list	Spaces Dots	Displays list of acceptable field entries.
L	Edit acceptable entry list		Alphanumeric - Lets you change the acceptable entries.
D	Filler characters		Specifies whether to fill field blanks with spaces or dots.
S	Sequence number		Specifies the order that agents use fields.

You can change field attributes in several ways. Use the following guidelines to choose an edit method.

Number of Edits	**Action**
One attribute for one field	Move the cursor to the field you want to change. Press the shortcut letter for the attribute you want to change.

Number of Edits	**Action**
Several attributes for one field	Move your cursor to the field you want to change. Press E (Edit). Press the shortcut letter for the attribute you want to change. Use Tab to move between buttons or type the requested information. Press Enter. Press Shift+F2 (Save current screen).
Several attributes for several fields	Move your cursor to each field you want to change. Press T (Tag). After you tag all fields, press E (Edit). Press the shortcut letter for the attribute that you want to change. When you finish making the changes for the first field, choose either NEXT or PREV to edit more fields. Move your cursor to the DONE button. Press Shift+F2 (Save current screen).

Fields can be from 1 to 78 characters long; however, a record's data may not fill all the spaces in a field. For example, a name field may be 30 characters, but a record with Jones in the name field uses only 5 spaces. You still need to allow for all 30 characters on the screen.

Hints to build helpful screens

Tips and hints

A well-designed screen is effective and easy to use. The easier a screen is to use, the better your agents can communicate with your customers. A well-designed screen provides agents with the information they need about an account, product, or job.

Reference Information	Description	Change? Yes or No
Name	Calling list field name	No
Width	Maximum number of characters in the field	No
Type	N - number, C - alphanumeric characters, D - date, $- monetary value, or T - time.	No
Position	Location on screen. Row and column of the first field character	Move only
Comments	Field information. If “CP” appears if the field, it is a cut-and-paste field. Do not change field locations for cut-and-paste fields.	Yes

Thoughtful questions

Ask yourself the following questions when designing screens.

- What should these screens accomplish?
- Is this information useful to your agents’ success?
- Can agents find the information that they need quickly?
- Are the screens consistent?

Layout tips

Use the following tips when designing the layout for your new screen.

- Present information in the order that the agents use it.
- Group related pieces of information.
- Leave blank rows between groups of data.
- Maintain consistent left and right margins.
- Arrange field labels and fields so that they visually go together.
- Align field labels and the starting point of data fields.

Tips for fields

Think of the following items when naming fields.

- Carefully named field labels save time and prevent confusion.
- Keep field labels less than 16 characters or not longer than four words.
- Start field labels with an uppercase letter, followed by lowercase letters.

  Example: Label a field Name instead of NAME. This helps to distinguish labels from data, which are always uppercase letters.
- Use consistent wording, abbreviations, and labels.

Miscellaneous

Finally, a couple of tips that will help agents use the screens designed for them.

- Include a list of the function keys on the screen that display the next screen and release the record.
- Take extra care to associate an inbound calling list with inbound screens and inbound jobs, and an outbound calling list with outbound screens and outbound jobs.

Open Screenbuilder

Open Screenbuilder

Use the following procedure to open Screenbuilder.

1. Choose Calling lists and users from the Supervisor Main Menu.

2. Choose Start Screenbuilder from the Calling Lists and Users menu. Use the shortcut keys when you are in menu mode.

Create a screen

Create a screen Use the following procedure to create a screen in Screenbuilder.

1 Choose Screen from the Screenbuilder menu.

2 Choose New Screen from the Screen menu.

3 Type a name for the screen (not more than 9 characters). The NEWSCRN: Select File Dictionary screen appears. It lists the calling lists for your system.

4 Use the arrow key to move the cursor to the calling g list you want to elect. Press Enter and a blank screen appears.

Add text to a screen

Add text to a screen

Use the following procedure to add text to a screen.

1. Use the arrow keys to move the cursor to where you want the text to begin.

2. Type the text you want to appear on the screen.

3. Repeat steps 1 and 2 for each text entry you want to add.

Add fields to a screen

Add fields to a screen

Use the following procedure to add fields to a screen.

1. Use the arrow keys to move to where you want the field to begin.
2. Press Ctrl+A (Add) and Enter. The field list appears.
3. Press down arrow to move to the field you want to add and press Enter.
4. Repeat steps 1 through 3 for each field you want to add.
5. Choose Save Screen from the Screen menu, then choose Close from the Screen menu.

Copy a screen

Copy a screen

Use the following procedure to copy a screen.

1 Choose Open Screen from the Screen menu.

2 Press the down arrow to move to the screen you want to copy and press Enter.

3 Choose Save Screen As from the Screen menu.

4 Type a new name for the screen. The original screen file remains unchanged and the copy is open on your screen.

5 To make changes, follow the steps in “Change or add text.”

Find a screen

Find a screen Use the following procedure to find a screen.

1. Choose Jobs from the Screenbuilder menu.
2. Choose All Jobs.
3. Choose either Outbound or Inbound.
4. Press down arrow to move to the job you want to view.
5. Press Enter and the screen list for the selected job appears.
6. Note the screens the job uses.
7. Press Ctrl+X to exit the list.

Change or add text to a screen

Change or add text to a screen

Use the following procedure to change or add text to a screen.

1. Choose Open Screen from the Screen menu.
2. Use the arrow keys to move to the screen you want to edit.
3. Press Enter and the screen appears.
4. Use the arrow keys to move to the text you want to change or to the place where you want to add text.
5. Make your changes or additions.

Delete a field or text

Delete a field or text

Use the following procedure to delete a field or text.

1. Use the arrow keys to move the cursor to the information you want to delete.

2. Position the cursor at the beginning of the field label or text. Press F5 (Cut) and use the right arrow to highlight the area to cut. Press Enter to select the highlighted area.

3. Type Y at the prompt to confirm the deletion or N to abandon the change.

Save screen changes

Save screen changes

Use the following procedure to save screen changes.

1 Switch to menu mode (Ctrl+X).

2 Choose Save Screen from the Screen menu or press F4 (Save).

Edit screen fields

Edit screen fields Use the following procedure to edit screen fields.

1 Open the screen.

2 Use the arrow keys to move to the field you want to change.

3 Tag the field by pressing T. (You can clear a tag by pressing T when the cursor is in a tagged field.)

4 Tag all the fields that you want to change.

5 Choose Change Field(s) from the Field menu. The Field Attribute screen appears.

6 Choose the first letter of the attribute for the first field. The attribute list appears.

7 When you finish making changes to the first field, press Tab or choose NEXT to move to the next field, PREVIOUS to move to the previous field, or DONE to save the changes and quit.

8 Clear all tags by pressing Ctrl+C (Clear all tags).

Add a screen to a job

Add a screen to a job

Use the following procedure to add a screen to a job.

1 Choose All Jobs from the Jobs menu.

2 Choose either Outbound or Inbound.

3 Press the down arrow to move to the job you want to change. Press Enter and the screen list for the selected job appears.

4 Position the cursor where you want to add the screen name. If necessary, switch to Insert mode (Ctrl+O).

5 Type a comma, then the name of the screen that you want to add. Use the appropriate uppercase and lowercase letters. Use a comma to separate screen names. The order in which they appear is agent, outbound, inbound. List the agent screen name first, then the outbound screen name, then the inbound screen name.

6 Press Ctrl+X to switch to menu mode.

7 Choose Save Screen from the Screen menu or press F4 (Save).

Spell-check your screen

Spell-check your screen

Use the following procedure to spell-check your screen.

1. Choose Open Screen from the Screen menu. The screen list appears.
2. Use the arrow keys to move to the screen name you want to add.
3. Verify the spelling and capitalization. (job1 is not the same as Job1 or JOB1.)
4. Use Ctrl+X to exit the selection box without opening a screen.

Delete a screen from a job

Delete a screen from a job

Use the following procedure to delete a screen from a job.

1. Choose All Jobs from the Jobs menu.

2. Choose either Outbound or Inbound.

3. Press the down arrow to move to the job you want to change. Press Enter and the screen list for the selected job appears.

4. Move the cursor to the comma before the screen name you want to delete.

5. Press Spacebar repeatedly to type over the screen name up to the next comma or the end of the list, then press Enter. Screenbuilder cleans up the extra spaces and commas in the list.

6. Press Ctrl+X to switch to menu mode.

7. Choose Save Screen from the Screen menu or press F4 (Save).

Change screen calling lists

Change screen calling lists

Use the following procedure to change screen calling lists.

1. Choose Open Screen from the Screen menu. The screen list appears.
2. Use the arrow keys to move to the screen name you want to open, then press Enter.
3. Choose Change Dictionary from the Fields menu.
4. Choose either Deleting (D) or Remapping (R).
5. Choose OK to proceed or Cancel to quit.
6. Choose a new calling list.
7. If you choose Remapping, confirm the substitutions.
8. Choose Save Screen from the Screen menu or press F4 (Save).

Change field appearance

Change field appearance

Use the following procedure to change field appearance.

1. Open the screen.

2. Use the arrow keys to move to the field you want to change.

3. Press D, the shortcut key for fill characters. The fill attributes list appears.

4. Use Tab to switch between Spaces and Dots. Press Enter when the cursor is on the attribute you want to use.

5. Repeat steps 2 through 4 for each change.

6. Switch to menu mode (Ctrl+X).

Set field edit capabilities

Set field edit capabilities

Use the following procedure to set field edit capabilities.

1. Open the screen.
2. Use the arrow keys to move to the field you want to change.
3. Press F, the shortcut key for edit format. The Edit Format list appears.
4. Select Accessible, Protected, Optional, or Required. Press Enter when the cursor is on the format you want to use.
5. Repeat steps 2 through 4 for each change.
6. Choose Save Screen from the Screen menu.

Change field sequence order

Change field sequence order

Use the following procedure to change the field sequence order.

1 Open the screen.

2 Use the arrow keys to move to the field you want to change.

3 Press S, the shortcut key for Sequencing. The sequencing attribute list appears.

4 Type the new sequence number.

5 Repeat steps 2 through 4 for each change.

6 Choose Save screen from the Screen menu.

Field verification formats

Overview

Verification format determines the format of the information that agents enter into a field.

Verification formats are valid for only three types of fields

- time
- date
- numeric

The Avaya PDS validates both the format elements and delimiters. For example, if you specify a time format of HH.MM, the agent must include the period between the hour and minute values for the system to successfully validate the information.

The acceptable entry list limits agents' entries to specific choices. For example, limit a field to a Yes or No response.

Format name	Format elements	Sample formats
time	HH hours MM minutes SS seconds	HH.MM.SS HH.MM
date	CCYY year MM month DD day	CCYY/MM/DD MM/DD/CCYY DD/MM/CCYY
numeric	Numbers only	#######

Set field verification formats

Set field verification formats

Use the following procedure to set field verification formats.

1. Open the screen.
2. Use the arrow keys to move to the field you want to change.
3. Press V, the shortcut key for Verification Edit. The Verification Edit list appears.
4. Type the appropriate format structure.
5. Repeat steps 2 through 4 for each change.
6. Choose Save Screen from the Screen menu.

Validate delimiters

Validate delimiters Use the following procedure to validate delimiters.

1. Open the screen.
2. Use the arrow keys to move to the field you want to change.
3. Press V, the shortcut key for Verification Edit. The Verification Edit list appears.
4. Type the appropriate format structure.
5. Repeat steps 2 through 4 for each change.
6. Choose Save Screen from the Screen menu.

Set acceptable field entries

Set acceptable field entries

Use the following procedure to set acceptable field entries.

1. Open the screen.
2. Use the arrow keys to move to the field you want to change.
3. Press A, the shortcut key for Acceptable entry list. The Acceptable entry list appears.
4. Choose the acceptable entry list number.
5. Repeat steps 2 through 4 for each change.
6. Choose Save screen from the Screen menu.

Field reference information

Overview

The field attributes screen includes five types of information (attributes) for each field

- name position, and comments
- width
- type
- position
- comments

However, you cannot change the name, width, or type of field. You can, however, change the position on the screen and edit the comments attribute.

When you change the comment for a screen field, your change does not affect the comment in the calling list. This is helpful when you use a field for different purposes on different screens.

The other use of the comment field is to designate a field as a cut-and-paste field. The Avaya PDS uses cut-and-paste fields to transfer information to the host computer. The system designates cut-and-paste fields with CP in the first two spaces of the comment field.

Note

Do not move these fields to different locations. This will disable the cut-and-paste function.

Set field reference information

Set field reference information

Use the following procedure to set field reference information.

1. Open the screen.

2. Use the arrow keys to move to the field you want to change.

3. Press C, the shortcut key for Comment. The comment box appears.

4. Type the new comment. If the field is a CP field, add the comment after the CP. You cannot have more than 256 characters in a comment.

5. Repeat steps 2 through 4 for each change.

6. Choose Save screen from the Screen menu.

Create and view reports

Create and view a report

Use the following procedure to create and view a Screenbuilder report.

1. Press Shift+F2 (Open).
2. Press Ctrl+X to switch to menu mode.
3. Choose Report from the Screen menu.
4. Press Ctrl+X to switch to edit mode. Choose Y to create the report.
5. Press F10 (Quit). Choose Reports from the Supervisor Main Menu to print the report.

Print a Screenbuilder report

Print a Screenbuilder report

Use the following procedure to print a Screenbuilder report.

1 Choose Reports from the Supervisor Main Menu.

2 Choose View or print reports from the Reports menu.

3 To view a report, press F4 or Ctrl+V (View). Type the number that corresponds to the report you want to view and press Enter.

4 The report appears on the screen. Press Ctrl+N (Next) or Ctrl+P (Previous) to see the entire report.

5 To print the report, press F2 or Ctrl+O (Print).

6 Press Ctrl+X (Exit) to return to the Report Files Status screen.

Part II: Administrative tasks in menus

11 Log in to the Avaya PDS menu system as an administrator

Overview

Purpose Use the Administrator menu system on the Avaya^{TM} Predictive Dialing System (PDS) to perform administrator functions.

Contents This section contains the following topic:

Log in to the Avaya PDS menu system as an administrator

Log in to the Avaya PDS menu system as an administrator

Use the following procedure to log in to the Avaya PDS menu system as an administrator.

1 Log on to the Avaya PDS as Administrator, using the Administrator login and password. The Administrator menu appears.

12 Administrator tasks

Overview

Purpose

The purpose of this section is to describe administrative tasks that you can perform in the Administrator menus on the Avaya™ Predictive Dialing System (PDS). The Administrator Main Menu includes sensitive features such as shutting down and restarting the Avaya PDS. To protect your system, change the administrator's password often.

Contents

This section contains the following topics:

- Delete an area code or prefix
- Change a country code
- Save area code and prefix changes
- Discard area code and prefix changes
- Restore a previous version of area code and prefix settings
- Start the Avaya PDS

Change administrator passwords

Change administrator passwords

Use the following procedure to change the administrator password.

1 Choose Change administrator password from the Administrative Tasks menu.

2 Type Y at the prompt to continue or N to cancel.

3 Type the current password and press Enter.

4 Type the new password and press Enter. It must contain at least 6 characters, 3 of which need to be different from the old password. It also needs to contain at least 2 letters and 1 number. After you press Enter, the Avaya PDS prompts you to type the new password again.

5 Type the new password again and press Enter.

Restart the Avaya PDS

Restart the Avaya PDS

Use the following procedure to restart the Avaya PDS. Make sure to shut down all jobs and tell all users to log off before restarting the Avaya PDS.

1. Choose Restart system from the Administrative Tasks menu.

2. Type Y at the prompt to continue or N to cancel. A series of messages appear. When the restart is complete, the system displays the login prompt.

Shut down the Avaya PDS

Shut down the Avaya PDS

To avoid damaging the system components or losing data in active jobs, stop all jobs and log all users off before shutting down the Avaya PDS.

1. Choose **Shut down system** from the **Administrative Tasks** menu.
2. Type Y at the prompt to continue or N to cancel. The following prompt appears: Are you sure you want to shutdown HP-UX? Enter Y or N.
3. Type Y at the prompt to continue or N to cancel. The following message appears: Halted, you may now cycle power.
4. Go to the Avaya PDS cabinet and turn off the power to all components. Most systems have the components connected to a power strip. The easiest way to turn off the equipment is to turn off the power strip.

Avaya PDS date and time

Overview

This option is used to reset the Avaya PDS date and time. It is important to keep the system time accurate due to time zone legalities. Make sure to log all other users off and shut down all jobs before choosing this option.

Warning

If you change the date or time during the Avaya PDS operations, you can critically affect system operation and data.

Note

If you have automatic file procedures such as an automatic download of data from the host, setting the time forward can affect the timed event.

Set the Avaya PDS date and time

Set the Avaya PDS date and time

Use the following procedure to set the Avaya PDS date and time.

1 Choose **Set system date and time** from the **Administrative Tasks** menu.

2 Type Y at the prompt to continue or N to cancel.

3 Type a new time in the format HH.MM. The Avaya PDS uses a 24 hour clock and requires a period between the hours and minutes.

4 Type a new date in the format CCYY/MM/DD.

5 Press any key to return to the menu. The new time and date take effect immediately.

Monitor agent lines

Monitor agent lines Use the following procedure to monitor agent lines.

1. Choose **Monitor agent lines** from the Administrative Tasks menu.
2. Type Y at the prompt to continue or N to cancel.
3. Type Y at the prompt. The **Job Control** menu appears.
4. Choose Open Job (Ctrl+C) from the Jobs menu. If there is more than one current job, choose the job name from the list.
5. Choose **Monitor Agent** from the **Control** menu.
6. Choose the agent's user name from the list. If the agent is talking with a customer, the Avaya PDS immediately connects your headset to the agent's port. If the agent is not talking with a customer, a message appears to tell you the agent is not on a line.

Stop monitoring an agent

Stop monitoring an agent

Use the following procedure to stop monitoring an agent.

1. When you finish listening to an agent's conversation, choose **Disconnect Agent** from the **Control** menu.

Terminate user session

Terminate user session

Use the following procedure to terminate a user session.

1. Choose T**erminate a user session** from the **Administrative Tasks** menu.

2. Type Y at the prompt to continue or N to cancel.

3. Type the login name for the session you want to terminate, or press Enter to exit.

4. Type Y at the prompt to continue or N to cancel.

5. The Avaya PDS searches for the user session and displays a message when it finds the process or if it cannot find a session for the login name you entered.

6. Press any key to return to the menu.

Area codes, prefixes, and time zones

Overview

Telephone companies frequently add new area codes and prefixes to existing phone systems. The Avaya PDS needs the up-to-date area code and prefix information to call phone numbers that use the new codes. The Edit Area Codes and Prefixes option lets you update the area code and prefix settings on the Avaya PDS.

Telephone numbers generally consist of three parts: an area code, a prefix (also known as an exchange), and a line number.

The Avaya PDS associates prefixes with area codes based on system-defined time zones. The Avaya PDS configuration includes the standard time zones, such as Eastern, Central, Mountain, and Pacific. The Avaya PDS configuration also includes several additional time zones designed to accommodate local and regional ordinances regarding legal calling hours. For example, the Illinois time zone addresses laws specific to the state of Illinois. Several other Avaya PDS time zones accommodate areas that do not follow daylight savings time.

The Avaya PDS time zones have associated zone codes. A zone code is a one-letter designation that the Avaya PDS uses to reference a time zone. Zone codes are case-specific. For example, zone code C (upper case) represents the Atlantic No Daylight time zone while zone code c (lower case) represents the United Kingdom time zone.

Another important telephone system designation is country code. The Time Zone and Exchange Prefix Editor default country code is 1, which represents the United States and Canada. Usually, you'll make time zone and prefix setting changes to country code 1. The editor, however, includes an option to select a different country code if necessary.

Note

Some states limit or prohibit placing certain types of telephone calls during specific times. Area code fields may be modified by the customer in order to respond to regional area code changes. Such modifications may result in telephone calls being made in violation of after-hours calling limitations. The customer is solely responsible for any violations of applicable laws or regulations resulting from area code modifications.

The Query option displays the area codes and area code and prefix combinations that currently exist on the Avaya PDS. It lists the settings according to time zones. Use the Query option to determine if you need to change any existing settings. You can also use the Query option to identify zone codes for which you need to change area code and prefix settings. You need to know the zone code(s) when you add or delete area code and prefix settings.

Query options

The Query Area Codes and Prefixes option accepts the following queries:

Area Code The Avaya PDS lists all zone codes that contain the specified area code. For each zone code, it also lists the prefixes associated with the area code.

Area Code and Prefix, separated by a colon The system identifies the zone code in which the specific area code and prefix combination is listed.

Zone Code (for example, L, the zone code for Pacific Daylight time zone) The system generates a list of all area codes and prefixes for the specified zone code.

Zone Code followed by a space and an area code or an area code and prefix combination Use this option to query for a very specific item. If your criteria is too limited and the system finds no matches, the system reports the area code or prefix as “not found.”

An asterisk (*) in query results represents all prefixes for this area code that aren’t explicitly listed under another zone code. There can be only one asterisk entry for any given area code. Other entries must contain specific, unique exchange prefixes. For example, area code 709 exists under two zones, Newfoundland Daylight time zone (A) and Atlantic Daylight time zone (B). The asterisk in the Newfoundland Daylight Prefix List represents all prefixes that don’t appear in the Atlantic Daylight prefix list.

Note

You can also view current area codes and prefixes from the Add and Delete options.

Area code addition

When you select Add from the Area Code and Exchange Prefix Editor menu, the Avaya PDS prompts you to type a time zone code. For example, to add an area code to the Central Daylight time zone, specify zone code G.

Use commas to add one or more area codes or area code and prefix combinations. To add one or more area codes (implicitly including all prefixes) to the selected zone code, type the area codes.

To add an area code with specific prefixes or to add new prefixes to an existing area code, type the area code, a colon, and one or more prefixes separated by commas. For example, to add the 282 and 285 prefixes to area code 709 type 709:282, 285.

The Avaya PDS compares your request to the current area code and prefix settings to identify duplicate area codes or area code prefix combinations. If the settings do exist, Avaya PDS doesn't add the duplicate settings and displays a message. The Avaya PDS displays a status message if it successfully adds your requested area code and prefix information.

Note

You can't add a prefix to an area code that has an asterisk listed as its prefix. The asterisk indicates that the prefix is included implicitly in this area code, provided it's not explicitly listed elsewhere. Also, verify that you're adding the area code and prefix to the correct time zone.

Discard changes

The Discard Changes option lets you abandon changes you made since the most recent save (or since you started the editor if you haven't saved yet). The Discard Changes option restores the original file that the system loaded when you started the editor or the last saved version.

If there are no changes to discard, the system notifies you and cancels the command.

View Time Zones

The Timezone/Guard Time Query option lists the Avaya PDS time zones and calling guard times. Guard times define the earliest and latest times of day that the Avaya PDS can place phone calls.

Use this option to identify to which time zones you need to add a new area code or area code and prefix combination.

You can query Avaya PDS time zones using a descriptive string (such as eastern or pacific), by zone code, or using an asterisk (*). An asterisk returns a listing of all Avaya PDS time zones.

If you don't know a particular zone code, query using the asterisk. You need to know the zone code(s) when you add or delete area code and prefix settings.

Correct changes

The Rollback option allows you to cancel saved area code and prefix changes. You can recover area code and prefix settings under two different circumstances: Rollback to current live version and Rollback to last backup version.

Choose the Rollback to current live version option if you saved changes in error but have not restarted the Avaya PDS. Avaya PDS loads the current live area code and prefix settings into the editor. Save the restored settings as is or make additional changes. You must save the restored version and restart the Avaya PDS for the restored settings to take effect.

Choose the Rollback to last backup version if you saved changes in error and have since restarted the Avaya PDS. Avaya PDS loads the most recently backed up version of the live area code and prefix settings into the editor. Save the restored settings as is or make additional changes. You must save the restored version and restart the Avaya PDS for the restored settings to take effect.

Edit area codes and prefixes

Edit area codes and prefixes

Use the following procedure to edit area codes and prefixes.

1 From the Administrative Tasks menu, choose **Edit area codes/prefixes**. The Area Code & Exchange Prefix Editor menu appears.

2 Type the option number or the first letter of the command name.

3 The Avaya PDS saves changes you make using the Area Code and Exchange Prefix Editor to a temporary file. When the Avaya PDS restarts, it activates the changes.

View current area codes and prefixes

View current area codes and prefixes

Use the following procedure to view current area codes and prefixes.

1 Choose Query from the Area Code & Exchange Prefix Editor menu. The Query Area Codes and Prefixes screen appears.

2 Type an area code; area code and prefix combination; zone code; or zone code, area code, and prefix combination. The query results appear at the bottom of the query screen. If the query results fill more than one screen, press Enter to view subsequent pages.

View time zones

View time zones

Use the following procedure to view time zones.

1. Choose Timezone/Guard Time Query from the Area Code & Exchange Prefix Editor menu. The Timezone/Guard Time Query screen appears.

2. Type a time zone code, search string, or asterisk (*), then press Enter. Avaya PDS displays the results below your query. If the results fill more than one screen, press Enter to view the following page.

Add an area code or a prefix to a time zone

Add an area code or a prefix to a time zone

Use the following procedure to add an area code or a prefix to a time zone.

1. Choose Add from the Area Code & Exchange Prefix Editor menu. The Add Area Codes and Prefixes screen appears.

2. Type the zone code for the time zone to which you want to add an area code or prefix.

3. Type one or more area codes or area code and prefix combinations to add to the selected time zone.

4. To change the time zone, press Enter with nothing typed on the Enter Choice line.

5. Type a different time zone code to continue adding area codes, or press Enter with no selection to exit the Add option.

View current area code and prefix settings

View current area code and prefix settings

Use the following procedure to view current area code and prefix settings.

1 Type q or Q at the prompt instead of an area code or prefix. The Query Area Codes and Prefixes screen appears.

2 Type the area code, area code and prefix combination, or zone code that you want to view.

Delete an area code or prefix

Delete an area code or prefix

Use the following procedure to delete an area code or an area code or prefix.

1. Choose Delete from the Area Code & Exchange Prefix Editor menu. The Delete Area Codes and Prefixes screen appears.

2. Type the zone code for the time zone from which you want to delete an area code or prefix.

3. Type one or more area codes or area code and prefix combinations to delete. The system displays the results of delete action.

4. To change the time zone, press Enter with nothing typed on the Enter Choice line.

5. Type a different time zone code to delete area codes from another time zone, or press Enter with no selection to exit the Delete option.

Change a country code

Change a country code

Use the following procedure to change a county code.

1 Choose Change Country Code from the Area Code & Exchange Prefix Editor menu. The Change Country Code screen appears.

2 Type a country code, then press Enter. The new country code appears on the Area Code and Exchange Prefix Editor main menu.

Save area code and prefix changes

Save area code and prefix changes

Use the following procedure to save area code and prefix changes.

1 Choose Save Changes from the Area Code & Exchange Prefix Editor menu.

2 Type Y to confirm the save or N to cancel the save command.

Discard area code and prefix changes

Discard area code and prefix changes

Use the following procedure to discard area code and prefix changes.

1. Choose Discard Changes from the Area Code & Exchange Prefix Editor menu. The Confirm: Discard Current Changes screen appears.

2. Type Y to discard the changes or N to cancel the discard command.

Restore a previous version of area code and prefix settings

Restore a previous version of area code and prefix settings

Use the following procedure to restore a previous version of area code and prefix settings.

1. Choose Rollback from the Area Code & Exchange Prefix Editor menu. The Rollback to Previous Version screen appears.

2. Choose 1 to restore the current live version or choose 2 to restore to the last backup version.

3. Add or delete area codes or prefixes as necessary.

4. Save the restored area code and prefix settings.

Start the Avaya PDS

Start the Avaya PDS

Use the following procedure to start the Avaya PDS.

1. Turn on the power to the following equipment: Administrator workstation, digital switch rack, digital switch controller, terminal server, mass storage unit, bridge

2. Wait at least 10 seconds, then turn on the power to the tape drive, modem, and central processing unit (CPU). Start up is successful when you see the login prompt on the screen.

13 File transfers

Overview

Purpose

The purpose of this section is to explain file transfers on the Avaya™ Predictive Dialing System (PDS).

Contents

This section contains the following topics:

FTP

Overview

FTP is a convenient, effective, and inexpensive file transfer method. It does not require the use of any additional hardware and is fast and reliable. Also, changes are easy to make, including changing hosts or adding calling lists.

FTP is the user interface to the ARPANET standard File Transfer Protocol. It is widely used on the Internet for transferring files between disparate platforms, and FTP software exists for almost every system type.

FTP uses TCP/IP and the Ethernet connection of the Avaya PDSPDS to connect to the host. Either the system waits for the files to be sent to it, or it initiates a file transfer retrieval from the host. In either case, FTP is easy to set up, troubleshoot, support, and test.

Note

If you are using the FTP file transfer method, an Ethernet board and the file sets needed to run TCP/IP and the FTP application are already installed on your Avaya PDS.

Anonymous FTP

Anonymous (or host-initiated FTP), allows the host to send file(s) to the Avaya PDS. After this happens, you can use either an automatic or manual process on the system to convert the received data into one or more calling lists.

A typical file transfer using FTP might look like this:

1. At 4:00 AM, the host system connects to the Avaya PDS using TCP/IP.
2. The host uses FTP to place specified data files into a directory on the Avaya PDS and disconnects.
3. At 4:10 AM, the Avaya PDS finds the files and processes them into one or more callable lists.

Typically, the FTP file transfer processes occur automatically. If, however, the file transfers are not automated or an automated process fails, you can use the Transfer and Process Records menu to manually start a transfer.

Direct-connect FTP

The Avaya PDS can also be configured to directly connect to the host and retrieve files from it before creating calling lists. This method is known as direct-connect (Avaya PDS-initiated) FTP. With this approach, the Avaya PDS has more control over the file transfer and more responsibility for it.

It is slightly more difficult to configure but is preferred by customers who lack the ability to schedule FTP transfers on the host or who need the increased security.

Download host records to the Avaya PDS

Download host records to the Avaya PDS

Use the following procedure to download host records to the Avaya PDS.

1. At the Administrator workstation, choose **Download host records to PDS** from the Transfer and Process Records menu.

2. Type Y at the prompt to continue or N to cancel. The host transmits the calling list records to the Avaya PDS.

Upload the Avaya PDS records to a host computer

Upload the Avaya PDS records to a host computer

Use the following procedure to upload the Avaya PDS records to a host computer.

1 Choose Upload records to host from the **Transfer and Process Records** menu.

2 Type Y at the prompt to continue or N to cancel. The Avaya PDS transmits the calling list records to the host computer.

Recover calling list

Recover calling list

Use the following procedure to recover a calling list.

1 Choose **Recover old calling list** from the **Transfer and Process Records** menu.

2 Type Y at the prompt to continue or N to cancel.

Count calling list records

Count calling list records

Use the following procedure to count calling list records.

1 Choose **Count calling list records** from the **Transfer and Process Records** menu.

2 Type Y at the prompt to process the changes or N to cancel.

Download records for an infinite job

Download records for an infinite job

Use the following procedure to download records for an infinite job.

1 Choose D**ownload records for Infinite Job** from the **Transfer and Process Records** menu.

2 Type Y at the prompt to continue or N to cancel. The host transmits the calling list records to the Avaya PDS.

14 Inbound lists

Overview

Purpose

The Avaya™ Predictive Dialing System (PDS) uses inbound lists to capture information from inbound calls.

These commands are available if your Avaya PDS uses Intelligent Call Blending.

An inbound calling list contains the fields that the agents use when handling inbound calls. Once created, the inbound calling list file is a permanent part of the Avaya PDS.

Contents

This section contains the following topics:

- Create an empty inbound calling list
- Clear existing inbound calling list data
- Count calling list records

Create an empty inbound calling list

Create an empty inbound calling list

Use the following procedure to create an empty inbound calling list.

1 Choose C**reate empty inbound data list** from the Inbound Lists menu.

2 Type Y at the prompt. If the list already exists, the Avaya PDS does not create a new one.

3 When the system completes the process, press any key to return to the Inbound Lists menu.

Clear existing inbound calling list data

Clear existing inbound calling list data

Use the following procedure to clear existing inbound calling list data

1 Choose C**lear an existing inbound data list** from the Inbound Lists menu.

2 Type Y at the prompt to continue or N to cancel.

3 When the Avaya PDS completes the process, press any key to return to the Inbound Lists menu.

Count calling list records

Count calling list records

Use the following procedure to count calling list records

1. Choose **Count calling list records** from the Inbound Lists menu.
2. The date and disk free space (in kilobytes) appears along with the outbound and inbound calling lists and the number of records in each list.

15 Back up and recovery

Overview

Purpose

Backup is a method used to archive information, which provides a way to restore operations if the Avaya™ Predictive Dialing System (PDS) or its software is damaged.

Contents

This section contains the following topics:

- Backup and restore commands
- Back up the Avaya PDS
- Verify backup files
- Restore Avaya PDS
- DAT drive status
- Back up a calling list
- Restore a calling list

Backup and restore commands

Back up media

The standard backup medium is a 4mm, 90-meter, 2.2 GB digital data storage (DDS) tape. However, you can also use a 9-track tape.

Back up the following files on a regular basis:

- outbound calling lists
- inbound calling results
- call activity statistics
- files containing user passwords
- files containing host network (IP) addresses

Maintain backup tapes

Each day, use the eject button to remove the previous day’s tape from the tape drive. Before loading the new tape, check to make sure it is write-enabled. To prevent data loss, we recommend that you observe the following items:

- Keep a minimum of two sets of backup tapes. In each set, keep one tape for each day.
- Store one backup set away from your Avaya PDS site.
- Store backup tapes in a controlled environment. Optimal tape storage environment is 50% relative humidity at 22° C.
- Replace each DDS tape after 100 uses, approximately two years.
- Clean the tape drive monthly using a cleaning tape.
- Replace cleaning tapes after 25 uses.

Back up commands

From the Administrator Backup Menu you can access sub-menus to back up the Avaya PDS. You can back up and restore the entire Avaya PDS, the calling lists only, or the host gateway files.

If you choose any of the back up menu options you will be asked if you want to perform a full or incremental backup. A full backup will back up all the files in a selected category. An incremental backup will back up only those files that have been changed since the last backup.

The following table describes the available back up commands.

Command	**Description**
Back up complete system	This is the most comprehensive backup option. The backup includes the entire root file system, the Avaya PDS, and all calling lists. Use this option to prepare for events such as major system upgrades and service pack installations.
Back up Avaya PDS & calling lists	This command backs up the entire Avaya PDS and all customer calling lists. Use this option for routine daily system backups.
Back up Avaya PDS only	This command backs up the entire Avaya PDS excluding the calling lists.
Back up Avaya PDS configuration files	This command backs up all the Avaya PDS configuration files. These are the files needed to customize a newly installed Avaya PDS to the customer's applications.
Back up Avaya PDS data/stat files	This command backs up the data files needed to run reports using the Avaya PDS PC Analysis tools.

Restore Commands

The following table describes the available restore commands.

Command	**Description**
Restore all from tape	This command restores all files from the backup tape.
Restore a file from tape	This command attempts to restore a single user-specified file from the backup tape.
List/verify a file on tape	This command attempts a search for a single user-specified file on the backup tape.
List/verify tape contents	This command lists the entire contents of the backup tape.
List tape volume info	This command displays the creation information of the backup tape.

Back up the Avaya PDS

Back up the Avaya PDS Use the following procedure to back up the Avaya PDS.

1 Locate the tape drive in the Avaya PDS cabinet.

2 Insert a new DDS tape in the drive.

3 Choose a command from the Back Up and Restore Avaya PDS menu. For routine daily system backups, choose Back up Avaya PDS & Calling Lists.

4 Select full or incremental backup.

5 After the backup is complete, rewind and remove the tape. Store the tape in antistatic environment at the proper temperature and humidity.

Verify backup files

Verify backup files

Use the following procedure to verify backup files.

1. Choose a List/Verify command from the **Back Up and Restore** menu.
2. Type Y at the prompt to continue or N to cancel.
3. Follow the tape loading instructions on the screen.
4. Type C to continue or press Ctrl+X to exit. Byte count, date, size, and file names appear on the screen during the tape verification process.
5. After verifying the tape, follow the unloading instructions on the screen.
6. Type C to return to the **Back Up and Restore** menu.

Restore Avaya PDS

Restore Avaya PDS

Use the following procedure to restore the Avaya PDS from a backup tape.

1 Locate the tape drive in the Avaya PDS cabinet.

2 Insert the backup tape containing the files to be restored.

3 Choose a restore command from the **Back Up and Restore** Avaya PDS menu. After the backup is complete, rewind and remove the tape. Store the tape in an antistatic environment at the proper temperature and humidity

> **Important!** You cannot restore files from backup tapes created on earlier versions of the Avaya PDS.

DAT drive status

Overview

You need to monitor the tape drive status during back up and restore procedures. There are two LEDs on the tape drive. The LED on the left is the cassette LED. The LED on the right is the drive LED. When the Avaya PDS uses the tape drive, both lights flash in different color combinations.

LED color

These combinations identify the tape drive's status.

Cassette LED Color	Drive LED Color	Status
Flashing green	Flashing green	Write-enabled tape loading or unloading.
Green	Green	Write-enabled tape loaded and online.
Flashing amber	Flashing green	Write-protected tape loading or unloading.
Amber	Green	Write-protected tape loaded and online.
Green	Flashing green and amber	Media wear. Replace tape or clean tape drive.
Amber	Amber	High room humidity. Tape cannot load or unload.
Flashing amber	Flashing amber	Successful power-on self-test.
Flashing amber	Amber	Unsuccessful power-on self-test. Contact your Avaya PDS vendor.

Back up a calling list

Back up a calling list

Use the following procedure to back up a calling list.

1. Locate the tape drive in the Avaya PDS cabinet.
2. Insert a new DDS tape in the drive.
3. Choose a backup command from the Back Up and Restore Avaya PDS Calling Lists menu. After the backup is complete, rewind and remove the tape. Store the tape in an antistatic environment at the proper temperature and humidity.

Restore a calling list

Restore a calling list

Use the following procedure to restore a calling list.

1. Locate the tape drive in the Avaya PDS cabinet.
2. Insert a DDS tape with the backup calling list in the drive.
3. Choose a restore command from the **Back Up and Restore** Avaya PDS Calling Lists menu.
4. Type Y at the prompt to continue or N to cancel. After the restoration is complete, rewind the tape.
5. Remove the tape from the tape drive.

16 System security event monitor

Overview

Purpose

The purpose of this section is to provide information about how the Avaya™ Predictive Dialing System (PDS) monitors events.

Contents

This section contains the following topics:

Monitor security logs

Overview

Use the Monitor security log command to monitor security-related system activity. The System Log Monitor, at a specified time interval, continually checks the status of critical system and log files. Specifically, the security monitor checks whether critical system files have been modified since the last status check and whether the Avaya PDS recorded particular events in the system audit and log files. Events include users logging into and out of the Avaya PDS; changes to the permissions, ownership, and content of sensitive system files; attempts to log into restricted user accounts; and changes to the system, date, and time.

The System Log Monitor displays results including the date and time of the event, the event type, whether the event succeeded or failed, and other event details such as the user name associated with the event. The monitor also provides additional file information when the file has been changed. For example, for the current and previous versions of a file, the System Log Monitor lists the permissions, owner, group, file size, and date and ti me stamps.

Note

The System Log Monitor tracks system events only when it is active. Events that occur when the monitor is not running are not reported.

Use the system log monitor

Use the system log monitor

Use the following procedure to use the system log monitor.

1. To start the System Log Monitor, choose Monitor security log from the System Log Monitor main menu. At a specified interval, the monitor updates the screen with information about targeted events.

2. To close the System Log Monitor, type X, then press Enter.

Change the monitor interval

Change the monitor interval

Use the following procedure to change the monitor interval.

1. From the System Log Monitor main menu, choose Change Monitor refresh interval. The Additional Entry for Change Monitor refresh interval screen appears.

2. Type a new refresh interval, in seconds, then press Enter.

3. At the Are above entries correct prompt, type Y for yes or N for no.

Part III: Agent Blending

17 Agent Blending

Overview

Purpose

The purpose of this section is to provide procedural information regarding CUI agent blending. For a thorough description of Agent Blending, please refer to the *Avaya PDS Installation Planner.*

Contents

This section contains the following topics:

- Add extensions
- List extensions
- Delete extensions

Domain group control methods

Domain group control methods

Predictive Blend manages agents within each domain group based on a control method you choose. The three control methods are:

- Average Speed to Answer (ASA)
- Service Level (SL)
- Outbound-only (OB_ONLY)

A blend domain group blends inbound and outbound calling. It uses either the ASA or SL control method. Each control method has an associated set of parameters, which the system supervisor specifies during calling operations.

An outbound-only domain group uses the OB_ONLY control method.

Start Predictive Agent Blending

Start Predictive Agent Blending

Use the following procedure to start Predictive Agent Blending.

1. Choose Start Predictive Blend from the Admin menu to start Predictive Agent Blending. The system starts accumulating new statistics on call performance.

Stop Predictive Agent Blending

Stop Predictive Agent Blending

Use the following procedure to stop Predictive Agent Blending.

1 Choose **Stop Predictive Blend** from the Admin menu

Note

Stopping Predictive Agent Blending does not affect other processes running on the system.

It is not necessary to stop Predictive Blend to change domain group parameters, such as adding domains and domain groups. These changes take effect immediately. However, when you delete domains and domain groups, you must reset Predictive Agent Blend for the changes to take effect.

Reset Predictive Agent Blending

Reset Predictive Agent Blending

Use the following procedure to reset Predictive Agent Blending.

1. Choose **Reset Predictive Blend** from the Admin menu to stop Predictive Blend and immediately restart it.

Resynchronize agents (Meridian systems only)

Resynchronize agents

Use the following procedure to resynchronize agents.

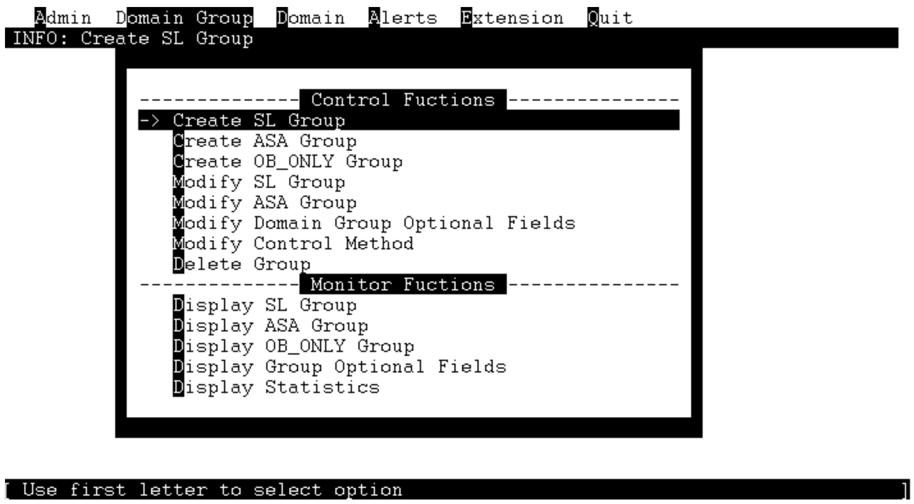
1 Choose **Resynch Agents** from the Admin menu to update the ACD agent queue assignments. Use this command after you reassign agents to different domains.

Control and monitor domain groups

Control and monitor domain groups

Use commands on the Domain Group menu to create and modify domain groups. Because there are innumerable variables in the calling environment, including agent availability and talk time, it is impossible to ensure that the settings are absolutes. Use them as goals.

Choose Domain Group from the Predictive Blend menu. The Domain Group menu appears.



Exit a menu

Exit a menu Use the following procedure to exit a menu.

1 To exit a drop-down menu, press Ctrl+X.

2 To exit the main menu, press Q and press Enter.

Display groups

Display Service Level (SL) Groups

Choose **Display SL Group** from the Domain Group menu to view current settings for all SL groups. The SL Domain Groups screen displays the status of the following fields:

- Time Interval
- Service Criteria
- Desired Service Level (DSL)
- Abatement Service Level (ASL)
- Minimum Agents on Outbound

Display Average Speed to Answer (ASA) Groups

Choose **Display ASA Group** from the Domain Group menu to view current settings for all ASA groups. The ASA Domain Groups screen displays the status of the following fields:

- Time Interval
- Control Method
- Average Speed to Answer (ASA)
- Traffic Intensity
- Minimum Agents on Outbound

Display Outbound-Only (OB_ONLY) Groups

Choose **Display OB_ONLY Group** from the Domain Group menu to view a list of all OB_ONLY groups.

Display Group Optional Fields

Choose **Display Group Optional Fields** from the Domain Group menu to view the Traffic Rate, Talk Time, and After Call Work Time for all jobs.

Display ACD Statistics

Choose **Display Statistics** from the Domain Group menu to view the Performance, Acquisitions, and Releases for all jobs.

Performance is the average answer delay (Service Level).

Releases are the number of completed releases that the system requested. It does not include releases caused by the agent ending the acquired call or the agent logging off of the system. If the domain is outbound only, the releases represent the number of agents that have logged off or hung up on an acquired call.

Modify Service Level domain groups

Modify Service Level domain groups

Use the following procedure to modify Service Level domain groups.

1 Choose **Modify SL Group** from the Domain Group menu. The screen appears with all SL domain groups listed.

2 Move to the field that you want to modify and make your changes, or move to the last line and add a domain group.

3 Press Ctrl+X to exit.

Modify Average Speed to Answer domain groups

Modify Average Speed to Answer domain groups

Use the following procedure to modify Average Speed to Answer domain groups.

1. Choose **Modify ASA Group** from the Domain Group menu. The screen appears with all ASA domain groups listed.

2. Move to the field that you want to modify and make your changes, or move to the last line and add a domain group.

3. Press Ctrl+X to exit.

Modify Outbound only groups

Modify Outbound only groups

Use the following procedure to add groups to the Outbound only domain group.

1. Choose **Modify OB_ONLY Group** from the Domain Group menu. The screen appears with all OB_ONLY domain groups listed.

2. Move to the last line and add the new domain.

3. Press Ctrl+X to exit.

Modify domain group optional fields

Modify domain group optional fields

Use the following procedure to modify domain group optional fields.

1. Choose **Modify Domain Group Optional Fields** from the Domain Group menu. The screen appears with all domain groups listed.
2. Move to the field that you want to modify and make your changes.
3. Press Ctrl+X to exit the screen. A confirmation prompt appears.
4. Press Enter to accept Yes or press Tab to move to Cancel and press Enter.

Modify control methods

Modify control methods

Use the following procedure to modify control methods.

1. Choose **Modify Control Method** from the Domain Group menu. The screen appears with all the domains listed.

2. Use the down arrow to move to the domain you want to change and press Enter. The Select a Control Method screen appears. To leave the screen without making a change, use Tab to move to Cancel and press Enter.

3. Use the down arrow to move to the method you want to use and press Enter. The Modify screen appears.

4. Enter settings as appropriate for your ACD.

5. Press Ctrl+X to exit the screen. A confirmation prompt appears.

6. Press Enter to accept Yes or press Tab to move to Cancel and press Enter.

Delete domain groups

Delete domain groups

Use the following procedure to delete domain groups.

1. Choose **Delete Group** from the Domain Group menu.
2. Choose the group to delete from the list of domain group names.
3. Press Enter to accept Yes or press Tab to move to Cancel and press Enter.
4. Choose **Reset Predictive Blend** from the Admin menu for your changes to take effect.

Delete a domain

Delete a domain

Use the following procedure to delete a domain.

1. Choose **Delete Domain** from the Domain menu.

2. Use the down arrow to choose the domain to delete and press Enter.

3. Choose **Reset Predictive Blend** from the Admin menu for the changes to take effect.

Add extensions

Add extensions

Use the following procedure to add an extension.

1. Choose **Add** from the Extension menu to add an ACD extension.
2. Type an SCAI Link ID and press Tab to move to the next column.
3. Type an Extension number and press Tab.
4. Press Ctrl+X to exit.

List extensions

List extensions

Use the following procedure to list extensions.

1 Choose **List** from the Extension menu to display a list of ACD extensions.

2 Press Ctrl+X to return to the Predictive Blend menu.

Delete extensions

Delete extensions Use the following procedure to delete extensions.

1 Choose **Delete** from the Extension menu.