



Avaya Aura™ Contact Center

CPS Enterprise Edition Product Overview

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Chapter 1 About This Guide

This chapter provides an introduction to the CPS Enterprise Edition Product Overview. It contains the following sections:

- Introduction
- Intended Audience
- Document Conventions

Introduction

The Product Overview provides an overall description of CPS Enterprise Edition, SER Solutions' contact center technology. This guide was created to help you become familiar with CPS Enterprise Edition's functional and technical characteristics.

Intended Audience

This guide was designed to be used by all potential CPS Enterprise Edition customers. You may be new to automated dialing, currently using one of the many SER Solutions call management systems, or replacing non-SER Solutions equipment. This Guide will introduce you to the major features of CPS Enterprise Edition.

Document Conventions

This guide uses the following conventions.

Any screen fields, buttons, tabs, or other controls that you can manipulate are printed in **bold** type. Keys that you press on the keyboard are also printed in bold type. For example:

Press the **Exit** button.

Press the **Enter** key.

Keyboard keys that you must press simultaneously are printed in bold type and separated by a hyphen (-). For example:

Press **Ctrl - C**.

Instructions that require you to use the menu bar start with the menu name in bold type, followed by a right arrow (>), followed by the menu option in bold type. For example:

Select **File>Exit**.

Special notes, references to other sections in the guide, cautions, and warnings are marked by an icon and located in the left margin. These icons are illustrated and explained in below.

Table 1-1: Guide Icons

Icon	Description
	Note — important information you must be aware of to use the system successfully.
	See also — a reference to information elsewhere in the guide that is relevant to this topic or procedure.
	Caution — a recommendation that you perform or avoid particular actions to ensure smooth operation of the system.
	Warning — an indication that a significant problem with the system or contact center operations may be possible under certain circumstances.

Chapter 2 Introducing SER Solutions, Inc.

This chapter provides an overview of current SER Solutions, Inc. computer telephony integration systems.

It includes the following sections:

- About SER Solutions, Inc.
- SER Solutions, Inc. Products and Services
- Contact Center Solutions
- Contact Us

About SER Solutions, Inc.

SER Solutions, Inc. provides differentiated solutions that offer the latest in technology advances to help contact centers adapt, change and evolve to meet emerging challenges. SER delivers solutions for telemarketing, collections, market research, fundraising, and proactive customer care. Today, we hold 30 technology patents, countless awards, and the distinction of having the top teleservices companies rely on our contact management solutions to drive their success.

At SER, we understand that our company's success not only depends on the solutions we deliver but in the unparalleled customer service and premier education and training programs we provide. In fact, we pride ourselves in building long-term relationships with our customers—many of which have been our customers for over a decade. We work in concert with them to discuss their most demanding business challenges and initiatives and ensure that they obtain maximized investment from their technology.

The company, an affiliate of The Gores Group, LLC, is headquartered in Dulles, Virginia with operations in North America and Europe.

SER Solutions, Inc. Products and Services

As a pioneer in contact management with more than 20 years and 30 patents under our belt, including innovations in speech analytics technology, no one knows more about helping you achieve maximum ROI from your technology than SER.

Technology can solve many business challenges. But technology, combined with expert implementation and advisement, can solve even more.

When you work with SER, we're there for you every step of the way—from kicking off your project and preparing your site to conducting onsite user testing and seeing the system deployment to completion. Even after your deployment is complete, you can count on SER to provide ongoing services and support. Our mission is not merely to meet your expectations, but to exceed them, delivering greater returns than you thought possible on your investment in contact center technology.

Contact Center Solutions

SER provides best-in-class enterprise contact center solutions for telemarketing, collections, proactive customer care, and agent performance optimization. Contact center Technology includes SERTAINTY, Call Processing System, and CPS Enterprise Edition.

Call Processing System™ (CPS™)

Call Processing System (CPS) – Winner of several industry awards and named “best pacing algorithm in the industry”, CPS™ delivers productivity-boosting predictive dialing while meeting FCC/FTC regulations and effectively eliminating unwanted busy signals, answering machines, fax machines, and ring no answers.

SERTAINTY™

SERTAINTY is a solution focused on agent performance optimization, SERTAINTY uses sophisticated speech recognition technology to listen to 100 percent of all recorded calls and analyze every customer interaction for script adherence, achievement of Key Performance Indicators, and overall call quality.

Contact Us

For more information or to schedule a demonstration, please visit SER Solutions, Inc., online at www.ser.com, email: info@ser.com or call 703.948.5500 or (800) 999-1482.

Chapter 3 Overview of CPS Enterprise Edition

This section introduces you to the distinctive architecture of CPS Enterprise Edition. It includes the following items:

- CPS Enterprise Edition Overview
- Features
 - Improved Visibility into Records Distribution
 - Integrated Recording
 - The Strategy Editor
 - External Transfer and Third Party Transfers With Data
 - Ability to Calculate Storage Requirements
 - Security
 - Dial Number Exclusion List
 - Define Record Format Description
 - Logging of Supervisory Activities
 - Report Record Inventory Statistics
 - Caller ID Through Record Fields (using CZAT)
 - Use DNC on a Campaign-by-Campaign Basis
 - Transmit Caller ID Text with Dials
 - Redesigned Query Manager
 - Test Selectors
 - Agentless Campaigns, Text to Speech Messages
 - Registry for State Change Notifications
 - Selector
 - Support for East European Character Set
 - Digit Collection
 - CPS Enterprise Edition .NET API
 - Selector Variables for Campaigns and Work Sessions
 - Direct Import of Records
 - Real-Time Portfolio Management
 - Basic Record Management
 - Client Update Application
 - Dynamic Record Management
 - Collections Management
 - Dynamic Agent Reassignment
 - Flexible Campaign Distribution
 - Efficient Campaign Transitioning
 - Single Contact Resolution
 - Simultaneous Data and Call Transfer

- Recycling a Call List
- Automatic Administration of Tasks
- Reports and Statistics
- Variety of Outbound Dialing Modes
- Precision Answering Machine Detection
- Digital Messaging With Encore
- Centralized Windows Interface Management
- Customizable System Management Using Rules
- Scalability
- Open Architecture
- Benefits of Using CPS Enterprise Edition
- Client/Server Architecture
- Overview of System Architecture
- Connectivity
- CPS Enterprise Edition Details
- Advantages of CPS Enterprise Edition Architecture

Specifications, features or product configurations described herein are subject to change without notice. Product availability is subject to current release schedules. Consult your SER Solutions representative.

CPS Enterprise Edition Overview

CPS Enterprise Edition is a centralized, automated enterprise contact center system that integrates voice and data for managing calls for virtually every application in today's market, including teleservice, collections, fund raising, customer service, etc. It is ideally suited for outbound contact centers.

As a comprehensive enterprise management system, CPS Enterprise Edition offers flexibility in list management, campaign management, agent assignment, and list and campaign distribution. You can dynamically add or delete records during a live campaign, based on any combination of fields, strategically assign Agents, and distribute data over multiple outbound switches.

CPS Enterprise Edition provides a comprehensive enterprise management tool for the collections market. Features such as Diligence, Skip Trace, Multiple Phone Number Management and Directory Assistance, Aging, Account Ownership, and Do Not Call, which are specifically designed for the credit and debt recovery environment, enable contact centers to increase Agent productivity and achieve delinquency and recovery goals.

Recycling call lists ensures a fully leveraged dialing list, while the ability to preset tasks and have them run automatically increases productivity and efficiency.

CPS Enterprise Edition has a Microsoft Windows-based graphical user interface. CPS Enterprise Edition Client, Supervisor, and System Administrator screens comply with the Microsoft Windows style guide as defined by Microsoft.

CPS Enterprise Edition's scalability promotes future growth. As the workload increases, you can add more computers, with no change to response time. And, you can distribute call lists and dialing strategies across one or more outbound switches.

Additional features, including blending, automated voice message management, and scripting software, reports and statistics, combined with administration and management features, make CPS Enterprise Edition the best, most comprehensive automated contact center system in the business.

Features

Improved Visibility into Records Distribution

To get a better view of what the records distribution for dialing looks like, there is now a detailed counts feature. Previously, the user was only able to view a subset of the total records that are eligible for dialing. Now, the user will be able to view records in all states, and include those that are out of zone. The user can view a detailed counts feature that displays more than a subset of the total records that are eligible for dialing. It provides a snapshot of the number of ineligible and eligible records in each category, including records in a closed time zone, a done state, or some form of reschedule state. The display will output by zone. The increased visibility will facilitate agent distribution and contact center planning.

Integrated Recording

Integrated Recording is a software solution for recording Agent conversations with contacts and/or conferencing parties. Supporting for up to 288 simultaneous recording sessions, Integrated Recording is useful for quality assurance purposes to review a call for accuracy and content. For example, when running Sales Campaigns, you can use Integrated Recording to verify purchases. The recording can be archived and reviewed later. Advantages of Integrated Recording include:

- No external hardware needed
- No additional wiring needed
- Choice of script driven or full time
- Integrates call data with voice recording

The Strategy Editor

The Strategy Editor, a comprehensive editing application for creating and editing strategies, has a modern interface with user-friendly toolbars and panels for automating and organizing contact, record, custom, and statistics strategies for a Campaign. Its Step Toolbox, a Flowchart Pane and individual information panels provide all of the information and tools that you need to create or edit a variety of strategies. Toolbars with drag-n-drop actions make it easy to build, edit, and view every aspect of a strategy at any stage.

Strategies Features

The following features apply to Contact, Record, and Recycle strategies:

- Set character as well as numeric values in Contact and Record strategies. You can also clear a field if you wanted to modify a record's information.
- Forward a copy of the user data from the call record to a specified destination using the FORW field in a Contact Strategy.

- In Contact Strategy, the option to compare Field, Current Date, Collected Digits, Variable, or last step result to a Field, Current Date or User-entered constant.
- In Record and Recycle Strategy, the option to compare Field or Current Date to a Field, Current Date, or User-entered constant.
- Specify an external (non-agent, off switch) transfer in a Contact Strategy by either specifying a portfolio field that contains the phone number or by entering the phone number of the external party.
- Change the result code prior to the drop in a Contact Strategy in cases where the drop step is never called. For example, you might use it in the case of an external transfer under strategy control.
- The System can use a Portfolio field as a source for the name of a prerecorded message with that message ID.
- A Contact Strategy Step now includes a test for the Hours of Operation for each day of the week and also includes a test for Holiday dates. Before setting up the test, you would enter hours of operation or holidays in the Admin, Expert View. Both features simplify the administration of checking for holidays and hours of operation in a Contact Strategy.
- Audit events is an optional enhancement that gives you the ability to troubleshoot contact strategies and verify scripts. You can strategically place them at different points within a strategy. When the strategy runs, a report is sent to the event manager. The event manager stores the information in an event log. For a self-service call, for example, if the caller is having trouble navigating the IVR, you can check the event manager to monitor the flow of the strategy for flaws. If the flow is not working as desired, you can locate the problem in the event log and modify the strategy..
- Testing for staffed agents. You can test to see if there are any agents logged into a team or session. If there are no agents, you can redirect the call or play a message.
- Text-to-speech option that uses an audible voice for playback messages. You can set a strategy to speak the account number, for example.
- Variables that you can define at different points within a Campaign's Contact Strategy that can have different purposes. You can use a variable to provide temporary storage during a strategy execution. For example, you can use a variable to collect digits if a caller requested an account balance, but didn't need a live agent on the line. The caller would enter account and PIN numbers and a variable can collect and store digits of the transaction. You can also use variables to compare Portfolio fields. For example, you might want to search a Portfolio to find a record with the last name of Anderson. Variables can also be vehicles for information that you can pass between an agent and a Campaign through the call-script.

Portfolio Access Using a Contact Strategy

Using a Contact Strategy, you can find a caller's record in the Portfolio based on CTI data (like a calling number) or collected digits. After locating a record, the user can enter any fields in the Contact Strategy steps to route the call. If a record is not found, the strategy can store collected information in

variables before the call is connected, and relay this information to the agent desktop, decreasing Agent handling time. Previously, the agent had to match the inbound call to the record when the call came in. On inbound calls, this will facilitate more self-service and more accurate routing to the appropriate agents.

External Transfer and Third Party Transfers With Data

The Connect Contact Strategy Step includes the ability to connect a called party to an external party using strategy control. For example, after playing message to a called party, the strategy control connects a party to an external validator. Strategy control conducts the message play and external connection – no agent intervention is required. This feature is available only with SER's TSP500.

Ability to Calculate Storage Requirements

To properly size disk space requirements in the event database for report data, CPS Enterprise Edition includes a configuration guide with formulas that calculate disk space requirements using agent, campaign, statistics, and dialing data. This will help customers to determine the amount of disk space they will need for their data. The guide will also help customers to decide on the amount of data to store in the event database and use for reports..

Security

Leverage Windows security model by using a user's Windows security for access to CPS Enterprise Edition. With some minor configurations, you can set up the application to automatically recognize a login in one of three ways:

- Require a specific name and password.
- Use an environment variable to locate the username of the person who logs into the PC that is running the application.
- Use the PC user name and the host computer name as the station name.

The Admin can also display the file lists without having direct access to the file system. Lists of files, for example, import files, are now provided by the server. This satisfies a need for better security for system files.

Dial Number Exclusion List

When defining a campaign's post processing procedures, you can extend your customization by including a list of numbers that you wish to make unavailable for callbacks and manual dialing. Using the Dial Number Exclusion List feature, you can for example, exclude the dialing of international numbers (e.g., numbers starting with 011)

Define Record Format Description

The Define Record Format section of the Portfolio tab includes an option for adding a description of the Portfolio record.

Logging of Supervisory Activities

Logging of Supervisor Activities records all object changes in the event database and identify who did it and which object was affected.

Report Record Inventory Statistics

For active campaigns, log record counts in the event database. The same information is Display Counts in the Admin.

Caller ID Through Record Fields (using CZAT)

Specify caller ID information on a record-by-record basis. When building a campaign, under **Caller Id Options**, select Use Caller ID if you want to pass the originating number on to the switch. If no origination number is specified at the Campaign level, by default this originating number is used.

Use DNC on a Campaign-by-Campaign Basis

On an individual Campaign basis, you can specify the use of the DNC in the dial parameters on a record-by-record basis. With Bypass DNC, you can make available numbers on a Do Not Call list on selected campaigns. This option is available when DNC checking is enabled system-wide during installation.

Transmit Caller ID Text with Dials

For default caller ID options when defining a switch for outbound dialing, you can add text to pass to the switch. Available with TSP500 only.

Redesigned Query Manager

The Query Manager has a new interface. The system no longer shares the SQL directory and SQL queries are now represented as objects within the system.

Test Selectors

A test for selectors at design time helps to determine the number of records available to a given selector.

Agentless Campaigns, Text to Speech Messages

Agentless campaigns provide the ability to dial calls without the need for an agent. When an agentless call connects, control of the contact is transferred to an online strategy. The online strategy can perform all strategy operations, including playing messages. In addition to the traditional source for messages (SER Encore Plus), you can customize messages based on data stored in the contact's portfolio record.

With Agentless Campaigns, you can customize messages using a combination of advanced branching logic and Text-To-Speech (TTS) (for message generation). TTS messages are available to all campaign types using online strategies.

Registry for State Change Notifications

In the .NET API, the Campaign, Work Session, and Portfolio objects provide a way to “register” for state change notifications.

Selector

The Selector provides the ability to call database functions in the Value text box by entering the name of the function within a set of parentheses. For example, you would enter GET DATE () to get the function named GET DATE.

You can also compare one database field to another in the Value text box. Example: [ACCOUNT]<>[PHONE] compares the information in the ACCOUNT field to the information in the PHONE field.

Support for East European Character Set

CPS Enterprise Edition supports international character sets that use the CP1250 (Latin 2) code page for Eastern European languages like Polish and Greek (English and Western Europe use CP1252 (or Latin 1)). Right now, there are only mappings for the Polish national characters in the product, so customers running a fat client will only be able to view special characters for the Polish language.

Digit Collection

Play message allows for digit collection after the playing of a message. You can use the collected digits to implement branching logic or you can place them into a Portfolio field. For example, when implementing branching logic, you can direct the strategy to play “Press 1 for address information, press 2 to speak to an agent.” In this case, you would branch on collected digits. If the party selects 1, it would play a message, if the party selects 2, it would execute a connect step. This feature is available only with SER’s TSP500.

CPS Enterprise Edition .NET API

The CPS Enterprise Edition .NET API is a comprehensive layered interface that you can use to develop custom Agent interfaces and integrations. It also provides some supervisory functions.

The API object model encapsulates messages and events, providing a simple and easy-to-use user interface. Any environment that supports the .NET framework can use the API objects.

The CPS Enterprise Edition .NET API exposes the following interfaces:

- Agent interactions such as new contact, end contact, telephony functions and data functions.
- Support for the integration of third party call logging solutions. The events and commands make available configurations for direct station tap, remote digital stations, trunk side recording, and VOIP.
- Limited supervisory functions including object retrieval, object link, and object unlink.

You also have the ability to add, remove, and check Do Not Call entries in the CPS Enterprise Edition .NET Object Framework.

Selector Variables for Campaigns and Work Sessions

Within the Selector, there are specific Campaign and Session variables that you can use to select Campaign or Work Session names downloaded from a Portfolio for dialing. Selecting specific Campaigns or Work Sessions simplifies the dialing process for companies that want to focus dialing on records based on Campaign or Work Session name only.

Direct Import of Records

You can import records directly through the SQL View instead of waiting for them to import through the AutoAdmin.

Real-Time Portfolio Management

CPS Enterprise Edition's Real-Time Portfolio Management is a centralized control center for real-time management of calling records, Agent profiles, dialing strategies, work flow, and systems. With holistic centralized control, you have the ability to identify and match campaign details, campaigns, and calls to the most qualified Agents at the most strategic time of the day, ensuring maximum Agent productivity. Portfolio Management in real-time capitalizes on customer interaction as it happens with flexible, on-the-fly controls.

Basic Record Management

Basic Record Management is the uninterrupted flow of records to an active campaign. This occurs without stopping a campaign and without interrupting dialing. Basic Record Management is advantageous because it provides a constant flow of work for the Agents throughout the day, without the need to administrator intervention.

Client Update Application

Client Update is an application that checks for software updates, backs up the files to be updated, and updates the CPS Enterprise Edition admin application. You can choose from a list of options and you can schedule the update or perform an immediate update. The application has a popup menu that sits in the desktop tray or you can use a shortcut. The Client Update application facilitates CPS Enterprise Edition software backs up files that need updating,

and updates them, providing the customer with the latest in software features and functions.

Dynamic Record Management

CPS Enterprise Edition dynamically requests the system to select records based on specific criteria, based on any combination of fields in the calling record. You can select groups of records in a particular order of importance and automatically rollover from one group to another when a selection becomes unproductive and you can blend fresh records with records already in the system for optimum performance. Finally, you can preset the criteria, and you can change it as your needs change, without interrupting dialing.

Collections Management

Collections Management features include Diligence, Skip Trace, Directory Assistance, Aging, Do Not Call, Multiple Phone Number Management, Directory Assistance, and Ownership.

A **Diligence** table records all attempts to contact a delinquent account. The table stores vital diligence data such as the name of the debtor, date and time of the attempt, phone name and number, Portfolio, Campaign, Team Stat Group and Agent ID for each call placed.

To **Trace** a particular debtor, Agents can contact as many as 20 numbers within the same client record in order, in a single Work Session without being interrupted by a new call.

The **Aging** feature tracks the number of times a record is dialed. This feature allows contact centers to provide documentation required to comply with legislation that restricts when, where, and how often collectors can contact debtors.

You can also filter selected phone numbers (for example, numbers that the contact center is legally barred from contacting) to prevent them from being dialed. CPS Enterprise Edition maintains a list of do not call records. Each record in every campaign is checked against a **Do Not Call** list before being sent to the dialer. You can exclude phone numbers based on criteria such as campaign name, field name, and field value. The Do Not Call list filter helps debt collectors prove compliance with the Fair Debt Collection Practices Act.

Multiple Phone Number Management, on a campaign basis, better positions the Agent for correct contact, which is crucial when working in collections. If a record has multiple numbers, you can set the priority for dialing, for example, home, work, and then mobile phone, and you can assign calling times. The Agent can also make adjustments to the phone number in the system, and use other options, such as directory assistance and manual dialing, to connect with a contact. With **Directory Assistance**, if there are no more valid phone numbers for a debtor, the Agent terminates the call with a special result code that converts the phone number to a directory assistance number.

Due to CPS Enterprise Edition's flexible records assignment capabilities, you can assign specific accounts to Agents of which they can have complete **ownership**. This is especially critical for successful collections.

Dynamic Agent Reassignment

Dynamic Agent Reassignment is the ability to reassign a Agent or User to a different campaign when a campaign becomes unproductive. It also gives you the flexibility to either move the new campaign to the Agent, or move the Agent to a new campaign. To move a campaign to a Agent, you can transition a campaign by setting up a condition that another campaign will replace the current campaign if it becomes unproductive, according to specifications. Or, you can select a new campaign for the Agent and direct the Agent to join this campaign. This feature eliminates Agent idle time by ensuring a constant flow of calls throughout the day.

Flexible Campaign Distribution

With CPS Enterprise Edition, you have the ability to centralize campaign management while providing distribution of one or multiple calling lists and dialing strategies across one or multiple outbound switches. You can also choose to distribute dialers to any geographical location and manage them in a central location.

Efficient Campaign Transitioning

To promote efficient campaign transitioning, CPS Enterprise Edition provides a contact center to group or tie two or more campaigns together and to centralize Agent management. The result is highly productive Agents with no unscheduled idle time.

Single Contact Resolution

Single Contact Resolution means that you can build a single call list from multiple call lists and organize the records by customer name. When organized this way, you will have full disclosure of all customer details, which would enable you to identify and resolve multiple issues with a customer, even those unrelated to the current campaign.

Simultaneous Data and Call Transfer

Seamless simultaneous transfer of contact and contact's record data, using person-to-person live transfers and/or concealed, moderator transfers.

Recycling a Call List

Recycling a Call List gives you the ability to rerun call lists at various times of the day, including redialing missed contacts and for manual and auto-next pass contacts. Recycling a Call List ensures a fully leveraged dialing list using fresh records.

Automatic Administration of Tasks

AutoAdmin enables scheduling of common administrative operations to be executed on a periodic or event-driven basis. You can schedule several tasks in different configurations to run automatically. This is especially useful for End of Day processing and Work Session management.

Autoadmin has been enhanced to provide a more intuitive and easy-to-use interface. Also, a new type of task called “Instant” gives you the ability to run tasks on the fly.

Reports and Statistics

Enterprise Stats is a new Web-based online reporting and statistics program in which you can analyze and manage business performance. With Enterprise Stats, you can manage critical issues in real time with the help of near real time reports. Enterprise Stats includes six standard reports that show Campaign, Dialing, Diligence, Management Summary, and Agent activity over a user-defined time period. Each of the standard reports can be fine-tuned to specific contact center requirements. You can run most of the reports for a single selector, a campaign, or a Work Session. Enterprise Stats also includes a variety of graphs to display dynamically updated data.

Variety of Outbound Dialing Modes

The system supports four different outbound dialing modes:

- Predictive
- Preview
- Progressive
- Paced
- Manual
- Trunk

Precision Answering Machine Detection

The system can determine, during a pre-set analysis period, if a call has been answered by an answering machine by analyzing the detected voice. If there is a period of silence, or “pause length,” the call is considered a live voice. If the voice is continuous with no pause, the call is considered recorded.

CPS Enterprise Edition automatic machine detection can accurately determine, during a pre-set analysis period, if a call has been answered by an answering machine. Supervisors can select the degree of agent involvement required per campaign. Special system firmware detects a human voice within milliseconds, as well as busy signals, no-answers, and telephone company SIT tri-tone intercepts. This feature boosts productivity and ensures a natural call flow because agents will hear the first “hello” instead of a silent pause.

Digital Messaging With Encore

CPS Encore Plus allows messages to be played at any time after a call is connected, whether to a contact or an answering machine.

Centralized Windows Interface Management

CPS Enterprise Edition is a centralized, industry standard graphical user interface for system, campaign, and list management. In addition, CPS Enterprise Edition Client, Supervisor, and System Administrator screen designs comply with the Microsoft Windows style guide as defined by Microsoft.

Customizable System Management Using Rules

SER Solutions' Professional Services can implement complex rules as needed without touching the base code. This means that you can customize the system at any time to adjust permissions.

Scalability

CPS Enterprise Edition was designed to be scalable. Traditionally, contact centers have relied on hardware capability (generally one computer) to increase workload capacity. CPS Enterprise Edition distributes computer processing over a number of computers. As the workload increases, more computers can be added, maintaining response time.

Open Architecture

CPS Enterprise Edition features open architecture. It's built on Microsoft Windows technology and integrates the best of breed technologies such as MS Access and MS Visual Basic.

CPS Enterprise Edition uses SQL Server as its database. SQL Server is Windows-based data management and analysis software. SQL Server provides increased scalability, availability, and security to data and analytical applications while making them easier to create, build, and manage.

Benefits of Using CPS Enterprise Edition

Some of the benefits of using CPS Enterprise Edition include the following:

- Maximizes worker productivity and capitalizes on customer interaction by ensuring workers are closely and consistently matched to contacts throughout the workday.
- Provides Agent recording for quality assurance with Integrated Recording.
- Increases worker productivity by automatically moving workers to another campaign when one is exhausted, eliminating worker idle time by ensuring a constant flow of calls throughout the workday without the need for administrator intervention.
- Extends campaign flexibility, productivity, and efficiency by:
 - Enabling contact centers to dynamically fine tune campaign strategies to optimize penetration of calling records and maximize agent productivity. Allows centers to rapidly change and match target records and dialing strategies without interruption in productivity.
 - Ensuring each campaign maintains productivity by mixing fresh records with previously dialed records.
 - Freeing up Administrators and Supervisors. Campaigns can automatically select calling records from a one or more lists based on selection criteria to maximize productivity and list penetration.
- Maximizes calling list penetration by fully leveraging calling records, including retrying records that were previously not contacted due to a ring-no-answer, busy signal, answering machine, etc.
- Maximizes customer interaction by providing holistic account information of each customer. This gives the Agent information to identify and resolve multiple issues with a customer regardless of which campaign is currently active.
- Enhances customer experience by assigning workers accounts that they own throughout the life span of the account.
- Includes flexible contact strategies, such as multiple phone numbers, to maximize Agent match with contact.
- Enhances contact experience. Ensures both the call record data and voice calls are transferred at same time, eliminating the need for the contact to repeat information multiple times.
- Automates repetitive tasks, such as end of day processing or list uploads and downloads, saving administrators significant time and effort.
- Includes a comprehensive range of pre-designed reports that precisely detail system and worker performance.
- Provides real-time statistical reports in tabular format or chart design.
- Aids in Collections Management by including diligence records, tracks record dialing, multiple phone numbers, tracing, and a Do Not Call list. Helps contact centers support state and federal Do-Not-Call legislation.

Client/Server Architecture

Introduction

The distribution of processing power is performed on a client/server platform that greatly improves the responsiveness, flexibility, and maintainability of applications

The CPS Enterprise Edition's client/server call management system operates on a LAN. The system distributes data processing activities among a server computer and one or more client workstations.

Client/Server Details

Server

CPS Enterprise Edition servers are Microsoft Windows 2003 servers, dedicated to the management of CPS Enterprise Edition system resources such as databases, switches, printers, trunks, etc.

Clients

CPS Enterprise Edition clients can be Windows-based PC workstations running Windows XP Professional.

Client workstation software presents scripts and information, processes transactions, performs data analysis and other application activities. Client workstations also share network resources such as hard disks, communication lines, printers, etc.

Overview of System Architecture

As previously described, the system architecture is designed so that all software is detached from the hardware and layered, with the core software isolated from other software and hardware details. The advantage to this distinctive architecture is that if a change is required, the impact on the rest of the system is minimal.

For purposes of describing system architecture, there are five tiers to the CPS Enterprise Edition system, each made up of many details:

Client Applications

- Monitor
- Supervisor/System Admin/Team Leader
- Script Writer

Administrative Support Applications

- Report tools
- Query Manager
- Third Party Software

Server Applications

- Switch Manager
- Resource Manager
- Error/Event Manager
- Portfolio/Campaign Manager

Foundation

- Communication and Message Interface
- Operating Systems

Hardware

- Windows Servers
- Client PCs
- Switches

Table 3-1: System Architecture

Item	Description
Hardware	The underlying hardware for every system consists of a server or servers, client PC workstations, and a switching platform of your choice.

Table 3-1: System Architecture

Item	Description
Foundation	consists of the operating system and communication and message interfaces
Operating System	The system rests on a foundation of various operating systems: Windows 2003 Server and Windows 2003 Server Enterprise Edition and Windows XP Professional for client PCs.
Communication and Messaging Interface	All system details are connected by special communication and message interfaces that allow the dissimilar hardware and software details to communicate with one another.
Server Applications	These are applications that govern server processes including management of switch(es), disk space and memory, objects, databases, call results, and error handling.
Client Applications	These are applications that govern client processes including special Client tools to generate scripts, reports, and database searches.
Presentation Applications	There are six main categories of CPS Enterprise Edition users: Client, Supervisor, System Administrator, Team Leader, Monitor, and Script Writer. Each user has a presentation application that is consistent with Microsoft Windows.

Connectivity

SER Solutions recognizes that computers and their software are, more than ever before, required to interface with pre-existing MIS environments. Data must be freely exchanged without restrictions from different communications protocols and incompatible operating systems. With this in mind, CPS Enterprise Edition was designed to utilize widely-accepted industry standards for connectivity. Open connectivity on CPS Enterprise Edition is achievable over a LAN using the Microsoft Windows operating system.

Communication Interface

TCP/IP

TCP/IP is an industry standard for transferring data between computers with different architectures and different operating systems. The TCP/IP protocol provides the basic formula for formatting and transmitting programs or data between the computers on the CPS Enterprise Edition system, enabling them to function as a coordinated unit.

Ethernet

Data is transmitted over the CPS Enterprise Edition network using Ethernet network architecture. Ethernet specifies the way computers and data systems connect and share cabling and signaling - indicating the source of the message and its destination.

The advantages of Ethernet are as follows:

- It allows for multiple communications among multiple computers all of which are proceeding simultaneously
- You can mix and match different media (i.e., cabling)
- It is cost effective since it is the most mature network technology with the broadest vendor support and the largest installed base

CPS Enterprise Edition Details

CPS Enterprise Edition can support multiple switches and is designed to scale by adding additional servers and switches. There is no architectural limit on the number of agents that can be supported on a single system.

The system is specially designed for contact center applications that require the versatility of PC-based workstations. CPS Enterprise Edition features a graphical user interface with full access to the comprehensive array of CPS Enterprise Edition's configuration tables.

See Also:

[see “Hardware Details” on page 4-1 for an illustration of this CPS Enterprise Edition configuration](#)

Optional System Enhancements

In addition to the features listed, you can also add the following optional packages:

- **Encore Plus™** – a stand-alone automated voice message management system. It can record and store messages and manage the download of messages to the switch for playback to contacts.

See Also:

[“Software Design Features” on page 5-1](#)

Advantages of CPS Enterprise Edition Architecture

Some advantages to using CPS Enterprise Edition are the following:

- Scalable capacity. As your SER Solutions seat requirements and processing requirements increase, CPS Enterprise Edition grows with you.
- Faster system response time since, instead of sending entire data sets to a network workstation, the server can send an individual record which is smaller and therefore processed and displayed faster.
- Platform compatibility. Information can be exchanged between different platforms.
- Easy installation of new switching systems without changing the rest of the contact center application.
- Functions and application modification facilitated in a modular fashion, reducing the time of integration and improving the reliability of the resulting work
- Easy migration to various computer platforms.
- Standard Microsoft Windows environment for all Client, Supervisor, and Administrative workstations.
- Expandible product functionality.
- Flexible integration of third party relational database platforms.

Chapter 4 Hardware Details

This chapter provides an overview of the basic hardware details that make up the CPS Enterprise Edition system.

This chapter includes the following sections:

- Introduction
- Switches
- Clients
- Configuration Guidelines
- Overall System Configuration

Introduction

CPS Enterprise Edition supports many different hardware configurations. For example, in its simplest form, it can consist of a single computer with one switch and a number of PC workstations; CPS Enterprise Edition can also contain multiple switches.

CPS Enterprise Edition, running on a LAN, is made up of the following basic network details: server, client stations, and hardware connections including adapter cards and cables. Each component of the network is connected to each other using an ETHERNET 10/100 BaseT LAN.

Switches

Switches dial numbers, determine the outcome of dials, and route connections to available Agents. Switches can also:

- conference calls
- transfer calls to third parties
- monitor calls between Agents and contacts
- automatically choose a route selection for toll and local calls to minimize costs for your business
- detect answering machines

A CPS Enterprise Edition system can support many different types of switches since the dialing/pacing algorithm is built into the software, not the switch. Switches that currently are supported by CPS Enterprise Edition include:

- TSP500
- Avaya Definity G3r
- Aspect
- Nortel Symposium (SAM only)

For Outbound Operations

SER Solutions' TSP500

The TSP500 Call Processing System is a comprehensive system that combines predictive dialing with voice recognition techniques and information processing. The TSP provides increased agent capacity, enhanced Caller ID functionality, and integrated VoIP capabilities.

The TSP500 currently supports 1152 ports domestically and 1200 ports internationally, supporting up to 384 simultaneous outbound campaigns, one per agent. It can be delivered in various configurations, depending on your business needs.

Avaya Definity® G3/8700

The SER Solutions' CVLAN interface communicates with the Avaya's Definity G3i or G3R and the Microsoft Windows server.

Aspect

The Aspect Routing system blends voice, VoIP, email, and interactive Web contacts into a single, centrally-managed universal queue. Aspect supplies standard adapters for integration with telecommunications switches, helping businesses to expand contact center functionality and rapidly and cost-effectively integrate contact center systems.

Clients

Clients can include any of the following:

System Administrator Workstation

The System Administrator workstation, running either Windows Vista or Windows XP Professional, exclusively runs the System Administrator user interface that controls all facets of the CPS Enterprise Edition system.

The System Administrator workstation contains a LAN adapter card, VGA monitor, and connects to a printer (*optional*).

Supervisor/Team Leader Workstation

Each Supervisor/Team Leader workstation, running Windows Vista or XP Professional, runs daily supervisory contact center tasks, such as viewing call records when Agents request assistance, and showing alarm messages coming from the Supervisor's group of Agents.

The Supervisor/Team Leader workstation can also perform some processing tasks in its own right, for example, report generation. For this, CPS Enterprise Edition provides built-in reports as well as customized reports.

Agent Stations

Agent stations are PC workstations. As the number of Agents increases, the system can grow modularly, connecting to other switches using the local area network. Agent workstations have telephones or headsets attached to the switch.

Agent workstations are PCs connected to the server on the local area network. Workstations maintain the graphical user interface for the Agents as well as a software package to display the call script. This displays once the Windows server transmits records.

Script Writer Workstations

Script Writer (and Monitor) functions can be implemented on either a Supervisor PC workstation or from a separate Script Writer workstation.

Configuration Guidelines

Configuration guidelines for are as follows:

CPS Enterprise Edition can support multiple switches and is designed to scale by adding additional servers and switches. There is no architectural limit on the number of agents that can be supported on a single system.

Consult with your SER Solutions Account Executive for specific configuration information.

Overall System Configuration

The following diagram illustrates the overall CPS Enterprise Edition configuration:

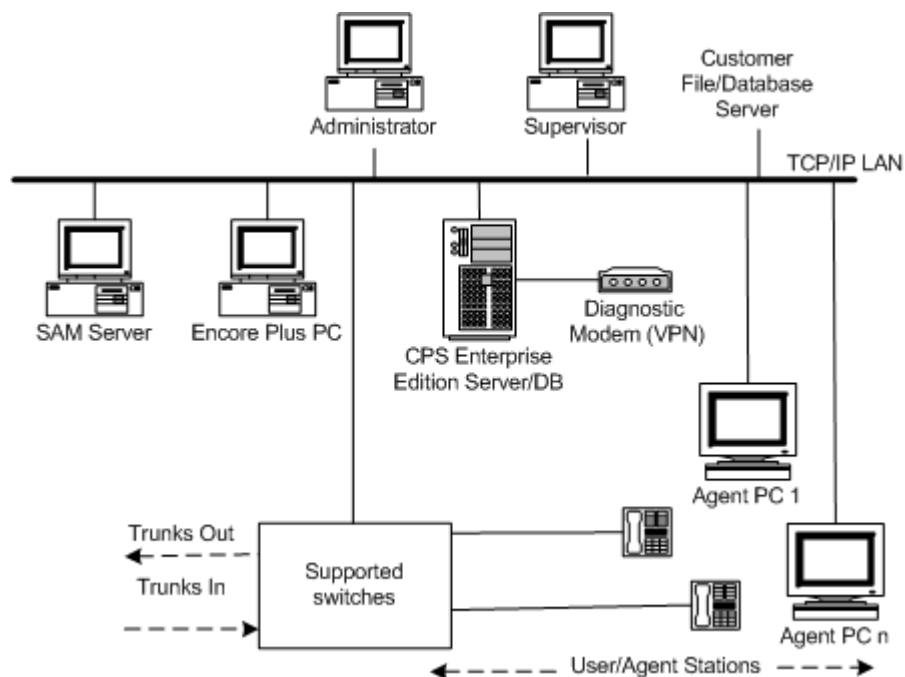


Figure 4-1. CPS Enterprise Edition sample configuration.

Chapter 5 Software Design Features

This section includes a description of CPS Enterprise Edition's basic software design, and reviews features and optional enhancements that you can purchase for your individual system.

This section also includes a software summary flowchart to illustrate how CPS Enterprise Edition works. The topics include the following:

- Software Design
- CPS Enterprise Edition Configuration Screens
- Query Manager
- Enterprise Stats
- CPS Enterprise Edition .NET API
- Precision Answering Machine Detection
- Dialing Modes
- Collections
- Digital Messaging
- Additional Software Features
- Advantages of CPS Enterprise Edition
- Software Summary Flowcharts

Because CPS Enterprise Edition product configurations are different, the software descriptions in this chapter may not be applicable to all configurations.

Software Design

Object-Oriented Design

CPS Enterprise Edition has adapted object-oriented technology to create a software package that, along with a graphical user interface and Microsoft Windows environment, is extremely flexible and easy to use.

As with all object-oriented design, everything in the software is modular so that you can “plug and play,” connect and disconnect objects as you wish. As a result, once an object is created, it can be used in many different ways. This versatility makes for a very rich, very powerful software package.

CPS Enterprise Edition Objects

There are five basic building blocks, known as objects, of the CPS Enterprise Edition system. These objects are basic elements of the system that help you manage the calling process more efficiently. They are:

- Portfolio
- Campaign
- Users
- Team
- Work Session

Portfolio

CPS Enterprise Edition call processing begins with a Portfolio, a database from which records are selected for dialing. A Portfolio is imported into CPS Enterprise Edition from an external source (either tape or disk or downloaded from a host). Multiple Portfolios may exist on CPS Enterprise Edition at the same time.

Campaign

A Campaign is comprised of selected records that are chosen according to specified characteristics. A Campaign is created from a Portfolio and contains a portion of data from the corresponding Portfolio.

You can define Campaigns with outbound by criteria such as geography, gender, age, income, etc. The resulting Campaign contains data that has been extracted from the corresponding Portfolio record and represents your target audience. Many Campaigns can be created from any single Portfolio.

Team and Users

A Team is made up of a group of users. Users are most often Agents, but they can also be System Administrators or Supervisors. Supervisors can assign users to Teams or users, if authorized, can assign themselves to a particular group.

Work Session

A Work Session is an organizational tool for configuring teams and associated user and Campaigns. You must first create your teams and users and define your Campaign before you create a Work Session.

The number of Work Sessions that can be active on the system at any given time depends upon the switch being used. For example, the SER Solutions CP12000 supports a maximum of ninety-six simultaneously active Work Sessions.

Events and some statistics are logged by Work Session so that reports can be generated on a per Work Session basis.

There are two details of a Work Session:

- Team and associated users
- Campaign and its essential details (For example, Campaign Definition, Selector, and Call Zone Assignment)

A Supervisor has control over who is authorized to work on a particular Work Session. Once Supervisors link a Team and a Campaign to a Work Session, any Agents assigned to that Team can begin to work on that Work Session.

Enterprise Manager™ Window

Objects are managed through tabs on the CPS Enterprise Edition Enterprise Manager window.

Five of the eight tabs displayed on the Enterprise Manager window identify the key CPS Enterprise Edition objects.

- Portfolio
- Campaign
- Team
- User
- Work Session

Clicking on any tab will display a list of previously saved objects in that category that currently exist on the system. For example, by clicking on the Campaign tab, you'll see all available Campaigns:

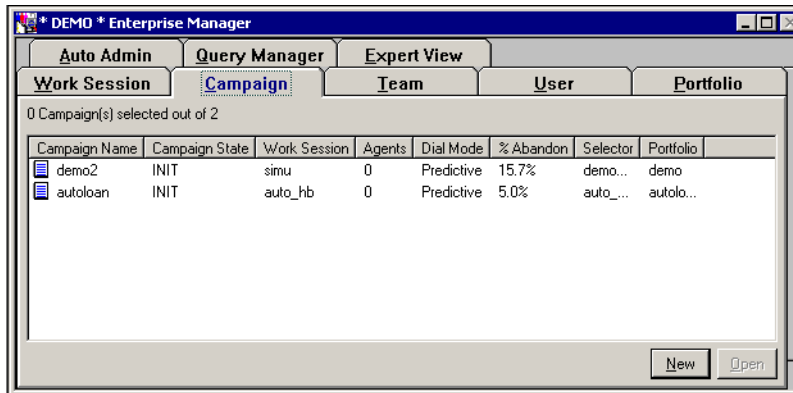


Figure 5-1. Enterprise Manager Window.

Wizard Feature

A CPS Enterprise Edition Wizard steps you through the process of creating a Work Session or campaign.

It works in the following way: the Wizard presents, in a sequential order, each step that is required to build a Portfolio, a Campaign, a Team, Users, and a Work Session. By continuously selecting **Next** on each panel, you can define all the parameters that complete the steps necessary to build a Work Session. Of course, you can save a procedure at any point and pick up where you left off at a later time.

There is a Wizard summary panel for each major object (Portfolio, Campaign, etc.) The summary panel lists all steps necessary to complete that object. In the example below, to build a Portfolio, the summary panel lists five sub steps:

Portfolio Information

- Define Action Result Codes
- Determine Portfolio Record Format
- Determine Import Record Definitions
- Determine Export Record Definitions
- Define Diligence Record Definitions (optional)

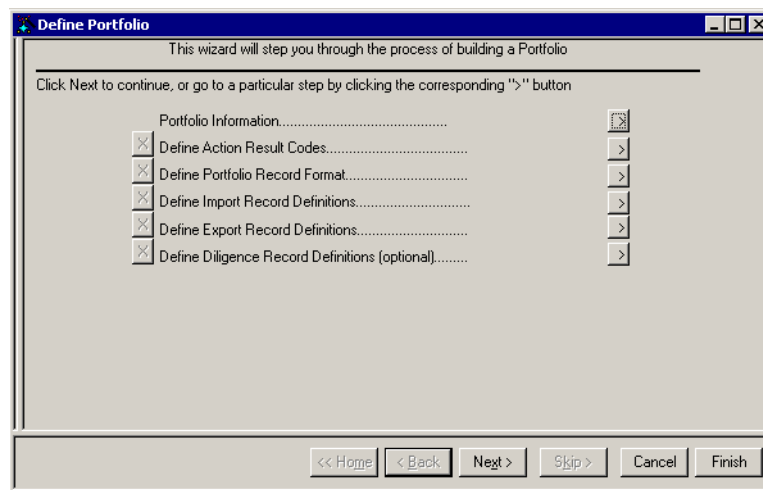


Figure 5-2. Wizard Summary Panel.

If you have completed some, but not all, of the steps, those steps that are finished will appear with a check mark next to them.

Error Handling

The Wizard checks to make sure you completely defined the parameters required to build a Work Session. If you have defined some, but not all, the Wizard lets you know what parameter is missing and requests that you complete it.

CPS Enterprise Edition Configuration Screens

Most functions that govern the way CPS Enterprise Edition operates are configurable. In other words, the System Administrator or Supervisor has control over the way the system works.

This control is implemented using management screens that are built into the system. You can use these management screens to specify actions or parameters for a Work Session/campaign, Portfolio/database, or switches.

The Screens appear in two different formats: in a traditional tabular manner or as Strategies that are defined graphically.

Tabular Screens

This Screen allows you to enter values in rows. Side buttons enable you to reorder the way in which information was entered and Copy and Share buttons enable you to retrieve data from another screen and incorporate it in a new one.

Field Name	Type	Length	Process Option
ACCOUNT	Character	10	Primary
FNAME	Character	10	<none>
LNAME	Character	12	<none>
ADDRESS	Character	25	<none>
ADDRESS2	Character	25	<none>
CITY	Character	16	<none>

Figure 5-3. Tabular Screen

Strategy Editor

The Strategy Editor is an application, accessible from the Campaign wizard or Expert View, for creating and editing contact, record, custom, and recycle strategies. The Graphical User Interface includes drag-n-drop tools, interactive, expandable, retractable, and repositionable panels, and a expandible Flow Canvas to help you to create simple or elaborate strategies for contact management.

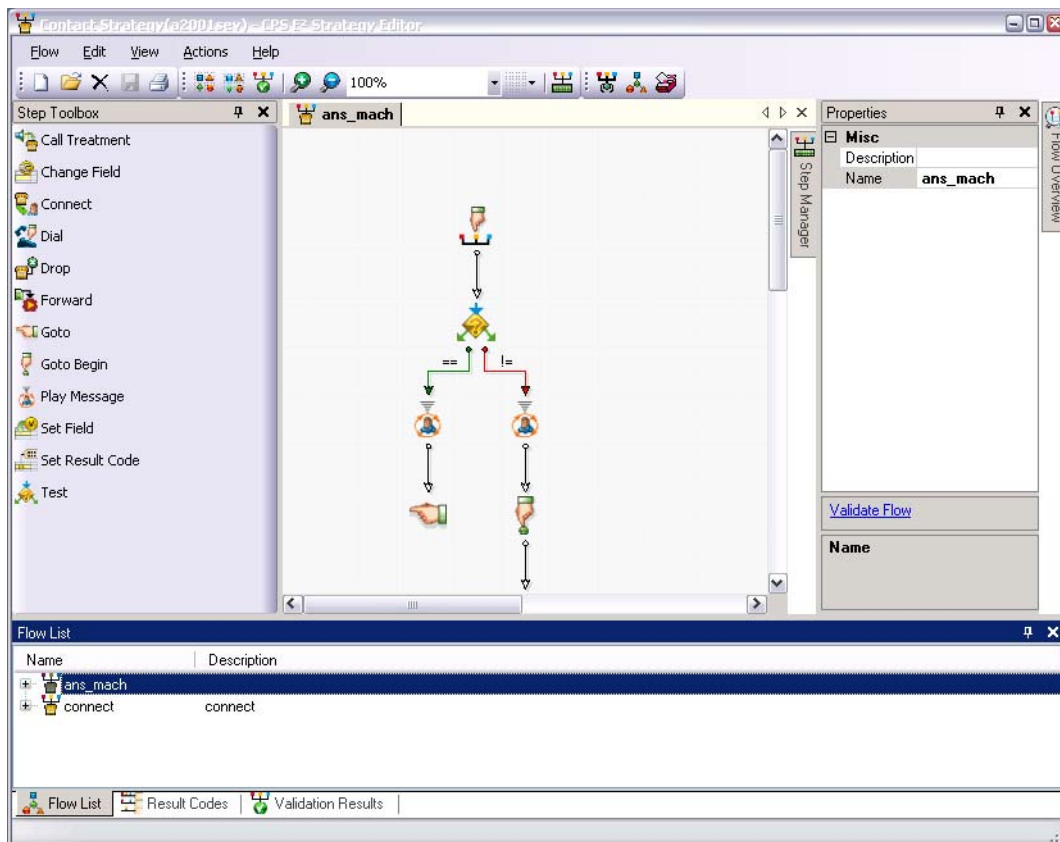


Figure 5-4. Strategy Editor.

Control Functions

This section describes some of the CPS Enterprise Edition control calling functions. Following these descriptions, you'll find a summary listing of all managers and what they do.

Control the Records in a Calling List

You can use the Portfolio Record Format to define the format for all fields in a Portfolio, including raw data (such as a telephone field) and data the Agent will capture on the script (such as a quantity field). To designate which raw data fields will be imported into your Portfolio, use the Import Record Definition.

Control Calling Times

Call Zone Assignment and Call Zone Activity Map lets you control the time that records are called.

Call Zones are Administrator-defined time zones that you can set up within standard time zones. CPS Enterprise Edition allows for as many as 64 Call Zones per Campaign.

With a Call Zone Assignment, you can determine to which call zone a record is assigned. For example, you can specify a state (or area code) so that all records from, say, Connecticut, (or an area code in Connecticut) will be called.

Call Zone Activity Map controls precisely when records in a Call Zone may be dialed. This gives you a great deal of control over dialing times so there's a much better chance of reaching the people you wish to contact.

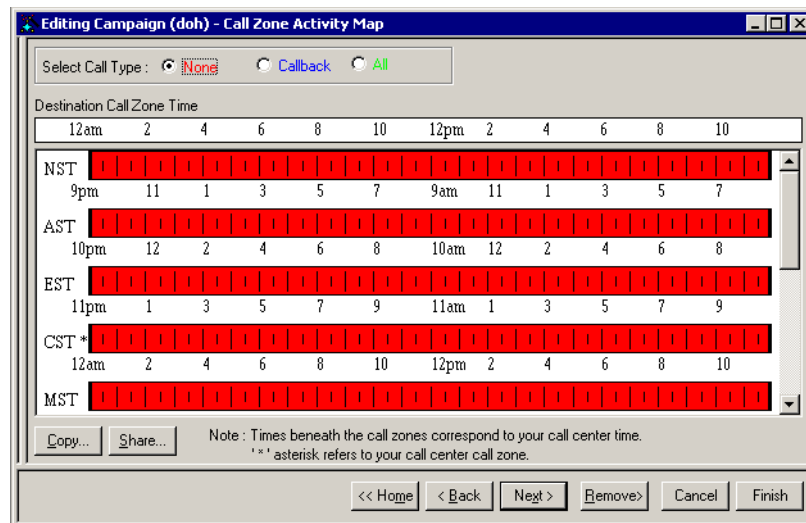


Figure 5-5. Call Zone Activity Map.

Call Zones are assigned a unique name for each Work Session and a time, in hours and minutes, within the base time zone, or local time. As a result, the system has a record of the local time when each connect was made.

There may be multiple Call Zone Activity Maps in the system, but only one per Campaign.

Control Callback Times

When processing a call with standard callbacks, an Agent may schedule an automatic callback at a given telephone number, either at a specific time later in the day, or at a specific time on a later date. When the specified time arrives, the system automatically dials the call.

CPS Enterprise Edition has increased the flexibility of standard callbacks by means of a Callback Control Manager that allows you to specify as many as six different types of callbacks:

Standard Callbacks

Standard callbacks are scheduled redials that are not associated with any Agent. When they are redialed and there is a connect, like any standard connected record, they go to any available Agent.

Enterprise Campaign

For this type of callback, the record will be presented as a preview call. If the initial Agent is not linked to the Campaign from which the record is taken, it will be given to any available Agent on the Campaign.

Private Campaign

For Private Campaign callbacks, the record will be presented as a preview call. If the initial Agent is not linked to the Campaign from which the record is taken, the record waits until that Agent returns to the Campaign.

Enterprise Team

For Enterprise Team callbacks, the record will be presented as a preview call. If the initial Agent is not assigned to the Team from which the Agent scheduled the recall, it will be given to any Agent currently assigned to that Team.

Private Team

For Private Call Group callbacks, the record will be presented as a preview call. If the Agent is not assigned to the Team from which the Agent scheduled the recall, the record waits until that Agent returns to the Team.

Personal

For Personal callbacks, once the call is dialed, the Agent will receive it regardless of which Campaign or Team the record belongs. The record is presented as a preview call.

A Personal callback enables an Agent to “own” an account and get total credit for it.

Control Dialing Parameters

CPS Enterprise Edition allows you to specify parameters governing the dialing process. These parameters can be entered on the Dialing Parameters Manager and can include some or all of the following entries:

Table 5-1: Control Dialing Parameters.

Parameter	Description
Dialing Modes	Predictive, Preview, Progressive, Paced, or Manual dialing mode.
Automatic Answering Machine	The system differentiates between an answering machine and a live voice before connecting the call to an Agent.
Automatic w/ Beep Detection	Enables the CP12000/TSP500 to wait for the answering machine beep before playing a digital announcement.
Timeouts:	

Table 5-1: Control Dialing Parameters.

Parameter	Description
Abandon Calls	Maximum desired number of times a connected call will be disconnected because an Agent is not available to take the call - per 1000 connects.
Answer Machine Timeout	The amount of time, in seconds, allowed before a dial attempt is automatically aborted once it has been determined to be a call received by an answering machine.
Preview Time-out	(Applies to Preview Work Sessions). The maximum number of seconds that a call record is displayed on an Agent's station before a telephone number is automatically dialed.
RNA Ring Count	The desired number of times that a phone will ring before being considered a "no answer." This action is switch dependent.
Answering Machine Ring Count	The number of rings before automatic answering machine detection begins.
Trunk Count	For Agentless Campaigns, the number of trunks the Agentless Campaign will use. The range is 1-999.
Passthrough Processing Options:	
Changed Number/Disconnected Calls	Number has been changed. If it is in the same area code, it is redialed immediately; otherwise, it can go back in the database with the corrected time zone.
Vacant Number Calls	Special information tone encountered when an unassigned number, central office, or station code was dialed.
Reorder Calls	Special information tone encountered when all switching paths or toll trunks are busy, unassigned code dialed, equipment blockages, or incomplete registration of digits at a tandem or toll office.
Busy Calls	Circuit busy, call cannot be put through. Call is automatically rescheduled.
Unknown SIT Calls	Special information tone encountered for an unrecognized number. Call is not rescheduled.

Strategies

Strategies enable you to control exactly what happens to a record from the moment it is dialed to when it is returned to the database. There are three Strategy types: Contact Strategy, Record Strategy, and Recycle Strategy. All of the strategies are defined graphically.

Control Active Calls

A Contact Strategy controls how the system handles a record while the Agent is connected to a party. For example, you can determine if a call should be transferred to another Agent (perhaps for validation), have a pre-recorded message played, or (if it's a refusal) send it back to the database.

Here are some actions you can take on a record using the Contact Strategy:

Table 5-2: Contact Strategy actions.

Action	Description
Dial	Put the current call on hold and dial another number. If no Agents are available, or the maximum required dials are currently in progress, queue the record until it can be dialed.
Connect	Connect the call to the first available Agent in a specified Team or Work Session.
Drop/Hangup	Hang up any trunks associated with the record.

Control Post Processing

A Record Strategy controls what happens to a record after it has been completed and just before it goes back to the dialing database. For example, you can keep a count of dial results and decide what to do with the record. If a record receives, say, five ring-no-answers, it can be returned to the database, not to be called again.

Table 5-3: Record strategy actions.

Action	Description
Test Counter	Compare a result you are counting (for example, Answering Machines or busies) to a given value.
Increment Counter	Increment the result you are counting.
Schedule a Callback	Schedule the record for a callback.
Cycle	Increment the Record Cycle counter, enabling the record to be called again after all fresh records have been dialed.
Reset Counter	Reset the result you are counting to zero.
Find Next Number	For records that contain multiple phone numbers, find the next number that meets the criteria specified in the procedure parameter.
Stop	Stop all dialing for the Campaign. All dials and calls in progress will be allowed to complete normally.
Schedule Redial	Schedule the record to be redialed after a specified time interval has expired.

Table 5-3: Record strategy actions.

Action	Description
Test Timer	Test the result being counted against a specified time period.
Directory Assistance	Modify the current phone number to a directory assistance format

Control Recycling

A Recycle Strategy controls what happens to a record after it has been returned to the dialing database, based on its action result code.

Table 5-4: Recycle strategy actions.

Action	Description
Test Counter	Compare a result you are counting (for example, Answering Machines or Busies) to a given value.
Reset Counter	Reset the result you are counting to zero.
Cycle	Increment the Record Cycle counter, enabling the record to be called again after all fresh records have been dialed.
Schedule a Callback	Schedule the record for a callback.
Schedule Redial	Schedule the record to be redialed after a specified time interval has expired.
Increment	Increment the result you are counting.
Test Action Result Code	Compare a result code in the record with a given value.
Test Timer	Test the result being counted against a specified time period.
Directory Assistance	Modify the current phone number to a directory assistance format to be redialed at a specified time.

Summary of CPS Enterprise Edition Managers

Below is a alphabetized summary of CPS Enterprise Edition Managers with a description of what each manager does. As you create each manager using the Wizard, it is temporarily linked to the previous manager.

Table 5-5: Summary of CPS Enterprise Edition managers.

Manager	Description
Call Script	Determines the script to be selected for the Work Session.
Call Zone Assignment	Defines Call Zones, i.e., regions for calling.
Call Zone Activity Map	Defines activity levels for each Call Zone.
Callback Control	Defines the way in which callbacks are implemented on a system-wide basis.
Selection	Defines individual SQL statements to specify records, based on specific criteria, from the Portfolio to create the Campaign's call records.
Selection Group	Group of selectors that specify the records, based on specific criteria using SQL statements, from the Portfolio to create the Campaign's call records. Selectors are in order of importance by percentage, with the total of all selectors in a group equaling 100.
Team	Links defined users to a specific Team.
Custom Database	Select a database, other than a system Portfolio, to be referenced within a script.
Dial Number List Manager	Creates a secondary list of telephone numbers that may be available to an Agent during a call.
Dialing Parameters	Defines the various settings governing the dialing rates of the switch.
Diligence Export Record Definition	Specifies fields from the Diligence Manager to be extracted and sent to the Diligence export file.
Export Control Definition	Specify fields from the Portfolio to be extracted and sent to an export file.
Import Record Definition	Specifies customer database fields for import into your Portfolio.
Initial Call Screen	Describes fields in the initial call screen.
Local Dictionary	Select customized names for objects on the system.
Contact Strategy	Determines actions to be performed on a record while the call is being processed.

Table 5-5: Summary of CPS Enterprise Edition managers.

Manager	Description
Record Format	Defines all fields (not only those in the customer database) to include in your Portfolio.
Record Strategy	Determines actions to be taken once a call has been processed.
Recycle Strategy	Specify recycle procedures for records that have returned to the Campaign.
Campaign Group	Links multiple Campaigns together which are then dialed in a specified order.
Station Definition	Maps an extension number to a station name, which can then be linked to a switch, ACD, and/or SmartAgent Manager.
Stats Screen	Defines fields that will appear on the (between call) Agent Status screen.
User Record	Defines user name, type, password, skill and authorization level, which can then be linked to a Team.
Campaign Format	Defines the layout of the Campaign database fields for managing the Campaign.

Query Manager

Introduction

Query Manager® is another powerful CPS Enterprise Edition feature that enables you to manage calling lists. Query Manager is based on SQL, a structured query language, and is used to manipulate the CPS Enterprise Edition database.

With Query Manager, you can request the system to select records based on specific criteria. The selected records go into an SQL file.

Using Query Manager

An SQL file can be used to either build a calling list or manage records in a Portfolio or Campaign with outbound.

Build a Calling List

Using Query Manager, you can build a customized calling list by:

- Identifying records from a Portfolio to create a Campaign
- Extracting selected records from a Campaign to further streamline your calling list

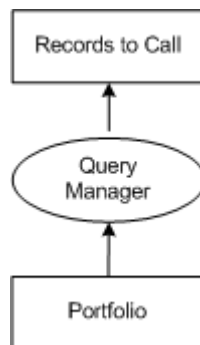


Figure 5-6. Build a Customized Calling List.

Manage a Portfolio/Campaign

Query Manager is also used throughout the system to search for records in order to perform a variety of management functions:

- Edit or delete a Portfolio record or records
- Select records from a Campaign in order to recycle
- Edit a result code
- Select records from a Portfolio to export
- Place selected records on hold

- Edit, delete, or schedule records for a callback
- Edit a Do Not Call list.

Query Manager Interface

The Query Manager window provides step-by-step assistance in creating an expression that specifies which fields you want the system to find. The records with those fields will then be retrieved in order to build or manage your database.

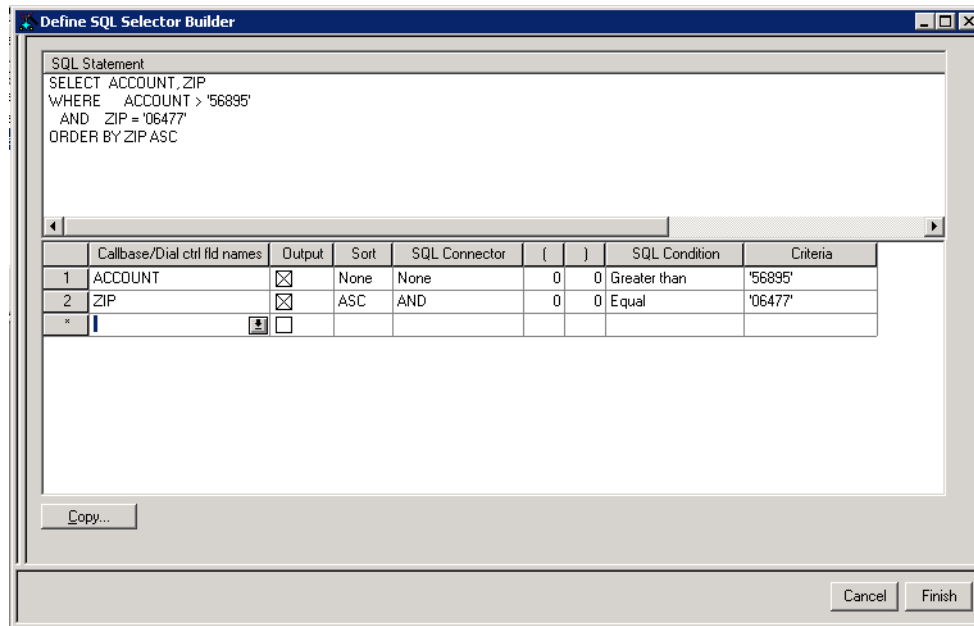


Figure 5-7. Query Manager screen.

The screen (illustrated above) steps you through the selection process by means of the following fields:

- FROM - from what database are you taking the records
- SELECT - select the fields you wish
- WHERE - sets up the query expression that commands the system to find the records whose fields you designate
- ORDER BY - statement that gives you a way to sort the records by field parameters and descending or ascending order.

Enterprise Stats

CPS Enterprise Edition introduces flexibility and efficiency to report creation with Enterprise Stats. Enterprise Stats is a Web-based reporting package for custom and pre-designed reports that precisely detail Campaign, Diligence, and Agent performance. Additionally, you now have the ability to run most reports at three levels: single Selector, Campaign, or Work Session.

Enterprise Stats provides thirteen standard reports that show Campaign, Dialing, Statistics Group, and Agent activity over a user-defined time period.

Groups of one or more reports can be run on demand, at a specified date/time, or at scheduled intervals. You can view reports in a Web browser on the main console display or you can print them.

Each of the standard reports can be fine-tuned to specific contact center requirements. You can determine which report you want, select the data, and the time period over which it will run. Custom reports can be developed using standard or custom statistics.

For reports that you create on a regular basis, you can schedule them to run in the future over a selected period of time using the scheduling feature. This frees up time for other tasks.

CPS Enterprise Stats includes four major components for analyzing and comparing data, the Dashboard, Reports, Alerts and MDS. The Dashboard displays Key Performance Indicators (KPI) to help you to quickly start evaluating calls with a minimal amount of training, in chart or tabular format.

Standard Reports

CPS Enterprise Edition generates the following standard reports:

- Agent Productivity Report
- Agent Time Summary Report
- Campaign Summary Report
- Dialing Report
- Diligence Report by Portfolio and Retrieval
- Diligence Report by phone number)
- Inbound Answer Daily Campaign Report
- Inbound Answer Hourly Campaign Report
- Inbound Answer Distribution Hourly DNIS Report
- Inbound Call Distribution Daily Campaign Report
- Inbound Call Distribution Hourly Campaign Report
- Inbound Call Distribution Hourly DNIS Report
- Management Summary

Table 5-6: Standard Reports.

Report Name	Description
Agent Productivity	Provides general productivity information per Agent.
Agent Time Summary	Provides information on login activity for each Agent.
Campaign Summary Report	Summarizes Campaign activity over a specified period of time.
Dialing	Tracks the results of dial attempts by count and as a percentage of total dial attempts.
Diligence Report by Phone Number	Demonstrates whether “due diligence” was exercised by the caller. Tracks all events that have occurred on a telephone number. Data comes from Event Log, not the statistics database.
Diligence Report by Portfolio and Retrieval Key	Demonstrates whether “due diligence” was exercised by the caller. Tracks all events that have occurred on a given record . Data comes from Event Log, not the statistics database.
Inbound Answer Daily Campaign Report	Provides detail on how inbound calls are being answered.
Inbound Answer Hourly Campaign Report	Provides detail on how inbound calls for a given Campaign are being answered on an hourly basis
Inbound Answer Distribution Hourly DNIS Report	Provides detail in the form of hourly data and then a daily summary on how inbound calls are being answered.
Inbound Call Distribution Daily Campaign Report	Provides detail on how inbound calls for a given Campaign are being distributed.
Inbound Call Distribution Hourly Campaign Report	Provides detail on how inbound calls for a given Campaign are being distributed on an hourly basis
Inbound Call Distribution Hourly DNIS Report	Provides detail on how inbound calls for a given DNIS are being distributed on an hourly basis
Management Summary	Provides a global summary of call center aggregate dialer activity.

Standard KPIs

CPS Enterprise Edition Enterprise Stats includes standard KPIs, from Agent, Campaign, and Queue statistics. Agent KPIs include Agent detail, time, Campaign, custom, drillable icon, and three types of blend stats (inbound and out-

bound). Campaign KPIs include Agent states, time, dialing, consolidated custom, predictive results, and drillable icon. Queue KPIs include Campaign, DNIS, Hourly, Call Distribution, and Answer inbound.

See Also:

[The CPS Enterprise Edition Enterprise Stats User Guide and the CPS Enterprise Edition Enterprise Stats Release Notes for more information.](#)

CPS Enterprise Edition .NET API

The CPS Enterprise Edition .NET API is a comprehensive layered interface that you can use to develop custom Agent interfaces and integrations. It also provides some supervisory functions.

The API object model encapsulates messages and events, providing a simple and easy-to-use user interface. Any environment that supports the .NET framework can use the API objects.

The CPS Enterprise Edition .NET API exposes the following interfaces:

- Agent interactions such as new contact, end contact, telephony functions and data functions.
- Support for the integration of third party call logging solutions. The events and commands make available configurations for direct station tap, remote digital stations, trunk side recording, and VOIP.

Limited supervisory functions including object retrieval, object link, and object unlink.

Precision Answering Machine Detection

The system can determine, during a pre-set analysis period, if a call has been answered by an answering machine by analyzing the detected voice. If there is a period of silence, or “pause length,” the call is considered a live voice. If the voice is continuous with no pause, the call is considered recorded. Both the detection period and pause length are set for the entire system.

The types of answering machine modes include:

- Automatic Answering Machine Detection
- Leave Message to Admin/Beep Detection

Automatic Answering Machine Detection

Only if a call is analyzed as a live voice, is it passed on to an Agent as a connected call. Automatic Answering Machine Detection can be selected per Campaign.

Automatic with Beep Detection

The CP12000/TSP500 waits for the answering machine beep, then plays a digital announcement.

Answering Machine Ring Count

Supervisors can set the number of rings counted before automatic answering machine detection begins when using the Answering Machine Ring Count option. Because after three rings, there is a greater probability that the call will be picked up by an answering machine, a supervisor can set the machine for three rings before answering machine detection begins. As a result, agents will receive fewer calls with answering machine pickups and more calls with live voices.

Dialing Modes

The system supports several different dialing modes for outbound calling.

Outbound

Predictive™ Dialing Mode

With outbound campaigns, CPS Enterprise Edition automatically dials business and home telephone numbers for each Work Session from a computer-provided list of records, called the Campaign. The goals of an outbound Work Session could include, for example, the sale of a particular product or product line, a customer satisfaction survey, a collection of overdue accounts, or requests for donations from university alumni.

Calls are dialed in anticipation of Agents becoming available. For each Campaign, the Supervisor or System Administrator can adjust the rate of dialing so that the system will automatically adapt the dialing rate to variations in the calling environment.

Preview Dialing Mode

With preview Work Sessions, each record is presented to an Agent for review within a time limit. The Agent then determines whether or not to dial. If the time limit is exceeded and no decision is made, the record is automatically dialed.

Progressive Dialing Mode

Progressive dialing mode is a specialized form of predictive dialing that prevents the number of calls in progress from exceeding the number of idle agents. You should use Progressive Dialing when you want a guarantee that no call is abandoned during the time that you are connecting only live connects to agents.

Paced Dialing Mode

As with a preview Work Session, each record is presented to an Agent for review. But in this case, the Agent cannot reject the record. Instead, the call is automatically dialed while the Agent reviews the record.

Manual Dialing Mode

This mode is similar to preview Work Session in that each record is presented to an Agent for review. However, there is no time limit for the review and the Agent must manually dial the telephone number from the record.

Trunk Dialing Mode

A form of Agentless Campaign, dials originate from the trunk continuously. Dialing keeps trunks busy, even if there are no Agents. You can set up the call

to play a message and then drop the call or it can be picked up by an Agent. You must have a Connect Contact Strategy when selecting Trunk mode.

Collections

CPS Enterprise Edition provides a comprehensive management tool for the collections market. The following features, specifically designed for the credit and debt recovery environment, enable contact centers to increase Agent productivity while achieving their delinquency and recovery rates.

Perform Diligence

A Diligence table records all attempts to contact a delinquent account. The table stores vital diligence data such as the name of the debtor, date and time of the attempt, phone name and number, Portfolio, Campaign, Team, Stat Group, and Agent ID for each call placed. This information can be reviewed on a standard Diligence Report or you can create a custom report sorted on the time field.

The Diligence table is created when a Portfolio is created. If a specific record in a Portfolio is deleted, its associated diligence information is deleted. You can also export diligence information by means of a Diligence Export Record Definition.

Skip Trace

Agents can contact as many as twenty numbers within the same client record in order to trace a particular debtor. The Agent can do this in a single Work Session without being interrupted by a new call. The system can also capture any new number and make it a part of the debtor's record. While the Supervisor sets up the dialing order for the numbers attempted, an Agent can choose to override the order to improve productivity. The new number can be dialed immediately and is saved to the Portfolio.

By linking phone numbers from multiple sources, this feature can improve campaign recovery rates.

Directory Assistance

CPS Enterprise Edition provides Directory Assistance campaigns so that if there are no more valid phone numbers for a debtor, the Agent terminates the call with a special result code which converts the phone number to a directory assistance number. This is implemented through a step in the Recycle Strategy that will modify a phone number to a directory assistance format (555-1212). The system will not interrupt the Agent with a new call until s/he has processed the directory assistance call.

Aging

CPS Enterprise Edition allows users to determine and track the number of times a record is dialed. A user can specify the maximum number of dial attempts that are implemented from phone counters on the Record Strategy Manager. This feature allows contact centers to provide documentation

required to comply with legislation that restricts when, where, and how often collectors can contact debtors. Once a record is aged, the system will not attempt to dial the record again.

Multiple Phone Number Management

Multiple Phone Number Management, on a campaign basis, better positions the Agent for correct contact, which is crucial when working in collections. If a record has multiple numbers, you can set the priority for dialing, for example, home, work, and then mobile phone, and you can assign calling times. The Agent can also make adjustments to the phone number in the system, and use other options, such as directory assistance and manual dialing, to connect with a contact. With **Directory Assistance**, if there are no more valid phone numbers for a debtor, the Agent terminates the call with a special result code that converts the phone number to a directory assistance number.

Account Ownership

Due to CPS Enterprise Edition's flexible records assignment capabilities, you can assign specific accounts to Agents with complete ownership. This means that a Agent can be responsible for an account from the beginning and follow it to the end. The single point of contact is especially beneficial for fast and complete resolution of collections issues.

Do Not Call

CPS Enterprise Edition give you the ability to filter selected phone numbers (for example, numbers that the contact center is legally barred from contacting) to prevent them from being dialed. The system maintains a list of do not call records. Each record is checked against a Do Not Call list before being sent to the dialer.

There are several methods for adding or deleting records from the Do Not Call list. You can add or delete records through a batch file, through the Do Not Call menu option on the Supervisor interface, or by selection criteria such as creation date, expiration date or record age. You can also add or delete records by assigning a disposition to a result code that is linked to a Do Not Call procedure on the Record Strategy.

You can display the date that a record was added to the Do Not Call (DNC) list. In some cases, you may want to remove the records based on the amount of time the record has been in the list or to get a report for how long the records have been active.

Phone number filtering helps debt collectors prove compliance with the Fair Debt Collection Practices Act.

As an option, CPS Enterprise Edition also supports **Gryphon DNC**. Gryphon DNC is a Do Not Call implementation that works over the Internet. The Gry-

phon DNC will connect over the Internet to the Gryphon database and perform queries for blocked phone numbers.

A DNC enhancement, required for Disaster Recovery, includes an option for storing data in the **MS SQL Server**. Previously, you could only store data in a proprietary file format. With the new format, you can use standard tools to manipulate the data and you will find that there is a noticeable increase in performance. The increased performance and flexibility provides a more efficient and customizable DNC option for your business needs.

Digital Messaging

This feature allows messages to be played at any time after a call is connected. Digital messaging can be implemented in one of two ways:

- CPS Enterprise Edition system in conjunction with a G3 using the inherent messaging capability of the G3. This configuration requires an ASAI CallVisor server.
- CPS Enterprise Edition system in conjunction with Encore Plus. Encore Plus runs on a standard Microsoft Windows PC and can only be implemented on systems utilizing the CP12000 or TSP500.

Features

CPS Enterprise Edition Digital Messaging provides the following features:

- An Agent can play a message to a contact, then drop the call or transfer the call to another Agent
- An Agent can play a message to an answering machine
- The system can automatically play a message to an answering machine. (The G3 detects an answering machine by voice cadence, then plays a message multiple times; the CP12000 can wait for an answering machine beep before playing a message.)
- The system can automatically play a “front hold message” until an Agent is available to take the call.
- The system can automatically play a Work Session-specific “front main message” to every connected call, then connect the call to an available Agent. *(This is applicable only for the G3)*

With the exception of the front main message, these features can all be implemented based on pre-defined online strategies.

Encore Plus™

Encore Plus is a Microsoft® Windows-based application that records, stores, and downloads voice messages in conjunction with a SER Solutions switch – either a CP12000 or a TSP.

Encore Plus records and stores messages as digital sound files (.wav format). After recording the messages, Encore Plus transfers them to the switch. You can choose to play the messages automatically or Agents can select function keys and script fields.

Encore Plus runs on standard Microsoft Windows™ 2000 or Microsoft Windows XP Professional with the latest service packs. It is compatible with the SER Solutions Call Processing System (CPS).

A summary of Encore features includes:

- Remote access of Encore Plus using a client to employ Encore Plus features
- Multiple connection options, including CP12000 with IP-based VPB and TSP500.
- Ability to manage up to 64 messages.
- Automatic management of the disposition of calls by the CPS Enterprise Edition. Agents can stay on the line to resume conversation or the call can be disconnected or transferred to another Agent.
- Ability to play messages to answering machines.

CPS Enterprise Edition determines the disposition of the call when the message is played based on a previously defined Contact Strategy. Agents can stay on the line to resume conversation or the call can be disconnected or transferred to any other available Agent.

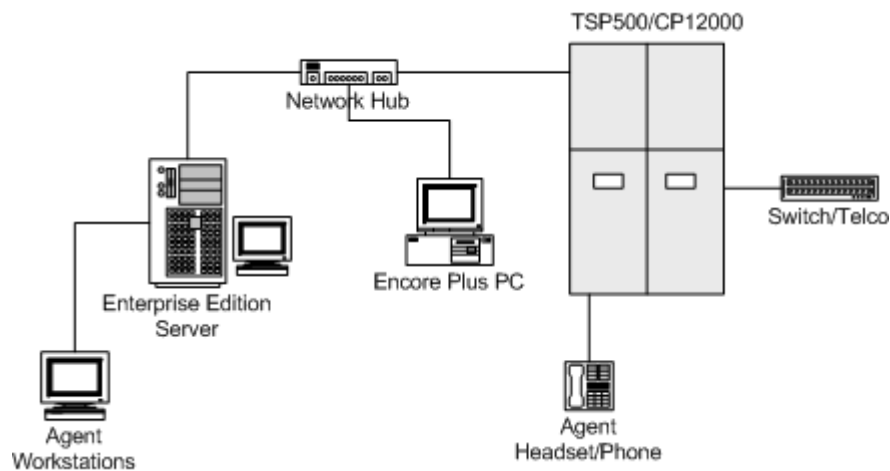


Figure 5-8. Encore Plus Configuration.

Additional Software Features

Security Features

For security purposes, you can have a login to the CPS Enterprise Edition application. With some minor configurations, you can set up the application to automatically recognize a login in one of four ways:

- You can configure the application to require a specific name and password.
- You can configure the application to use an environment variable to locate the username of the person who logs into the PC that is running the application. This would eliminate the need for the user to type their name whenever starting the program.
- SER technical support can configure an option to login using the PC user name and/or using the host computer name as the station name. When a user logs in, the name that they logged in with must be the Windows login name.

Disaster Recovery

If you have a multi-site system, in the event of a catastrophic loss of a master node, you can now reconfigure your system back to online status using a secondary node on another site, assuming it has the required hardware. The configured system will perform at a reduced capacity, without the original master node and with a minimal loss of dialing data, within thirty minutes.

The list of data that will be recovered includes:

- Dialing databases
- Statistics Database
- System Configurations
- DNC Database (Requires SqlDNC)

This feature provides a fast and secure backup plan in the event of a master node failure, with little business interruption.

Campaign Groups

Campaign Group is a CPS Enterprise Edition feature that helps expedite call processing. While only one Campaign can be linked to a Work Session, multiple Campaigns can be linked to a Campaign Group. Therefore, Campaign Groups can effectively process many small Campaigns, keeping Agents and contact centers productive.

To use a Campaign Group, you would first assign campaigns to a Campaign Group and give it its own distinct Campaign Group name. Once assigned to a Campaign Group, Campaigns are processed in a designated sequence - the first Campaign is processed, then the second, and so on. When all Campaigns

are complete, the Campaign Group will begin with the first Campaign again to recycle the lists until the Campaign Group has cycled through the maximum number of times.

Send, Receive Notes

CPS Enterprise Edition contains a feature that enables users to communicate with each other. Messages can be sent on-line between Agents and Supervisors/System Administrators in the following way:

- Agents can send messages to their Supervisors (but not to other Agents)
- Supervisors and System Administrators can send messages to one particular Agent or Supervisor, or to a group of Agents or Supervisors.
- Agent and Supervisors/System Administrators can assign a message as normal or high priority.

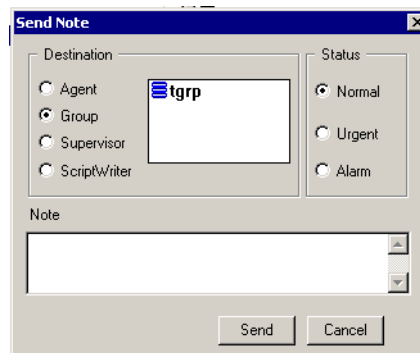


Figure 5-9. Notes Sample Screen.

Event Log

Each and every event that occurs on CPS Enterprise Edition can be recorded into an Event Log file. Event Logs are generated on a daily basis using a CPS Enterprise Edition relational database.

You can examine the values of all fields in an Event Log. For example, you'll be able to find the time an event took place or look up a record in a given Portfolio and pull out, say, the dollar amount from that record.

What's more, since each event is recorded with an event-time and the time elapsed from the previous event, you can determine how long a Work Session took place, or how long an Agent was on a call.

When setting up your system, SER Solutions can customize the fields in an Event Log, thereby omitting fields that may not be relevant to your needs.

Validation

The Validation option on CPS Enterprise Edition enables an Agent to send a call to a Validator in order to confirm a sale or agreement or provide additional information before completing a transaction. The Validation process can be either immediate or delayed:

Immediate

- the Agent dials the Validator's station and the call and call record are immediately transferred. The Agent is then free to take another call.

Delayed

- the Agent terminates the call that is transferred to a callback queue for callback to a Validator. The Agent is then free to take another call.

Validators are assigned to a special Validation Campaign designed specifically to handle validation calls.

Do Not Call List

The CPS Enterprise Edition system can maintain a list of records that should not be called. Before a record is selected for dialing, CPS Enterprise Edition checks all phone numbers or primary keys against the Do Not Call list. If there is a match, the record will not be dialed.

Help

CPS Enterprise Edition Help consists of online Help in.pdf format. You can do an index search for items, or search individual topics.

Monitoring

Any Supervisor or Team Leader, designated as a Monitor, can silently monitor the audio and visual parts of a call that is being handled by an outbound Agent.

Throughout the call, the Monitor hears both Agent and his or her contact, views the same screen, and is able to view any keystrokes made by the Agent.

By monitoring an Agent, a Supervisor or Team Leader is able to evaluate performance and be in a position to coach an Agent towards greater productivity.

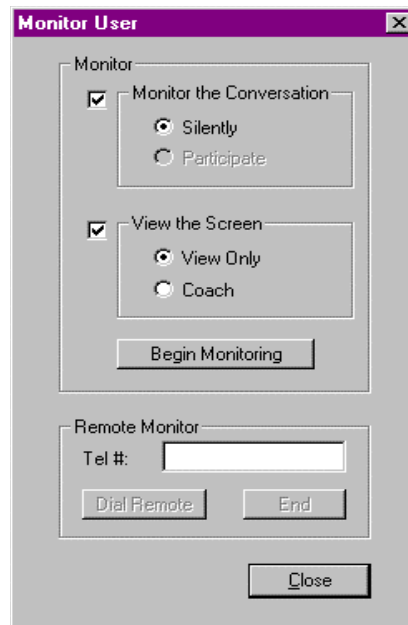


Figure 5-10. Monitor a User.

Advantages of CPS Enterprise Edition

Software was Designed as a Tool

CPS Enterprise Edition was designed as both a system and a tool. By so doing, application development is performed, not only by SER Solutions, but by you, the customer.

Easy Manipulation of Building Blocks (Objects)

Portfolio, Campaigns, Teams, and Work Sessions enable you to manipulate details of the call processing procedure as groups, rather than as individual units. For example, instead of assigning an individual Agent to a specific Work Session, you can assign a group of Agents to a Team and then assign that Team to a Work Session.

Wizard Design Panels

Wizard panels help you create a Work Session quickly and efficiently. All available details of an object are displayed on Wizard summary panels.

Control of Team Contacts

Supervisors know exactly which people Agents will be speaking with since they have control over the assignments of Teams and Campaigns to Work Sessions.

Even if your system configuration contains more than one switch, Agents associated with different switches can be working from the same Campaign.

Campaign Management

Query Manager enables you to create customized Campaigns according to the market you wish to reach. For example, you may want to specify a Campaign of people exclusively from Connecticut who are between the ages of 25 and 35. You can define your Campaign by any criteria you wish in order to conform to your company objectives.

Software Summary Flowcharts

Figure 5-11 displays the interrelationship between the comprehensive software details of CPS Enterprise Edition. Figure 5-12 shows a “real-life” example of how those details operate.

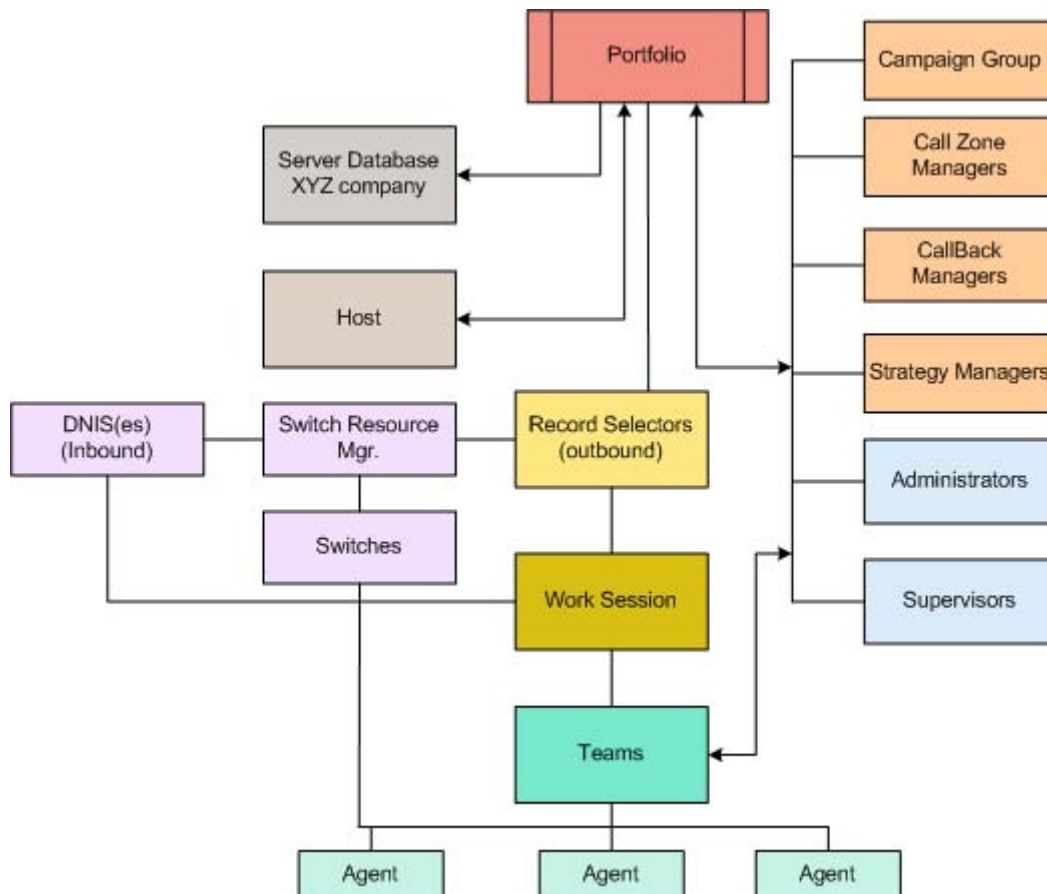


Figure 5-11. Interrelationship of CPS Enterprise Edition details.

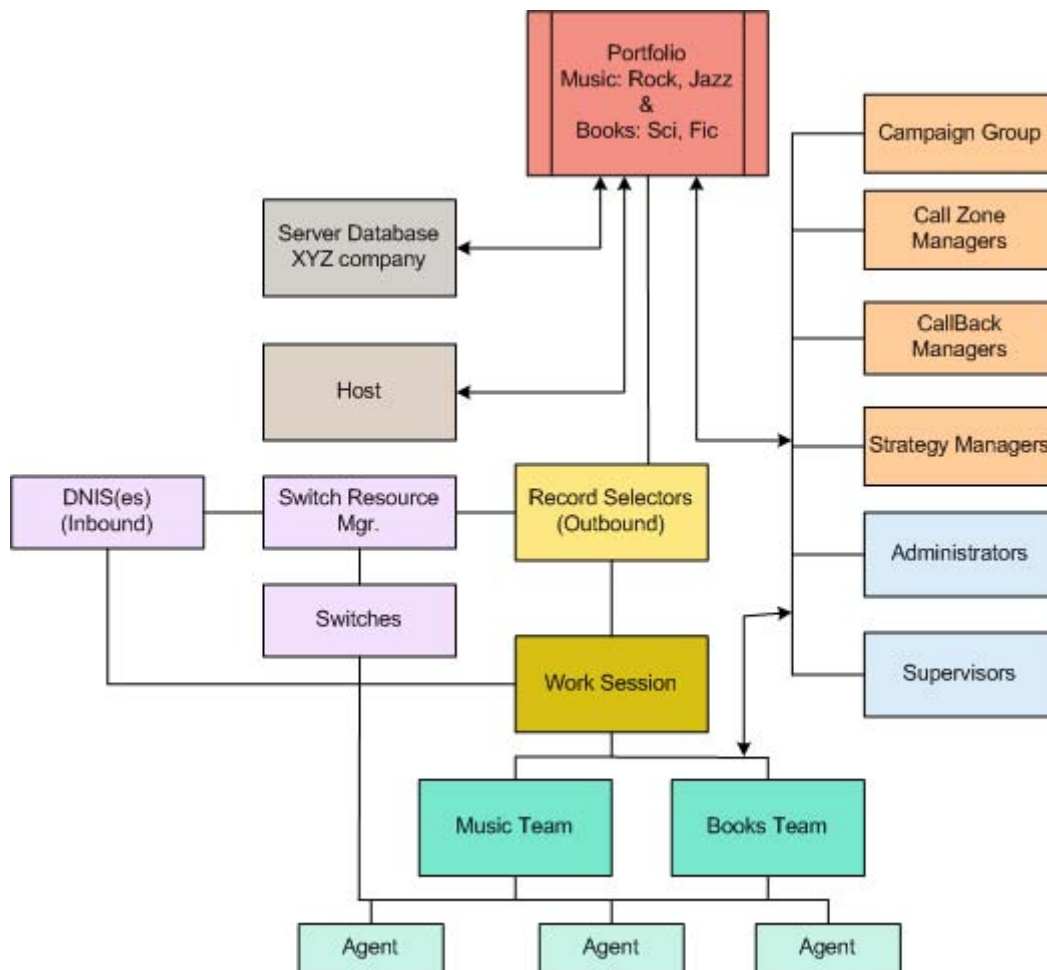


Figure 5-12. CPS Enterprise Edition Functional Operation Example.

Functional Operation Example

- XYZ Company represents the main database
- XYZ Company's main database is imported and formatted to become two CPS Enterprise Edition Portfolios: "Music" and "Books".
- The Portfolios are segmented (using Query Manager)
 - The Music Portfolio becomes "Rock" and "Jazz."
 - The Book Portfolio becomes "Sci Fi" and "Fiction."
- Selectors dynamically select records for dialing.
- Dialing parameters are set up for the switch resource manager located on the server.
- Call Zone events are defined within 64 possible time zones.
- Callback parameters are set up indicating how calls are to be returned
- Additional Strategies are defined as well as a Result Code Manager that is associated with the script.
- Agent workstations are grouped into logical Teams for inbound and outbound calls for "Music" and "Books".

- Campaigns and Teams are linked together to create an actual dialing Work Session.

Chapter 6 User Tasks

This chapter identifies the key people who operate the CPS Enterprise Edition call processing system and describes their tasks.

It includes the following sections:

- Overview of CPS Enterprise Edition Personnel
- Security
- System Administrator Tasks
- Agent Tasks
- Supervisor Tasks
- Team Leader Tasks
- Monitoring Tasks
- Script Writer Tasks

Overview of CPS Enterprise Edition Personnel

The following is a brief overview of CPS Enterprise Edition personnel. In a large calling center, there may be people who serve in each of these capacities. In smaller centers, the likelihood is that several jobs will be performed by one individual.

Agents

Agents are those people who speak with contacts over the phone. These people may be called telemarketers, service representatives, fund raisers, sales associates, collection representatives, or customer service reps. For purposes of this task description, they are referred to as Agents. On the other side of the phone calls are the people your Agents are trying to reach - your contacts, or potential contacts. The primary purpose of CPS Enterprise Edition is to connect Agents with their contacts as quickly and efficiently as possible. By increasing efficiency, Agents can be more productive.

System Administrators

These are the top managers of your contact centers, the people who handle the high level aspects of running a CPS Enterprise Edition system. Your System Administrator can perform all system maintenance such as a system backup, etc., and set parameters that affect every aspect of your calling operation. In addition, the System Administrator controls all resources, including Teams, Campaigns, Work Sessions, and switches.

Supervisors

A Supervisor's primary task is to manage the daily functions of a contact center. These tasks include managing statistics and reports, assigning Agents to Teams, assigning Teams to Work Sessions, assigning Campaigns to Work Sessions, managing Campaign records, managing Work Sessions, and monitoring each Team's progress.

Team Leaders

Team Leaders perform many of the same management tasks as a Supervisor. However, their access to CPS Enterprise Edition functions is somewhat limited. For example, they cannot configure systems nor run reports and they have some restrictions regarding recycling and restoring Campaigns as well as editing Campaign records.

Monitors

Anyone designated as a Supervisor, Monitor, or Team Leader can monitor a user. This feature is helpful in overseeing Agent productivity, and in coaching for better performance.

Hardware capacity will determine the maximum number of monitors on a system.

Script Writers

Script Writers are responsible for creating text that will be displayed on an Agent's screen. Scripts tailor messages to prospective contacts and suggest responses to any anticipated questions or objections. A Script Writer cannot serve as an Agent and take calls.

Security

Server software differentiates the requests coming from different client workstations and determines whether each person or station has the right to receive the requested data or service.

CPS Enterprise Edition limits network activity to authorized personnel by means of passwords.

Each user is assigned an authorization level. Upon login, only those functions that are assigned to the user can be accessed.

Login

At their workstations, users identify themselves to the CPS Enterprise Edition system by names and passwords.

Separate logins identify each category of CPS Enterprise Edition user: Agents, Supervisors, System Administrators, Script Writers, and Monitors.

Agent Tasks

For outbound Work Sessions, once Agents log into CPS Enterprise Edition, they identify their Team and notify the system that they are ready to handle calls. CPS Enterprise Edition begins to dial calls on their behalf.

With predictive dialing Work Sessions, Agents receive only answered calls. Once a call has been answered, the system connects the answered call to an available Agent workstation within one second, under normal conditions, often before the contact finishes saying “Hello”. In most cases, the contact cannot detect that the call was dialed by a computer.

The system distinguishes between answers, busies, ring-no-answers, and network intercepts or failures and responds appropriately in each case. It automatically redials busy and unanswered calls at intervals set by the System Administrator or Supervisor.

With preview calling, Agents see a call record before the number is dialed and can choose to have the system make the call or bypass the record and go to the next one. With callbacks, the call that is scheduled for an Agent, Team, or Campaign is dialed at the appropriate time and directed to the designated user.

Agent operations are accomplished by using a mouse to point and click. But Agents can also type information into data fields on the computer screen. Of course, some fields are protected and cannot be changed and some fields have values that are computed on the basis of other fields or on the basis of statistics that have been collected on the Agent’s performance or the progress of the Work Session. Individual values are validated as they are entered and cross-field validation is done when the Agent completes work on the current call and indicates that the Agent is ready to take another call.

Transfer Calls

Agents can transfer calls in an outbound Work Session to any of the following:

- an external number
- anyone in a specified Team
- anyone in a specified Work Session or campaign
- any individual Agent or Supervisor (if the Supervisor is logged in with an Agent ID)

This feature can be initiated manually or automatically. Call transfer is particularly useful if:

- in a sales environment, Agents may need to transfer a call to verifiers in order to verify that a sale has been made.

- someone may call the center and wish to speak to an Agent whom they spoke with during a prior call. The Agent can then transfer the call to the original Agent.

Once an Agent initiates a call transfer, the party is placed on hold. This allows the Agent to discuss the situation with, say, a Supervisor, to whom the contact is being transferred. If that person accepts the call, the system transfers the call.

The system also transfers screen information and the person who accepted the transfer can continue to enter local data. If the transfer is not accepted, either party can cancel the transfer, and the Agent that originally handled the call is reconnected to the called party.

Once a call is transferred, the Agent becomes available for the next call.

Conference Calls

Conference calls mean that a third party can participate in the Agent's current call. Third parties for an outbound Work Session can include:

- an external number (for example, a service bureau)
- anyone in a specified Team
- anyone in a specified Work Session or campaign
- any individual Agent or Supervisor

The need for conferencing a call may occur if, for example, a contact has questions or problems best handled by a third person while the Agent remains on the phone.

The screen data remains on the Agent's screen and only participants on the Agent's originating switch can be included in the conference call.

Schedule Automatic Callbacks

During call processing, an Agent may schedule an automatic callback at a specific telephone number, and at a specific time later in the day, or at a later date. When the appointed time arrives, CPS Enterprise Edition automatically assigns the call to an Agent depending upon the type of callback. If no Agent is available, then the call is marked as overdue and goes into a queue, to be dialed according to callback specifications.

The System Administrator can reschedule callbacks or cancel them.

System Administrator Tasks

The System Administrator is responsible for defining all resources including Portfolios, Campaigns, Teams, Work Sessions, users, and switches.

The following is a list of outbound tasks that might normally be performed by a System Administrator:

Campaigns with Outbound Tasks

The System Administrator downloads raw data from a tape or floppy, or from the host to the Windows server using FTP, Telnet, or another method. The data can be defined in a post-download procedure whereby fields can be removed, if desired.

The System Administrator defines a Portfolio by performing the following tasks:

- Define the Portfolio, defining its location, fields and record structure. Then, the administrator names the Portfolio, and imports the data to create a new Portfolio, or adds records to an existing Portfolio.
- Create user-defined Action Result Codes that assign customized result codes to completed calls such as sale, refusal, maybe, etc.
- Define Import and Export Record Definition for records.
- Define Diligence Export Record Definition (optional) for collections.

The System Administrator then creates a Campaign by performing the following tasks:

- Create a Campaign SQL File which will set up the criteria to select records for the Campaign
- Select a predefined Portfolio for the Campaign
- Define the format for the Campaign database
- Define the fields to be extracted for the Campaign database
- Define the End Call Data list (optional)
- Define the selector group, which is a group of SQL statements that select records using specific instructions.
- Select the selector group.

The System Administrator also must configure some additional Campaign details that will eventually be needed in order to run an outbound Work Session. For example:

- Define the dialing parameters that control the way in which the system handles dial attempts
- Specify actions to be performed on a record while the call is being processed
- Specify actions to be performed on a record after the call has been processed

- Specify calling activity for a given Call Zone
- Define how callbacks are performed

The System Administrator also designates the following presentation details for the Campaign:

- Initial Call Screen (created with ScriptVision)
- Call Script (created with CPS Enterprise Edition ScriptVision or CPS Enterprise Edition VisualScriptor)

The System Administrator then designates the Users/Agents who will comprise a Team by specifying their IDs, password, whether they are SmartAgents, etc. and then creates a Team by assigning users to the group.

The System Administrator then creates a Work Session by naming it, and linking a Team and Campaign to the Work Session. Also, creates a Campaign Group (a group of Campaigns that will be processed in a given order).

For outbound dialing, the System Administrator specifies the switch to be used. Stations are then defined and linked to the switch.

The System Administrator can use the Report interface in order to create, configure, and run reports.

For Post Processing, the System Administrator can

- Select a Statistic Group.
- Specify recycle procedures for records returned to the Campaign's database.

In addition to the above steps, the System Administrator can edit records from Teams and Campaigns, send notes to any user on the system, and has final authority to:

- Detect and correct system errors
- Perform system maintenance
- Monitor system status and resource utilization by means of event logs
- Perform shutdown procedures
- Perform system maintenance such as backups, recovery, diagnostics, etc.

Optional Components

Some additional components are helpful in gathering and updating statistics, but are not required:

- Recycle Strategy
- Call Script
- Custom Stat Strategy
- End Call Data List

- Enterprise Statistics
- Stat Group
- You can also, optionally, specify a Dial Number List or Dial Number Exclusion List that provides the Agent with selected numbers to call or exclude.

Supervisor Tasks

The Supervisor is primarily responsible for managing CPS Enterprise Edition's day-to-day operation. This means monitoring reports and statistics and maintaining Portfolios, Campaigns, Teams, and Work Sessions.

The following is a list of tasks that might normally be performed by a Supervisor on a daily basis:

System Startup

- Login Procedure

Manage a Work Session

- Link/Unlink Work Session details
- Start a Work Session
- Suspend the Work Session
- Resume the Work Session
- Stop the Work Session
- Abort a Work Session
- Transition a Work Session

Manage a Campaign

- Link/Unlink Campaign details
- Recycle a Campaign
- Restore a Campaign (if the database is damaged)
- Edit a Campaign record
- Hold a Campaign record
- Edit callback options for a Campaign record
- Edit Result Code for a Campaign record
- Display Campaign Counts
- Sort a Campaign

Reports

- Create, run reports and graphs

Manage Users

- Define Users
- Edit User information
- Delete a User
- Link/Unlink a User
- Force Logout

Manage Teams (for outbound only)

- Create Teams

- Modify Teams
- Delete Teams
- Link/Unlink Teams
- Show Active Users

Work with CPS Enterprise Edition Managers and Controls

- Call Zone Activity Map
- Dial Number List
- Dialing Parameters Manager
- Campaign Group

Other Procedures

- Monitor Users
- Send and receive notes
- Implement Do Not Call function

System Shutdown

- Log Out of CPS Enterprise Edition

Team Leader Tasks

The Team Leader is responsible, in a more limited way than the Supervisor, for managing CPS Enterprise Edition's day-to-day operation. Basically, the Team Leader oversees Work Sessions, creates and assigns users to Teams, and assigns Teams to outbound Work Sessions.

Below is a list of operating tasks that a Team Leader might normally perform; some are essential, some are optional.

System Startup

- Login Procedure

Manage a Work Session

- Start a Work Session
- Suspend the Work Session
- Resume the Work Session
- Stop the Work Session
- Abort a Work Session
- Transition a Work Session

Manage a Campaign

- Hold a Campaign record
- Edit callback options for a Campaign record
- Display Campaign Counts

Manage Users

- Define Users
- Edit User information
- Delete a User
- Link/Unlink a User
- Force Logout

Manage Teams

- Create Teams
- Modify Teams
- Delete Teams
- Link/Unlink Teams
- Show Active Users

Work with CPS Enterprise Edition objects

- Call Zone Activity Map (can only edit)

Other Procedures

- Monitor Users
- Send and receive notes

Monitoring Tasks

On a CPS Enterprise Edition system, a Monitor can either participate in, or listen undetected to, a user's conversation. A Monitor can also view the user's screen passively, or actively enter data while an Agent watches the Monitor's activity on their screen.

In addition, a Remote Monitoring feature enables a Monitor to initiate a call to an external third party, select a local Agent to monitor, then listen (along with the third party) as the Agent talks to the contact.

Switch Dependency

The switch determines the specific monitoring functionality for the auditory detail.

- With a CP12000 and TSP500, voice is available directly from the CPS Enterprise Edition Supervisor function selection. The Supervisor is automatically connected to the voice monitoring at the same time that the data for the Agent being monitored is displayed.
- With an Avaya G3, voice is available through the "Service Observer" feature on the Avaya G3. Consult Avaya for proper operation.

Script Writer Tasks

The Script Writer is responsible for creating three elements of a script:

- an Agent's initial startup screen with its call record format
- a multi-page Call Script containing dialogue and fields. Call Scripts are associated with a system Portfolio.
- status screens that summarize Agent activity and appear between calls.

A script can range in complexity - from simple one page presentations to very sophisticated presentations with elaborate branching.

The Script Writer can create and place fields exactly as the Agent will see them, display calculations, and establish trees for branching. Trees evaluate a condition, then, based on the result, go to the next branch.

The Script Writer can also test the script to make sure it runs in a smooth and logical progression.

Chapter 7 Documentation

This section includes information about different elements of customer support, including the following:

- Documentation

Documentation

This section describes available documentation. The following documentation is available to system users:

The CPS Enterprise Edition Product Overview (this document) provides an overview of the system including capabilities, architecture, configurations, hardware, software, and specifications.

The CPS Enterprise Edition Release notes is a high level overview of the software, including a list of the features, requirements, and problems addressed.

The CPS Enterprise Edition Client Installation Guide provides information on installing software on client workstations.

The CPS Enterprise Edition System Administrator Guide provides a comprehensive description of the CPS Enterprise Edition system, the roles and duties of System Administrators, and the underlying tasks necessary to complete those duties. The individual procedures that make up each user task are described.

The CPS Enterprise Edition Supervisor Guide provides a comprehensive description of the roles and duties of Supervisors, and the underlying tasks necessary to complete those duties. The individual procedures that make up each user task are described.

The CPS Enterprise Edition Site Preparation Guide assists the customer in preparing for installation of a CPS Enterprise Edition system.

The CPS Enterprise Edition Digital Messaging User Guide assists the customer in implementing digital messaging on either a G3 or Encore Plus with the switch.

The Enterprise Stats User Guide assists the customer in using CPS Enterprise Edition's Web-based reporting software.

The CPS Enterprise Edition Database Reference Guide CPS Enterprise Edition uses the industry standard Microsoft SQL Server Database to store calling records and system statistics. This document describes the organization of the databases.

All of the guides come in an online PDF format including hypertext links. The guides can be printed or viewed on a PC from a CD that accompanies your system.

Chapter 8 Glossary

This chapter defines technical terms and acronyms used in this document as an aid to understanding CPS Enterprise Edition.

Abandoned	An answered dial which was hung up because no resources were available to handle it.
Agent	An Agent makes presentations over the phone to contacts. They may be referred to as telemarketers, service representatives, fund-raisers, sales associates, collection representatives, or customer service reps.
Agentless Campaigns	Agentless campaigns provide the ability to dial calls without the need for an agent. When an agentless call connects, control of the contact is transferred to an online strategy. The online strategy can perform all strategy operations, including playing messages.
Aging	Aging defines when a record is no longer available for use. This is determined by date or by number of attempts.
ANI	Automatic Number Identification. Refers to the number the caller used to telephone the contact center.
Answered Dial	A dial result that indicates a voice was detected after a number was dialed. The results in this category are: Abandoned, Connect, and Answering Machine.
Answering Machine Detection (<i>Precision</i>[™])	Dialing Work Sessions/campaigns that are designed to detect and filter answering machines.
Busy	A dial result in which the system detects a busy signal on the trunk.
Call	A call starts when an answered dial is connected to an Agent and ends when the associated record is returned to the Portfolio.
Call Zone Activity Map	Defines the valid times to call within a calling region. For example, Call Zone 1: 9 AM-5 PM, Call Zone 2: 8 AM-9 PM, etc. Call Zone Activity Maps can be linked to Campaigns.
Callback	A record is scheduled for redial at a later date once the connect is completed.
CallScript	The screen formats and data entry fields that appear on an Agent's screen. A CallScript is used to process a call.

Campaign	A subset of records in a Portfolio. A Campaign is created by selecting records based on criteria specified by a Supervisor. Multiple Campaigns may exist for a single Portfolio, but a Campaign may only contain records from one Portfolio.
Campaign Definition	Manager that defines the layout of the call record. Each entry specifies field name, data type and length. The order of entries in the manager determines the order of the fields in the record.
Client	The person to whom an Agent is talking during a call.
Collected Digits	A credit card or account number that was keyed in by the client and collected by the VRU (Voice Response Unit) prior to the Agent getting the call.
Complete	A connected call that received a result which indicates no further processing is required for the associated record.
Connect	An answered dial that was connected to an available Agent. Once the connect has taken place, it is referred to as a call.
Contact Strategy	Strategy that defines the sequential processing to be performed on records during the operation of the system. Strategies are linked to Campaigns. For example, connect to user, play pre-recorded message, dial current number, return to database.
Contacts	An answered dial that was connected to an available Agent, and received either a positive or negative result.
Conversion	An answered dial that was connected to an available Agent and received a positive result such as a sale or a pledge.
DDE	(Dynamic Data Exchange) Windows standard that allows database interconnectivity. When two or more programs that support DDE are running simultaneously, they can exchange information and commands.
Dial Number List	A list of additional numbers that an Agent can dial while on a call with a customer. That number can be used for transferring the call, conferencing, or to handle credit card verification, sales verification, etc.
Dial Result	The result of a dial attempt as determined by the system. Results are grouped into answered and unanswered dials.
Dialing Parameters	Parameters related to the dialing of records. Parameters include abandon rate, Agent rest time, RNA detection period, answering machine detection. Dialing parameters may be linked to Campaigns.

Directory Assistance	Directory Assistance function move records for which no valid phone numbers were found into directory assistance Work Sessions. Users can also take data and convert the existing telephone number to a directory assistance number (555 prefix).
DLL	(Data Link Library). A feature of OS/2 and Windows that allows executable code modules to be loaded on demand and linked at run time. This enables integration of third party products and application extensibility.
Encore Plus	An (optional) automated digital message record and playback system used with the switch.
Event Log	A record of call results based on specified disposition fields.
Export File	An ASCII data file with fixed length fields that may or may not have a dBASE III header.
Group	A collection of objects. There are two types of groups: Campaign Group A Campaign Group contains a set of Campaigns and it is linked to a Work Session. When a campaign becomes unproductive, the system automatically transitions to another campaign. Team A set of Agents who are to handle calls.
Host	A computer system external to CPS Enterprise Edition that can operate independently. A host is connected to CPS Enterprise Edition by a communications link such as a serial line or a Local Area Network.
Import File	Either an ASCII text file with fixed length fields or a dBASE formatted file. Import files must be a hard disk file before being imported.
Initial Call Screen Definition	Contains the definition for the display of data on the initial call screen.
Intercept	Incomplete dial normally preceded by a unique set of three tones which identify the following type of intercept: • Changed number • Number is out of service • Telephone network is too busy to handle calls • Unknown number
Local Portfolio	A Portfolio that can be accessed directly through the CPS Enterprise Edition system regardless of whether it physically resides on the CPS Enterprise Edition server or on a host system.

Local Terminology Definition Table	A list of generic names for selected items and an equivalent term.
Master Object Database (dbMOD)	This is a file that contains an entry for every element within the system. It is used to control the linking of objects.
Monitor	Monitors can listen to conversations between Agents and contacts in order to insure quality interaction.
Non-Connect	Any dial result (such as abandoned or unanswered dials) other than a connect.
ODBC	(Open Database Connectivity) Microsoft's strategic interface for accessing data in a heterogeneous environment of relational and non-relational database management systems.
OLE	(Object Linking and Embedding) Enables customers to create their own applications that work in conjunction with CPS Enterprise Edition properties and methods.
Overdue Callback	A callback whose scheduled redial data/time has passed.
Portfolio	Database of client records. Each record contains at least one telephone number.
Portfolio Record Format	Specifications for the exact format of a record in the Portfolio.
Progressive Dialing Mode	A specialized form of predictive dialing that prevents the number of calls in progress from exceeding the number of idle agents. You should use Progressive Dialing when you want a guarantee that no call is abandoned during the time that you are connecting only live connects to agents.
Query Manager	An SER Solutions program, based on Structured Query Language, that performs selection criteria searches.
Record Strategy	Strategy that defines the sequential processing to be performed on records once they are returned to the database. Record Strategies are linked to Campaigns. For example, Mark record as done, increment result counter, schedule for redial.
Remote Portfolio	Portfolio that resides on a host system and cannot be accessed directly through CPS Enterprise Edition.
RNA - Ring-No-Answer	Ringling is detected and it continues to ring at regular intervals, for a defined length of time without interruption.
Script Writer	Script Writers are responsible for creating text that will be displayed on an Agent's screen.
Scripting	The formatting and display of data on an Agent's screen and the handling of all Agent input.

Selection Criteria	Expressions that include a data field name, a mathematical operator and a comparison value. This expression is used to locate call records that contain the specified data field name.
Selection	Defines individual SQL statements to specify records, based on specific criteria, from the Portfolio to create the Campaign's call records.
Selection Group	Group of selectors that specify the records, based on specific criteria using SQL statements, from the Portfolio to create the Campaign's call records. Selectors are in order of importance by percentage, with the total of all selectors in a group equaling 100.
SIP	Switch Interface Process. Provides an abstraction layer between the Switch Resource Manager and the various switches that can be connected to CPS Enterprise Edition.
Skip Trace	Skip Tracing is the ability to contact a series of references related to a particular debtor.
Station	A PC that has a unique ID.
Supervisors	Supervisors manage the daily functions of a contact center such as setting up Teams, assigning Campaigns to Work Sessions, managing reports, etc.
Switch	The hardware and software that handles the trunk lines and stations, dials telephone numbers, and determines dial results.
Switch Resource Manager	Switch Resource Manager is software that manages the interface between the server, a switch, and the client software.
System Administrator	System Administrators handle the high level functions of running a CPS Enterprise Edition system. They can perform all system configuration, management, and maintenance tasks.
TTS (Text-To-Speech)	The Text to Speech (TTS) feature in the PLAY strategy provides the ability to play an Encore message, display text message or a portfolio field, or play a .wav file.
Team	A group of users assigned to process calls.
Team Leaders	Team Leaders perform many of the same management tasks as Supervisors, however, their access to CPS Enterprise Edition functions is somewhat limited. For example, they cannot configure systems nor run reports and they have some restrictions regarding recycling and restoring Campaigns as well as editing Campaign records.

Unanswered Dial

A dial result that indicates no voice response was detected after a number was dialed. The results in this category can include busy, intercept, and ring-no-answer.

Work Session

A calling project for outbound dialing that has a Portfolio, Campaign, CallScript, Users and Teams linked to it.

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