

# **Administering Avaya Proactive Contact**

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# **Chapter 1: Introduction**

### **Purpose**

This document contains information about how to perform Proactive Contact administration tasks including how to use management tools, how the manage data and security, an how to perform periodic maintenance tasks. The document also provides detailed information about the operation of the Proactive Contact system through the Linux-based menu system.

This document is intended for people who perform Proactive Contact system administration tasks such as backing up and restoring data and managing users. Users include system supervisors, system administrators, integration consultants, application consultants, and customer support engineers who use the Proactive Contact Linux-based interface.

### Document changes since last issue

Issue	Date	Summary of changes
1	July 2018	Major changes for Release 5.2:
		Added the topic "New in Avaya Proactive Contact Release 5.2".
		Added the topic "Transport Layer Security configuration".
		Added the topic "Configuring SIPREC".
		Added the topic "2016 OFCOM Implementation".

## **Chapter 2: Overview**

The Proactive Contact system is an enterprise outbound solution software application that consists of software, hardware, and network components. The system is comprised of the following: system cabinet, supervisor workstation, agent workstations, printer, and modem.

Use the Linux-based interface to gain access to the Proactive Contact system from either the administrator workstation or any personal computer using Telnet. To gain access to the Administrator menus, you must have an account set up with administrator privileges. Using the Supervisor menus, you can perform the tasks available in the Proactive Contact Supervisor applications. However, you must have an account set up with supervisor privileges.

- As a system administrator, you can manage users, maintain host uploads and downloads, and maintain calling lists.
- As a system supervisor, you can set up, monitor, modify, and report on your calling activities. Agents use the agent workstations to handle inbound and outbound phone calls.

The system works with the equipment of your call center and performs call center tasks.

Your installation can include more than one dialer.

### **New in Avaya Proactive Contact Release 5.2**

### Support for Avayatized Red Hat Enterprise Linux 6.9 version

Avaya Proactive Contact Release 5.2 supports version 6.9 of Avayatized Red Hat Enterprise Linux (RHEL).

### Supports Transport Layer Security 1.2 including High Ciphers

Avaya Proactive Contact Release 5.2 supports Transport Layer Security (TLS) 1.2 for connections between the dialer server and the clients including high ciphers. Dialer is configured, by default, to support TLS 1.2. Customers have an option to configure security setting of their choice.

To support TLS 1.2, following components are modified:

- Agent binary
- Listserver
- PC Agent
- Agent API

- Event SDK
- Internet Monitor
- WebLM
- Supervisor

TLS 1.2 and SHA-2 certificates are now supported between the dialer server and the Avaya Application Enablement Server (AES).

### **Supports SIP Recording**

Avaya Proactive Contact Release 5.2 introduces a unique call-id on the ISDN and H.323 trunks when using the PG230 trunks. The function of such an ID is to enable SIP Recording (SIPREC) recording solutions in cases where PG230 trunks are converted to SIP. The ID provided within the trunks can be correlated with the ID provided by the Event SDK to identify individual calls on the SIP trunks. For more information, see Configuring SIPREC on page 32.

### Support for custom certificate

Avaya Proactive Contact Release 5.2, introduces deployment of the custom certificate into Proactive Contact system including Dialer, Supervisor, Agent, and Event SDK. Customers can create and install their own certificates into PC system and the certificate may be signed by any third party Certificate authority (CA).

### Java, WebLM, and Tomcat upgrades

Avaya Proactive Contact Release 5.2 upgrades the Java platform on the dialer and supports the following versions of Java, WebLM, and Tomcat:

- Azul JDK version 1.8 and JacORB version 3.2
- WebLM version 7.1.0
- Tomcat version 9.0

### **Secure System Access**

The Access Security Gateway, effective from Avaya Proactive Contact Release 5.1, is a system access challenge and response feature. It is a multi-user, one-time token system that is able to securely generate responses for the challenges posed by administrative and support access from remote systems. The Enhanced Access Security Gateway has been integrated with Avaya Proactive Contact Release 5.2 to further improve remote access security.

The Enhanced Access Security Gateway (EASG) has been integrated into the Avaya Proactive Contact system. EASG provides secure authentication and auditing of all remote access into the maintenance ports.

#### Area codes with Time Zone Mapping (U.S and Canada)

Avaya Proactive Contact Release 5.2 includes updated area code mapping tables for the United States and Canada. The area code and time zone information is stored in locale.cfg, timezone.cfg, and sttday.cfg files located at /opt/avaya/pds/config directory.

Migration from Avaya Proactive Contact Release 5.1.x to Avaya Proactive Contact Release 5.2 creates a backup of the original Avaya Proactive Contact Release 5.2 locale.cfg, timezone.cfg, and sttday.cfg files in /opt/avaya/pds/pc52\_orig/pds/config backup directory for migration. Customer's custom files are restored to the /opt/avaya/pds/config directory.

To use the latest area codes from Avaya Proactive Contact Release 5.2, refer to the files in /opt/avaya/pds/pc52\_orig directory. Customers must manually update their customized locale.cfg file with the new area codes.

If customer does not have any customization and require to use updated area code information, then the locale.cfg, timezone.cfg, and sttday.cfg files can be copied from the backup directory to the active directory.

For detailed instructions for migration, see *Migrating to Proactive Contact, 5.2, - Release Notes*.

### **Proactive Contact Features**

### **OFCOM 72-hour compliance**

The OFCOM 72-hour regulation specifies that you must have a 72-hour period before a telephone number receiving an abandoned call might be called again without the guaranteed presence of an agent. There must be a live operator if you are making a repeat call to a number to which a nuisance call was made. Proactive Contact supported the OFCOM 72-hour regulation on a perrecord basis. From Proactive Contact 5.1.2, Proactive Contact also supports the OFCOM 72-hour regulation on a phone number basis.

To comply with the OFCOM 72-hour regulation, Proactive Contact adds a new parameter, OFCOM72 in the master.cfg file. You can set the OFCOM72 parameter for a job, a tenant, or a dialer. If you set this parameter, without the guaranteed presence of a live operator, no repeat call is made to a number that received a nuisance call in the prior 72 hours.

### ZIP codes to determine time zones

Determining the time zone of a phone number is important, because there are regulations on the time when you can make outbound calls. Phone users' mobility makes it difficult to decide the time zones of cellular phone numbers based on area codes.

With the ZIP to time zone utility, you can determine the time zone of a phone number based on ZIP codes instead of area codes. The dialer dials out only after checking the time zone of the phone number.

### Maximum number of failed authentication attempts

In Release 5.1.2, you can configure the number of failed authentication attempts that a Proactive Contact user can make. After the specified number of failed authentication attempts, the system

locks a user account. If you specify 0 as the value, the system does not lock the user password, irrespective of the number of failed authentication attempts.

### **Support for strong ciphers**

In Avaya Proactive Contact Release 5.1.2, you can configure the system to use only strong ciphers with >=128 bits key size. Using strong ciphers enhances the security of your system.

# Support for acceptance of double-digit reason codes in the soft dialer mode

In Avaya Proactive Contact Release 5.1.2, the dialer accepts double-digit reason codes from Communication Manager in the soft dialer mode. The new supported reason code range is 1–99. For backward compatibility, single-digit reason codes are also supported.

### **Manual Dialing**

Proactive Contact introduces a new dialing mode called the Manual Dialing mode that is available only with Preview jobs. In the Manual Dialing mode, the dialer presents the call record to the agents for previewing and does not automatically dial the number. The agent must click a button to dial or cancel the call. Using Manual Dialing, an agent can dial a number through Proactive Contact or a third-party application.

### **Multi-tenancy**

Multitenancy creates separate instances of configuration so that multiple individual business units can use the same Proactive Contact system but not have access to the configuration of other business units.

In this release, you can create multiple tenants on the dialer which work as mutually exclusive units but can provide all the functionalities of the dialer. You can allocate campaigns, agents, calling lists, schedules, agent keys, and other components to the tenants.

To ensure backward compatibility, you can choose to not create any tenants and use Proactive Contact as earlier with the other new features added in this release.

### Increased dialer support in a pod

In this release, the number of dialers that can be included in a pod setup has been increased from 4 to 10.

### **Enhanced ID field for calling list names**

In this release, support has been added to provide meaningful names to the calling list. Earlier, you could name a calling list only to indicate the nature of the calling list, that is inbound or outbound, and select a pre-assigned number for the calling list. Now, you can provide a meaningful name to calling lists to indicate the reason for creating the calling list.

You can also use customized calling list names in strategy, call selections, and jobs. You can also create, download, upload, and install a campaign template for a calling list with a customized name. All the reports also display customized calling lists names.

### Out of timezone cellphone support

Earlier, when the called party moved to other time zones and kept their old numbers, Proactive Contact dialer was dialing numbers on their cell phones outside of regulatory time zone hours. This limitation was putting Proactive Contact customers out of compliance or severely reducing the calling times for Dialer customers who deploy cell phone-centric campaigns.

In this release, you can support calls to mobile phones when the called party keeps their original mobile phone numbers after moving to a different time zone.

For this feature, you designate a field that identifies the time zone for each phone number, which is migrated to a different location. The dialer checks this field for each record for time zone determination. If the value is null, then it continues with the normal phone number's time zone. If it is not null, the value in the field sets the time zone for the phone number.

### **Automated Release Agent to Ready for Voicemail**

In the United Kingdom, Proactive Contact customers are required to connect the called party with the agent within two seconds. Therefore, the customers are unable to use Proactive Contact's AMD to eliminate agent intervention for any and all calls. Customers typically turn off Answering Machine Detection (AMD) and answer all calls with a live agent. The live agent passes the call to the correct message, selects the completion code for this result, and then goes back to the ready state. However, this procedure impacts agent productivity significantly.

For the Automated Agent Release to Ready feature, all calls are connected to a live agent and they system continues to detect answering machines. If the system detects an answering machine, the system administrator can choose from the following three choices:

- End the call without playing message and at the same time put agent into ready mode.
- Play message onto the answering machine but at the same time put agent into ready mode.
- Leave the answering machine with the agent.

This feature has been introduced at the job level and it can be configured in the Job details pane.

### **USB** support

In addition to the earlier supported media types, in Proactive Contact 5.1 you can also use USB (Flash Memory Drive) to install dialers, perform backups, and restore.

### **Backup logs**

In Proactive Contact 5.1, backup and restore activities that are performed on the dialer are now logged in a separate log file which is at /opt/avaya/logs/archive\_mgr.log. This file captures the actions and user inputs during the backup and restore activities.

### **Dialer functions**

The main functions of the dialer are as follows:

- Receive customer records from the call center's host computer.
- Select and sort customer records based on your call center's business goals.
- Supports agents to update customer information on an agent screen or on the host, depending on your configuration.
- · Pass only specific call types to the agents.
- Adjust the calling pace to meet the call center's requirements.
- Monitor ACD inbound traffic and predict when to acquire and release ACD agents for the outbound calling on Proactive Contact with Agent Blending.
- Support outbound, inbound, and blend Jobs.
- Generate a variety of reports, such as Job, agent, and system reports.
- Upload record information to the host. This is optional.
- · Support CORBA security.
- · Support licensing.
- Support Character-Separated-Value (CSV) raw file along with fixed-width file.
- Support password rotation.
- Support agent connection through SSL.

### **Multiple dialers**

Proactive Contact system can include multiple dialers. You can connect up to ten dialers through a middle-tier structure.

### Note:

You must configure Lightweight Directory Access Protocol (LDAP) configured for each of the dialers that you include in a pod. A pod is a pool of dialers. A pod without LDAP does not work in the Proactive Contact system.

Your Proactive Contact system can also have a distributed architecture. The system can use dialers in the following architecture:

- Multiple standalone dialers
- · One or more pods of dialers
- · Multiple standalone dialers and multiple pods of dialers

### **Pods**

A multiple dialer office environment that uses a pod increases your company's outreach capacity. Using a pod, you can manage large-scale outreach programs from a single Administration and Supervisor interface. A pod can support up to 10 Proactive Contact dialers configured as Hard Dialer with PG230 environment.

A pod provides the following features:

- · Calling lists
- Jobs
- · Phone strategies
- · Record selections
- Logins

From a single Supervisor application, you can run a Job on multiple dialers and monitor the calling activities on each dialer.

You must configure LDAP when configuring a dialer in a pod environment. For details, refer to *High Availability LDAP Configuration Guide*.

### **Calling lists**

A calling list is a file that contains customer records. Proactive Contact uses two types of calling lists:

- outbound calling
- inbound calling on Intelligent Call Blending systems.

The host system creates the download file of customer records for the outbound calling list. The download file contains the records and fields that are defined by your outbound calling activities.

Proactive Contact processes the host file and prepares the host file for the calling activities. When the calling activities end, the system prepares the calling list to be uploaded to the host.

### **Process calling lists**

After the host downloads the customer records, Proactive Contact completes the following tasks to create a calling list:

- Checks for and flags duplicate records and invalid phone numbers.
- Identifies and marks records that are on the system more than a specified number of days.
- Recalls the name of the last agent to speak to the customer.
- Stores the result of the last call attempt that the agent has recorded.
- · Verifies the following statistics:
  - Name of the last agent to speak with the customer
  - Date and time of the last call attempt
  - Result of the last call attempt as recorded by the agent on the system
  - Number of days the record is on the system
  - Record status

After the calling activities, Proactive Contact completes the following tasks at the scheduled time to upload the file to the host:

- Converts the customer records in a specific calling list to format specified for your host computer.
- Creates a file for uploading.

The host then updates your customer database with the data in the converted calling list.

### **Calling list environment**

The calling list environment is responsible for the following:

- Create the files required to convert host computer data to the Proactive Contact calling list format.
- Prepare the calling list for the calling activities.
- Prepare the calling list for extracting data to send back to the host after calls have been made.

# **Chapter 3: System administration**

You can perform administrative tasks using the Administrator menus on the Proactive Contact Linux-based system. Using either the administrator workstation or your desktop computer, you can gain access to this menu through the System Telnet option in Supervisor applications or an SSH connection. The Administrator Main Menu includes critical features, such as shutting down and restarting the Proactive Contact system. To protect your system, you must frequently change the administrator's password.

### Starting the system

#### **Procedure**

- 1. Turn on the power to the following equipment: Administrator workstation, digital switch rack, digital switch controller, terminal server, mass storage unit, and bridge.
- 2. Wait for 10 seconds, and then turn on the power to the tape drive, modem, and central processing unit (CPU).



#### Note:

The startup is successful when you see the login prompt on the screen.

### Logging in as Administrator

### **Procedure**

1. At the Login: prompt, enter your user name.

You must have a user account in the System Administrator user group.

2. At the Password: prompt, enter your password.

The system displays the Administrator Main Menu.

### Selecting a tenant

### **Procedure**

1. Log in as sysadm type user.

By default the system presents the user with only the default tenant. In case the user belongs to multiple tenants, the tenant selection menu appears.

- 2. Enter the tenant number.
- 3. Press Enter.

### **Changing the Administrator password**

#### **Procedure**

- 1. From the Administrator Main Menu, select **Administrative tasks > Change sysadm** password.
- 2. At the Change sysadmin password Are you sure? prompt, type Y.
- 3. Type the current password, and press Enter.
- 4. Type the new password and press Enter.

Ensure that your new password contains a minimum of eight characters and includes at least three of the following:

- One upper case letter
- · One lower case letter
- One numerical value
- · One special character
  - Note:

While resetting your password, ensure that your new password is different from the last seven passwords that you used for logging in to the Proactive Contact Supervisor application. Do not use an upper case character as the first character of your password and a numerical value as the last character of your password.

5. At the prompt, type the new password again, and press Enter.

#### **Related links**

User accounts and permission levels on page 34

### Restarting the system

#### About this task

Use the following procedure to stop and start the system again. To resume calling after restart, start the Jobs.



#### **Warning:**

To prevent damaging the system components or losing data in active Jobs, stop all Jobs and log off all users before restarting the system.

#### **Procedure**

- 1. From the Administrator Main Menu, select **Administrative tasks > Restart the system**.
- 2. At the Are you sure you want to reboot system? prompt, type Y.

The system displays a series of messages. When the restart is complete, the system displays the Login: prompt.

### Shutting down the system

#### About this task

You must shut down the system operations from the Administrator workstation before turning off the system power.



### Warning:

To prevent damaging the system components or losing data in active Jobs, stop all the Jobs and log off all users before shutting down the system.

#### **Procedure**

1. From the Administrator Main Menu, select Administrative tasks > Shut down the **system**. Type Y at the prompt.

The system displays the following confirmation prompt:

```
Are you sure you want to shutdown? Enter Y or N..
```

2. Type Y at the prompt to continue or N to cancel. The system displays the following message:

```
Halted, you may now cycle power..
```

3. Go to the system cabinet and turn off the power to all components. Most systems have the components connected to a power strip. The easiest way to turn off the equipment is to turn off the power strip.

### Setting system date and time

### **About this task**

Before you use this procedure, you must log off all the agents from the system and stop all the Jobs manually.

Shut down all the Jobs and inform all users to log off before restarting the system. If you change the date or time during system operations, the system operation and data can get critically affected.

### Important:

Keep the system time as accurate as possible to ensure time zone restriction compliance.

### Important:

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

Use the procedure in this section to set the system date and time. The system uses these settings to control the starting or stopping of the Jobs and the time for placing the calls within the time zones. Many systems, such as the Lightweight Directory Access Protocol (LDAP) systems, are set up with NTP.

#### **Procedure**

- 1. From the Administrator Main Menu, select **Administrative tasks > Set the system date** and time.
- 2. At the Set system date and time Are you sure? prompt, type Y.
- 3. Type a new time in the format HH:MM and press Enter. As the system uses a 24-hour clock, place a period between hours and minutes. For example, use 14.00 for 2:00 PM.
- 4. Type a new date in the format (CCYY/MM/DD), and press Enter. For example, use 2010/05/28 for May 28, 2010.
- 5. Press any key to return to the main menu. The new time and date takes effect immediately.

### **Manual Dialing**

Proactive ContactRelease 5.1.2 introduces the Manual Dialing mode.

### **Proactive Contact in non-telephony mode**

Avaya Proactive Contactintroduces the Manual dialing feature so that the dialer does not dial a call automatically. An agent must dial the phone number manually.

If you want to have a dedicated Proactive Contact server setup with non-telephony mode, you can convert the dialer into the non-telephony mode from the Installation and Configuration CUI menu. In this setup, the dialer does not have any dialing capability. The agent must manually dial using a third-party software. This dialer setup cannot have predictive, preview, blend, or virtual jobs.

When you convert your dialer into the non-telephony mode, the system sets the following parameters automatically in the master.cfg file:

SWITCHTESTMODE: YES

SWITCHTYPE:DIGITAL

The system sets the following parameters in the Job template:

TESTMODE:VOICE=100

• PVLENGTH:0

SHADOW\_IN\_PREVIEW: YES

MANUAL MODE: YES

THIRD\_PARTY\_DIAL: YES

In the non-telephony mode, an agent cannot dial using the Proactive Contact dialer. The agent can preview a customer record in Proactive Contact Agent application, but must use a third-party application for dialing.

To use the Click to dial functionality of the Proactive Contact Agent application for dialing, you must integrate a third-party application with your Proactive Contact Agent. The Click to dial functionality is disabled on your Proactive Contact Agent if you do not integrate a third-party application with your Proactive Contact Agent.

When your dialer is in the non-telephony mode, you can have only manual dial-enabled preview jobs. The system displays the following an error message if you try to run a predictive, managed, virtual, or an inbound job in the non-telephony mode:

The dialer is in non-telephony mode. Only manual mode jobs are allowed to run.



#### Note:

After your dialer is converted into the non-telephony mode, contact Avaya Services to revert to the telephony mode.

### Converting a dialer into non-telephony mode

#### **Procedure**

- 1. Log in to the dialer as an admin user.
- 2. Type the check pds command to verify whether the dialer processes are stopped.
- 3. Type the stop pds command to stop the dialer processes.

- 4. Switch to sroot user.
- 5. Type menu install and press Enter.
- 6. In the INSTALLATION AND CONFIGURATION screen, type 3 to select **Configure the system** and press Enter.
- 7. In the SYSTEM CONFIGURATION screen, type 6 to select Convert Dialer into Non-Telephony mode and press Enter.
- 8. At the Are you sure you want to convert the dialer into the non-telephony mode? prompt, type Y and press Enter.

### **Transport Layer Security configuration**

To configure Transport Layer Security (TLS) in the dialer system, there are two parameters available in the configuration file pc ssl.conf.

- CORE\_SSL\_METHOD:TLSv1.2 The CORE\_SSL\_METHOD:TLSv1.2 parameter is applicable to agent binary and listserver binary in the dialer system. This setting impacts the PCAgent, agent API clients and listAPI clients.
- SERVICE\_SSL\_METHOD The SERVICE\_SSL\_METHOD parameter is applicable to the dialer's CORBA services. This setting impacts all the supervisor applications and EventSDK clients.

The above two parameters govern TLS configuration in the dialer system. The default setting for both the parameters is TLSv1.2. CUI menu is used to configure Transport Layer Security (TLS).

### Configuring TLS and high ciphers for dialer

#### About this task

Use CUI menu to configure Transport Layer Security (TLS) and high ciphers.

#### **Procedure**

- 1. Log in to the Proactive Contact Dialer as administrator.
- 2. Navigate to ADMINISTRATOR MAIN MENU > ADMINISTRATIVE TASKS > Configure SSL/TLS and Ciphers.

The system displays the following:

SSL/TLS configuration

- 0. Exit
- 1. Configure SSL/TLS
- 2. Toggle High Ciphers
- 3. Disable Specific Ciphers

Type the number corresponding to the required option in the menu.

#### 3. To configure SSL/TLS, press 1.

### For example

```
The current setting of Agent connection is
CORE SSL METHOD: TLSv1.2
0. Exit
   1. SSLv23
   2. TLSv1
   3. TLSv1.1
4. TLSv1.2
Enter TLS Option to set:4
TLSv1.2 set successfully in Agent, listserver.
The current setting of Dialer CORBA Service is
SERVICE SSL METHOD:TLSv1.2
    0. Exit
   1. SSLv23
   2. TLSv1
   3. TLSv1.1
    4. TLSv1.2
Enter TLS Option to set:4
TLSv1.2 set successfully in Dialer CORBA service.
```

#### 4. To toggle high ciphers, press 2.

#### For example

```
Enter Option:2

High Ciphers are enabled in the current system.

Do you want to Disable High Ciphers (Y/N):
```

#### 5. To disable specific ciphers, press 3

### For example

```
Enter Option:3
Currently following ciphers are supported
ECDHE-RSA-AES256-GCM-SHA384
ECDHE-ECDSA-AES256-GCM-SHA384
ECDHE-RSA-AES256-SHA384
ECDHE-ECDSA-AES256-SHA384
DHE-DSS-AES256-GCM-SHA384
DHE-RSA-AES256-GCM-SHA384
DHE-RSA-AES256-SHA256
DHE-DSS-AES256-SHA256
ECDH-RSA-AES256-GCM-SHA384
ECDH-ECDSA-AES256-GCM-SHA384
ECDH-RSA-AES256-SHA384
ECDH-ECDSA-AES256-SHA384
AES256-GCM-SHA384
AES256-SHA256
ECDHE-RSA-AES128-GCM-SHA256
ECDHE-ECDSA-AES128-GCM-SHA256
ECDHE-RSA-AES128-SHA256
```

```
ECDHE-ECDSA-AES128-SHA256
DHE-DSS-AES128-GCM-SHA256
DHE-RSA-AES128-GCM-SHA256
DHE-RSA-AES128-SHA256
DHE-DSS-AES128-SHA256
ECDH-RSA-AES128-GCM-SHA256
ECDH-ECDSA-AES128-GCM-SHA256
ECDH-RSA-AES128-SHA256
ECDH-ECDSA-AES128-SHA256
AES128-GCM-SHA256
AES128-GCM-SHA256
AES128-GCM-SHA256
AES128-SHA256
The current setting is !MD5:!RC4:!3DES:!SHA:!IDEA:!SEED:!CAMELLIA
Do you want to modify this setting (Y/N):
```

### **Configuring SIPREC**

### Before you begin

To configure SIPREC, set the SEND\_CALLID\_OUTCALL parameter value to YES in the master.cfg file. By default, the value of SEND\_CALLID\_OUTCALL parameter is No.

#### **Procedure**

- 1. Log in to the Proactive Contact Dialer.
- 2. Type the command telnet <IP address of PG230> and press Enter.
- 3. On the Digital Switch Login screen, enter the login credentials.
- 4. Go to DATABASE ADMINISTRATION MENU.

The system displays the following:

	DATABASE ADMINISTRATION MENU
B) C) D) E) F)	Card Summary Resource Group Summary Inpulse Rules Outpulse Rules Print Data Base Summary Print Data Base Detail BRC Configuration Summary N Answer Supervision Templates I SDN Supervision Templates K ISDN Message Templates L ISDN NFAS Group Summary PLPVC Configuration Summary N Signaling Group Summary

#### 5. Select ISDN Message Templates.

Ente	Enter Selection: _										
	ΙS	D N	M E	S S A G	E TE	M P L	АТЕ	s t	J M M A R Y	7	
NO	MESSAGE	R/T	DSP	NO	MESSAGE	R/T	DSP	NO	MESSAGE	R/T	DSP
1	SETUP	Т		17				33			
2			_	18		_	_	34		_	_
3	SETUP	$\overline{R}$	_	19		_	_	35		_	_
2			_			_	_			_	_
4	CALLPROC	T	_	20		_	_	36		_	_
5	ALERTING	Т	_	21		_	_	37		_	_
6			_			_	_	38		_	_
0		_	_	22 23		_	_			_	_
7				23				39			

8			24			40			
9	 _	_	25	 _	_	41	 _	_	
1.0	 _	_	26	 _	_	12	 _	_	
1 1	 _	_	20	 _	_	42	 _	_	
ΤŢ	 _	_	21	 _	_	43	 _	_	
12	 _		28		_	44	 _	_	
13			29			45			
14	 _	_	3.0	_	_	4.6	 _	_	
15	 _	_	21	 _	_	17	 _	_	
1.0	 _	_	31	 _	_	4 /	 _	_	
Τ 6	 _	_	32	 _	_	48	 _	_	

### Message Template

```
Tmpl Message R/T
1 SETUP T

IE BEARER

DATA 8090A3
IE CHAN ID
DATA A98300
IE CP NUM
DATA 80
D ANI
IE CD NUM
DATA 80
D FLD 1
IE USR-USR
DATA 04
D FLD 2
```

### 6. Edit **ISDN MESSAGE TEMPLATE SUMMARY** to include the following fields:

```
IE USR-USR
DATA 04
D FLD 2 _____
```

On enabling the fields in the master.cfg and PG230 ISDN message template, the Call ID that the dialer generated for each call is passed to the PG230. This information is further passed to the CM's user-user information for the call.

# Chapter 4: User accounts and permission levels

A user account consists of a user name, password, and permission level. The system determines the permission level based on the group you assign to the user. The permission level determines a user's access to the system features.

For example, you assign agents to the Agent group that grants permission to the Agent Main Menu where Agents can gain access only to call handling. You assign system administrators to the system group, which grants permission to the Administrator Main Menu, giving the administrators access to the system maintenance functions.

### **User types**

Administrators: Set up and maintain the Proactive Contact system, and perform the following tasks:

- · Set up user accounts
- Start and stop dialers
- Define and download calling lists.

Supervisors: Set up and monitor the contact center calling activities and perform the following tasks:

- Create and maintain phone strategies
- Create and maintain record selections
- Create Jobs that define the calling activities
- Start and stop Jobs
- · Monitor and maintain calling activities

Agents: Handle inbound and outbound calling activities. Agents work on outbound and blend Jobs and receive inbound calls to the contact center.

Report Analyst: Creates and runs system reports using PC Analysis.

System Auditor: Monitors failed login attempts, user Job activities, system calls and syslog, and system files.

Role Administrator: Creates a role. Assign permissions to the role and assign users to the role.

Lead Administrator: Performs administrative tasks in a multi-tenancy environment.

### User types and corresponding groups

The following table lists user types with their corresponding group names and the system menus that appear when these users log in to the system:

User type	Group name	Command	Menu access
administrator	sysadm	menu sysadm	Administrator Main Menu
supervisor	system	menu system	Supervisor Main Menu
agent	agent		Agent Main Menu
report analyst	pcanal or cdwanal	menu cdwanal	PC Analysis Main Menu
system auditor	auditor	menu auditor	Auditor Main Menu
rbac	rbac	-	-
rbac administrator	rbacadmin	-	Permission to the Role Editor application.
leadadm	lead administrator	menu leadadm	Lead Administrator Main Menu

### Logins and permissions

In Proactive Contact, your login determines the applications and the features you can use in the application. For example:

Role Administrator login and password:

Using the Role Administrator login and password you can gain access to the Role Editor application. You can use the Role Editor application to create a role, assign permission to the role, and assign a user to the role.

Administrator login and password:

Using the Administrator login and password you can use the administrative features and the supervisor features in the character-based application and in Supervisor. Administrators also use Health Manager to monitor and manage the operations of Proactive Contact.

Supervisor login and password:

Using the Supervisor login and password you can use the supervisor features in the character-based application, Supervisor, and Proactive Contact Agent application.

Agent login and password: Using the Agent login and password you can use the Proactive Contact Agent application. The type of calling activities an agent can handle depends on the Agent type that the agent selects when logging in to the Agent application.

Auditor login and password: Using Auditor login and password you can monitor failed login attempts, user Job activities, system calls and syslog, and system files.

### Agent types

When agents log in, each agent selects an agent type that is set up for your system. The agent type determines the types of calls that the agent can handle.

Agents can log in to the Proactive Contact and select one of the following agent types:

Outbound agent: Outbound agents handle outbound calls only. Outbound agents can join the following Job types:

- · Unit work list
- Sales Verification
- Infinite

Managed agent: Managed agents only handle outbound calls during an outbound Job set up as a Managed Dialing Job. A managed agent can join the Managed Dialing Job.

Inbound agent: Inbound agents handle only inbound calls. Inbound agents can join inbound or blend Jobs. The Proactive Contact receives calls directly from customers or through an ACD.

Blend agent: Blend agents handle both outbound and inbound calls. Blend agents join blend Jobs and can handle customer records on outbound and inbound calling screens.

Person to Person agent: Person-to-Person agents handle outbound calls when outbound agents are not available to handle outbound calls.

ACD agent: ACD agents handle outbound calls on the Proactive Contact and handle inbound calls on the ACD.

### **Agent logins**

Basic login: The following table describes the agent logins used, regardless of the blending configuration on your system:

Agent type	Login	Joins Jobs	Handles calls
Managed	m	outbound	Outbound calls on Proactive Contact.
Outbound	0	outbound or blend	Outbound calls on Proactive Contact.
Person to Person	р	outbound	Outbound calls on Proactive Contact.

Agent Blending login: If you want to configure your system with Agent Blending, see the following table for a description of the agent logins used:

Agent type	Login	Joins Job	Handles calls
ACD	а	outbound	Outbound calls on Proactive Contact and inbound calls on ACD.
ACD	а	managed	Managed Outbound calls on Proactive Contact and inbound calls on ACD.

Intelligent Call Blending logon: If you want to configure your system with Intelligent Call Blending logon, see the following table for a description of the agent logins used:

Agent type	Login	Joins Job	Handles calls
Inbound	i	inbound or blend	Inbound calls on Proactive Contact.
Blend	b	blend	Inbound and outbound calls on Proactive Contact.

Agent Blending and Intelligent Call Blending login: If you want to configure your system with Agent Blending and Intelligent Call Blending login, see the following table describes the additional agent logins that you can use:

Agent type	Login	Joins Job	Handles calls
ACD	а	blend	Outbound calls on Proactive Contact and inbound calls on ACD.

### **Guidelines for User account**

Use the following guidelines when creating user accounts:

User Name: Must contain three but not more than eight alphanumeric characters. Use an alphabet as the first character of a user name. User names cannot contain blank spaces or special characters. User names are also called Login IDs.

Password: Must contain between six and eight characters. Passwords must contain at least two letters and one numeric or special character. Also, the password must not be the same as the user name or a variation of the user name. Passwords with leading and trailing spaces will not be accepted.

Group for Login:

The name of the group to which the user belongs.

Description:

Must not contain more than 30 characters and spaces. Do not use special characters. Description is optional.

### User permissions in a multi-tenancy environment

When a user, who is a part of any tenant and does not belong to the default tenant, logs in as an administrator, only the following CUI menus are available to the administrator:

- · T. Change Tenant
- 0. Exit
- 1. Display help
- 2. Inbound calling lists

- 3. IVR administration
- 4. Transfer and process records
- 5. Voice messages
- 6. View customer support information
- 7. View APS information

When a user, who is a part of any tenant and does not belong to the default tenant logs in as a supervisor, only the following CUI menus are available to the supervisor:

- T. Change Tenant
- 0. Exit
- 1. Display help
- · 2. Calling lists
- · 3. Campaigns
- 4. Manage active jobs
- 5. Reports
- 6. View customer support information
- 7. View APS information

When a non-default tenant user logs in as a PC Analysis Extract, only the following CUI menus are available to the PC Analysis Extract:

- T. Change Tenant
- 0. Exit
- 1. Display help
- 2. PC Analysis Extract
- 3. PC Analysis Tools

When a user logs in as a Lead Administrator, and selects the default tenant option, the following CUI menus are available:

- T. Change Tenant
- 0. Exit
- 1. Display help
- · 2. Administrative tasks
- · 3. Back up, restore and verify
- 4. Manage back up configuration file
- 5. Inbound calling lists
- 6. IVR administration
- 7. Transfer and process records
- 8. Voice messages

- · 9. Manage database accounts
- 10. Monitor Predictive Agent Blend
- 11. Calling lists
- 12. Reports
- 13. Support information

The following CUI options are available to the Lead Administrator for a non-default tenant:

- T. Change Tenant
- 0. Exit
- 1. Display help
- · 2. Inbound calling lists
- 3. IVR administration
- · 4. Transfer and process records
- 5. Voice messages
- 6. Reports
- 7. Support information

### Note:

Change Tenant is a new menu option in Proactive Contact 5.1. Change Tenant takes you back to the list of tenants. The Change Tenant option is available only to those users, supervisors, administrators who belong to multiple tenants.

### Note:

When you assign a user to a tenant, the user gets automatic access to the tenant space via CUI. However, if the same assigned user wants to log into the tenant space via GUI applications such as Editor or Monitor, the tenant administrator must explicitly grant rights to the user.

### **Changing tenants**

### About this task

You can change the tenant and go back to the list of tenants to select a new tenant.

#### **Procedure**

1. On the Administrator Main Menu type T.

The system displays the list of tenants.

2. Select the tenant that you want to change to.

### Manage user accounts

You can create user accounts for each agent that logs in to Proactive Contact. You can add or delete users and set or change their access rights to the system.

### Adding a user account

#### **Procedure**

- 1. On the Administrator Main Menu select **Administrative tasks > Manage user accounts**.
- 2. At the Manage user accounts Are you sure? prompt, type Y.

The system displays the Manage User Accounts screen with a list of the available commands near the bottom of the screen.

- 3. Press Control+L. Type the user name, password, group, and an optional description. Both user names and passwords are case-sensitive.
- 4. Press Enter after typing each value. Press Enter after you complete the last line.

The system rewrites the screen and encrypts the password.

5. Press Control+X. Type Y to save the changes.

### Deleting a user account

#### **Procedure**

- From the Administrator Main Menu select Administrative tasks > Manage user accounts.
- 2. At the Manage user accounts Are you sure? prompt, type Y.

The system displays the Manage User Accounts screen with the list of the available commands at the bottom of the screen.

3. Press Control+F. Type the user name for the account you want to delete, and press **Enter**.

The system displays the matching user account information.

- 4. Press Control+D. Type Y at the prompt.
- 5. Press Control+X. Type Y to save the changes.

### Editing a user account

#### **Procedure**

- From the Administrator Main Menu select Administrative tasks > Manage user accounts.
- 2. At the Manage user accounts Are you sure? prompt, type Y.

The system displays the Manage User Accounts screen with a list of the available commands near the bottom of the screen.

3. Press Control+F. Type the user name for the account you want to change and press **Enter**.

The system displays the matching account.

- 4. Move the cursor to the field to be changed and press Control+C. Type the changes, and press Enter after each change.
- 5. Press Control+X. Type Y to save the changes.

### Failed authentication attempts

In Release 5.1.2, you can configure the number of failed authentication attempts that a Proactive Contact user can make. After the specified number of failed authentication attempts, the system locks a user account. If you specify 0 as the value, the system does not lock the user password, irrespective of the number of failed authentication attempts.

### Configuring maximum failed authentication attempts

### Before you begin

Before configuring the maximum failed authentication attempts you must stop the following dialer processes:

- PDS Processes
- MTS Processes
- DB Processes

### **Procedure**

- From the Administrator Main Menu select Administrative tasks > Configure maximum failed authentication attempts.
- 2. At the Configure maximum failed authentication attempts Are you sure? prompt, type Y and press Enter.

The system displays the message to confirm whether the services were stopped before initiating the configuration changes.

- 3. In the Have you stopped the PDS processes? (Y/N), type Y and press Enter. The system displays the current value of failed authentication attempts.
- 4. At the Enter the new value. prompt, specify the value for the number of failed authentication attempts and press Enter.
  - Note:

If you specify 0 as the value then the password lockout policy will be disabled.

- 5. At the Is this correct? (y/n) type Y and press Enter to save the changes.
  - Note:

If an administrator unlocks a user account and the user re-enters an incorrect password, the user account is locked again. User accounts are locked on a dialer configured on LDAP.

### Unlocking a user account

#### **Procedure**

- 1. From the Administrator Main Menu select **Administrative tasks > Manage user** accounts.
- 2. At the Manage user accounts Are you sure? prompt, type Y.

The system displays the Manage User Accounts screen with a list of the available commands near the bottom of the screen.

3. Press Control+F. Type the user name for the account you want to unlock and press Enter.

The system displays the matching user account information.

- 4. Press Control+U. Type Y at the prompt.
- 5. Press Control+X. Type Y to save the changes.
  - ₩ Note:

If an administrator unlocks a user account and the user re-enters an incorrect password, the user account is locked again. User accounts are locked on a dialer configured on LDAP.

### Manage database accounts

You can use this option to modify passwords of the following database users:

dsc

- · reporter
- datapump
- statspump

### Changing password of database account

### **Procedure**

1. From the Administrator Main Menu select Manage database accounts.

The system displays the Manage Database Accounts screen with a list of the available commands near the Type the database account name for which you want to change the password, and press Enter.

The system displays the matching account.

- 2. Type the existing password, and press Enter.
- 3. Type the new password, and press Enter.
- 4. Type the new password again, and press Enter.
- 5. Press Control+X.

# Chapter 5: Area codes, prefixes, and time zones

Telephone companies frequently add new area codes and prefixes to existing phone systems. You need to add to the system newly added area codes and prefix information to call phone numbers that use the new codes. Use the Edit Area Codes and Prefixes command to update the area code and prefix settings on the system.

Phone numbers consist of the following three parts:

- Area code
- Prefix also known as an exchange
- Line number

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

The system time zones have associated zone codes. A zone code is a unique number designation that the system uses to refer to a time zone.

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

### Security alert:

Some states limit or prohibit placing certain types of phone calls during specific times. You can modify area code fields to respond to regional area code changes. Such modifications can result in users making phone calls in violation of after-hours calling limitations. You are solely responsible for any violations of applicable laws or regulations resulting from area code modifications.

### Area Code and Exchange Prefix Editor

You can add or delete area codes and exchange prefixes in various system-defined time zones.

The Area Code & Exchange Prefix Editor has two modes of interaction:

Menu Response mode: In the Menu Response mode, you can enter one of the menu choices or other information as described in the menu text. The system displays the results of your choice in the lower half of the menu screen along with the next appropriate menu.

Report mode: In the Report mode, the system displays more data than will fit at the bottom of the next menu screen. In this mode, you can display the next page of the report, or enter any other key to go to the next menu.

Area codes and exchange prefixes are linked to various time zones through entries in the system file locale.cfg. When you add or delete area codes and exchange prefixes, the changes reflect in this file. As changes to this file do not take effect while the system is running, the changes you make are saved to a temporary file (config/upt/locale.cfg.locale ed.1) which automatically replaces the locale.cfg file when you restart the system.



#### Caution:

If a temporary file is present, you can make changes manually only when the application is not running. If you make a change when the application is running, you might experience loss of changes that you or the application make between the last system restart and the next system restart.

Using Area Code/Exchange Prefix Editor, you can enter either the number or the first letter of a menu choice to select the menu choice.



### Important:

In a file, data error appears while loading the locale.cfg file. A message describing the error appears for 5 seconds prior to the system returning to the previous menu. Note the error message and keep the message ready when you contact Avaya Technical Services for further assistance.

# Viewing current area codes and prefixes

#### About this task

You can view information about current area codes and their associated exchange prefixes in relation to existing system time zones. You can also query all area codes and prefixes linked to a specific time zone.

To view current area codes and prefixes:

### **Procedure**

- 1. From the Administrator Main Menu, select Administrative tasks > Edit area codes/ prefixes.
- 2. At the Edit area codes/prefixes Are you sure? prompt, type Y.
- From the Area Code & Exchange Prefix Editor Main Menu, select Query.
- 4. On the Query Area Codes and Prefixes screen, type an area code, area code and prefix combination, zone code, or zone code, area code, and prefix combination.
  - Or, type Q at the prompt instead of an area code or prefix.
- 5. Press Enter.
- 6. At the Enter y/Y to search for Zone code prompt, Type Y to search for zone codes.

The system displays the query results. If the query results are more than one screen, press Enter to view subsequent pages.



#### Note:

You can also view current area codes and prefixes using the Add and Delete options from the Area Code & Exchange Prefix Editor - Main Menu.

### View time zones

You can look up, by zone code or other descriptive strings, time zone and guard time information associated with each zone code on the system.



#### Note:

Under the DAY columns, 0 represents Sunday, 1 represents Monday, and so on. To add a new time zone or zone code to the system, you must make an entry to the timezone.cfg file. before you use this program to add new area codes or prefixes that use it. Contact Avaya Technical Services for any assistance with this task.

Guard times define the earliest and latest times of day that the system can place phone calls. You can identify the time zones to add a new area code or area code and prefix combination. Query the system time zones using a descriptive string such as eastern or pacific, by zone code, or using an asterisk (\*).

An asterisk returns a listing of all time zones. If you do not know a particular zone code, you can run a query using the asterisk. You must know the zone codes when you add or delete area code and prefix settings.

### Viewing time zones

#### **Procedure**

- 1. From the Administrator Main Menu, select **Administrative tasks > Edit area codes/** prefixes.
- 2. At the Edit area codes/prefixes Are you sure? prompt, type Y.
- 3. From the Area Code & Exchange Prefix Editor Main Menu, select **Timezone/Guard Time Query**.
- 4. On the Time Zone/Guard Time Query screen, type a time zone code, search string, or asterisk (\*), and then press Enter.
- 5. The system displays the results below your query. If the query results are more than one screen, press Enter to view subsequent pages.

### Add an area code or a prefix to a time zone

You can add an area code or area code/exchange prefix combination to a zone code. At the prompt, enter the zone code to which the additions must be made. On the Add Menu, you can enter one of the following:

- A single area code
- A list of area codes separated by commas or spaces
- An area code, a colon, and prefixes, separated by commas or spaces

Write the keyword **all** in upper or lower case to designate all area codes for the current country code. The usage of the keyword is typically only done for countries in a single time zone. Alternatively, enter Q to run a quick area code or prefix query.

### Note:

To ensure you do not accidentally introduce duplicate area codes or area code AND prefix combinations into the system, the system checks and displays the results of every proposed addition.

When you select **Add** from the Area Code & Exchange Prefix Editor - Main Menu menu, the system prompts you to type a time zone code. For example, to add an area code to the Central Daylight time zone, specify zone code 56.

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

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

The system compares your request to the current area code and prefix settings to identify duplicate area codes or area code prefix combinations. If the settings exist, the system does not add the duplicate settings and displays a message. The system displays a status message on successful addition of your requested area code and prefix information.

### Note:

You cannot add a prefix to an area code that has an asterisk listed as its prefix. The asterisk indicates that the prefix is included in this area code, and is not listed in any other area code. Also, verify that you are adding the area code and prefix to the correct time zone.

### Adding an area code or a prefix to a time zone:

### **Procedure**

- 1. From the Administrator Main Menu, Select Administrative tasks > Edit areas codes/prefixes.
- 2. At the Edit area codes/prefixes Are you sure? prompt, type Y.
- From the Area Code & Exchange Prefix Editor Main Menu, Select Add.
- 4. On the Add Areas Codes and Prefixes screen, type the zone code for the time zone to which an area code or prefix is to be added.
- 5. Type area codes, or area code, and prefix combinations to add to the selected time zone.
- 6. To change the time zone, press Enterwithout any data at the Enter Choice prompt.
- 7. Type a different time zone code to continue adding area codes, or press Enterwithout making any selection to exit the screen.

### Deleting an area code or prefix

#### **Procedure**

- 1. From the Administrator Main Menu, select Administrative tasks > Edit area codes/ prefixes.
- 2. At the Edit area codes/prefixes Are you sure? prompt, type Y.
- 3. From the Area Code & Exchange Prefix Editor Main Menu, select **Delete**.
- 4. On the Delete Area Codes and Prefixes screen, type the zone code, which is casesensitive, for the time zone from which you want to delete an area code or prefix.
- 5. Type area codes, or area code, and prefix combinations to delete. The system displays the results.
- 6. To change the time zone, press Enter without any data at the Enter Choice prompt.

7. Type a different time zone code to delete area codes from another time zone, or press Enter with no selection to exit screen

### Changing a country code

### About this task

You can make area code/exchange prefix queries or modifications for non-US or Canadian (non-Country Code 1) locales.

To change a county code:

#### **Procedure**

- 1. From the Administrator Main Menu, select Administrative tasks > Edit area codes/ prefixes.
- 2. At the Edit area codes/prefixes Are you sure? prompt, type Y.
- 3. From the Area Code & Exchange Prefix Editor Main Menu, select Change Country Code.
- 4. On the Change Country Code screen, type a country code, and then press Enter. The system displays the new country code.
- 5. Press Enter with no selection to exit screen.

### Saving area code and prefix changes

#### About this task

You can save your changes to the temporary save file for locale.cfg (local.cfg.local ed.1) for use after system restart.

When you select Exit from the Area Code & Exchange Prefix Editor - Main Menu, the system automatically saves the changes made in the current session. If you do not make any changes, you can save the current data to the temporary file. Make additional changes to the locale.cfg file only after first exiting this program, and then only to the temporary file locale.cfg.locale ed.1, as described at the beginning of this help message.

To save area code and prefix changes:

#### **Procedure**

- 1. From the Area Code & Exchange Prefix Editor Main Menu, select Save Changes.
- 2. Type Y to save your changes to the /opt/avaya/pds/config/upt/ locale.cfg.locale ed.1 file.

### Discarding area code and prefix changes

#### About this task

You can abandon changes you made since the most recent save or since you started the Area Code & Exchange Prefix Editor if you have not saved yet. The system restores the original file that the system loaded when you started the editor or the last saved version. If there are no changes to discard, the system notifies you and cancels the command.

To discard area code and prefix changes:

#### **Procedure**

- 1. From the Area Code & Exchange Prefix Editor Main Menu, select Discard Changes.
- 2. On the Confirm: Discard Current Changes screen, type Y to discard the changes.

# Restore a previous version of area code and prefix settings

You can recover previously saved area code and prefix settings by rolling back to current live version or rolling back to the last back up version.

- Roll back to the current live version option if you saved changes inadvertently and did not restart the system. The system loads the current live area code and prefix settings into the Editor application. Save the restored settings as is or make additional changes. You must save the restored version and restart the system for the restored settings to take effect.
- Roll back to last backed up version if you saved changes in error and have since restarted the system. The system loads the most recently backed up version of the live area code and prefix settings into the editor. Save the restored settings as is or make additional changes.



#### Note:

You must save the restored version and restart the system for the restored settings to take effect.

### Restoring a previous version of area code and prefix settings **Procedure**

- 1. From the Area Code & Exchange Prefix Editor Main Menu, select Rollback.
- 2. On the Rollback to Previous Version screen, select 1 to restore the current live version or select 2 to restore to the last back up version.
- 3. Add or delete area codes or prefixes as necessary.
- 4. Save the restored area code and prefix settings.

### Time zone selection based on ZIP codes

Determining the time zone of a phone number is important, because there are regulations on the time when you can make outbound calls. Phone users' mobility makes it difficult to decide the time zones of cellular phone numbers based on area codes.

With the ZIP to time zone utility, you can determine the time zone of a phone number based on ZIP codes instead of area codes. The dialer dials out only after checking the time zone of the phone number.

### **Important:**

Avaya Proactive Contact Release 5.1.2 and later implements the Time zone selection based on zip code feature.

To facilitate this feature, Avaya Proactive Contact creates a database, which maps ZIP codes to a time zone, along with country codes. You can add, delete, and find ZIP codes, and import and export configuration files.

### Creating database for ZIP codes

#### **Procedure**

- 1. Log in to the dialer as a sysadm user.
- 2. In the Administrator Main Menu, type 2 to select **Administrative tasks**.
- 3. Press Enter.
- 4. In the Administrative Tasks screen, type 10 to select Edit zipcodes configuration.
- 5. Press Enter.
- 6. At the Edit zipcodes configuration Are you sure? prompt, type Y and press

The system displays the main menu for configuring the ZIP codes

### Adding ZIP codes

#### About this task

Using this feature, you can add:

- A single ZIP code
- Multiple ZIP codes divided by commas
- A range of ZIP codes, for example, 1–9

#### **Procedure**

- 1. Log in to the dialer as a sysadm user.
- 2. In the Administrator Main Menu, type 2 to select **Administrative tasks**.
- 3. Press Enter.
- 4. In the Administrative Tasks screen, type 10 to select **Edit zipcodes configuration**.
- 5. Press Enter.
- 6. At the Edit zipcodes configuration Are you sure? prompt, type Y and press Enter.

The system displays the main menu for configuring the ZIP codes

- 7. At the Enter choice prompt, type 1 to select Add Zip Codes.
- 8. Press Enter.
- 9. At the Enter the country code prompt, type the country code.

The system displays the message, Please choose the time zone from following available time zones for the country.

- 10. Type the number adjacent to a time zone to select it.
- 11. At the Add zipcode: prompt, type the zip code or a range of zip codes that you want to add for the selected time zone.
- 12. At the Do you want to see the details of the added zipcodes? type Y.

  The system displays the message, zipcode added, with the details of the zip codes.
- 13. **(Optional)** If he zip codes you added is a range, the system displays the message: Do you want to expand the range provided for <zip code range>?
- 14. Click Y to expand the range and add all the ZIP codes in the range.

### **Deleting ZIP codes**

### **Procedure**

- 1. Log in to the dialer as a sysadm user.
- 2. In the Administrator Main Menu, type 2 to select **Administrative tasks**.
- 3. Press Enter.
- 4. In the Administrative Tasks screen, type 10 to select Edit zipcodes configuration.
- 5. Press Enter.
- 6. At the Edit zipcodes configuration Are you sure? prompt, type Y and press Enter.

The system displays the main menu for configuring the ZIP codes

- 7. At the Enter choice prompt, type 2 to select Delete Zip Codes.
- 8. At the Enter the country code, type the country code for which you want to delete the ZIP code.

The system displays a list of time zones for the country code.

- 9. At the Enter the time zone prompt, type the time zone and press Enter.
- 10. At the Enter the ZIP code or ZIP code range prompt, type the zip code or zip code range that you want to delete.
- 11. At the Are you sure you want to delete the zip codes prompt, type Y.
- 12. At the Do you want to see the details of deleted ZIP codes prompt, type Y.

The system displays the details of the deleted ZIP code.

- 13. **(Optional)** If he zip codes you are deleting is a range, the system displays the message:

  Do you want to expand the range provided for <zip code range>?
- 14. Click Y to expand the range and delete all the ZIP codes in the range.

### **Finding ZIP codes**

#### **Procedure**

- 1. Log in to the dialer as a sysadm user.
- 2. In the Administrator Main Menu, type 2 to select **Administrative tasks**.
- 3. Press Enter.
- 4. In the Administrative Tasks screen, type 10 to select Edit zipcodes configuration.
- 5. Press Enter.
- 6. At the Edit zipcodes configuration Are you sure? prompt, type Y and press Enter.

The system displays the main menu for configuring the ZIP codes

- 7. At the Enter choice prompt, type 3 to select Find Zip Codes.
- 8. Press Enter.
- 9. At the Enter the ZIP code prompt, type the ZIP code that you want to find.

The system displays the matching ZIP codes.

### Importing configuration file

#### **Procedure**

- 1. Log in to the dialer as a sysadm user.
- 2. In the Administrator Main Menu, type 2 to select **Administrative tasks**.
- 3. Press Enter.
- 4. In the Administrative Tasks screen, type 10 to select **Edit zipcodes configuration**.
- 5. Press Enter.
- 6. At the Edit zipcodes configuration Are you sure? prompt, type Y and press Enter.

The system displays the main menu for configuring the ZIP codes

- 7. At the Enter choice prompt, type 4 to select Import Configuration File.
- 8. Press Enter.

The system displays a l.csv files available in /opt/avaya/pds/xfer/public/public directory. The format of the CSV file must be country code, zone code, area code.

9. At the Enter the file name prompt, type the file that you want to import.

### **Exporting configuration file**

### **Procedure**

- 1. Log in to the dialer as a sysadm user.
- 2. In the Administrator Main Menu, type 2 to select **Administrative tasks**.
- 3. Press Enter.
- 4. In the Administrative Tasks screen, type 10 to select Edit zipcodes configuration.
- 5. Press Enter.
- 6. At the Edit zipcodes configuration Are you sure? prompt, type Y and press Enter.

The system displays the main menu for configuring the ZIP codes

- 7. At the Enter choice prompt, type 5 to select Export Configuration File.
- 8. Press Enter.
- 9. At the Enter the new CSV file name prompt, type the name of file that you want to export.

The system saves the file in /opt/avaya/pds/xfer/public/public directory.

# Chapter 6: Calling lists and records

After you download customer records from the host, the system adds several fields to each record to help track calling results. After adding the fields, the system can check for and reject duplicate records and uncallable phone numbers. This process depends on your system configuration. The system refers to the modified records as the calling list.

## Calling list field description

You can see a complete list of all the calling list fields for your system by pressing F4 or Control +V. This can be done when the cursor is in a calling list field on a screen.

The following table describes the added fields:

Name	Description
COUNTER	The Record attempt counter that indicates the number of times the system called the record.
AGENT	The agent who handled the call.
DTE	The date of the last attempt on the record.
TME	The time of the last attempt on the record.
CODE	The completion code.
STATUSFLAG	The status of the record. If blank, the specific record is available for calling.
	B = all bad numbers. The Reject Report lists the records rejected by the system because the system is unable to match them to a time zone or the number is a bad number.
	C = received inbound call from account. So, cancelled outbound call
	D = maximum days on the system
	E = manually deleted in Record Edit
	R = repeated or duplicate account
	T = time zone cannot be determined

Table continues...

Name	Description
DAYSCNT	This field is optional. The days on the system calling lists. The number of days a record is on the system. The Days on System report lists accounts that the system has downloaded for a certain number of days.
ENTRYDATE	The date a record was first downloaded.
ZONEPHONE#	The time zone stamp of a phone number. For example, Pacific, Mountain. The system calls a record only during the recommended
	calling time for the time zone of that record. The system determines the time zone by the area code and the phone number prefix.
DUPE	A duplicate record. The system can reject a record because there is more than one record in the calling list with the same phone number or account number.
	During system configuration, you can select whether to perform duplicate checking and on which field. The system lists these duplicate records on the Reject Report. Duplicate checking adds time to the processing time, but eliminates unnecessary calls.
	An asterisk (*) in DUPE field indicates that duplicate records exist. The system places an R in the STATUSFLAG field of the second, third, and subsequent records to mark these as repeated records that are not called in future.

### **Record Edit and Quick Search**

Using Record Edit, you can gain access to and edit a customer record in a calling list. Use the Record Edit menu to view a calling list record, change the contents of a field in an outbound calling list, or delete a record. Use Record Edit when you cannot gain access to the account of a user on your host computer. If you upload data to the host computer, the changes are included in the upload. On some systems, the system uploads the changes to the host computer each night.

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

You can make several fields available for standard search and specify the fields during system configuration. An advantage of standard search is the use of wild cards. For example, if you are

unsure about the spelling of a name, you can search using the asterisk (\*). If you enter wil\* the system returns Williams, Williamsons, Willis, and other similar names.

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

### Calling List Reports menu

Using the Calling List Reports menu, you can view the following reports:

- · Generate Days on System report
- Generate Reject report
- Generate Release Code report
- Dump a raw file or calling list

### Using calling list commands

### **Logging in as System Operator**

#### About this task

To log in as a system operator:

#### **Procedure**

- 1. At the Login: prompt, enter your user name. You must have set up a user account on the system that is part of the System Operator group.
- 2. At the Password: prompt, enter your password.

The system displays the Supervisor Main Menu.

# Counting calling list records using Supervisor Main Menu Procedure

1. From the Supervisor Main Menu, select Calling List > Count calling list records.

The system displays the date and disk free space in kilobytes along with the calling lists and the number of records in each list.

2. After viewing the information, press Control+X to exit, and press any key to return to the previous menu.

### Creating an empty list for appending

#### About this task

Based on an existing dictionary file, you can create an empty calling list to which you can append records. The empty calling list contains header information only.



#### Note:

Do not create an empty list for appending records while a Job is running on the list as the existing calling list might get overwritten.

To create an empty list for appending:

#### **Procedure**

- 1. From the Supervisor Main Menu, select Calling List > Create an empty calling list for appending.
- 2. Enter a calling list name, and press Enter.

### Editing a record

#### About this task

You can display a client record based on a specified field. You do not need to know the exact field value. You can change all the fields on the screen.

To edit a record:

#### **Procedure**

1. From the Supervisor Main Menu, select Calling List > Edit records > Edit a record or **Edit a record with Quick Search**. Type Y at the prompt.

The system displays the Record Search Criteria screen.

- 2. Type the search values in the screen fields. Quick Search screens have only one field. Press F10. If the system cannot find a match, the system displays the Record Search Criteria screen. Type different criteria and press F10. If the system finds a match, it displays the record on your screen. To see if there is more than one match, press F10 again.
- 3. Use the arrow keys to move to the field you want to change. Press Control+C and type your changes.

4. Press F1 to save your changes or Control+X to abandon the changes.

The system prompts you to confirm the command. Press Y to save the changes.

5. Press Control+X to return to the Record Search Criteria screen.

### **Purging non-selected records**

#### About this task

You can select a set of records to keep and purge unwanted records from a calling list.



#### Caution:

Do not use this command on a calling list if you are using this command in a calling campaign. This command maintains the records that meet the selection criteria and purges the other records.

To purge records:

#### **Procedure**

- 1. From the Supervisor Main Menu, select Calling List > Purge non-selected records.
- 2. Enter a calling list name and press Enter.

### Marking records as DO NOT CALL

#### About this task

Using the batch mode, you can mark records as do not call for all calling lists in the selected do not call group.

To mark records as do not call:

#### **Procedure**

- 1. From the Supervisor Main Menu, select Calling List > Mark records as do not call.
- 2. Select Mark DNC group using batch mode.
- 3. Select the calling list and press Enter.
- 4. Type Y at the confirmation prompt.

### Deleting a record

#### About this task

You can get a client record that the system can mark as deleted. You do not need to know the exact field value. When marked, the system keeps the record but cannot use it to call a client. You can restore the record at any time.

#### To delete a record:

#### **Procedure**

- 1. From the Supervisor Main Menu, select Calling List > Edit records > Delete a record or Delete a record with Quick Search. Type Y to continue.
- 2. If the system has more than one calling list, type the calling list number and press Enter. If your system has only one calling list, the system skips this step. The system displays the Record Search Criteria screen. Type the search values in the screen fields. Quick Search screens have only one field. Press F10. If the system cannot find a match, the system displays the Record Search Criteria screen. Type a different criteria and press F10. If the system finds a match, it displays the record. To see if there is more than one match, press F10 again.
- 3. When the system displays the record, press Esc+D to mark it as manually deleted in Record Edit. The system displays an **E** in the STATUSFLAG field. Press Y to confirm.
- 4. Press F1 and press Control+X.

### Restoring a deleted record

#### **Procedure**

- 1. From the Supervisor Main Menu, select Calling List > Edit records > Delete a record or Delete a record with Quick Search. Type Y to continue.
- 2. If the system has more than one calling list, type the calling list number and press Enter.

  The system displays the Record Search Criteria screen.
- 3. Type the search values in the screen field. Press F10. If the system cannot find a match, the system displays the Record Search Criteria screen. Type a different criteria and press F10 to Search. If the system finds a match, the system displays the record on your screen. To see if there is more than one match, press F10 again.
- 4. When the system displays the record, press Esc+U. The system removes the E from the STATUSFLAG field.
- 5. Press F1 and press Control+X.

### **Outbound Campaign overview**

You specify a field the system uses to mark a record for not calling. The system marks a record as uncallable when an inbound call has come in from a customer whose record can be included in an outbound list. This is similar to deleting a record.

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

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

If you have an Agent Blending system, the system updates all records at a predefined time, or performs the update manually using the updating Outbound Campaign procedure.

### **Updating Outbound Campaign**

### **Procedure**

- 1. From the Supervisor Main Menu, select Calling List > Edit records > Outbound Campaign Update.
- 2. Type the calling list number to update and press Enter.
- 3. At the prompt, type Y.
- 4. Type the search criteria, for example, account number or phone number, and then press F10 to search for the record.

If matching records do not exist, the system displays a message. If the system finds a match, it enters a C in the STATUSFLAG field.

### Marking records ineligible from host

#### About this task

You can mark calling list records as ineligible for calling based on the criteria specified in the host file that contains the unique record identifier. After you mark a customer record, the system immediately searches the outbound calling lists specified in the Do Not Call group and marks all the customer's records. The system does not call a customer during any Job if the record of the customer is marked as do not call.

To mark records as ineligible:

#### **Procedure**

- 1. From the Supervisor Main Menu, select Calling List > Edit records > Mark records as ineligible from host.
- 2. Enter the list number that is to be used, and press Enter. Type Y at the prompt.
  - The system displays the Set DO NOT CALL Status screen with the selected group's unique identifier.
- 3. In the screen field, type the specific value for the customer whose record is to be marked as Do Not Call. Press Enter.
- 4. Repeat steps 5 and 6 for each record to be marked as Do Not Call.
- 5. Press Control+X to exit the screen.

### **Creating an outbound Campaign Update report**

#### **Procedure**

- 1. From the Supervisor Main Menu, select Calling List > Edit records > Create outbound campaign update report.
- 2. Type a date in the format CCYYMMDD. For example, type 20070921 for September 21, 2007.

The system displays a message confirming the report generation.

3. Select View or print reports to view or print the report.

### Calling lists and records maintenance

The system uses inbound lists to capture information from inbound calls. An inbound calling list contains the fields that the agents use when handling inbound calls. If you create an inbound calling list file, the file becomes a part of the system. Use these procedures to create or clear an inbound calling list.



You must log in with administrator privileges. The following commands are available only if your system uses Intelligent Call Blending.

### Creating an empty inbound calling list

### **Procedure**

- From the Administrator Main Menu, select Inbound calling lists > Create an empty inbound calling list.
- 2. Type Y at the prompt. If the list already exists, the system does not create a new one. When the system completes the process, press any key to return to the previous menu.

### Clearing existing inbound calling list

#### About this task

To clear existing inbound calling list data:

#### **Procedure**

1. From the Administrator Main Menu, select Inbound calling lists > Clear an existing inbound calling list. Type Y at the prompt.

The system erases the existing inbound list and creates a new empty one.

2. Press any key to return to the previous menu.

### **Downloading records from host**

### About this task

You can download calling list records from your host computer to the Proactive Contact system. You can download records manually if the download process does not occur automatically.



#### Note:

Do not download records from host while outbound calling is being performed on the calling list you are downloading.

To download host records to the system:

#### **Procedure**

From the Administrator Main Menu, select Transfer and process records > Download host records to system. Type Y at the prompt.

The system transfers the records from the host to the Proactive Contact system.

### Uploading records to host

#### About this task

You can upload calling list records from Proactive Contact system to your host computer. You can upload records when the download process does not occur automatically.

To upload system records to your host:

#### **Procedure**

From the Administrator Main Menu, select Transfer and process records > Upload **system records to host**. Type Y at the prompt.

The system transfers the records from the Proactive Contact system to the host.



#### Note:

This procedure will upload consolidated call statistics to a host computer. Host computer details are configured in /opt/Avaya/pds/config/stats.upld.

### Recovering old calling list

#### About this task

You can process the calling list from the previous day for use with the Jobs the system uses today. Use a calling list from the previous day when you are unable to receive a new calling list from your host. For example, when a host transmission fails, you can use the previous list because it usually contains non-contacted records that the system can use to call clients for a part of the workday.

To recover an old calling list:

### **Procedure**

From the Administrator Main Menu, select Transfer and process records > Recover old **calling list**. Type Y at the prompt.

The system recovers the old calling list records.

### Counting calling list records using Administrator Main Menu

#### About this task

You can view the name of each calling list on the system and the number of records contained in each list.



#### Tip:

You can also use this option to check the available disk space on your system.

To count calling list records:

#### **Procedure**

1. From the Administrator Main Menu, select Transfer and process records > Count calling list records.

The system displays the date, time, and number of records in each calling list on the system.

2. Press Control+X to return to the previous menu.

### **Downloading records for Infinite Job**

### About this task

You can download calling list records from your host computer into a calling list segment to append the records to the calling list and Infinite Job.

To download records for an Infinite Job:

### **Procedure**

From the Administrator Main Menu, select Transfer and process records > Download records for infinite job. Type Y at the prompt.

The system transfers the records from the host to the Proactive Contact system.

### New calling list validation

You can validate the processing of a new calling list. If the required files exist, the system processes the downloaded file into a calling list. This process does not perform a download of the raw calling list file but validates the entries required to perform the download. Ensure a raw file already exists. If it does not exist, you cannot test the processing of the raw file into a calling list.

After running a test, you can choose to remove the downloaded calling list. If further testing is not necessary, remove the raw file. If you must perform further tests, do not remove the raw file.

Once you complete the testing and correctly configure the various files, you can prepare the new calling list. The alternative is to wait for the download and the processing cycle that occurs every night. Either way, you must remove the downloaded raw file used for testing.

### Testing processing of a new calling list

### **Procedure**

- 1. From the Administrator Main Menu, select Transfer and process records > Test processing of new calling list. Type Y at the prompt.
- 2. Press any key to continue.
- 3. Enter the calling list name. If an old calling list with that name already exists, the system warns you that the existing files might get overwritten.
- 4. Type Y to test the files.

### Uploading today's calling statistics to host

#### About this task

You can upload today's calling statistics from the CPU to your host computer. Use this option when the upload process does not occur automatically.

To upload today's calling statistics to your host:

#### **Procedure**

From the Administrator Main Menu, select Transfer and process records > Upload today's call stats to host. Type Y at the prompt.

### Uploading yesterday's calling statistics to host

#### About this task

You can upload yesterday's calling statistics from the CPU to your host. Use this option when the upload process does not occur automatically.

To recover an old calling list:

#### **Procedure**

From the Administrator Main Menu, select Transfer and process records > Upload yesterday's stats to host. Type Y at the prompt.

### Indexing calling list records

#### **Procedure**

- 1. From the Administrator Main Menu, select Transfer and process records > List and/or Create 'list' index.
- 2. Type Y at the prompt.
- 3. At the prompt, provide the name of the calling list that should be indexed.
- 4. At the prompt, provide the name of the calling list field on which the indexing must be done. For example, ACCTNUM.

### Viewing or printing reports

### **About this task**

You can view, print, cancel print, and stop a report.

### **Procedure**

From the Supervisor Main Menu, select Reports > View or print reports.

### Viewing or printing reports shortcut keys

The various shortcut keys to perform viewing, printing, canceling printing, and stop a report operations are:

Key	Command	Description
ESC [ A	UP->	Up Arrow - Move up one field
ESC [ B	DN->	Down Arrow - Move down one field
ESC [ C	RT->	Right Arrow - Move right one position
ESC [ D	LF->	Left Arrow - Move left one position
CNTRL A @ CNTRL M	ABORT	Cancel report generation
CNTRL A A CNTRL M	PRINT	Print a Report PF2
CNTRL A B CNTRL M	CANCEL	Display/Cancel a Print Request PF3
CNTRL A C CNTRL M	VIEW	View a Report PF4
CNTRL T	ABORT	Cancel report generation
CNTRL O	PRINT	Print a Report
CNTRL C	CANCEL	Display/Cancel a Print Request
CNTRL V	VIEW	View a Report
CNTRL M	RETURN	Process entry
CNTRL X	EXIT	Exit
DEL	DELETEC	Delete a character at cursor
CNTRL I	INSERTC	Insert a space at cursor position
CNTRL E	ERASEL	Erase the entire line
CNTRL U	RESTORE	Undo any changes and restore to original
CNTRL R	REFRESH	Repaint the screen
CNTRL W	KEYHELP	Display this help info

# **Chapter 7: Agent Keys**

Using Agent Keys, you can perform actions that are available on your system, such as releasing a call, transferring a call, displaying an agent screen, and logging an agent out of a Job.

Agent Keys display a list of agent keys files, including the name of the file, the type, the file version, and a brief description.

#### Note:

You can enter only 64 characters in the agent keys description field. Third-party developed APIs may or may not use Agent Keys.

Use Agent Keys Wizard to add or edit keys to meet the changing needs of the contact center. Agent keys are from F1 through F12, depending on the type of keyboard. In addition to the function keys, you can assign key combinations to increase the number of available keys. For example, the agent can press and hold the Ctrl key, the Shift key, or the Alt key while pressing the function key.

Using the Agent Keys feature, you can modify an existing agent key or create a new Agent Key Set, and select Job features. The tasks that you can perform using the feature are explained in detail in the subsequent sections.

### **Supported Features**

Using the Supported Features page in the Agent Keys Set Wizard, the user can select the Job features that must be supported in this agent key set. Using the Job feature, the agent can perform the following functions:

- · Managed Dialing
- Sales Verification
- · Native Voice and Data Transfer
- · Do Not Call
- Agent Owned Recall
- Preview Search

### **Managed Dialing**

This Job feature allows agents to preview account information and cancel calls before the calls are made. You can also specify the keys needed to support managed dialing. These keys allow the user to control the pace and outcome of managed dialing. Specifically, when an agent is previewing a record, the agent can choose to cancel the call and move to the next record or the agent can choose to go ahead and dial the record immediately.

### Sales Verification

This Job feature automatically creates a second calling campaign to confirm sales or commitments obtained in a prior campaign. This also allows you to choose the keys needed to support a sales Job in a sales verification scenario. When Sales Verification is used, agents use a specific code to release records that resulted in a successful sale. These records are automatically fed to a second, verification Job. In this Job, each record is called, and a supervisor verifies that the person at the other end of the line agrees to a sale.

### **Native Voice and Data Transfer**

This Job feature allows you to define the keystrokes for transferring a call to another agent or to a supervisor. One keystroke immediately transfers the call and allows the agent to receive a new call. The other keystroke allows the agent to stay on the line with the customers until the other agent answers.

### **Do Not Call**

This Job feature allows you to choose the keys needed to support the Do Not Call feature. When an agent uses the defined key combination, the record is released and marked as Do Not Call. This prevents the dialer from calling the customer in future.

### Agent Owned Recall

An Agent Owned Recall is a recall set on the agent's name by the agent. If the agent leaves the job before the recall time but the job continues to run at the time of recall, in that case, when the time of recall is reached, the recall is converted to a general recall after the specified number of retry attempts and then is passed on to any available agent. However, if the job is shut down before the time of recall, then at the time of recall, the system creates a shadow job for all the AORs in the job. These AORs are indexed in the shadowjob.lst file located in opt/avaya/pds/lists folder. The system automatically starts the job the next day or when the dialer services are restarted, and repeats it everyday until all AORs are processed.

### **Preview Search**

In this feature, an empty record is displayed to agent. The agent needs to search a record from the calling list based on the criteria. The criteria are described in the following table:

Method	Description
HASH	The search is done through the system QuickSearch method. The system searches the calling list until the matching record is found.
LIS	The system uses the List Indexed Sequential method to search for the customer record. The LIS method processes the calling list into a table that is indexed on a key field from the calling list. That key field is specified during configuration.
NONE	No search is allowed. The only way for the agent to make a call is to enter a phone number manually.

# **Chapter 8: Licensing and Security**

The licensing feature provides licensing for various dialer entities using the Avaya standard Poetic Licensing and Web-based License Manager (WebLM) licensing software. WebLM is a standalone Web-based license manager that runs on both Windows and Linux systems. WebLM supports Proactive Contact licensing capabilities.

In a standalone WebLM, you use a WebLM server to support one or more licensed application instances. In this model, an administrator can perform the following tasks through the WebLM server:

- Install a license file on the WebLM server.
- Manage WebLM users
- Track feature licenses acquired by licensed applications
- Generate a usage report for the feature licenses

Due to hardware limitations or dialer performance, licensing does not replace any of the required configurable limits that you use to limit the capacity of an individual dialer.

Licensing is in addition to dialer capacity checks and is not intended to be used for role restriction. Determine the capacities and potential roles of an application prior to a request for a license.

All the dialer components that use licensing provide a 30-day grace period that allows access for 30 days in case of failure of the WebLM server.

For additional information, see the WebLM Administration Guide.

### **License Server Setup**

The pre-requisites for License server Setup are as follows:

- Tomcat Installation
- WebLM Server Installation
- · License file Installation on WebLM Server
- · License file

### Configuring the dialer

#### About this task

You must save the WebLM Server URL in the /opt/avaya/pds/etc/master.cfg file on the dialer. You can store the URL by any of the following ways:

#### **Procedure**

- 1. Modify the value of WEBLMURL parameter in the master.cfg file by manually entering the WebLM Server URL.
- 2. Use Health Manager > Tools > License Configurator.



You must restart the dialer every time you change the WebLM Server URL.

#### Result

The WebLM Server URL is: <a href="http://IP\_ADDRESS:8080/WebLM/LicenseServer">http://IP\_ADDRESS:8080/WebLM/LicenseServer</a>

### **Communication Encryption**

Avaya Proactive Contact adopts a secure protocols namely SSL and Transport Layer Security (TLS) for all its communications.



Avaya Proactive Contact Release 5.2 and later supports the TLS 1.2 protocol for communication.

SSL and TLS fulfills requirements that make it acceptable for use in the transmission of even the most sensitive of transactions, such as credit card information, medical records, legal documents, and e-commerce applications.

SSL and TLS encrypts the data before sending and the receiver decrypts the data once it is delivered. The encryption mechanism is a way of communication between the sender and the receiver.

### **Identity Authentication**

In addition to operating system, password-based authentication, Avaya Proactive Contact also validates incoming client certificates. Servers, such as Agent, Enserver, List Server, receive certificates of the client during communication with SSL. Based on the server configuration, the servers verify whether trusted Certificate Authority (CA) has signed the certificate.

### **Certificates**

The following is the list of certificates that Proactive Contact Agent requires:

- Certificate Key File: This file stores the agent client certificate key.
- Certificate File: This file stores the agent client certificate.

CA Certificate: This certificate is stored in Microsoft Certificate Store and is used to authenticate server certificate.

The Certificates are available at the following location on the server:

### /opt/avaya/pds/openssl

The following is the list of certificates, the description of certificates, and the location of the certificates:

Private Keys for CA Certificates are in the path:

#### ./cacertificate:

ProactiveContactCA.pem - CA Certificate file

#### ./certificate:

- agent\_cert.pem Certificate files used by Agent server.
- eventClient\_cert.pem Certificate used by Event Serve Client (Not in Use)
- listsrvClient\_cert.pem Certificate used by List Server clients used in List Sharing mode
- corbaClients\_cert.pem Certificates used all internal corba clients
- eventServer cert.pem Certificate used by Event Server (Not in Use)
- corbaServer\_cert.pem Certificates used by All Corba Services
- listserver cert.pem Certificates used by List Server.

#### ./keystore:

jacorb - Java Keystore built with java client certificates and ProactiveCA certificates

### ./private:

- agent\_key.pem corbaServer\_key.pem eventServer\_key.pem
- corbaClients key.pem eventClient key.pem listserver key.pem

### **Requirements for Certificates**

- To gain access to the certificate path, you must gain root access.
- The name of the key files and the certificates must match with the file names deployed during installation.

# Certificates Generation, Signing, and Maintenance

Proactive Contact supports OpenSSL CA and Enterprise Java Bean Certificate Authority (EJBCA) as the Certificate Authorities.

- EJBCA. Issued by Core Services Group of Avaya. EJBCA is a fully functional CA, built in Java and based on Java 2 Platform Enterprise Edition (J2EE) technology. It constitutes a robust, high performance, and component based CA. Flexible and platform-independent, you can use EJBCA as a standalone CA or as an integrated J2EE application.
- OpenSSL CA. Is an Open Source CA distributed from <a href="http://openssl.org">http://openssl.org</a>. OpenSSL CA is a minimal CA application, which you can use to sign certificate requests in a variety of forms and generate Certificate Revocation Lists. This CA application also maintains a text database of issued certificates and their status.

The shipped Proactive Contact systems include default certificates for all services and internal clients. For external clients, you can obtain default certificates from the system's SDKs.

You can generate certificates in several ways. You can either generate a single certificate shared by all the services on Proactive Contact, a single certificate shared by all the internal clients, or a certificate for each service or internal client. The configuration file provides all these options with information on whether both servers and clients have certificates or whether only servers have certificates.

Documentation is available that describes the ways to generate the default certificates and the configurations on EJBCA. With the documentation provided, Avaya Customer Support or customers can set up EJBCA to maintain the certificates including non-default certificate generation, certificate renewals, and revocations.

# **List of Secured Services**

The list of secured CORBA Services in Proactive Contact systems includes, but is not limited to, the following services:

- · Command and Control Service
- DataPump HDCC
- Dialer Command and Control Service
- · Event Service
- History Data Service HDSC
- Logging Service
- · Naming service
- RBACManager Service
- Real-Time Data Service
- Service Activation Service

- · Service Monitor
- StatsPump
- System Health Service

The exposed tcp socket based interfaces are as follows:

- Agent API
- List Server

## **Secured Telnet and FTP**

The telnet and ftp operations from Supervisor workstations to Proactive Contact systems are replaced with SSH and SFTP.

The operations use the following tools:

WEONLYDO's FTPDLX

WEONLYDO's TelnetDLX

# **Database Security**

The application specific database users are:

- · avayadba application specific schema owner.
- statspump used for statspump process connection to the database and update real-time statistics for monitoring.
- datapump used for datapump process connection to the database and update historical statistics for reporting.
- dsc real-time data reporter, used by Real Time Data Server (rtdatasvr process) and Data Services Component (DSC) to report real-time data to the Supervisor. This user is also responsible for hierarchy operations such as create/update/read/delete. This user is also responsible for Role Based Access (RBAC) and tenant management operations such as create/update/read/delete.
- reporter used by Avaya Proactive Contact Supervisor for historical data retrieval.

Proactive Contact enables use of database security. For Oracle, you can enable Oracle Advanced Security to use TCPS instead of TCP. Oracle manages certificates (client/server/trusted CA) with wallets. Avaya Proactive Contact supplies default wallets using certificates signed by the Certificate Authority.

Proactive Contact also uses password management for database users, using a menu, which allows the user to change the passwords for all database users, with the exception of avayadba.

# Configuring TLS and high ciphers for dialer

#### About this task

Use CUI menu to configure Transport Layer Security (TLS) and high ciphers.

#### **Procedure**

- 1. Log in to the Proactive Contact Dialer as administrator.
- Navigate to ADMINISTRATOR MAIN MENU > ADMINISTRATIVE TASKS > Configure SSL/TLS and Ciphers.

The system displays the following:

Type the number corresponding to the required option in the menu.

3. To configure SSL/TLS, press 1.

#### For example

```
The current setting of Agent connection is
CORE SSL METHOD:TLSv1.2
0. \, \mathrm{Exit}
    1. SSLv23
   2. TLSv1
   3. TLSv1.1
    4. TLSv1.2
Enter TLS Option to set:4
TLSv1.2 set successfully in Agent, listserver.
The current setting of Dialer CORBA Service is
SERVICE SSL METHOD:TLSv1.2
    0. Exit
    1. SSLv23
2. TLSv1
    3. TLSv1.1
    4. TLSv1.2
Enter TLS Option to set:4
TLSv1.2 set successfully in Dialer CORBA service.
```

4. To toggle high ciphers, press 2.

#### For example

```
Enter Option:2
```

High Ciphers are enabled in the current system.

Do you want to Disable High Ciphers (Y/N):

#### 5. To disable specific ciphers, press 3

#### For example

```
Enter Option: 3
Currently following ciphers are supported
ECDHE-RSA-AES256-GCM-SHA384
ECDHE-ECDSA-AES256-GCM-SHA384
ECDHE-RSA-AES256-SHA384
ECDHE-ECDSA-AES256-SHA384
DHE-DSS-AES256-GCM-SHA384
DHE-RSA-AES256-GCM-SHA384
DHE-RSA-AES256-SHA256
DHE-DSS-AES256-SHA256
ECDH-RSA-AES256-GCM-SHA384
ECDH-ECDSA-AES256-GCM-SHA384
ECDH-RSA-AES256-SHA384
ECDH-ECDSA-AES256-SHA384
AES256-GCM-SHA384
AES256-SHA256
ECDHE-RSA-AES128-GCM-SHA256
ECDHE-ECDSA-AES128-GCM-SHA256
ECDHE-RSA-AES128-SHA256
ECDHE-ECDSA-AES128-SHA256
DHE-DSS-AES128-GCM-SHA256
DHE-RSA-AES128-GCM-SHA256
DHE-RSA-AES128-SHA256
DHE-DSS-AES128-SHA256
ECDH-RSA-AES128-GCM-SHA256
ECDH-ECDSA-AES128-GCM-SHA256
ECDH-RSA-AES128-SHA256
ECDH-ECDSA-AES128-SHA256
AES128-GCM-SHA256
AES128-SHA256
The current setting is !MD5:!RC4:!3DES:!SHA:!IDEA:!SEED:!CAMELLIA
Do you want to modify this setting (Y/N):
```

# Configuring TLS and strong ciphers for Supervisor

For Supervisor, modify the following entries in sqlnet.ora file located in C:\Program Files (x86)\Avaya\Proactive Contact 5.1\Services\3rdParty\Oracle11g to connect TLS-enabled Oracle server:

- a. For SSL VERSION, update the value as 1.0.
- b. For SSL\_CIPHER\_SUITES, update the value.For example, (SSL\_RSA\_WITH\_AES\_128\_CBC\_SHA).

# **Password Ageing on Clients**

The Avaya Proactive Contact server authenticates the clients with a password in addition to the certificates and private keys. The clients can be internal clients or external clients from the third party. Users can set the password to get expired.

There are certain clients invoked by the user from the background, Proactive Contact has a programmable password change mechanism so that clients can set the new password without human intervention.

As Proactive Contact system requires certain passwords to age, certain users are created only for internal use.

## **Password Detail**



#### Note:

By default, the PAMPASS CRITERIA parameter is disabled in the system.

The password criteria when PAMPASS\_CRITERIA parameter in master.cfg is set to YES are as follows:

- Password Strength
  - Minimum password length: 8 characters.
  - For Avaya Proactive Contact Release 5.1.2 and later the maximum password length is set at 20 characters.
  - Passwords must include any three of the following:
    - One upper case letter
    - · One lower case letter
    - One number
    - One special character
    - Passwords are locked after three failed attempts
- Password History password must differ from login name of the user and any reverse or circular pattern of the user name. Letters are case sensitive. New password must differ from old password by at least three characters.

The password criteria when PAMPASS\_CRITERIA parameter in master.cfg is set to NO in the English language are as follows:

- Password Strength:
  - Must have a minimum password length of 6 characters.
  - For Avaya Proactive Contact Release 5.1.2 and later the maximum password length is set at 20 characters.

- Must contain at least two alpha, and at least one numerical or special character.
- All characters must be 7-bit ASCII set.
- Must differ from user's login name and any reverse or circular shift of that name. The comparison are case insensitive.
- Must differ old password by a least 3 characters.

The password criteria when PAMPASS\_CRITERIA parameter in master.cfg is set to NO in a non-English language are as follows:

- Must have six characters.
- For Avaya Proactive Contact Release 5.1.2 and later the maximum password length is set at 20 characters.
- Must differ from user's login name and any reverse or circular shift of that name. The comparisons are case insensitive.
- Must differ old password by a least 3 characters.
- Password History The default setting specifies that you cannot use the same password twice in succession. However, after using a different password, you can revert to the original one the next time a change is required.
- Password lockout: Passwords are locked after three failed attempts.

Password Aging/Expiration: The administrator can define the Password Expiration setting in the createop.cfg file. The createop.cfg file is present in the opt/avaya/pds/config. By default the password expiration time is four weeks.

The FORCEPWCHANGE setting helps the user to change the password after the first login. By default the FORCEPWCHANGE setting is enabled on the dialer.

## Note:

Password Strength is applicable to the GUI application. For the CUI application, Enhanced Password strength criteria is always applicable irrespective of whether the PAMPASS\_CRITERIA is set to No or YES. Password history is not maintained in CUI.

## **Password Rotation**

The password rotation feature provides the following benefits:

- All CORBA services user names are added with the dialerID. For example, the User name of Service Monitor is smntr10 where 10 is dialerID.
- The manage\_corba\_users command to add all the users in the LDAP directory or to reset the users' password.
  - To add all the CORBA users, run the following command:
    - \$ manage corba users -D 10 -A

- To reset all user passwords, run the following command:

```
$ manage corba users -D 10 -R
```

- To reset a specific user password, run the following command:

```
$ manage corba users -U smntr10
```

- All services use the default password to log into the respective servers.
- In case of password expiry, the specific Service sets a new password (a combination of 2) char seeds + current timestamp) into the system LDAP. This password is stored in encrypted form (using AES128) format in /opt/avaya/pds/config/<username>.pass file for logging in the next time.
- Services decrypt the respective . pass file using AES 128 algorithm when services require the password.



If you get an error message, Getting an error UNKNOWN USER: PAM Authentication failed. Check the LDAP and verify that the username already exists with the dialerID specified in the master.cfg file.

#### Tip:

If you get an error message "Invalid password in the account file", the problem is that this user password does not match. In this case, you can run manage corba users with reset option. Ensure that the respective .pass file in /opt/avaya/pds/config directory is deleted when you run manage corba users.



#### Warning:

Do not delete the \*.pass files for DB users.

# **Secured Agent**

The Agent application is secured and offers the following benefits:

- Communicates using Secure Socket Layer (SSL). Avaya Proactive Contact Release 5.2 and later also supports TLS 1.2 for communication.
- Data Transmission is encrypted.
- Certificates are used for client and server authentication.
- Security Settings are saved in PDSAgent.ini file.

# Chapter 9: Back up and restore

For back up and restoration capabilities, you can use the following options:

- Digital Data Storage Tape (DDS)
- DVD Writable
- · Third Party Host
- USB (Flash Memory Stick)

The DDS tape drive is connected to a SCSI LVD/SE connector (a factory option). The necessary software for tape operations is already installed on the workstation. For more information on the DDS tape drive, see *Planning and Prerequisites for Proactive Contact* and *Implementing Proactive Contact*. Note that USB devices do not support Mondo backup.

# Guidelines for back up

Back up the following files on a regular basis:

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

Every day, use the eject button to remove the tape from the tape drive. Before loading the new tape, ensure that it is write-enabled. To prevent data loss, follow these guidelines:

- Keep a minimum of two sets of back up tapes. In each set, keep one tape for each day.
- Store one back up set away from your site.
- Store back up tapes in a controlled environment and the optimal tape storage environment are 50% relative humidity at 22° C.
- Replace each DDS tape after 100 times of use, approximately two years.
- Clean the tape drive every month using a cleaning tape.
- Replace cleaning tapes after 25 times of use.

The standard back up medium is a 4mm, 170-meter, 72 GB DDS tape.



#### Note:

Backup and restore activities that are performed on the dialer are now logged in a separate log file which is at /opt/avaya/logs/archive mgr.log. This file captures the actions and user inputs during the backup and restore activities.

# Manage back up configuration file

This menu allows you to configure various parameters associated with back up and recovery operations. You will see the following three areas of configuration:

- Third Party Host
- Secure Shell (SSH)
- Archive Encryption

# Starting configuration

#### About this task

To start back up configuration:

- 1. Log in as a user of the sysadm user group.
- 2. From the Administrator Main Menu, select Manage backup configuration file.
- 3. To start configuration, type 1 in the back up Configuration Utility menu and press Enter. The system displays the Third Party Host Configuration menu and the following message:

```
Do you want to configure/ alter third party host now? (Y or N)
```

- 4. Type Y to allow third party back up. Otherwise, type N. If you type Y, the system displays the following prompts:
  - a. On the Enter the third party host name prompt, specify the third party host name and press Enter.
  - b. On the You entered '<hostname>'. Is that correct? (Y or N) prompt, type Y to confirm the host name and press Enter.
  - c. On the Enter the user account used '<hostname>' prompt, specify the user account. Confirm the user account on the prompt.
  - d. On the Enter the directory prompt, specify the directory where you want to save the back up. Ensure that you have appropriate write permissions on the specified directory. Confirm the directory name on the prompt.

5. On the Do you wish to configure/ alter the SSH parameters now? (Y or N) prompt, type N.

## ₩ Note:

You must not modify the ssh parameters, unless required.

- 6. On the Do you wish to configure/ alter the encryption values now? (Y or N) prompt, type N. The confirmation screen displays all the parameters that have been entered or modified.
- 7. On the Do you want to save these values? (Y or N) prompt, type Y to create the back up.cfg file. You can now continue with the back up creation with the selected configuration.

## Note:

Only those users who performed the back up, or users existing at the time the back up was performed, must restore the back up.

## Show current settings only

This option provides a summary of the following:

- · Name of the Third Party Host
- · Login account for the Third Party Host
- · Directory path on the Third Party Host
- SSH version
- SSH Cipher specification
- Archive encryption option
- PGP ASCII armored option

# **Backup and restore commands**

### **DAT** drive status

You can monitor the tape drive status during back up and restore procedures. There are two LEDs on the tape drive. The LED on the left is the cassette LED. The LED on the right is the drive LED. When the system uses the tape drive, both lights flash in different color combinations. The following table describes the status of the tape and the tape drive:

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

## **Backup and restore options**

You can use the following for backing up and restoring information on Proactive Contact:

- DAT 72 USB External Tape Drive
- DVD Writable



#### Note:

Proactive Contact does not work with DVD back up, if:

- The file size of the entire back up exceeds 4 GB.
- The back up spans across multiple DVDs.

In case the size of the entire back up exceeds 4GB, you must either take the back up on a Third Party Host, on DDS Tape or USB Flash Memory Stick device. All these options are for media other than DVD. If a back up operation fails due to the back up size limitation (4GB), the system displays an error message. In case of non-interactive mode, the system saves the back up logs at the following location:

/opt/avaya/logs/archive\_mgr.log

A Third Party Host



#### Note:

When you are restoring any of the following back ups, you must restart the dialer services.

- Local back up/restore/verify
- · Back up complete system
- Back up system and calling list
- · Back up system only

- · Back up system configuration files
- Pod back up/restore

#### Note:

If you are performing back up or restore in a POD, after restoring system back up on secondary dialer, restart that dialer. After a back up/restore of the secondary dialer in a Pod, you must restart the server on which LDAP is running. At present, LDAP back up is performed in the following cases:

- · back up complete system.
- back up system and calling lists.
- · back up system only.
- back up system configuration files.

# Performing back up on a third party host

#### About this task

You cannot schedule or automate network backup, which is a back up or recovery, on a third-party host. You require to type your password multiple times during back up or recovery, on a third-party host.

- 1. Log in as a sysadm type user. Ensure that the back up.cfg file is created.
- 2. Select the required option for which you want to perform the back up. For example, calling list or system.
- 3. Type 3 to select Third Party Host option in the Select Media for back up/ resotore/verify menu. Note that the system does not display the Third Party Host option for any of the Intrapod back ups.
- 4. The system displays the third party host information. Ensure that the third party host supports the SSH protocol and not just the SFTP because while taking network back up, some shell commands, which are required for the successful back up creation, require ssh protocol to run.
- 5. Type Y to continue the back up on the third party host.
- 6. Enter the password and continue with creating the back up.

# Local back up/restore/verify

# Backing up the complete system

#### About this task

You can back up the entire contents of the root file system, including the operating system and the Proactive Contact system files.

#### **Procedure**

- 1. From the Administrator Main Menu, type 3 and press Enter to select Back up, restore and verify.
- 2. From the Back Up and Restore Menu, type 2 and press enter to select **Local back up/** restore/verify.
- 3. Type 2 and press enter to select **Back up complete system**.
- 4. At the prompt, type Y.
- 5. Select back up media type.
- 6. After the back up process is completed, store the back up in antistatic environment at a regulated temperature and humidity. This is valid only if you use a DDS Tape.



Any user of group pds\_leadadm and pds\_sysadm with default tenant can take backup.

## Backing up the system and calling lists

- Locate the DVD/DDS tape drive/USB (Flash Memory Stick) in the system cabinet. Insert a new DVD/DDS/ tape in the drive or insert the USB (Flash Memory Stick). You can also configure a third party host.
- 2. From the Administrator Main Menu, type 3 and press Enter to select Back up, restore and verify.
- 3. From the Back Up and Restore Menu, type 2 and press Enter to select Local back up/restore/verify.
- 4. Type 3 and press enter to select **Back up system and calling lists**.
- 5. At the Back up system and calling lists Are you sure? prompt, type Y for yes and N for no.
- 6. At the Are above entries correct? prompt, type Y for yes and N for no.
- 7. Select the back up media type.

- 8. Follow the onscreen instructions.
- 9. After the back up process is complete, store the back up in antistatic environment at the proper temperature and humidity.

## Backing up system files

#### About this task

You can back up the entire system excluding the calling lists (specifically, excluding all data in the /opt/avaya/pds/xfer/clist directory).

To back up the system files:

#### **Procedure**

- Locate the DVD/DDS tape drive/USB (Flash Memory Stick) in the system cabinet. Insert a new DVD/DDS tape in the drive or insert the USB (Flash Memory Stick). You can also configure a third party host.
- 2. From the Administrator Main Menu, type 3 and press Enter to select Back up, restore and verify.
- 3. From the Back Up and Restore Menu, type 2 and press Enter to select Local back up/restore/verify.
- 4. Type 4 and press Enter to select Back up system only.
- 5. At the Back up system only Are you sure? prompt, type Y for yes and N for no.
- 6. At the Are above entries correct? prompt, type Y for yes and N for no.
- 7. Select the back up media type.
- 8. Follow the onscreen instructions.
- 9. After the back up process is complete, store the back up in antistatic environment at the proper temperature and humidity.

# Backing up system configuration files

#### **About this task**

You can back up all the system configuration files (all files needed to customize a newly installed system to the customer's specifications).

To back up system configuration files:

#### **Procedure**

 Locate the DVD/DDS tape drive/USB (Flash Memory Stick) in the system cabinet. Insert a new DVD/DDS tape in the drive or insert the USB (Flash Memory Stick). You can also configure a third party host.

- 2. From the Administrator Main Menu, type 3 and press Enter to select Back up, restore and verify.
- 3. From the Back Up and Restore Menu, type 2 and press Enter to select Local back up/restore/verify.
- 4. Type 5 and press Enter to select Back up system configuration files.
- 5. At the Back up system configuration files Are you sure? prompt, type Y for yes and N for no.
- 6. At the Are above entries correct? prompt, type Y for yes and N for no.
- 7. Select the back up media type.
- 8. Follow the onscreen instructions.
- 9. After the back up process is complete, store the back up in an antistatic environment at a regulated temperature and humidity.

## Backing up system data or stat files

#### About this task

You can back up all data files needed to run reports using the PC Analysis tools. Specifically, all files matching the following patterns:

- /opt/avaya/pds/lists/\*.stat
- /opt/avaya/pds/lists/history/\*.hist
- /opt/avaya/pds/account/\*

If you select any of the options, the system displays a prompt message whether you want the back up to be incremental or full. In the case of a full back up, the system backs up all files in the specified category. In the case of an incremental back up, the system backs up a file only if it has changed since it was last backed up as part of any full back up.

To back up system data or stat files:

- Locate the DVD/DDS tape drive/ USB (Flash Memory Stick) in the system cabinet. Insert a new DVD/DDS tape in the drive or insert the USB (Flash Memory Stick). You can also configure a third party host.
- 2. From the Administrator Main Menu, type 3 and press Enter to select Back up, restore and verify.
- 3. From the Back Up and Restore Menu, type 2 and press Enter to select Local back up/restore/verify.
- 4. Type 6 and press Enter to select Back up system data/stat files.
- 5. At the Back up system data/stat files Are you sure? prompt, type Y for yes and N for no.

- 6. Enter the media type.
- 7. At the Are above entries correct? prompt, type Y for yes and N for no.
- 8. Select the back up media type.
- 9. Follow the onscreen instructions.
- 10. After the back up process is completed, store the back up in antistatic environment at the proper temperature and humidity.

## Restoring all the data

#### About this task

You can restore all files from all supported media types created using the back up menu commands.

#### **Procedure**

- 1. From the Administrator Main Menu, type 3 and press Enter to select Back up, restore and verify.
- 2. From the Back Up and Restore Menu, type 2 and press Enter to select Local back up/restore/verify.
- 3. Type 7 and press Enter to select Restore all.
- 4. At the Restore all Are you sure? prompt, type Y for yes and N for no.
- Select the restore media type.
- 6. Follow the onscreen instructions.
- 7. After the restore process is complete, store the back up in antistatic environment at the proper temperature and humidity.

## Important:

You cannot restore files from back up tapes created on earlier versions of the system.

## Restoring a file from archive

- 1. From the Administrator Main Menu, type 3 and press Enter to select Back up, restore and verify.
- 2. From the Back Up and Restore Menu, type 2 and press Enter to select Local back up/restore/verify.
- 3. Type 8 and press Enter to select Restore a file.
- 4. Enter the full filename in the ADDITIONAL ENTRY for Restore a file menu.

- 5. At the Are above entries correct? prompt, type Y for yes and N for no.
- 6. Select the restore media type.
- 7. Follow the instructions on the screen.

## Archiving a List or Verify a file

#### **Procedure**

- 1. From the Administrator Main Menu, type 3 and press Enter to select Back up, restore and verify.
- 2. From the Back Up and Restore Menu, type 2 and press Enter to select Local back up/restore/verify.
- 3. Type 9 and press Enter to select List/Verify a file in archive.
- **4.** At the List/Verify a file in archive Are you sure? prompt, type Y for yes and N for no
- 5. Enter the full filename in the ADDITIONAL ENTRY for List/Verify a file in archive menu.
- 6. The system displays a message Are above entries correct? Type Y for yes and N for no.
- 7. Select the back up media type.
- 8. Locate the DVD drive / tape drive in the system cabinet. Insert the DVD / DDS tape with the existing back up files in the drive. You can also use a third party host.
  - The system displays the byte count, date, size, and file names on the screen during the tape verification process.
- 9. After verifying the tape, follow the downloading instructions on the screen. Type  ${\tt C}$  to return to the previous menu.

## **Archiving List or Verify contents**

#### About this task

To verify a back up file on a tape:

- 1. From the Administrator Main Menu, type 3 and press Enter to select Back up, restore and verify.
- 2. From the Back Up and Restore Menu, type 2 and press Enter to select Local back up/restore/verify.
- 3. Type 10 and press Enter to select List/Verify archive contents.

- 4. At the List/Verify archive contents Are you sure? prompt, type Y for yes and N for no.
- 5. Select the back up media type.

The system displays the byte count, date, size, and file names on the screen during the tape verification process.

6. After verifying the archive contents, follow the unloading instructions on the screen.

# Listing archive volume information

#### About this task

You can view the creation information on a back up tape.

To view back up volume information:

#### **Procedure**

- 1. From the Administrator Main Menu, type 3 and press Enter to select Back up, restore and verify.
- 2. From the Back Up and Restore Menu, type 2 and press Enter to select Local back up/restore/verify.
- 3. Type 11 and press Enter to select List archive volume information.
- 4. At the List archive volume information Are you sure? prompt, type Y for yes and N for no.
- 5. Select the back up media type.
- 6. The system displays the volume information.
- 7. After verifying the archive volume, follow the unloading instructions on the screen.

## Important:

You cannot restore files from back up tapes created on earlier versions of the system.

# Creating a bootable back up

#### About this task

You can create a bootable back up using a DVD or a tape drive.

#### **Procedure**

1. From the Administrator Main Menu, type 3 and press Enter to select Back up, restore and verify.

- 2. From the Back Up and Restore Menu, type 2 and press Enter to select Local back up/ restore/verify.
- 3. Type 12 and press Enter to select Create bootable backup.
- 4. At the Create bootable back up Are you sure? prompt, type Y for yes and N for no.



#### Warning:

While performing the bootable back up, all processes are shutdown, and all processes start only after the completion of bootable back up.

5. Follow the onscreen instructions to complete the bootable back up.

# Local back up or restore calling lists

# Backing up all calling lists

#### About this task

You can back up all calling lists currently on the system. Specifically, all files in the directory /opt/avaya/pds/xfer/clist.

- 1. Locate the DVD/DDS tape drive/USB (Flash Memory Stick) in the system cabinet. Insert a new DVD/DDS tape in the drive or insert a USB (Flash Memory Stick). You can also configure a third party host.
- 2. From the Administrator Main Menu, type 3 and press Enter to select Back up, restore and verify.
- 3. From the Back Up and Restore Menu, type 3 and press Enter to select Local back up/ restore calling lists.
- 4. Type 2 and press Enter to select Back up all calling lists.
- 5. At the Back up all calling lists Are you sure? prompt, type Y for yes and N for no.
- 6. Select the back up media type.
- 7. Follow the onscreen instructions to complete the back up.
- 8. After the back up process is completed, store the back up in an antistatic environment at the proper temperature and humidity.

# Backing up a specific calling list

#### About this task

You can select a specific calling list from the Item List on the right side of the screen. View additional files by scrolling down the list.

#### Note:

The system lists the files in alphabetical order and truncates file names with more than 10 characters in the displayed list. If you select a truncated file name, the system selects and backs up the correct file.

To back up a specific calling list:

#### **Procedure**

- Locate the DVD or DDS tape drive or USB (Flash Memory Stick) in the system cabinet. Insert a new DVD/DDS tape in the drive or insert a USB (Flash Memory Stick). You can also configure a third party host.
- 2. From the Administrator Main Menu, type 3 and press Enter to select Back up, restore and verify.
- 3. From the Back Up and Restore Menu, type 3 and press Enter to select Local back up/ restore calling lists.
- 4. Type 3 and press Enter to select Back up a specific calling list.
- 5. Type the item number of the calling list on the right of the command menu that needs to be backed up and press Enter.
- 6. At the Back up a specific calling list on item stname> Are you sure? prompt, type Y for yes and N for no.
- 7. Select the back up media type.
- 8. Follow the onscreen instructions.
- 9. After the back up process is completed, store the back up in an antistatic environment at a regulated temperature and humidity.

## Restoring all calling lists

#### About this task

To restore all callings lists from a back up tape:

#### **Procedure**

1. From the Administrator Main Menu, type 3 and press Enter to select Back up, restore and verify.

- 2. From the Back Up and Restore Menu, type 3 and press Enter to select Local back up/restore calling lists.
- 3. Type 4 and press Enter to select Restore all calling lists.
- 4. At the Restore all calling lists Are you sure? prompt, type Y for yes and N for no.
- 5. Select the restore media type.
- 6. Follow the onscreen instructions to restore all the calling lists.

# Restoring a specific calling list

#### About this task

You can restore a single calling list file from tape. Restoring a specific calling list is similar to restoring all calling lists except that the file to be restored appears in the Item List on the right hand side of the menu. The command overwrites the list of the same name currently on the system.

To restore a specific calling list from tape:

- 1. From the Administrator Main Menu, type 3 and press Enter to select Back up, restore and verify.
- 2. From the Back Up and Restore Menu, type 3 and press Enter to select Local back up/restore/verify.
- 3. Type 5 and press Enter to select Restore a specific calling list.
- 4. Type the item number of the calling list on the right of the command menu that needs to be restored and press enter.
- 5. At the Restore a specific calling list on item 1 are you sure? prompt, type Y for yes and N for no.
- 6. Select the restore media type.
- 7. Follow the onscreen instructions to restore a specific calling list.

# Local back up or restore database

# Backing up a database

#### About this task

You can back up all database data files and database system files, specifically, all files in the directory /opt/oracle/oradata.

## Important:

You must execute a database back up when no other activities, such as dialing, are in progress. During this operation, the control and monitor functions are unavailable. This operation is also time and resource intensive, which can slow down system activity.

To back up a database:

#### **Procedure**

- Locate the DVD/DDS tape drive/ USB (Flash Memory Stick) in the system cabinet. Insert a new DVD/DDS tape in the drive or insert a USB (Flash Memory Stick). You can also configure a third party host.
- 2. From the Administrator Main Menu, type 3 and press Enter to select Back up, restore and verify.
- 3. From the Back Up and Restore Menu, type 4 and press Enter to select Local back up/restore/verify.
- 4. Type 3 and press Enter to select Back up a specific calling list.
- 5. Type 2 and press Enter to select Back up the database.
- 6. At the Back up the database Are you sure? prompt, type Y for yes and N for no.
- 7. Select the back up media type.
- 8. Follow the onscreen instructions to back up a database.
- After the back up process is complete, store the back up in an antistatic environment at the proper temperature and humidity.

## Restoring a database

#### About this task

You can restore database data files and database system files, specifically, all files in the directory /opt/oracle/oradata.

## Important:

You must execute a database restore when no other activities, such as dialing, are in progress. During this operation, the control and monitor functions are unavailable. This operation is also time and resource intensive, which can slow system activity.

## Note:

You must restart all the dialer services after restoring the database.

To restore a database:

#### **Procedure**

- 1. From the Administrator Main Menu, type 3 and press Enter to select Back up, restore and verify.
- 2. From the Back Up and Restore Menu, type 4 and press Enter to select Local back up/restore/verify.
- 3. Type 3 and press Enter to select Restore the database.
- 4. At the Restore the database Are you sure? prompt, type Y for yes and N for no.
- 5. Select the restore media type.
- 6. Follow the onscreen instructions to restore a database.

## Intrapod back up/ restore/verify

Use this menu to perform back up, restore, and verify operations related to the secondary system.

## Note:

During an Intrapod back up/Restore, when the system prompts for starting the dialer services on the secondary dialer, select the No option.

## Backing up the complete system in a POD configuration

#### About this task

You can back up the entire root file system contents, including the operating system and the Proactive Contact system files, and calling list. The back up is run at the primary dialer and the back up files are transmitted from the designated secondary dialer to the designated media on the primary dialer.

To Pod back up the complete system:

- 1. Locate the DVD/DDS tape drive/USB (Flash Memory Stick) in the primary system cabinet. Insert a new DVD/DDS tape in the drive or insert a USB (Flash Memory Stick).
- 2. From the Administrator Main Menu, type 3 and press Enter to select Back up, restore and verify.

- 3. From the Back Up and Restore Menu, type 5 and press Enter to select Intrapod back up/restore/verify.
- 4. Type 2 and press Enter to select Pod Back up complete system.
- 5. Select the back up media type.
- 6. After the back up process is complete, store the back up in antistatic environment at a regulated temperature and humidity.

## Backing up POD system and calling lists

#### **About this task**

You can back up the entire secondary system and all calling lists.

To back up the secondary system and calling lists:

#### **Procedure**

- 1. Locate the DVD/DDS tape drive/USB (Flash Memory Stick) in the primary system cabinet. Insert a new DVD/DDS tape in the drive or insert a USB (Flash Memory Stick).
- 2. From the Administrator Main Menu, type 3 and press Enter to select Back up, restore and verify.
- 3. From the Back Up and Restore Menu, type 5 and press Enter to select Intrapod back up/restore/verify.
- 4. Type 3 and press Enter to select Pod back up system and calling lists.
- 5. The system displays the following message Pod Back up system and calling lists Are you sure? Type Y for yes and N for no.
- 6. At the Are above entries correct? prompt, type Y for yes and N for no.
- 7. Select the back up media type.
- 8. Follow the onscreen instructions.
- 9. After the back up process is complete, store the back up in antistatic environment at the proper temperature and humidity.

### Backing up POD system only

#### About this task

You can back up the entire secondary system excluding the calling lists (specifically, excluding all data in the /opt/avaya/pds/xfer/clist directory).

To back up the system files:

- 1. Locate the DVD/DDS tape drive/USB (Flash Memory Stick) in the system cabinet. Insert a new DVD/DDS tape in the drive or insert a USB (Flash Memory Stick).
- 2. From the Administrator Main Menu, type 3 and press Enter to select Back up, restore and verify.

- 3. From the Back Up and Restore Menu, type 5 and press Enter to select Intrapod back up/restore/verify.
- 4. Type 4 and press Enter to select Pod back up system only.
- 5. The system will ask you the following Pod Back up system and calling lists Are you sure? Type Y for yes and N for no.
- 6. At the Are above entries correct? prompt, type Y for yes and N for no.
- 7. Select the back up media type.
- 8. Follow the onscreen instructions.
- 9. After the back up process is complete, store the back up in an antistatic environment at the proper temperature and humidity.

#### **Backing up POD system configuration files**

#### About this task

You can back up all the secondary system configuration files (all files needed to customize a newly installed system to the customer's specifications). The back up is run at the primary dialer, and back up files are transmitted from the designated secondary dialer to the designated media on the primary dialer.

To pod back up system configuration files:

- 1. Locate the DVD/DDS tape drive/USB (Flash Memory Stick) in the system cabinet. Insert a new DVD/DDS tape in the drive or insert a USB (Flash Memory Stick).
- 2. From the Administrator Main Menu, type 3 and press Enter to select Back up, restore and verify.
- 3. From the Back Up and Restore Menu, type 5 and press Enter to select Intrapod back up/restore/verify.
- 4. Type 5 and press Enter to select Pod back up system configuration files.
- 5. At the Pod back up system configuration files Are you sure? prompt, type Y for yes and N for no.
- 6. At the Are above entries correct? prompt, type Y for yes and N for no.
- 7. Select the back up media type.
- 8. Follow the onscreen instructions.
- 9. After the back up process is complete, store the back up in an antistatic environment at the proper temperature and humidity.

## Backing up POD system data/stat files

#### About this task

You can back up all data files needed to run reports using the PC Analysis tools. Specifically, all files matching the following patterns:

- /opt/avaya/pds/lists/\*.stat
- /opt/avaya/pds/lists/history/\*.hist
- /opt/avaya/pds/account/\*

If you select any of the options, the system displays a message whether you want the back up to be incremental or full. In the case of a full back up, the system backs up all files in the specified category. In the case of an incremental back up, the system backs up a file only if the files has changed since the files was last backed up as part of any full back up.

To pod back up system data/stat files:

#### **Procedure**

- 1. Locate the DVD/DDS tape drive/USB (Flash Memory Stick) in the system cabinet. Insert a new DVD/DDS tape in the drive or insert a USB (Flash Memory Stick).
- 2. From the Administrator Main Menu, type 3 and press Enter to select Back up, restore and verify.
- 3. From the Back Up and Restore Menu, type 5 and press Enter to select Intrapod back up/restore/verify.
- 4. Type 6 and press Enter to select Pod back up system data/stat files.
- 5. At the Pod back up system data/stat files Are you sure? prompt, type Y for yes and N for no.
- 6. At the Are above entries correct? prompt, type Y for yes and N for no.
- 7. Select the back up media type.
- 8. Follow the onscreen instructions.
- 9. After the back up process is complete, store the back up in antistatic environment at the proper temperature and humidity.

#### Restoring all files from a Pod system

#### **About this task**

You can restore all files from any back up tape or DVD created using the back up menu commands.

To restore all files from a DVD/DDS tape:

#### **Procedure**

1. From the Administrator Main Menu, type 3 and press Enter to select Back up, restore and verify.

- 2. From the Back Up and Restore Menu, type 5 and press Enter to select Intrapod back up/restore/verify.
- 3. Type 7 and press Enter to select Pod restore all.
- 4. At the Pod restore all Are you sure? prompt, type Y for yes and N for no.
- 5. Select the restore media type.
- 6. Follow the onscreen instructions.
- 7. After the restore process is complete, store the back up in antistatic environment at the proper temperature and humidity.

## Important:

You cannot restore files from back up tapes and DVD created on earlier versions of the system.

## Restoring an archive file from a Pod system

#### About this task

To restore an archived file from a DVD/DDS tape:

#### **Procedure**

- 1. From the Administrator Main Menu, type 3 and press Enter to select Back up, restore and verify.
- 2. From the Back Up and Restore Menu, type 5 and press Enter to select Intrapod back up/restore/verify.
- 3. Type 8 and press Enter to select Pod restore a file.
- 4. Enter the full filename in the ADDITIONAL ENTRY for Pod restore a file menu.
- 5. At the Are above entries correct? prompt, type Y for yes and N for no.
- 6. Select the back up media type.
- 7. Follow the onscreen instructions.

## Listing or Verifying a file in POD archive system

- 1. From the Administrator Main Menu, type 3 and press Enter to select Back up, restore and verify.
- 2. From the Back Up and Restore Menu, type 5 and press Enter to select Intrapod back up/restore/verify.
- 3. Type 9 and press Enter to select List/Verify a file in archive.
- 4. At the List/Verify a file in archive Are you sure? prompt, type Y for yes and N for no

- 5. Enter the full filename in the ADDITIONAL ENTRY for List/Verify a file in archive menu.
- 6. At the Are above entries correct? prompt, type Y for yes and N for no.
- 7. Select the back up media type.
- 8. Locate the DVD/DDS tape drive in the primary system cabinet. Insert the DVD/DDS tape with the existing back up files in the drive.
  - The system displays the byte count, date, size, and file names on the screen during the tape/DVD verification process.
- 9. After verifying the tape/DVD, follow the unloading instructions on the screen. Type  ${\tt C}$  to return to the previous menu.

#### Listing or Verifying archive contents

#### About this task

To verify the archive contents of a back up file on a DVD/DDS tape:

#### **Procedure**

- 1. From the Administrator Main Menu, type 3 and press Enter to select Back up, restore and verify.
- 2. From the Back Up and Restore Menu, type 5 and press Enter to select Local back up/restore/verify.
- 3. Type 10 and press Enter to select List/Verify archive contents.
- 4. At the List/Verify archive contents Are you sure? prompt, type Y for yes and N for no
- 5. Select the back up media type.
  - The system displays the byte count, date, size, and file names on the screen during the tape verification process.
- 6. After verifying the archive contents, follow the unloading instructions on the screen.

### Listing archive volume information in a POD system

#### About this task

You can view the creation information on a back up DVD/DDS tape.

To view back up volume information:

- 1. From the Administrator Main Menu, type 3 and press Enter to select Back up, restore and verify.
- 2. From the Back Up and Restore Menu, type 5 and press Enter to select Intrapod back up/restore/verify.
- 3. Type 11 and press Enter to select List archive volume information.

- 4. At the List archive volume information Are you sure? prompt, type Y for yes and N for no
- 5. Select the back up media type.
- 6. The system displays the volume information.
- 7. After verifying the archive volume, follow the unloading instructions on the screen.

#### Result

You cannot restore files from back up tapes created on earlier versions of the system.

## Backing up all calling lists in a POD system

#### About this task

You can back up all calling lists from the secondary system. Specifically, all files in the directory /opt/avaya/pds/xfer/clist.

To back up a calling list:

#### **Procedure**

- 1. Locate the DVD/DDS tape drive in the system cabinet. Insert a new DVD/DDS tape in the drive.
- 2. From the Administrator Main Menu, type 3 and press Enter to select Back up, restore and verify.
- 3. From the Back Up and Restore Menu, type 6 and press Enter to select Intrapod back up/restore calling lists.
- 4. Type 2 and press Enter to select Pod back up all calling lists.
- 5. At the Pod back up all calling lists Are you sure? prompt, type Y for yes and N for no.
- 6. Select the back up media type.
- 7. Follow the onscreen instructions.
- 8. After the back up process is complete, store the back up in antistatic environment at the proper temperature and humidity.

#### Backing up a specific calling list in a POD system

#### About this task

You can choose a specific calling list from the Item List on the right side of the screen and view additional files by scrolling down the list.

## Note:

The files are listed in alphabetical order, and file names with more than 10 characters are truncated in the displayed list. If a truncated file name is selected, however, the correct file is selected and backed up.

To back up a specific calling list:

#### **Procedure**

- Locate the DVD drive / tape drive in the system cabinet. Insert a new DVD/DDS tape in the drive.
- 2. From the Administrator Main Menu, type 3 and press Enter to select Back up, restore and verify.
- 3. From the Back Up and Restore Menu, type 6 and press Enter to select Intrapod back up/restore calling lists.
- 4. Type 3 and press Enter to select Pod back up a specific calling list.
- 5. Type the item number of the calling list on the right of the command menu that needs to be backed up and press enter.
- 6. At the Pod back up a specific calling list on item stname> Are you sure? prompt, type Y for yes and N for no.
- 7. Select the back up media type.
- 8. Follow the onscreen instructions.
- 9. After the back up process is complete, store the back up in antistatic environment at the proper temperature and humidity.

## Restoring all calling lists in a POD system

#### About this task

To pod restore all callings lists from a back up tape/DVD:

#### **Procedure**

- Locate the DVD/DDS tape drive in the primary system cabinet. Insert the restore DVD/DDS tape in the drive.
- 2. From the Administrator Main Menu, type 3 and press Enter to select Back up, restore and verify.
- 3. From the Back Up and Restore Menu, type 6 and press Enter to select Intrapod back up/restore calling lists.
- 4. Type 4 and press Enter to select Pod restore all calling lists.
- 5. At the Pod restore all calling lists Are you sure? prompt, type Y for yes and N for no.
- 6. Select the restore media type.
- 7. Follow the onscreen instructions.

## Restoring a specific calling list in a POD system

#### About this task

You can restore a single calling list file from tape/DVD. This choice is similar to the previous choice except that the file to be restored must appear in the Item List on the right hand side of the menu. This command will overwrite the list of the same name currently on the system.

To restore a specific calling list from tape:

#### **Procedure**

- 1. Locate the DVD drive / tape drive in the system cabinet. Insert a back up DVD / DDS tape in the drive.
- 2. From the Administrator Main Menu, type 3 and press Enter to select Back up, restore and verify.
- 3. From the Back Up and Restore Menu, type 5 and press Enter to select Intrapod back up/restore calling lists.
- 4. Type 5 and press Enter to select Pod restore a specific calling list.
- 5. Type the item number of the calling list on the right of the command menu that needs to be restored and press enter.
- 6. At the Pod restore a specific calling list on item listname> Are you sure? prompt, type Y for yes and N for no.
- 7. Select the restore media type.
- 8. Follow onscreen instructions.

## Mondo Rescue

Mondo Rescue backs up your file system to CD/DVD, tape. Mondo uses Afio as the back up engine. Afio is a well known replacement for tar. In the event of data loss, you can restore a part or all of your system, even if your hard drives are now blank.

Using Mondo Rescue, you can perform the following operations:

- Clone an installation of Linux by backing up the important information and excluding / home, /var/log.
- Back up a non-RAID file system and restore the system as RAID including the root partition if your kernel supports the restoration.
- Back up a system running on one format and restore as another format.
- Restructure your partitions. For example; shrink/enlarge, reassign devices, and add hard drives before you partition and format your drives. Mondo restores your data and amends /etc/lilo.conf and /etc/fstab accordingly.
- Back up the Linux or Windows systems, including the boot sectors. However, do run "Scandisk" when you first boot into Windows.
- Back up CD/DVD to verify the integrity of your computer.

## Note:

You cannot use Mondo as a daily back up program to replace Tar, Afio, and kback up. While Tar and Afio offer a quick, convenient way to back up small sets of files, sometimes

to removable media, Mondo is designed to recover data completely. Mondo back up does not back up the /proc, /sys, and /tmp directories and removable media such as /mnt/floppy and /mnt/cdrom. If you have saved important data at any of these locations, copy or back up data to a different location.

# Taking a Bootable back up and Restoring files using Mondo Rescue

#### About this task

For pod setup, you must first perform mondo back up and then reboot the server sequentially for each server in a pod. You can take mondo back up in any order irrespective whether the server is a primary or a secondary server in a pod. After you reboot a server, before commencing with further server back up, you must verify on Health Manager that the applications on that server have been restarted. Taking mondo back up for a primary server can take longer time as the mondo back up for primary server also includes back up of the database.

Perform the following procedure to back up and restore:

#### **Procedure**

- 1. From the Administrator Main Menu, select **Back up, restore and verify**.
- From the Back Up and Restore Menu select Local back up/restore/verify.
- 3. From the LOCAL BACK UP AND RESTORE OPERATIONS select **Create bootable backup**.
- 4. At the prompt, type Y.
- 5. To go to the previous menu, Enter 0.
- 6. Read the warning message and type Y or N.
- 7. Read the warning displayed. Type Continue.
  - All processes are stopped.
- 8. Select the back up destination.
  - Note:

If you use a localized dialer, the warning messages are also displayed in the localized language. However, you must type the word Continue only in English.

## Note:

Proactive Contact uses the highest compression level to back up the full system. Proactive Contact can ask for multiple discs for an entire back up. For tape back up, a boot DVD disc is burned by the user which is used from tape restore. This boot disc must be burned only once.

# Restoring the entire system on IBM 3650 M2 server

# Restoring from rebootable DVD back up

#### About this task



#### Caution:

When you restore the system from the bootable back up, the system deletes your current data on the disk and re-partitions it. Therefore, you must be careful when you restore the system from the back up media.

- 1. Insert the Mondo back up DVD to the computer.
- Restart the system.
- 3. At the boot prompt, type nuke and press Enter.
- 4. In the Alert screen, for the message Mountlist analyzed. Result: "2 MB overallocated on /dev/sda." Switch to interactive mode?, use Tab to select and press Enter.
- 5. On the Editing mountlist screen, use Tab to select the Reload option and press Enter.
- 6. On the Alert screen, Tab to select Yes for the Reload original mountlist? message and press Enter.
- 7. On the Editing mountlist screen, Tab to select the **OK** option. and press Enter.
- 8. On the Alert screen, Tab to select Yes for the Are you sure you want to save your mountlist and continue? (No changes will be made to your partition table at this time.) message and press Enter.
- 9. For the Do you want to erase and partition your hard drives? message, Tab to select Yes and press Enter.
- 10. For the Do you want me to restore all of your data? message, Tab to select Yes and press Enter.
  - After the above messages, the mondo restores the data. It takes close to 30 minutes to restore the data. After restoring the data, the following prompts are displayed.
- 11. For the Initialize the boot loader? message, Tab to select Yes and press Enter.
- 12. For the Did you change the mountlist or cloned the system? message, Tab to select No and press Enter.
- 13. For the Label/Identify your ext2/ext3/ext4 partitions if necessary? message, Tab to select Yes and press Enter.

- 14. For the message Mondo has restored your system. Please wait for the command prompt. The remove the back up media and reboot, press Enter.
- 15. At the sh: can't access tty; Job control turned off prompt, type Reboot.
- 16. After reboot, ignore the EXT3-fs: mounted filesystem with ordered data mode message. Login prompt appears within one minute.



If the system does not display prompts as described in Step 4 to 16 in the procedure, wait till the system automatically completes the restoration procedure.

# Restoring from tape on IBM 3650 M2 server

#### About this task

To restore the entire system from tape on IBM 3650 M2 server:

- 1. Insert the bootable DVD into the DVD drive and mondo tape in Tape drive.
- 2. Login as sroot user and reboot the system using the reboot command on the prompt.
- 3. At the boot prompt, type expert.
- 4. On the sh: can't access tty; Job control turned off prompt, type mondorestore.
- 5. On the How should I restore? prompt, select Automatically and press Enter. When the system displays the Restoring from Archives prompt, Mondo restores your data from the tape and displays the following prompt:
- 6. On the Alert screen, on the You will now be able to re-generate your initrd. This is especially useful if you changed of hardware configuration, cloned, made P2V, used multipath... Do you need to do it? prompt, Tab to select No and press Enter.
- 7. For the Mondo has restored your system. Please wait for the command prompt. The remove the back up media and reboot message, press Enter.
- 8. At the Execution run ended; result=0 type 'less /var/log/ mondorestore.log' to see the output log prompt, type Reboot.
- 9. If the DVD does not come out automatically, press the DVD Drive button.
- 10. After the reboot, ignore the EXT3-fs: mounted filesystem with ordered data mode message. Login prompt appears within one minute.

# Restoring from tape on HP DL 385 G5 and HP DL 360 G7/G8/G9 servers

- 1. Insert the bootable DVD into the DVD drive and mondo taken tape in the Tape drive.
- 2. Login as sroot user and reboot the system using the **Reboot** command on the prompt.
- 3. On the boot prompt, type expert.
- 4. On the sh: can't access tty; Job control turned off prompt, type mondorestore.
- 5. On the How should I restore? prompt, select Automatically and press Enter.
- 6. On the Alert screen, for the Mountlist analyzed. Result: "3 MB overallocated on /dev/cciss/c0d0." Switch to Interactive Mode? message, Tab to select Yes and press Enter.
- 7. On the Editing mountlist screen, Tab to select Reload, and press Enter.
- 8. On the Alert screen, for the Reload original mountlist? message, Tab to select Yes and press Enter.
- 9. On the Editing mountlist screen, Tab to select **OK** and press Enter.
- 10. On the Alert screen, Tab to select Yes for the Are you sure you want to save your mountlist and continue? (No changes will be made to your partition table at this time.) message and press Enter.
- 11. For the Do you want to erase and partition your hard drives? message, Tab to select Yes and press Enter.
- 12. For the Do you want me to restore all of your data? message, Tab to select Yes and press Enter.
- 13. For the Initialize the boot loader? message, Tab to select Yes and press Enter.
- 14. If the message You will now be able to re-generate your initrd. This is especially useful if you changed of hardware configuration, cloned, made P2V, used multipath... Do you need to do it? is displayed, Tab to select No and press Enter.
- 15. For the Did you change the mountlist or cloned the system? message, Tab to select No and press Enter.
- 16. For the Label/Identify your ext2/ext3/ext4 partitions if necessary? message, Tab to select Yes and press Enter.
- 17. For the message Mondo has restored your system. Please wait for the command prompt. The remove the back up media and reboot, press Enter.

- 18. At the prompt Execution run ended; result=0 type 'less /var/log/mondorestore.log' to see the output log, type Reboot.
- 19. If the DVD does not comes out automatically, press the DVD Drive button.
- 20. After the reboot, ignore the EXT3-fs: mounted filesystem with ordered data mode message if it appears. Login prompt appears within one minute.

# Connecting the host DVD during Virtual Machine power on Procedure

- 1. Log in to the vSphere client or vSphere web client.
- 2. Right-click on the virtual machine and click **Edit Settings**.
  - Virtual Machine Properties window is displayed.
- Click Hardware tab.
- 4. Click CD/DVD drive 1.
- 5. On the right pane, do the following:
  - a. For Device Type, select Host Device.
  - b. For Device Status, select both Connected and Connect at power on.
- 6. Click OK.

When the virtual machine powers on, it connects to the host DVD device.

# Booting from host DVD during Virtual Machine power on **Procedure**

- 1. Log in to the vSphere client or vSphere web client.
- 2. Right-click on the virtual machine and click Edit Settings.
  - Virtual Machine Properties window is displayed.
- Click **Options** tab.
- 4. Click Boot options.
- 5. On the right pane, for the Force BIOS Setup, select The next time the virtual machine boots, force entry into the BIOS setup screen.
- 6. Click Hardware tab.
- 7. Click CD/DVD drive 1.

- 8. On the right pane, do the following:
  - a. For **Device Type**, select **Host Device**.
  - b. For **Device Status**, select both **Connected** and **Connect at power on**.
- 9. Click OK.
- 10. Right-click on the virtual machine and click Power off.
- 11. Right-click on the virtual machine and click **Power on**.
- Right-click virtual machine and click Open Console.
   On the Console, the BIOS setup utility is displayed.
- 13. Navigate to **Boot** option in the set up utility.
- 14. In the menu, move **CD-ROM Drive** to the top.
- 15. Press Save and exit.

The system boots from CD-ROM.

# **Chapter 10: Phone strategies**

Proactive Contact uses phone strategies during Jobs to place phone calls to customers more effectively. A phone strategy is a set of instructions for the dialer about when and how to place calls to customers, which customer phone number to dial, and the frequency of calls.

The dialer receives and prepares the host data file and creates a calling list. The dialer places phone calls based on a phone strategy. The phone strategy specifies the phone numbers to dial during a Job, and how to place the calls.

## Phone strategy preparation

Before you create a new phone strategy, identify the following values for each phone strategy:

Description	Value
The number of rings to allow before disconnecting	
The time to wait before retrying a phone number that was busy, unanswered, or disconnected	
The phone number to dial if the first phone number is unanswered	
The number of times to retry a busy phone number	
The number of times to dial a phone number before switching to an alternate phone number	
The types of calls to pass to an agent when the dialer detects an answer	

You can create wildcard expressions to define a range of values. Each wildcard expression specifies a wildcard character and a value. A value can be a number or letter.

Wildcard characters include the following symbols:

Wildcard character	Description
=	is equal to
<> or ~	is not equal to
>	is greater than
<	is less than
>=	is greater than or equal to
<=	is less than or equal to

For more detailed pattern matching rules, see Appendix C: Pattern matching rules on page 285.

## Creating a phone strategy

#### About this task

You can create a new phone strategy when an existing phone strategy does not satisfy your requirements.

#### **Procedure**

- 1. From the Supervisor Main Menu, select Campaigns > Phone Strategies > Create a phone strategy.
- 2. If the system has more than one calling list listed in the Item List, type the calling list number and press Enter. If you use only one calling list, the system skips this step. The system displays the phone strategy name prompt.
- 3. Type a strategy file name which must not be more than 20 characters. Do not use special characters such as hyphens, slashes, or spaces. Type Y at the prompt.

The system displays the Select Initial Phone screen.

## Adding an initial phone

### **Procedure**

- 1. In the Phone column, type the phone type number (1, 2, 3, ...) of the first phone number to be called.
- 2. Select a field by typing the field name (uppercase letters) in the Field Name column or press F4 to select the field from the calling list.
- 3. Type a value in the Value column.

#### Examples:

- To exclude bad numbers, select PHONESTAT in the Field list and type ~B? in the Value field.
- To place a call to all records, type an asterisk (\*) in the **Value** field.
- 4. To add a second field and value for this phone, type AND or OR in the And/or column; then repeat steps 2 and 3.
- 5. Repeat steps 1 through 4 for each selected phone. After you enter all the fields and values for the initial phones, press F1.

The system displays the Select Alternate Initial Phone screen.

For more information, see the following sections.

### (Optional) Adding an alternate initial phone

### **Procedure**

- 1. In the Phone column, type the phone type number (1, 2, 3, ...) of the alternate phone number to be called.
- 2. In the Time Zones column, type the uppercase letter assigned to the time zone or type an asterisk (\*) for all time zones or press F4 to select a time zone from a list.
- 3. In the Time column, type the time you want the system to start calling the alternate phone (24-hour clock). Use a period to separate hours and minutes. For example, type 17.10 to enter 5:10 PM.

The dialer switches phone numbers based on the time in the time zone and not the system

4. Repeat steps 1 through 3 for each alternate initial phone. Press F1.

The system displays the Select System Set Recalls screen.



### Note:

You can add only 60 timezones in the Select Alternate Initial Phone screen. If any strategy file contains more than 60 timezones, then the system does not display all the timezones on this screen and editing the timezone information through the CUI menu may result in saving the incorrect values of timezones.

## Adding ring count and call connect criteria

### **Procedure**

- 1. In the Phone Field column, type the phone type number (1, 2, 3, ...).
- 2. Type the number of rings to allow in the # of Rings column. A low number such as 3 must be used.
- 3. Type the letters to designate the call detection mode in the Connect column.
- 4. Repeat steps 1 through 3 for each initial phone type.
- 5. Press F1. The system returns to the Record Selections menu.

### **Adding retries**

### **Procedure**

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

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

### **Setting recall times**

#### About this task

To set recall times:

#### **Procedure**

- 1. In the Phone Field column, type the phone type number.
- Press F4to view the completion codes list. Use the arrow keys to select a code, and then
  press Enter. You can also type the call code directly in the Call Result column. It must
  match upper and lowercase characters.
- 3. Type the number of minutes between each calling attempts in the Min (Minutes) column.
- 4. Type the number of retries in the Number column.
- 5. In the Next Phone column, type the phone type number. The Next Phone is the phone the system calls after it makes the last attempt to call the initial phone. If you leave this field blank, the system stops calling the record after the last retry.
- 6. Repeat steps 1 through 5 for each call result for which you want to schedule retries.
- 7. Press F1. The system displays the Select Ring Count and Call Connect Criteria screen.



To keep Job productivity high, select recall times that are appropriate for the initial call's result. For example, retry a BUSY result twice, after 15-minute intervals. Retry a NOANSWER result twice, after 60-minute intervals. The phone number the system dials next does not use the duration for which the system waits before dialing the number again.

## Deleting an initial phone

### About this task

To delete an initial phone:

#### **Procedure**

- 1. Select the initial phone to delete.
- Select **Delete**.

## Editing a phone strategy

#### About this task

You can edit phone strategy settings so that the system dials more efficiently. The changes are effective the next time you start a Job that uses the strategy.

If you select a different calling list for a phone strategy, redefine certain phone strategy settings:

- If the newly selected calling list contains the same number of phone fields with the same field names as the original list, the system retains all the phone strategy settings.
- If the newly selected calling list has a different number of phones or the phone field names are different, the system retains the initial phone and alternate initial phone settings, but does not retain the original detection modes and retries settings.

To edit a phone strategy:

#### **Procedure**

- 1. From the Supervisor Main Menu, select Campaigns > Phone Strategies > Edit a phone strategy.
- 2. If the system has more than one calling list listed in the Item List, type the calling list number, and press Enter. If you use only one calling list, the system skips this step. The system displays the phone strategy name prompt.
  - The system displays the Select Initial Phone screen. Complete the following steps, and press F1 to move to the next screen.
- 3. Press the down arrow to move to the field you want to change. Type the new value.
- 4. Repeat step 3 for each field you want to change.
- 5. Press F1 to continue to the next screen.
- 6. To edit the remaining screens, follow the steps in (Optional) Adding an alternate initial phone on page 112.

## Copying a phone strategy

### About this task

You can copy an existing phone strategy and assign a new filename. Then, you can use the Edit a phone strategy command to edit the copied phone strategy file.

To copy a phone strategy:

### **Procedure**

- 1. From the Supervisor Main Menu, select Campaigns > Phone Strategies > Copy a phone strategy.
- 2. If the system has more than one calling list listed in the Item List, type the calling list number, and press Enter. If you use only one calling list, the system skips this step. The system displays the phone strategy name prompt. Type Y at the prompt.
- 3. Type a new file name, not more than 8 characters, at the file name prompt. Type Y at the prompt.

## Deleting a phone strategy

### **About this task**

To delete a phone strategy:

#### **Procedure**

- 1. From the Supervisor Main Menu, select Campaigns > Strategies > Delete a phone strategy.
- 2. If the system has more than one calling list listed in the Item List, type the calling list number, and press Enter. If you use only one calling list, the system skips this step. The system displays the phone strategy name prompt. Type Y at the prompt.

## Phone strategy field descriptions

Name	Description
Initial phone tab	The initial phone is the first phone number that the dialer uses to place a call for each record.
	The system stores the phone numbers in the calling list phone fields, for example PHONE1 and PHONE2. If a record does not match the phone

Name	Description
	criteria that you set, the system does not place a call.
	The dialer classifies phone numbers by phone type and assigns a number to each type. For example, the home phone can be phone number 1 and the business phone number can be phone number 2. The dialer phone type numbers are set during your system configuration.
	Example:
	If the fields of the initial phone pane are as follows:
	• Phone=1
	• Field Name=PHONESTAT
	• Value=~B?
	The dialer dials the number in the PHONE1 field for all records whose PHONESTAT field does not contain a <b>B</b> or bad number.
	Phone:
	Click this field to select a phone.
	Field:
	Click this field to select one of the fields from your download.
	Value:
	Use a value or a wildcard character. Values can be numbers, letters, dates, and times. For example, account balances consist of numbers, while customer names consist of letters. For information on using wildcard characters, see Record selection wildcard characters on page 122.
Alternate initial phone tab	The alternate initial phone setting is the phone number that is the initial phone at the specified time of day. The setting also specifies the time the system starts dialing the alternate initial phone.
	The system starts dialing the alternative initial phone based on the local time in the selected time zone.
	Example:
	The dialer can switch from dialing business phones, the initial phone, to dialing home phones, the alternate initial phone, at 6:00 PM.

Name	Description
Detection mode tab	The system uses the detection mode to identify how the phone number was answered. The dialer passes phone calls to agents based on the detection mode you specify.
	Example:
	A detection mode can be a live voice, an answering machine, or an operator intercept.
	Number of Rings:
	Specify the number of rings to allow before the system records a NOANSWER completion code.
	Pass to Agent:
	Note:
	The detection mode tells the system which calls to pass to agents. When the dialer places a call, the system detects what type of answer comes for each call and then decides whether or not to pass that call to an agent. The dialer can also pass to an agent a call that is not yet answered. When the system passes the call, the agent hears the ringing phone in their headset. If you use Proactive Contact with Computer Telephony Integration (CTI), the agent does not hear the ringing tone in their headset when the dialer passes the unanswered call.
	The following fields describes the detection mode options:
	Voice:
	A person's voice was detected.
	Autovoice:
	An answering machine was detected.
	Intercept:
	An operator intercepted the call.
	No circuit:
	No circuit was available.
	Disconnect:
	Disconnected the phone call.
	Vacant:

Name	Description
	Vacant number.
	Reorder:
	Reorder.
	🛟 Tip:
	To increase your calling rate, decide which detection modes to use. With each additional criteria you select, your agents can handle more calls rather than the system.
Retries tab	The system uses the retries setting to place another phone call for the same record.
	The system applies the following criteria based on the result of the initial call:
	The duration for which the system waits before dialing the number again.
	The number of times the system dials the same phone number.
	The phone number the system dials next.
	Example:
	You can configure the system to retry the call in 15 minutes when the initial call result is busy and to stop dialing that phone number if there is no answer after three retries.
	• Tip:
	The difference between a system retry and a customer recall is as follows:
	A system retry is a computer generated phone call attempt. If the system detects a busy signal on the first call attempt, the system dials the phone number based on the retry parameters in the phone strategy.
	Agents set up recalls. An agent can set either an Agent Owned Recall or a general recall. For an agent owned recall, the system routes the phone call to the agent who sets the phone call. For a general recall, the system dials the phone number and routes the phone call to any available agent.

# Chapter 11: Record selections

Proactive Contact uses record selections to determine the records to use to place phone calls during a Job. You can create, edit, and view existing record selections or view only the already run record selections.

A record selection contains rules or selection criteria. For example, a record selection can place phone calls and select only customers who meet the following criteria:

- Have a balance of less than \$5,000
- · Live in California

You can use record selections that you saved on more than one Job.

A record selection contains a set of instructions for Proactive Contact to select specific customer records from a calling list.

A record selection consists of selection criteria and a phone strategy. Each Job uses the results of a record selection to place calls to customers.

When a record selection is started by you, Proactive Contact selects records based on the following criteria:

- Calling list fields
- Time zones
- · Previous calling results
- · Agent set recalls
- Phone strategy settings

You can verify a record selection before you start a Job to determine the number of records that were selected.

## **Time zones**

You can use a record selection to specify time zones such as Eastern, Central, or Pacific. Proactive Contact places phone calls to only the records whose addresses are in the specific time zones. If you do not specify time zones, Proactive Contact defaults to a follow-the-sun method. You can use dialers to place calls to customers in the east and proceed to the west.

If a customer uses the indexes over a course of several days and if Daylight Saving Time (DST) changes happen in the meantime, then there is a possibility that the system may place calls out of

guard time. To prevent calling out of guard time, the user must stop the job and run the call selection again and then restart the job so that the job automatically points to the new index file.

## Completioncodes

Completion codes represent the result of the last completed call. You can select records based on call completion codes. For example, if you specify the SIT completion code, the record selection looks for phone numbers that are disconnected, redirected, or are no longer in service. In most cases, you select records that you have not contacted with completion codes such as BUSY or NOANSWER. The three types of completion codes are:

- OP An agent assigns codes to a record.
- SYS The system assigns codes to a record.
- UNDEF You can configure and define codes. You must define the codes during the configuration of the system as an OP type.



### Note:

In Proactive Contact 5.1, the Completion code keyword length is 15 characters. Ensure that the length of the completion code is not more than 15 characters.

### Call completion codes

The following table describes the call completion codes available for the system. However, the configuration of your system can be different:

Completion Code No.	Keyword	Туре	Description
0	NOTCALLED	SYS	Record not yet called
1	RESERVED	UNDEF	Reserved for system
2	ERROR	SYS	Invalid number
3	TIMEOUT	SYS	No dial tone
4	HANG_PORT	SYS	Line idle after dial
5	NOTINZONE	SYS	Outside calling hours
6	MOFLASH_B	SYS	Blind trans to INB
7	HANG_TRANS	SYS	No agent for supervisor transfer
8	OPTOUT	SYS	Customer opted out
9	RESERVED9	UNDEF	Reserved for system
10	OPTOUTFAIL	SYS	Call could not be opted out

Completion Code No.	Keyword	Туре	Description
11	BUSY	SYS	Busy signal
12	CONTTONE	SYS	FAX or modem
13	AUTOVOICE	SYS	Answering machine
14	VOICE	SYS	Person on the line
15	NOANSWER	SYS	No answer
16	RINGING	OP	Ringing phone
17	CUSTHU	OP	Customer hung up in queue
18	TRANSFER	OP	Transfer release
19	RECALL	OP	Recall release
20-34	CODE20-34	OP	Codes 20-34
35	CANCEL	OP	Managed cancel call
36	INTERCEPT	SYS	Operator intercept
37	NOCIRCUIT	SYS	No circuit available
38	DISCONN	SYS	Disconnected number
39	VACANT	SYS	Cannot reach as dialed
40	REORDER	SYS	Fast busy
41	R-RINGING	SYS	Internal system code
42	LINEFAIL	SYS	Failure on phone line
43	OP_RECALL	SYS	Internal system code
44	DTMF_V	SYS	Internal system code
45	HU_INB	SYS	Customer hung up in inbound queue
46	HU_OUT	SYS	Customer hung up in outbound queue
47	HANG_INB	SYS	No agent for inbound call
48	HANG_OUT	SYS	No agent for outbound call
49	OPDIED	SYS	Abnormal agent end
50	R_HSONHOOK	SYS	Internal system code
51-88	CODE51-88	UNDEF	Codes 51-88
89	MANAGEDA	OP	Managed nonconnect A
90	MANAGEDB	OP	Managed nonconnect B
91	VIRTVOICE	OP	Virtual message to VOICE
92	VIRTAUTOV	OP	Virtual message to AUTOV
93	SOLD	OP	Sold campaign
94	VERIFIED	OP	Sale verified
95	UNVERIFIED	OP	Sale not verified

Completion Code No.	Keyword	Туре	Description
96	CONNEXPIRE	OP	Connection to the agent expired
97	ANS_MACHINE	OP	Answering machine for OUT call agent
98	AORECALL	OP	Agent Owned Recall
99	AVOICE	SYS	Virtual Answering machine
100-999	CODE100 - CODE 999	UNDEF	Code 100 - Code 999

### Note:

Keyword is the completion code keyword.

### Goals

You can use a record selection to specify goals, such as the following:

- Accounts more than 30 days overdue.
- Accounts with a balance of over \$2,000, or records in a particular state.

### Record selectionwildcard characters

Phone strategies and record selections use wildcard character expressions to specify criteria for a field. A wildcard character expression is a combination of wildcard characters and values.

In a record selection, you can use wildcard character expressions to define the subset of records you want to use.

Each wildcard expression specifies a field name from the records in the calling list, a wildcard character, and a value. A value can be numbers, letters, dates, and time. For example, account balances consist of numbers, and customer names consist of letters.

Wildcard characters include the following symbols:

Wildcard character	Description
=	is equal to
<> or ~	is not equal to
>	is greater than
<	is less than
>=	is greater than or equal to
<=	is less than or equal to

For more detailed pattern matching rules, see Pattern matching rules on page 285.

An example ofrecord selection statements includes the following:

Field	Value	Description
ACCT_BALANCE	>=500	Customer records with account balances greater than or equal to \$500.
CITY	=Chicago	Customer records with Chicago addresses.

# Setting up record selection

## Record selection shortcut keys

Use the following shortcut keys in record selections:

Actions	Keys
Done	F1
Move a line	F2
Group	F3
View calling list	F4
Previous page	F5
Next page	F6
View call detection modes or phone strategies	F10
Search strategy files and call detection	F8
Clear the field	Control+E

### Creating a record selection

### About this task

You can create a new record selection when an existing record selection does not satisfy current requirements.

To create a record selection:

### **Procedure**

- 1. From the Supervisor Main Menu, select Campaigns > Record Selections > Create a record selection.
- 2. If your system has more than one calling list, type the calling list number at the prompt.
- 3. Type a name for this file that must not be more than 20 characters. Do not use special characters such as hyphens, slashes, or spaces.

4. Type an optional report description which must not be more than 30 characters. The system names the report if you leave the field blank. Type Y at the prompt.

The system displays the Select Time Zones for Calling screen.

### Selecting time zones

### **About this task**

You can select the time zones that the system uses to call customers. The system displays the list of all the time zones available on the system. The time designated for the various zones is the local time of your system. An uppercase letter code in the Zone column designates the time zone code.

### **!** Important:

State laws differ about legal calling times. Therefore, your system can list numerous time zones.

The screen also shows the recommended start and stop times for each of these zones.

To select time zones:

#### **Procedure**

- 1. On the Select Time Zones for Calling screen, type the **Zone ID** (uppercase letters only) in the **Enter Time Zone Codes** field. Press Enter after each Zone ID. You must enter at least one time zone. To select all time zones, type an asterisk (\*).
- 2. If you enter an incorrect letter or type a lowercase letter, the system displays an error message. Press the arrow keys to move to the error. Make the correction, and press Enter. To clear an entry, press Spacebar.
- 3. Press F1.

The system displays the Select Call Completion Codes screen.

For more information, see the following sections.

### Selecting call completion codes

### About this task

Completion codes represent the result of the last completed call. Use the Selecting call completion codes screen to select records based on completion codes. When system displays the screen, it positions the cursor in the first field.

To select completion codes:

#### **Procedure**

- 1. On the Selecting call completion codes screen, press F4 to see the Call Completion Code List.
- 2. To select additional codes, press Enter again. The cursor moves to the next blank field.
- 3. Repeat steps 1 through 3 as necessary.

4. When the entries are correct, press F1.

The system displays the Select Field Names and Values screen.

See the following sections for more information:

### Selecting field names and values

#### About this task

You can target a specific group of customers for calling. Select records based on any field in the calling list and a value for that field.

Enter the same values that are in the calling list records. Use expressions, wildcard characters, and logical operators as needed.

To select field names and values:

#### **Procedure**

- 1. On the Select Field Names and Values screen, in the Name column, type the field name in uppercase letters or press F4 to select a field from the calling list.
- 2. Type a value in the Value column, and press Enter.

See the following section for more information on selecting a phone strategy:



#### Note:

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

### Selecting a phone strategy

### About this task

Select a phone strategy file to so that the system can call the selected records.

### **Procedure**

- 1. On the Select Call Strategy File screen, type the call strategy file name or press F10 to scroll through the available phone strategies. You can confirm that you are choosing the correct phone strategy by pressing F4 to review the phone strategy parameters.
- 2. Press F1.
- 3. On the Selection List Generation screen, start the record selection or exit without executing the record selection.

### (Optional) Sorting field names and direction

#### About this task

Sorting records by field names is optional. If you choose to sort records, the system calls the records in the order you set. Otherwise, the system calls the records in the order they appear in the calling list. To skip this screen, press F1.

To sort field names and direction:

#### **Procedure**

- 1. In the Sort Direction column, press Enter to leave the sort direction as Ascending or type D and press Enter to change to descending.
- 2. In the Field Name column, press F4 to see a list of fields. Select the sort field.
- 3. To add a subcategory, press Enter to move to the next line and repeat steps 1 and 2 for each subcategory. The system sorts first by the field in priority 1, then priority 2, and then other fields. Press F1.

The system displays the Select Recall Field Names and Values screen.

See the following section for more information:

### (Optional) Selecting recall field names and values

### About this task

You can enter in the system which agent-set recalls to include in the record selection. If left blank, the system includes all agent-set recalls. To skip this screen, press F1.

Many users do not define recall settings that the system can dial all scheduled agent-set recalls.

To prevent any agent-set recalls, enter values that cannot be met so that no records can qualify for recall. For example, select the **STATE** field and enter  $\mathbb{Z}\mathbb{Z}$ . As no records have a **STATE** value of **ZZ**, the system cannot select records for recall

To select recall field names and values:

### **Procedure**

- 1. On the Select Recall Field Names and Values screen, in the Name column, type a field name or press  $\mathbb{F}4$  to select a field name from the calling list.
- 2. Type a value in the Value column, and press Enter. Press F1.

### Setting ring count and call connect criteria

### **About this task**

You can specify the following settings:

- The number of rings to allow before the system records a NOANSWER.
- The call detection mode or connect criteria for the system to pass calls to agents.

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

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

To set ring count and call connect criteria:

### **Procedure**

- 1. On the Set Ring Count and Call Connect Criteria screen, in the Phone Field column, type the phone type number (1, 2, 3,...).
- 2. Type the number of rings to allow in the # of Rings column.
- 3. Type the letter to designate the call detection mode in the Connect Criteria column.
- 4. Repeat steps 1 through 3 for each initial phone type. Press F1 to return to the menu.

### **Grouping statements**

#### About this task

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

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

To group statements with AND or OR:

### **Procedure**

- 1. Type all the statements that belong to a group and press F3. The system displays the following prompt at the bottom of the screen: Group line # to line #
- 2. Type the number of the first line in the first group, and press Enter.
- 3. Type the number of the last line in the first group, and press Enter. To create a group consisting of only one line, both numbers must be the same.
- 4. Repeat steps 1 through 3 to make more group statements. Press F1 to move to the next screen.

The system displays the Sort Field Names and Direction screen.

### Moving fields and values in record selection

#### About this task

To move an entire expression or statement to another location:

#### **Procedure**

1. To move a field name and its value, press F2.

The system displays the following prompt at the bottom of the screen:

```
Move line # to line #
```

- 2. Type the number of the line to move, and press Enter.
- 3. Type the number for the target line, and press Enter. Press F1 to move to the next screen.

The system displays the Sort Field Names and Direction screen.

### Editing a record selection

### About this task

You can change criteria for an existing record selection. Use this command to refine the record selection criteria or to modify criteria for a copied record selection.

To edit a record selection:

#### **Procedure**

- 1. From the Supervisor Main Menu, select Campaigns > Record Selections > Edit a record selection.
- 2. If your system has more than one calling list, type the calling list number at the prompt.
- 3. Type a new report description, and press Enter. Type Y at the prompt.
- 4. Use the arrow keys to move to the value you want to change on the current screen and type the new value or press F1 to skip to the screen.
- 5. Press F1.

### **Executing a record selection**

#### About this task

Before you can start a Job on a system, run a record selection. Executing a record selection generates a report file based on the selected records. During the process, the total number of records appears on the screen.

To execute a record selection.

### **Procedure**

- 1. From the Supervisor Main Menu, select Campaigns > Record Selections > Execute a record selection.
- 2. If your system has more than one calling list, type the calling list number at the prompt.
- 3. Type a report description of up to 30 characters, and press Enter. Type Y at the prompt. The system generates the report and returns to the menu.

### Creating a unit record selection

#### About this task

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

You can create a unit record selection in the same way as you create a standard record selection except for setting a key field for the unit work lists.

### **Procedure**

- 1. From the Supervisor Main Menu, select Campaigns > Record Selections > Create a unit record selection.
- 2. To complete the screens, follow the steps in <a href="Creating a record selection">Creating a record selection</a> on page 123.
  - After you complete the Recalls screen, the system displays the Unit Work List Sort Field screen.
- 3. Type the field name in uppercase letters in the **Key Field Name** field or press F4 to select a name from the list. Press F1.
  - The system displays the Select Phone Strategy screen.
- 4. Type the strategy file name or press F10 to scroll through a list of available strategy files. Press F1.

The system displays the Call Selection List Generation screen.

### Editing a unit record selection

#### About this task

To edit a unit record selection:

#### **Procedure**

- 1. From the Supervisor Main Menu, select Campaigns > Record Selections > Edit a unit record selection.
- 2. Follow the steps in:
  - a. Creating a record selection on page 123.
  - b. Editing a record selection on page 128.
  - c. Executing a record selection on page 128.

### **Executing a unit record selection**

#### About this task

To execute a unit record selection:

### **Procedure**

- 1. From the Supervisor Main Menu, select Campaigns > Record Selections > Execute a unit record selection.
- 2. Type the item number for the unit record selection file you want to execute and press Enter.
- 3. Type a report description of up to 30 characters, and press Enter. Type Y at the prompt.

### Copying a record selection

### **About this task**

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

#### **Procedure**

- 1. From the Supervisor Main Menu, select Campaigns > Record Selections > Copy a record selection.
- 2. Type the record selection number.
- 3. Type the new file name at the prompt. Type Y at the confirmation prompt.

### **Deleting a record selection**

### **Procedure**

- 1. From the Supervisor Main Menu, select Campaigns > Record Selections > Delete a record selection.
- 2. Type the record selection number. Press Enter.

### **Executing an infinite record selection**

#### About this task

You can run a record selection required to start an Infinite Job. The system generates a report file based on the selected records. During the process, the total number of records appears on the screen.

To execute an infinite record selection:

#### **Procedure**

- 1. From the Supervisor Main Menu, select Campaigns > Record Selections > Execute infinite record selection.
- 2. Type the item number for the unit record selection file you want to execute.
- 3. Type a report description of up to 30 characters, and press Enter. Type Y at the prompt.

### **Executing a verify record selection**

#### About this task

You can run a record selection required to start a Sales Verification Job. The system generates a report file based on the selected records. During the process, the total number of records appears on the screen.

To execute an verify record selection:

#### **Procedure**

1. From the Supervisor Main Menu, select Campaigns > Record Selections > Execute verify record selection.

- 2. Type the item number for the unit record selection file you want to execute.
- 3. Type a report description of up to 30 characters, and press  ${\tt Enter.}$  Type  ${\tt Y}$  at the prompt.

# **Chapter 12: Jobs**

The objective of a Job is to accomplish specific campaign goals. Campaigns can include multiple Jobs. A Job integrates a calling list, phone strategy, record selection, and other settings to place outbound calls and receive inbound calls.

A Job contains all the information Proactive Contact needs to place phone calls to customers. The type of Job you set up determines the type of calling activities that agents handle.

## **Types of Jobs**

Depending on your system configuration, a Job can conduct the following types of calling activities:

- · Make outbound calls
- · Receive inbound calls
- Verify a sale

You can start more than one Job at a time.



You can run a maximum of 200 Jobs on the system. Running of 200 jobs allows for *shadow* Jobs for Agent Owned Recall and the ability to link running Jobs.

If you have an Agent Blending system, from the **Supervisor Main Menu**, you can use **Campaign > Job** to set up outbound Jobs.

### **Inbound Jobs**

An inbound Job is a Job on an Intelligent Call Blending system where the dialer automatically routes inbound calls to agents.

An Agent Blending system does not have inbound Jobs. The ACD controls inbound calling activity and not the dialer. The agents on the ACD handle the inbound calls.

### **Blend Jobs**

A blend Job is a Job on an Intelligent Call Blending system where the dialer moves agents between outbound and inbound calling activities. Blend agents receive inbound calls during peak inbound activity and outbound calls when inbound activity decreases.

In Proactive Contact, a blend Job handles both inbound and outbound calls on an Intelligent Call Blending system.

### **Outbound Jobs**

During outbound Jobs, the dialer uses a calling list, phone strategy, record selection, and other settings to place outbound calls to customers. During outbound Jobs, the dialer automatically dials phone numbers and routes calls to agents. Depending on the system configuration, the system monitors the phone calls to ensure that agents do not receive phone calls that result in the following connections:

- Answering machines
- Phone operator intercepts
- · Busy signals
- Interactive Voice Response systems (IVRs)
- No answers

### When a Job stops

Proactive Contact uses quotas as a means to complete a certain number of outbound calls based on a selected outcome.

A quota is a maximum number of releases for a particular completion code. When the Job reaches the quota for a unit, calls are not placed.

In Proactive Contact, a Job can stop when the following occurs:

- The Job reaches the Latest Stop Time Setting.
- · You stop the Job manually.
- The dialer placed a call to all initial phones at least once.
- The dialer placed a call to all recalls at least once if you are using a shadow job.
- The dialer placed a call to all scheduled recalls, but stops dialing after placing a call to all initial phones at least once.

You set and modify a quota that the dialer applies to the Job when the Job starts. Then you set and modify a quota that affects the current Job while that Job runs.

### **Special outbound Jobs**

An outbound Job uses settings to place calls to customers.

Depending on the configuration for an Intelligent Call Blending system, you can create or modify the following types of Jobs:

 A Unit Work List Job that divides customer records into work lists or subsets. Agents work with records only in their assigned work lists.

#### Note:

When you set unit work lists to run on a blend Job, the system must be set to allocate all agents to the units. The LOGONUNIT:Require unit ID for agent login parameter in the Job file must be set to NO. The rule of setting LOGONUNIT: Require unit ID for agent login parameter in the Job file to NO is enforced, by the system, in the code because the system cannot easily identify which agent to shift to inbound because of the small pool of agents assigned to each unit. This can result in nuisance calls. Alternatively, you can use agent blending for agents to log on to campaigns by units. This solution works, but is not as efficient as an outbound only campaign without agent blending.

- A Managed Job allows agents to preview or cancel a customer record before the dialer places the call to the customer. Depending on your system setup, you can adjust the maximum preview time and allow agents to cancel calls.
- A Sales Verification Job verifies a transaction or commitment that the customer made. Use the Sales Verification record selection when starting a Sales Verification Job.
- An Infinite Job uses a special record selection to add records for calling to an existing calling list while the Job is active. Use the Infinite record selection when starting an Infinite Job. An infinite Job runs until you stop it manually.
- A Virtual Agent Job allows the dialer to run a Job without agents. When the dialer detects a customer or an answering machine, the system plays a recorded message. You can use the Opt-out feature with a virtual Job. For configuring Opt-out, see Appendix E: Opt-Out Configuration And Pg230 Updates For New Features on page 298.

You define List, Managed, Sales Verification, and Virtual Jobs on the Edit and start job screen. The Job you select determines the type of additional Jobs you can select to create. For example:

- If you select Virtual, you cannot select any other type of Job.
- If you select Managed, you can select only Sales Verification.
- If you select Unit Work List, you can select only Sales Verification.

## Call pacing

The Proactive Contact system has two methods to pace outbound dialing during an outbound Job: Cruise Control and Expert Calling Ratio.

When you define a Job, you set the call pacing method based on the type of calling activity you want to complete. For example:

- If you want to limit abandoned or nuisance calls while maximizing agents handling calls, select Cruise Control.
- If you want to pace calling activities based on time in a wait queue or time agents spend handling calls, select Expert Calling Ratio.

#### Note:

Jobs with the same name on different dialers in a pod can use a different call pacing method. To ensure consistent monitoring and reporting, use the same settings for the same Job name on each dialer.

### **Cruise Control**

Use Cruise Control for outbound Jobs when any of the following dialing conditions are important:

- The Job is subject to government regulations prohibiting abandoned calls, nuisance calls, or silent calls.
- You want to provide a high level of customer service to the contacted parties.
- You want to supervise agents and calling activities rather than manually supervising the predictive dialing process.
- The number of agents on an outbound Job is large or can change.
- Agents perform other activities such as handing inbound calls during the Job.

Cruise control automatically maintains the service level of outbound dialing during a Job and connects the calls to agents within a specified period of time. During a Job, you do not have to monitor or modify the call pacing settings.

When you set up an outbound Job that uses Cruise Control, you must define the Desired Service Level and the Connect Tolerance settings. The dialer uses these settings to do the following:

- Predict when to automatically dial phone numbers.
- Distribute phone calls within the tolerable time period that you set.

After you start a Job that uses Cruise Control, you do not have to change the settings. If you want to change the settings, you must stop the Job. To resume calling activities with the new settings, restart the Job.

#### Note:

You cannot use Cruise Control with the following Job types:

- Managed
- Inbound
- Sales Verification

- Unit Work List
- Virtual
- · Infinite

You can adjust the following Cruise Control settings in the Job run verification screens:

## Job run verification field description

Name	Description
Desired Service Level (percentage)	The target percentage of serviced calls that you want the system to maintain. Enter a percentage from 70 to 99. The default value is 99. You must set this value if the Job uses Cruise Control.
	The system uses the Desired Service Level and Connect Tolerance settings for real-time monitoring and reporting of outbound, inbound, and blend Jobs. During outbound Jobs, the system also uses Desired Service Level and Connect Tolerance settings to predict when to automatically dial phone numbers and distribute the calls within the tolerable time period.
Connect Tolerance	The number of seconds that you will allow a phone call to be delayed waiting for an agent before the dialer designates the call as a nuisance call.
	Typically, you want to allow a minimum time delay before the dialer sends the phone call to an agent. Enter a number from zero (0) to 9. The default value is 1.
	You must set this value if the Job uses Cruise Control.

## **Expert Calling Ratio**

Use Expert Calling Ratio for any type of outbound Job when the following objectives are important:

- · Optimize the use of agents during the Job.
- · Manage and change call handling time during the Job.
- Place as many calls as possible during the Job.

Using Expert Calling Ratio, you can change the way the dialer determines when to place the next call while a Job is running.

When you set up an outbound Job that uses Expert Calling Ratio, you select the following settings:

- The method that the dialer uses to monitor calling activities
- A value that sets the pace at which the dialer places phone calls

Using Expert Calling Ratio method, the dialer determines when to place the next call based on one of the following values:

- The number of phone calls in the wait queue and the agents waiting for a phone call
- The total time agents spend handling the phone call and customer record
- The time agents spend updating customer records after releasing the phone line

Once you start a Job that uses Expert Calling Ratio, you can change the settings in Monitor without stopping the Job.

### Initial hit rate

The initial hit rate determines the average number of calls for an agent that the dialer makes during the first five minutes of the Job. The initial hit rate is the number of call completions compared with call attempts.

For example, an initial hit rate of 50 means the dialer must make approximately two dialing attempts for each agent to get one successful connection or 50% of the connection. When the dialer gathers statistics from actual call attempts, it readjusts the hit rate automatically to meet the minimum hit rate setting. If you set the rate too low, at 20 to 30, the dialer can make more connects than your agents can handle during the initial dialing period. If you set the rate too high, over 70, the system fails to make enough connections to keep your agents busy.

Use the following table to adjust the initial hit rate according to the particular needs of the Job:

Type of call	Set rate to	Description
Daytime home calls	30	3 calls per agent for 1 connection
Evening home calls	50	2 calls per agent for 1 connection
Weekend home calls	50	2 calls per agent for 1 connection
Daytime office calls	70	1 call per agent for 1 connection

### Minimum hit rate

Select the field to set the minimum hit rate for the Job. Enter a value between 1 and 100 in increments of 10. The default value is 30.

The dialer uses the minimum hit rate to determine the maximum number of calls to place to make an agent connection.

Use minimum hit rate to limit the number of lines a Job can use. For example, a minimum hit rate of 30 means the system makes no more than three dialing attempts for each agent or 30% of the

connection. The minimum hit rate prevents the dialer from allocating more pooled lines to a poorly performing Job at the expense of a more successful Job.

## Job linking

Link Jobs when you want the system to start a Job as another Job ends. When you link a Job, the system transfers agents to the next Job after the agents complete their calls and release the records. The system displays a screen message notifying the agents that they are changing Jobs. Before the new Job begins, the agent receives a message, You are now being transferred to Job <Jobname>.

The second Job begins as the system releases lines from the first Job. For example, if you schedule four small unlinked Jobs, you can link the first Job to the second Job, link the second to the third, and the third to the fourth.

The dialer automatically starts the Job when the agent on the current Job completes the last call and releases the record. The system displays a message telling the agents that they are changing

You can link a Job that uses Cruise Control to a Job that uses either the Cruise Control or Expert Calling Ratio method.

The following table describes the types of Jobs that you can link together:

Job type	Can link to
outbound Job	Any Job, except a virtual Job
managed Job	Any Job, except a virtual Job
inbound Job	Any Job, except a virtual Job
blend Job	Any Job, except a virtual Job
virtual Job	A virtual Job

If you stop a Job that is linked to another Job, the dialer automatically starts the next Job. Jobs that run throughout the day are configured to stop and start automatically through Job linking. Also, the last Jobs to run for the day are set to stop a few minutes before the latest guard time. This is to ensure that the system does not call past the legal calling time. At the latest guard time, the agents are automatically logged off of the Job as well. It is not possible to link from a job in one tenant to another job in another tenant.

### Messages and scripts

Messages are the recordings that are played to customers when they are on hold, waiting for an agent, or when an agent plays a message. Scripts are a series of messages that customers hear in the inbound, outbound, and transfer wait queues.

Messages provide the following functions:

- Assure customers that their calls remain connected
- Prepare customers for the upcoming transaction, asking them to have credit cards and order numbers ready
- · Answer frequently asked questions
- · Promote the business
- Advertise new products and services

You can create messages and scripts only if you have administrative privileges.

### Messages

Messages are the recordings that are played to customers when they are on hold, waiting for an agent, or when an agent plays a message.



On Proactive Contact with PG230RM, your recorded voice messages must be digitized for Proactive Contact to use the messages.

You choose message files when you set up Jobs on the system. Later, you can add and remove the messages.

The voicemsg.cfg file defines all of the voice message files that are used by the telephny.spt file. The voicemsg.cfg file cannot exceed 2048 entries. The telephny.spt file stores scripts that do not exceed 6000 lines.

### Important:

If the number of lines in the telephny.spt file exceeds 6000 lines, you will receive an error. You will not be able to save scripts. If the number of lines exceeds 6000, the system can do one of the following:

- Not start Jobs
- Start Jobs but not deliver messages beyond line 6000

### Reducing the number of lines in the telephny.spt file Procedure

To reduce the number of lines in the telephny.spt file, do any of the following:

### Result

- Remove Scripts and Messages that you no longer use.
- Contact Your Proactive Contact vendor for assistance.

The format of the voicemsq.cfg file is:

```
ID:Fname:PbxExt:Gender:Group:RecordedAs:Tex
```

### **Message information**

The following table defines the contents of each column of information in the file:

Name	Description
ID	Unique integer message identifier, range 1 - 247 and 255 - 2048
Fname	Textual label for the voice message
PbxExt	Avaya CTI mode only. This is the PBX extension dialed in Avaya CTI mode to play the message.
Gender	Describes whether the message was recorded in male or female voice in case it is a voice message. Allowed values are only Male, Female, or NULL
Group	Name of the group this message belongs to such as Outbound, Inbound, Managed and so on.
Recorded As	Either Voice or Music
Text	The text of the voice message or other description

### Reserved message IDs

The following message IDs are reserved:

Message ID	Description
248	ZIP1 tone
249	ZIP2 tone
250	Greeting message
251	Moving to inbound message
252	Moving to outbound message
253	Not logged in message
254	Interval tone

### **Record messages**

For the Proactive Contact and Proactive Contact with PG230RM systems, you can do the following to record messages:

- Record the audio messages and get a third party to digitize the messages.
- Use a service bureau to record and digitize the message.
- Use third party software that records and digitizes the messages.

You can use the Microsoft Sound Editor to save the voice message file. You must save the voice message file using the following format options:

- CCITT U-Law ("Mu-Law")
- 8k Sample (Hz)
- 8-bit
- Mono

For the Proactive Contact with CTI, the ACD stores the recorded messages. For information, see the ACD documentation.

When the message is ready for use, save the audio file in a location that is readily accessible to the Administrator workstation.

Outbound wait queue message example: The outbound wait queue message, wait1, follows this script:

- 1. Hold the line please, I have a call for this number. 5 second pause
- 2. Sorry to keep you waiting. I'm still trying to connect. 5 second pause
- 3. Still trying, hold please. 5 second pause
- 4. Thank you for waiting. Sorry I couldn't connect you. I'll try again later.

**Inbound wait queue message example:** The inbound wait queue message, inwait1, follows this script:

- 1. Thank you for calling. An operator will be with you shortly. 5 second pause
- 2. Please hold for the next available operator. 5 second pause
- 3. We're still trying. 5 second pause
- 4. Thank you for calling, you may continue to wait. 5 second pause
- 5. Loop back to first message

### **Scripts**

Scripts define how customers hear messages during the following occasions:

- While waiting in inbound, outbound, or transfer queues
- When customers answer a call placed by a virtual agent
- When an agent presses a function key

You designate the order in which Proactive Contact plays messages. You can either play music or maintain silence between messages.

### Types of scripts

After adding messages to the system, create scripts.

To create a script, complete the following tasks:

- Assign messages to a category when the script runs.
- Assign actions to messages.

The following table describes the categories of when scripts run:

Script	Description
Automated Messages	Messages that agents play to customers when the agent presses any function key.
Inbound Wait Queue	Messages that the system plays to customers while waiting for an agent in inbound wait queues.
Outbound Wait Queue	Messages that the system plays to customers while waiting for an agent in outbound wait queues and or when an answering machines receives the call.
Transfer Wait Queue	Messages that the system plays to customers while waiting to be transferred.
Virtual Wait Queue	Messages that the system plays to customers during Virtual Agent Jobs. A virtual agent Job delivers messages without agent intervention.

## **Script actions**

Script actions define a script. Depending on the script you select in the Job run verification screens, you can do the following when defining a script:

- Select to play the script when an answering machine or voice answers the phone call.
- · Assign actions that play additional messages.

### **Script labels**

The script label is the name of the script message used during the outbound Job. The message script is the message or string of messages customers hear. Jobs can use different wait queue messages.

Choose from the following scripts when setting up Jobs:

Script Label	Description
auto1_f	Place an outbound call. If no agent is available to take the call, play the female wait queue messages for wait1. If answering machine, play the female message for virt1.
auto1_m	Place an outbound call. If no agent is available to take the call, play the male wait queue messages for wait1. If answering machine answers the call, play the male message for virt1.
no_outwait	Place an outbound call. If no agent is available to take the call, disconnect on the customer.
ringing	Place an outbound call and pass the ringing phone to the agent. If no agent is available to take the call, disconnect the call.

Script Label	Description
wait1_f	Place an outbound call. If no agent is available to take the call, play the female wait queue messages for wait1.
wait1_m	Place an outbound call. If no agent is available to take the call, play the male wait queue messages for wait1.
preview_call	Before calling selected phone, display the customer record on an agent's screen for previewing. Upon agent command or specified time-out, call the selected phone. Use preview_call only with managed dialing.
virt1_f	Place an outbound call and, instead of passing the call to an operator, play the female message for virt1. Change the Main data process label on the Outbound Job Run Verification screen to virtual before running the Job.
virt1_m	Place an outbound call and, instead of passing the call to an operator, play the male message for virt1. Change the Main data process label on the Outbound Job Run Verification screen to virtual before running the Job.
no_inwait	Answer an inbound phone call. If no agent is available to take the call, disconnect on the customer.
inwait1_f	Answer an inbound phone call. If no agent is available to take the call, play the female wait queue messages for inwait1.
inwait1_m	Answer an inbound phone call. If no agent is available to take the call, play the male wait queue messages for inwait1.
answer_immser	Answer calls with IMMSERVICE set to YES.
generic	Default data processing.

## Job Run Verification shortcut keys

You can use the following shortcut keys on the Job Run Verification screens:

Keys	Description
Control+C	Change field values/toggle
Control+D	Display script information
Control+E	Erase line
Control+G	Start Job
Control+X	Exit current operation

## **Creating a Job**

### About this task

You can create a new Job by copying an existing Job. You can modify or edit Job settings easily if you select a Job that is similar to the one you want to create. The Job must be the same type of Job, that is, outbound, inbound, or blend. These features are also available from the Proactive Contact Editor application.

Before creating a Job for a campaign, load the calling list and prepare the phone strategy, and record selection files. Execute the record selection file, then copy the Job definition and edit the copy.iry

Job names must adhere to the following guidelines:

- Maximum of 20 characters for an English name
- Maximum of 15 characters for languages other than English
- · Special characters, such as dots, are not supported

### Tip:

In a pod, the same Job name can exist on each dialer.

To ensure consistent monitoring and reporting, use the same settings for the same Job name on each dialer.

To create a Job:

#### **Procedure**

- 1. From the Supervisor Main Menu, select Campaigns > Jobs > Copy a Job.
- 2. Type the item number for the Job you want to copy and press Enter.
- 3. Type Y in response to the prompt.
- 4. Type a new name for the Job and press Enter. Job names can be up to 20 characters.

The new Job name now appears in the Item List.

### **Editing and starting a Job**

#### About this task

To edit and start a Job:

#### **Procedure**

- 1. From the Supervisor Main Menu, select Campaigns > Jobs > Edit and start a Job.
- 2. Type the item number for the Job you want to edit, and press Enter.

The system displays the Outbound Job Run Verification screen with the cursor in the first field.

You can use this screen to enter outbound Job parameters. The parameters and settings on your system can vary depending on your system configuration. The following sections describe each outbound Job parameter listed on the screen and provide recommended settings:

### Job type parameters

The following table describes the Job type parameters in the Outbound Job Run Verification screen:

Parameter	Description	Value	Setting
Transaction verification Job	Determine if the Job is a Sales Verification Job.	YES or NO	NO
Run Jobs without agents	Determine if the Job is a Virtual Agent Job. The dialer runs the Job without agents.	YES or NO	NO
Run Job with OFCOM	Determines if the OFCOM is turned on for the Job.	YES or NO	NO
OFCOM Method	Defines the trigger point in which ofcom timer will be started.		
Start Ofcom timer when	Determines when to start the ofcom timer.	Customer begins to speak	Customer begins to speak.
		Customer takes phone off-hook.	

## **Basic parameters**

The following table describes the basic parameters either necessary to run a Job or most often changed:

Parameter	Description	Value	Setting
Job description	Description of the Job. For example, type a description that reflects the goal of the Job such as 30-day Accounts. You can enter a maximum of 40 characters in English language and 20 characters for other languages.	Up to 39 characters/spaces	
Earliest start time	Time to begin dialing customer phone numbers.  Note:  The dialer is preset with recommended start and stop times for different time zones. If you enter a time that is earlier than the recommended start	hh:mm (24 hour clock)	03:00
	time, the dialer does not dial phone numbers until the system clock reaches the recommended time.		

Parameter	Description	Value	Setting
Latest stop time	Time to stop dialing customer phone numbers.	hh:mm (24 hour clock)	23:59
Calling party number (ANI)	Identifies the party that placed the phone call. Displays the phone number of your contact center on the phone of the party that received the phone call.	NNN-NNN-NNNN	
Calling party number (ANI) by record	Calling party number (ANI) by record		
Require unit ID for agent login	Requires an agent to enter a unit work list when the agent logs in to Proactive Contact Agent.	YES or NO	NO
Transaction completion codes	Enter the call completion code to indicate the need to verify the transaction by the Sales Verification Job.		93
Tagged trunk-to-trunk transfer data	Tags trunk-to-trunk transfer calls with a field data from the calling lists.		
Percentage completion of Job to trigger callsel of link Job	Determines the time when to run the selection of a link Job.	Number from 0-99, where 0 indicates that the feature is turned off.	0

## File parameters

The following table describes parameters which reference various files on the system:

Parameter	Description	Value	Setting
Outbound calling list	The Job uses the outbound calling list to place calls to customers during outbound and blend Jobs. The calling list name includes the host dialer name where the list is stored.	Dialer name and outbound list file name	<dialer name="">- list1</dialer>
Record selection file name	The record selection defines which records the dialer uses to place phone calls during outbound and blend Jobs. The record selection contains the phone strategy for the	Record selection file name	all

Parameter	Description	Value	Setting
	Job. You can enter a maximum of 32 characters in English language and 15 characters for other languages. However, you must keep the maximum number of characters for English language as 15 characters and the maximum number of characters for other languages as 8 characters.		
Outbound screens	The outbound screen labels setting determines the outbound screens that agents see and the order in which the screens appear.	Outbound screen label name(s)	list1
Agent keys definition file name	Enter the agent keys file name to use during a Job. An agent keys file is configured with different sets of functions for keys used during different types of Jobs.	Agent keys definition file name	ag_cmd1
Data script (.dat) file name	Enter the data script file name to use during a Job.	Script file name	allJobs
Name of next Job to link to	The Job that you want the system to start automatically when an agent on the current Job completes the last call and releases the record.	Job name	
Name of inbound Job to transfer calls to	Enter the inbound Job name to identify the Job name that agents can use to transfer calls during inbound and blend Jobs.	Inbound Job file name	inbnd1
Do not call group name	Name of the do not call group.	Do not call group name	

## **Call pacing parameters**

The following table describes the parameters used for call pacing:

Parameter	Description	Value	Setting
Call pacing method	Enter the call pacing method	C - Cruise Control	E
	that you want to use with the Job. These settings are for	E - Expert calling	

Parameter	Description	Value	Setting
	non-cruise control job. For more information, see <u>Call</u> pacing on page 134.		
Expert calling ratio	Enter the desired setting for use with the Job. For more information see Expert Calling Ratio on page 136. Average ranges include: W29-W71 or Q4-Q31 or U32-U78	Q1-Q100 - Calls in wait queue W1-W100 - Agent work time U1-U100 - Agent update time	W40
Initial hit rate	Average number of calls that the dialer makes for an agent during the first five minutes of the Job. The initial hit rate is the number of call completions compared with call attempts. For more information see <a href="Initial hit rate">Initial hit rate</a> on page 137.	0-100, multiples of 10	50
Minimum hit rate	Set the minimum hit rate for the Job. For more information, see Minimum hit rate on page 137	0-100, multiples of 10	20
Cell Phone Campaign Call Progress	Defines the enhanced cell phone campaign call feature.	1-4, 0 for regular campaigns	

## Service level parameters

The following table describes the service level parameters:

Parameter	Description	Value	Setting
Desired service level	Target percentage of serviced calls that you want the system to maintain.	70.0-99.0	99.0
Time to connect tolerance	Number of seconds that you will allow a phone call to be delayed while waiting for an agent before the dialer designates the call as a nuisance call.	0-9	1

## **Quota parameters**

The following table describes quota parameter settings:

Parameter	Description	Value	Setting
Quota setting	Enter a completion code and a quota for the completion code. The system stops the Job automatically when the number of completion codes reaches the quota.	Completion code number, quota For example, 93,100 is the SOLD completion code with a quota of 100.	
Quota settings file name	Enter a name for the file that saves the quota settings.	Quota settings file name	
Save quota setting when the Job ends	Determine if you want to save the quota setting when the Jobs ends. The system continues to use the quota setting the next time the Job starts.	YES or NO	NO

## General processing parameter

The following table describes the general parameter pertaining to file processing during a Job:

Parameter	Description	Value	Setting
Automatically start Update mode on customer hang-up	Determine whether you want to start to record the time an agent takes to complete the after call work when the customer disconnects the phone call.	YES or NO	NO

### **Outbound processing parameters**

The following table describes outbound processing parameter settings:

Parameter	Description	Value	Setting
Shutdown Job when no more calls remain	Determine if you want the dialer to end Jobs when each customer has been called at least once.	Enter YES if you want the dialer to end Jobs after all calls are completed, including recalls.	YES
Make alternate phone lowest priority in selecting next record	Determine if you want to place calls that are first attempts, retries, and recalls before placing a phone call	YES or NO	NO

Parameter	Description	Value	Setting
	that uses the alternative phone.		
Order calling of records by time zone	Determine if you want to order calls by times zones. The system places phone calls following the sun from east to west. If the choice is YES, then all East calls are made before it moves to the next. If the choice is NO, then the calls are made per time zone east to west.	YES or NO	YES
	With either choice, time zone laws are still applied.		
VDN needed by the CTI dialer only	Specifies the VDN required for Opt-out by the CTI dialer		
Answer Supervision	Determine if you want to configure answer supervision for the job		

## **Label parameters**

The following table describes outbound processing parameter settings:

Parameter	Description	Value	Setting
Script label to use for making call	Enter the starting script label. The script label is the name of the script message used during the outbound Job. The message script is the message or string of messages customers hear. Jobs can use different wait queue messages. For more information, see <a href="Script labels">Script labels</a> on page 142.	Script starting label name (press Control+Dto see a list).	wait1_f
Main data processing label	Instructs the system to begin Job processing and tells the system what to display on the agent screens.	Virtual - virtual Job verify - sales verification Job generic - outbound Job	generic
Script label to use OFCOM	Specifies the OFCOM script used for applying OFCOM feature.	Name of the script	

## **Recall parameters**

The following table describes the parameters associated with recalls:

Parameter	Description	Value	Setting
Recall reschedule interval	If your system uses Agent Owned Recall, use Recall reschedule interval parameter to enter the minimum number of minutes that must elapse before the dialer tries to pass the agent a recall. This value is to reschedule the call if the agent who set the recall is not at the system at the time of recall.	minutes	10
Recall notification time	If your system uses Agent Owned Recall, use Recall notification time parameter to enter the time in minutes during which the system looks for the agent who set up the recall on the Job and is available for a call.	minutes	2
Number of recall attempts	If your system uses Agent Owned Recall, use Number of recall attempts parameter to enter the number of times to look for the agent that set up the recall. This is also the number of times to look for that agent along with recall reschedule interval before passing the recall to any agent on the job. If the AOR is not serviced in the job it was set in, the AOR will be handled subsequently in a shadow job, and the recall will never be passed to another agent.	0-10	2
Auto assign recall from Infinite Job to agents on another Job	Assigns recalls from infinite Jobs to the agents available on other Jobs	Yes or No	
Name of the Job to get agent for recall	Specifies the Job from which an agent must be pulled to address a recall.	Name of the Job	

Parameter	Description	Value	Setting
Shadow job in Preview Mode	Specifies whether details of shadow jobs can be viewed in preview mode.		

## Managed Job preview mode parameters

The following table describes parameter settings used with Managed Jobs:

Parameter	Description	Value	Setting
Managed (preview) dialing	Determine whether to allow an agent to look at a customer record before the dialer places the phone call.	YES or NO	NO
Allow agents to cancel call in preview mode	Enter YES to allow an agent to cancel the managed dialing call. Enter NO to prevent agents from cancelling a managed dialing call.	YES or NO	NO
Time limit (seconds) for preview	To set up the time limit in seconds during which an agent can preview a record before the system dials the number. The average time is 15 seconds.	1-999, or select 0 to set an unlimited amount of preview time.	15
Display empty record at preview	To allow an agent to create a new record during preview from an empty record (YES). The agent then uses the record to place the phone call. Enter NO to prevent the display of an empty record during preview.	YES or NO	NO
Allow dialing from deleted record	To allow an agent to use a record that was identified as not to use (YES). When an agent removes or deletes a record, the record remains on the dialer. The agent can place a call on a phone number from that record. Enter NO to prevent dialing a record that was marked not to use.	YES or NO	NO
Method for record search at preview	Enter YES for Managed (preview) dialing, to select whether an agent can	NONE - no search allowed (agent	NONE

Parameter	Description	Value	Setting
	search for a record and how they can search.	must enter number manually)	
		HASH - Quick Search	
		LIS - List Indexed Sequential (LIS) search method	
Key field for LIS record search	Enter the record field to be the key field for LIS searching.	For example, LNAME or ACCTNUM if those fields exist in your calling list.	
Manual Mode Dialing	Select the check box to enable manual mode dialing.		

## Wait queue and message parameters

The following table describes the wait queue and message parameters:

Parameter	Description	Value	Setting
Total wait delay (seconds)	Enter the number of seconds from 0 to 999 that the customer can wait in the wait queue before the dialer ends the call.	0-999 seconds	90
The number of message to play while on hold awaiting transfer	Enter the message number to play while a customer is on hold awaiting a transfer. For more information see Messages on page 139.	1-2048	

## **Virtual Job parameters**

The following table describes the parameters used for virtual Jobs:

Parameter	Description	Value	Setting
Should Opt-out be enabled?	Specifies whether or not to enable the Opt-out feature.	Yes or No	
Opt-out Digit	Specifies the digit to be pressed by the called party for opting out.	Number	
When an Opt-out happens, transfer to	Specifies the action when the called party opts out of a call.	Transfer to an inbound/blend Job or Transfer to a VDN.	

Parameter	Description	Value	Setting
Opt-out Job	Selects an inbound/blend Job from	Name of the Job	
	the list provided. Calls that are opted out are transferred to this inbound or blend Job as an inbound call.		
Opt-out VDN	Specifies the VDN to which the calls	VDN	
	that are opted out will be connected.		
Message to be played when Opt-out fails	Specifies the message that is played to the customer if an opt-out fails.	Number	

### IVR integration parameters

The following table describes the parameters used when your system is integrated with an IVR system:

Parameter	Description	Value	Setting
Allow IVR agents on Job	Determines whether to allow IVR agents to join the Job.	YES or NO	NO
IVR identifier	Enter the IVR identifier.	Number	
Initial script to run on the IVR	Enter the script agents hear when joining an IVR Job.	Name of the script	
Script to run on the IVR	Enter the script that customers hear when they answer an IVR phone call.	Name of the script	

## **Editing a Managed Job**

#### About this task

To edit a Managed Job:

#### **Procedure**

1. Set Minimum hit rate to 100.

Because the agents preview one record at a time, the hit rate must be set to **100**. This forces the system to dial only one number per agent.

2. Leave Expert Calling ratio blank.

The system sets it to the appropriate level after the first five minutes.

3. Type a Job description.

4. In the Start script label field, select the Managed Dialing script.

The managed script sends a signal to the system to first pass the record to the agent for preview. For more information, see Script labels on page 142.

- 5. Set Managed Dialing to YES by pressing Control+C to switch between NO and YES.
- 6. Set **Preview limit**. The range is **0** seconds to **999** seconds. If the setting is **0**, the agents have unlimited time to preview the record.
- 7. Set Allow agents to cancel calls to YES or NO. YES allows the agents to cancel the call.

## Setting up a source Job for a Sales Verification Job

#### About this task

To set up a source Job for a Sales Verification Job:

#### **Procedure**

- 1. On the Outbound Job Run Verification screen, verify that the Completion Code parameter is **93**.
- 2. If it is not, press Control+D and select 93.

### **Editing a Sales Verification Job**

#### About this task

To edit a Sales Verification Job:

#### **Procedure**

- 1. On the Outbound Job Run Verification screen, select the outbound Job named **Verify** as the Job you want to copy.
- 2. Type a name to indicate that the Job is a verification Job. Job names can be up to 20 characters.
- 3. From the Jobs menu, select Edit and start a Job.
- 4. Select the source Job's calling list.
- 5. Press Control+Cto change the verification Job setting to Yes.
- 6. Confirm that the setting on the main data process label is **Verify**. If not, press Control+C and select **Verify**.

### **Editing an Infinite Job**

#### About this task

To edit an Infinite Job:

#### **Procedure**

- 1. From the Supervisor Main Menu, select Campaigns > Jobs > Edit and start a Job.
- 2. Select the predefined infinite Job, usually called infinity. To set parameters that are not specifically for infinite Jobs, perform the steps in Editing and starting a Job on page 144.
- 3. Type infinity in the Job description.
- 4. Set the End Job when quota is met parameter to **No**. Type Y at the prompt.

The system receives the new calling list records.



Tip:

An infinite Job runs for long periods and you must shut down manually. If you must restart the Job, run the infinity record selection again before restarting. This ensures that the new list segments are properly incorporated into the calling list.

### Creating a Virtual Job

#### About this task

To create a Virtual Job:

#### **Procedure**

- 1. From the Supervisor Main Menu, select Campaigns > Jobs > Copy a Job.
- 2. Select the outbound Job named **virtual** as the Job to copy.
- 3. Type a name to indicate that the Job is a virtual Job, such as virtpm.

Job names must adhere to the following guidelines:

- Maximum of 20 characters for an English name
- Maximum of 15 characters for languages other than English
- Special characters, such as dots, are not supported
- 4. From the Jobs menu, select Edit and start a Job.
- 5. Press Control+C to change the agent setting to No.
- 6. Press Control+D and select the record selection file to which you assigned the virtual phone strategy.
- 7. Press Control+D and select the virtual Job script label you want to use with this Job. For more information, see Script labels on page 142.

8. Confirm that the main data process label setting is Virtual. If not, press Control+D and select this setting.



#### Note:

The suggested Number of Rings value is 8 on a virtual job to ensure the message will play after the dialer has detected the called party or answering machine is on the line.

### Editing and starting an inbound Job

#### About this task

To edit an Inbound Job:

#### **Procedure**

- 1. From the Supervisor Main Menu, select Campaigns > Jobs > Edit and start a Job.
- 2. Type the item number for the Job you want to edit or start.
  - The system displays the Inbound Job Run Verification screen with the cursor positioned in the first value field.
- 3. If the value is correct, press Enter, and go to the next field. If a value is incorrect, press Control+C. Type the new information and press Enter to move to the next field. If a field uses only a Yes or No response, use Control+C to switch between Yes and No.

Use these screens to enter blend Job parameters. The table in the following section describes each blend Job parameter listed on the screen and provides some recommended settings. The parameters and settings on your system can vary depending on your system configuration.

### Job type parameters for editing and starting an inbound Job

The following table describes the Job type parameters in the Inbound Job Run Verification screen:

Parameter	Description	Value	Setting
Pool Jobs for IVR agents	Specifies whether or not the Job must be pooled for the IVR agents.	YES or NO	NO
Run Jobs without agents	Determines if the Job is a Virtual Agent Job. The dialer runs the Job without agents.	YES or NO	NO
OFCOM Method	Defines the trigger point in which ofcom timer will be started.		
Start Ofcom timer when	Determines when to start the ofcom timer.	Customer begins to speak	Customer begins to speak

Parameter	Description	Value	Setting
		Customer takes	
		phone off-hook	

## Basic parameters for editing and starting an inbound Job

The following table describes basic parameters either necessary to run a Job or most often changed:

Parameter	Description	Value	Setting
Job description: Inbound Job	Description of the Job. For example, type a description that reflects the goal of the Job such as 30-day Accounts.	Up to 39 characters/spaces	
Earliest start time	Time to begin dialing customer phone numbers.	hh:mm (24 hour clock)	03:00
	Note:		
	Note: The dialer is preset with recommended start and stop times for different time zones. If you enter a time that is earlier than the recommended start time, the dialer does not dial phone numbers until the system clock reaches the recommended time.		
Latest stop time	Time to stop dialing customer phone numbers.	hh:mm (24 hour clock)	23:59
Calling party number (ANI)	Identifies the party that placed the phone call. Displays the phone number of your contact center on the phone of the party that received the phone call.	NNN-NNN-NNNN	
Transaction completion code(s)	Enter the call completion code to indicate the need to verify the transaction by the Sales Verification Job. For more information see Completion codes on page 120.		93

Parameter	Description	Value	Setting
Tagged trunk-to-trunk transfer data	Tags trunk-to-trunk transfer calls with a field data from the calling lists.		
Percentage complete of Job to trigger callsel of link Job	Determines the time when to run the selection of a link Job.	Number from 0-99, where 0 indicates the feature is turned off.	0

## File parameters for editing and starting an inbound Job

The following table describes the parameters which reference various files on the system:

Parameter	Description	Value	Setting
Inbound calling list	Inbound calling list used to place calls to customers during inbound and blend Jobs. The calling list name includes the host dialer name where the list is stored.	Dialer name and inbound list file name	<dialer name="">- inbnd1</dialer>
Inbound screens	Enter inbound screen labels. This setting determines the inbound screens that agents see and the order in which the screens display.	Inbound screen label name(s)	inbnd1
Agent keys definition file name	Enter the agent keys file name to use during a Job. An agent keys file is configured with different sets of functions for keys used during differently types of Jobs.	Agent keys definition file name	ag_cmd1
Data script (.dat) file name	Enter the data script file name to use during a Job.	Script file name	allJobs
Name of next Job to link to	The Job that you want the system to start automatically when an agent on the current Job completes the last call and releases the record.	Job name	
Do not call group name	Name of the do not call group.	Name	

### Service level parameters for editing and starting an inbound Job

The following table describes the service level parameters:

Parameter	Description	Value	Setting
Desired service level	Target percentage of serviced calls that you want the system to maintain.	70.0-99.0	99.0
Time to connect tolerance	Number of seconds that you will allow a phone call to be delayed while waiting for an agent before the dialer designates the call as a nuisance call.	0-9	1

### General processing parameter for editing and starting an inbound Job

The following table describes the general parameter pertaining to file processing during a Job:

Parameter	Description	Value	Setting
Automatically start Update mode on customer hang-up	Determine whether you want to start recording the time an agent takes to complete the after call work when the customer disconnects the phone call.	YES or NO	NO

## Inbound processing parameters for editing and starting an inbound Job

The following table describes the inbound processing parameter settings:

Parameter	Description	Value	Setting
Activate inbound lines at logon	Determine whether to activate the inbound lines when agents log in to the Job.	YES or NO	YES
Service inbound call immediately	Allows the ACD to take back control of the inbound call if the ACD has an agent available prior to a dialer agent servicing the call. The ACD must have the ability to retain control of the call so it can move the call back to its inbound agents. Using this feature, the dialer does not use an inbound wait queue, all those configurations are done on the ACD. The dialer script label is configured for ANSWER_IMM.	YES or NO	NO
Percent of calls in queue to inbound agents	Enter the upper percentage limit of the calls waiting to be	percentage between 1-100	100

Parameter	Description	Value	Setting
	passed to inbound agents during the inbound or blend Job.		
Maximum time call can spend in wait queue (seconds)	Enter the longest time in seconds that calls can be held in the wait queue during the Job.	seconds	15
BUSYON	Visible by default. YES means that when a job does not activate lines, the lines are shown busy so that the ACD cannot pass calls to the dialer which is not working.	YES or NO	

### Various label parameters for editing and starting an inbound Job

The following table describes the inbound processing parameter settings:

Parameter	Description	Value	Setting
Script label to use for transferring to wait queue	Specifies the label to transferring the inbound call to the wait queue		
Main data processing label	Instructs the system to begin Job processing and tells the system what to display on the agent screens.	virtual - virtual Job verify - sales verification Job generic - outbound Job	generic
Script label to use for answering call	Enter the script label name. The script label is the name of the script message used during the inbound or blend Job. The message script is the message or string of messages customers hear. Jobs can use different wait queue messages.	Script label name (press Control +Dto see script labels).	waitxfer_f

# Wait queue and message parameters for editing and starting an inbound Job

The following table describes the wait queue and message parameters:

Parameter	Description	Value	Setting
Inbound wait queue limit	Enter the number of seconds	0-999 seconds	60
(seconds)	from 0 to 999 that the		

Parameter	Description	Value	Setting
	customer can wait in the inbound wait queue before the system ends the call.		
Number of message to play while on hold awaiting transfer	Enter the message number to play while a customer is on hold awaiting a transfer. For more information see  Messages on page 139.	1-2047	

### IVR integration parameters for editing and starting an inbound Job

The following table describes the parameters used when your system is connected to an IVR system:

Parameter	Description	Value	Setting
Allow IVR agents on Job	Determine whether to allow IVR agents to join the Job.	YES or NO	NO
IVR identifier	Enter the IVR identifier.		
Initial script to run on the IVR	Enter the script agents hear when joining an IVR Job.		
Script to run on the IVR	Enter the script that customers hear when they answer an IVR phone call.		

### **Editing and starting blend Job**

#### About this task

To edit a blend Job (Agent Blending systems only):

#### **Procedure**

- 1. From the Supervisor Main Menu, select the Campaigns > Jobs > Edit and start a Job.
- 2. Type the item number for the Job you want to edit.
  - The system displays the Blend Job Run Verification screen with the cursor positioned in the first value field.
- 3. If the value is correct, press Enter and go to the next field. If a value is incorrect, press Control+C(Change). Type the new information and press Enter to move to the next field. If a field uses only a Yes or No response, use Control+C to switch between Yes and No.
- 4. Select **Y** to save your changes.

Use these screens to enter blend Job parameters. The parameters and settings on your system can vary depending on your system configuration.

### Job type parameters for editing and starting blend Job

The following table describes the Job type parameters in the Blend Job Run Verification screen:

Parameter	Description	Value	Setting
Run Jobs without agents	Determine if the Job is a Virtual Agent Job. The dialer runs the Job without agents.	YES or NO	NO
Run Job with OFCOM	Determines if the OFCOM is turned on for the Job.	YES or NO	NO
OFCOM Method	Defines the trigger point in which ofcom timer will be started.		
Start Ofcom timer when	Determines when to start the ofcom timer.	Customer begins to speak	Customer begins to speak
		Customer takes phone off-hook	

### Basic parameters for editing and starting blend Job

The following table describes the basic parameters either necessary to run a Job or most often changed:

Parameter	Description	Value	Setting
Job description: Blend Job	Description of the Job. For example, type a description that reflects the goal of the Job such as 30-day Accounts.	Up to 39 characters/spaces	
Earliest start time	Time to begin dialing customer phone numbers.	hh:mm (24 hour clock)	03:00
	Note:		
	Note: The dialer is preset with recommended start and stop times for different time zones. If you enter a time that is earlier than the recommended start time, the dialer does not dial phone numbers until the system clock		

Parameter	Description	Value	Setting
	reaches the recommended time.		
Latest stop time	Time to stop dialing customer phone numbers.	hh:mm (24 hour clock)	23:59
Calling party number (ANI)	Identifies the party that placed the phone call. Displays the phone number of your contact center on the phone of the party that received the phone call.	NNN-NNN-NNNN	
Require unit ID for agent login	Requires an agent to enter a unit work list when the agent logs in to Proactive Contact Agent.	YES or NO	NO
Transaction completion code(s)	Enter the call completion code to indicate the need to verify the transaction by the Sales Verification Job.		93
Tagged trunk-to-trunk transfer data	Tags trunk-to-trunk transfer calls with a field data from the calling lists.		
Percentage complete of Job to trigger callsel of link Job	Determines the time when to run the selection of a link Job.	Number from 0-99, where 0 indicates that the feature is turned off.	

## File parameters for editing and starting blend Job

The following table describes the parameters which reference various files on the system:

Parameter	Description	Value	Setting
Outbound calling list	Outbound calling list used to place calls to customers during outbound and blend Jobs. The calling list name includes the host dialer name where the list is stored.	Dialer name and outbound list file name	<dialer name="">- list1</dialer>
Inbound calling list	The Job uses the inbound calling list to identify the calls that customers placed during inbound and blend Jobs. The calling list name includes the host dialer name where the list is stored.	Dialer name and inbound list file name	<dialer name="">- inbnd1</dialer>

Parameter	Description	Value	Setting
Record selection file name	Record selections define which records the dialer uses to place phone calls during outbound and blend Jobs. The record selection contains the phone strategy for the Job. You can enter a maximum of 20 characters in English language and 10 characters for other languages.	Record selection file name	all
Outbound screen(s)	Enter outbound screen labels. This setting determines the outbound screens that agents see and the order in which the screens display.	Outbound screen label name(s)	list1
Inbound screen(s)	Enter inbound screen labels. This setting determines the inbound screens that agents see and the order in which the screens display.	Inbound screen label name(s)	inbnd1
Agent keys definition file name	Enter the agent keys file name to use during a Job. An agent keys file is configured with different sets of functions for keys used during differently types of Jobs.	Agent keys definition file name	ag_cmd1
Data script (.dat) file name	Enter the data script file name to use during a Job.	Script file name	allJobs
Name of next Job to link to	The Job that you want the system to start automatically when an agent on the current Job completes the last call and releases the record.	Job name	
Name of inbound Job to transfer calls to	Enter the inbound Job name to identify the Job name that agents can use to transfer calls during inbound and blend Jobs.	Inbound Job file name	inbnd1
Do not call group	Name of the do not call group	Name	

## Call pacing parameters for editing and starting blend Job

The following table describes the parameters used for call pacing:

Parameter	Description	Value	Setting
Expert calling ratio	Enter the required setting for using the Job. Average ranges include:  W29-W71  or	Q1-Q100 - Calls in wait queue W1-W100 - Agent work time U1-U100 - Agent	W40
	Q4-Q31 or	update time.	
	U32-U78.		
Initial hit rate	Average number of calls per agent that the dialer makes during the first five minutes of the Job. The initial hit rate is the number of call completions compared with call attempts.	0-100, multiples of 10.	50
Minimum hit rate	Set the minimum hit rate for the Job.	0-100, multiples of 10.	20
Cell Phone Campaign Call Progress	Select the field to define a duration for which the system analyses a call as live voice or a voice messages on a cell phone. This field corresponds to a value added to the Job that allows the supervisors to define the duration in the system for which the system should listen to the voice before determining if the call is a live voice or an answer machine. The value defined in this field	1-4, 0 for regular campaigns.	
	gets translated into a duration predefined in the system.		

## Service level parameters for editing and starting blend Job

The following table describes the service level parameters:

Parameter	Description	Value	Setting
Desired service level	Target percentage of serviced calls that you want the system to maintain.	70.0-99.0	99.0.

Parameter	Description	Value	Setting
Time to connect tolerance	Number of seconds that you will allow a phone call to be delayed waiting for an agent before the dialer designates the call as a nuisance call.	0-9.	1

### Quota parameters for editing and starting blend Job

The following table describes the quota parameter settings:

Parameter	Description	Value	Setting
Quota setting	Enter a completion code and a quota for the completion code. The system stops the Job automatically when the number of completion codes reaches the quota.	Completion code number, quota For example, 93,100 is the SOLD completion code with a quota of 100.	
Quota settings file name	Enter a name for the file in which the quota settings is saved.	Quota settings file name.	
Save quota setting when the Job ends	Determine if you want to save the quota setting when the Jobs ends. The system continues to use the quota setting the next time the Job starts.	YES or NO.	NO

### General processing parameters for editing and starting blend Job

The following table describes the general parameters pertaining to file processing during a Job:

Parameter	Description	Value	Setting
Automatically start Update mode on customer hang-up	Determine whether you want to start to record the time an agent takes to complete the after call work when the customer disconnects the phone call.	YES or NO.	NO

### Outbound processing parameters for editing and starting blend Job

The following table describes the outbound processing parameter settings:

Parameter	Description	Value	Setting
Shutdown Job when no more	Determine if you want the	Enter YES if you	YES
calls remain	dialer to end Jobs when each	want the dialer to	

Parameter	Description	Value	Setting
	customer has been called at least once.	end Jobs after all calls are completed, including recalls.	
Make alternate phone lowest priority in selecting next record	Determine if you want to place calls that are first attempts, retries, and recalls before placing a phone call that uses the alternative phone.	YES or NO	NO
Order calling of records by time zone	Determine if you want to order calls by time zones. The system places phone calls following the sun from east to west.	YES or NO	NO
	With either option, time zone laws are still applied.		

## Inbound processing parameters for editing and starting blend Job

The following table describes the outbound processing parameter settings:

Parameter	Description	Value	Setting
Activate inbound lines at logon	Determine whether to activate the inbound lines when agents log in to the Job.	YES or NO	YES
Service inbound call immediately	Determine whether you want the agents to handle the inbound calls immediately during the Job.	YES or NO	NO
Move blend agents to inbound after call	Determine whether to have blend agents handle inbound calls after handling the outbound call during the blend Job.	YES or NO	NO
Max time blend agent can be idle on inbound	This is how long before an agent will be assigned to outbound calling if they are idle on inbound.	seconds	5
Percent of calls in queue to inbound agents	Enter the upper percentage limit of the calls waiting to be passed to inbound agents during the inbound or blend Job.	percentage between 1-100	100

Parameter	Description	Value	Setting
Maximum time call can spend in wait queue (seconds)	Enter the longest time in seconds that calls can be held in the wait queue during the Job.	seconds	15

### Various label parameters for editing and starting blend Job

The following table describes the outbound processing parameter settings:

Parameter	Description	Value	Setting
Script label to use for making call	Enter the starting script label. The script label is the name of the script message used during the outbound Job. The message script is the message or string of messages customers hear. Jobs can use different wait queue messages.	Script starting label name (press Control+Dto see a list).	wait1_f
Script label to use for answering call	Enter the starting script label.	Script starting label name (press Control+Dto see a list).	inwait1
Main data processing label	Instructs the system to begin Job processing and tells the system what to display on the agent screens.	virtual - virtual Job verify - sales verification Job generic - outbound Job	generic
Script label to use for transferring to wait queue	Name of the transfer message used during the inbound or blend Job.	Transfer message label (press Control+Dto see a list)	waitxfer_f
Script label to use OFCOM	Specifies the OFCOM script used for applying the OFCOM feature.		

### Recall parameters for editing and starting blend Job

The following table describes the parameters associated with recalls:

Parameter	Description	Value	Setting
Recall reschedule interval	If your system uses Agent Owned Recall, use the Recall reschedule interval parameter to enter the minimum number	minutes	10

Parameter	Description	Value	Setting
	of minutes that must elapse before the dialer tries to pass the agent a recall.		
Recall notification time	If your system uses Agent Owned Recall, use this parameter to enter the time in minutes during which the system looks for the agent who set up the recall on the Job and is available for a call.	minutes	2
Number of recall attempts	If your system uses Agent Owned Recall, use this parameter to enter the number of times to look for the agent that set up the recall.	0-10	2
Auto assign recall from Infinite Job to agents on another Job	Assigns recalls from infinite Jobs to the agents available on other Jobs	Yes or No	
Name of the Job to get agent for recall	Specifies the Job from which an agent must be pulled to address a recall.	Name of the Job	

## Wait queue and message parameters for editing and starting blend Job

The following table describes the wait queue and message parameters:

Parameter	Description	Value	Setting
Total wait delay (seconds)	Enter the number of seconds from 0 to 999 that the customer can wait in the wait queue before the dialer ends the call.	0-999 seconds	90
Inbound wait queue limit (seconds)	Enter the number of seconds from 0 to 999 that the customer can wait in the inbound wait queue before the system ends the call.	0-999 seconds	60
Number of message to play while on hold and awaiting transfer	Enter the message number to play while a customer is on hold awaiting a transfer.	1-2047	

### Copying a Job

#### About this task

To copy a Job:

#### **Procedure**

- 1. From the Supervisor Main Menu, select Campaigns > Jobs > Copy a Job.
- 2. Type the item number for the Job you want to copy. Type Y at the prompt.
- 3. Type the new Job name. Type Y at the prompt.

Job names must adhere to the following guidelines:

- Maximum of 20 characters for an English name
- Maximum of 15 characters for languages other than English
- Special characters, such as dots, are not supported

### **Deleting a Job**

#### **Procedure**

- 1. From the Supervisor Main Menu, select Campaigns > Jobs > Deleting a Job.
- 2. Type the item number for the Job you want to delete. Type Y at the prompt.

## **Showing auto start Jobs**

#### About this task

You can specify the Jobs that must be run automatically. The specifying commands display the contents of the auto\_start commands file. The autostart\_jobs script uses the auto\_start file. The autostart\_jobs script is used from crontab to automatically start the specified Jobs.

To view the Jobs that are marked to be run automatically:

#### **Procedure**

- 1. From the Supervisor Main Menu, select Campaigns > Schedule Jobs to automatically run > Show auto start jobs.
- 2. Press Enter.

The system displays a list of all the Jobs that are marked to be run automatically.

### Adding Job to auto start list

#### **About this task**

To add a Job to the auto start list:

#### **Procedure**

- 1. From the Supervisor Main Menu, select Campaigns > Schedule Jobs to automatically run > Add Job to auto start list.
- 2. Select the Job and press Enter.

The Job is added to the auto start list. Repeat the procedure for adding more Jobs to the auto start list.

To add Jobs to the auto start list along with reporting flag, select **Add Job to auto start list**. This command adds a new entry in the auto\_start file with reporting with the -r flag. The -r flag will tell the autostart\_Job script to run the call selection with the -R -P parameters for reporting.

### **Deleting Job from auto start list**

#### About this task

To delete a Job from the auto start list:

#### **Procedure**

- 1. From the Supervisor Main Menu, select Campaigns > Schedule Jobs to automatically run > Delete Job from auto start list
- 2. Select the Job and press Enter.
- 3. Type Y at the confirmation prompt.

### Deleting all Jobs from auto start list

#### About this task

To delete all the Jobs from the auto start list:

#### **Procedure**

- 1. From the Supervisor Main Menu, select Campaigns > Schedule Jobs to automatically run > Delete all Job from auto start list.
- 2. Select the Job and press Enter.
- 3. Type Y at the confirmation prompt.

### Creating an Infinite record selection

#### **About this task**

To create an Infinite record selection:

#### **Procedure**

- 1. From the Supervisor Main Menu, select Campaigns > Record Selections > Execute a record selection.
- 2. Type the item number for the infinite record selection file you want to execute.
- 3. Type a report description up to 30 characters and press Enter. Type Y at the prompt.

## **Turning on agent Job list functionality**

#### About this task

Agent Job list functionality allows agents to view and join only those Jobs that are included in their Job lists. This functionality is available only for the default tenant.

To turn on agent list functionality:

#### **Procedure**

From the Supervisor Main Menu, select Calling lists > Manage agent Job lists > Turn on agent list functionality. Type Y at the prompt.

The system returns to the previous menu.

## **Turning off agent Job list functionality**

#### About this task

You can turn off the agent Job list functionality if you want the agents to be able to view and join all the running Jobs. This functionality is available only for the default tenant.

To turn off agent list functionality:

#### **Procedure**

From the Supervisor Main Menu, select Calling lists > Manage agent Job lists > Turn off agent list functionality. Type Y at the prompt.

The system returns to the previous menu.

### Turning on AGENT\_JOIN\_ALL\_JOBS

#### About this task

If the agent Job list functionality is turned on if the user is part of the default tenant, then the tenant administrator can decide, to turn on the AGENT\_JOIN\_ALL\_JOBS parameter to allow an agent to join any of the running Jobs if no Job list defined for that agent.

If the agent Job list functionality is turned on, but the AGENT\_JOIN\_ALL\_JOBS parameter is turned off, then agents will not be allowed to view any Jobs if no Job list defined for that agent.

To turn on AGENT\_JOIN\_ALL\_JOBS parameter:

#### **Procedure**

From the Supervisor Main Menu, select Calling lists > Manage agent Job lists > Turn on AGENT\_JOIN\_ALL\_JOBS. Type Y at the prompt.

The system returns to the previous menu.

## Turning off AGENT\_JOIN\_ALL\_JOBS

#### About this task

If the agent Job list functionality is turned on if the user is part of the default tenant, then the tenant administrator can decide to turn off the AGENT\_JOIN\_ALL\_JOBS feature to restrict an agent from joining any of the running Jobs if no Job list defined for that agent.

To turn off AGENT\_JOIN\_ALL\_JOBS parameter:

#### **Procedure**

From the Supervisor Main Menu, select Calling lists > Manage agent Job lists > Turn off AGENT\_JOIN\_ALL\_JOBS. Type Y at the prompt.

#### Result

The system returns to the previous menu.

## **Chapter 13: Office of Communication**

Office of Communication (OFCOM) feature is primarily for the customers in the U.K. The new law requires that any outbound calls in gueue must not be passed to an agent after the gueued time is longer than 2 seconds. The queued time is configurable and is followed by a voice message being played to the customer.

The Office of Communication (OFCOM) U.K. releases a "Statement of policy on the persistent misuse of an electronic communication network or service." This policy applies to predictive dialers making calls in the U.K. For more information, see:

http://www.ofcom.org.uk/consult/condocs/persistent misuse/statement/

The OFCOM office specified changes in their "Revised statement of policy on the persistent misuse of an electronic communications network or service" on October 30th, 2009.

For information on changes in this policy applicable only to the United Kingdom, see:

http://www.ofcom.org.uk/consult/condocs/persistent misuse/amendment/amendment.pdf

Editor application has been updated to enable the new OFCOM policy.

The abandoned calls that result from OFCOM feature are coded with a unique completion code. You cannot call the customer again in next 72 hours except on managed Jobs. You can use the OFCOM feature with a regular outbound Job, blend Job, and cruise control Job.

A new field, OFCOM's Abandon Rate, has been added to the CUI nuisance report. The report displays the OFCOM's Abandon Rate field that displays data for the job and an average for the day.



#### Note:

Hard Dialer with PG230 environment	CTI Dialer/Soft Dialer environment
The OFCOM feature is available only on the Proactive Contact PG230RM dialer.	The OFCOM feature is available only on the Avaya Proactive Contact PG230RM dialer.
In case of blend jobs, OFCOM calculation includes only the Outbound Connects. Inbound calls are not a part of the calculation.	
To use the OFCOM feature in Proactive Contact, you might need to configure some parameters in the master.cfg file. To configure these parameters, contact Avaya Professional Services.	The Avaya OFCOM feature is not approved for use in the Proactive Contact CTI Dialer (Soft Dialer). If the OFCOM feature is enabled in the customer's Proactive Contact CTI Dialer (Soft Dialer), it will be subject to the Support Limitations and Exclusions contained in the applicable Service Agreement Supplement, and Avaya will have no

Hard Dialer with PG230 environment	CTI Dialer/Soft Dialer environment
	obligation to support, diagnose or correct problems caused by or associated with the OFCOM feature.

## \*.Job files configuration

You must configure the OFCOM feature based on the Job. Four parameters (OFCOM, OFCOMTIMER, OFCOM\_METHOD, and RUNOFCOM) are added into \*.Job files that are outbound or blend Jobs. The system automatically makes corresponding changes in outbound.edt and blend.edt. The following is an example on how to configure an OFCOM Job, where OFCOM is a feature on/off flag:

```
OFCOM:YES:
RUNOFCOM:OUT_wait1_f_ofcom:
CONNTOLE:0:
OFCOMTIMER:2.0:
OFCOM_METHOD:VOICE:
```

#### OFCOMFR:0:

where OFCOM is a feature on/off flag.

RUNOFCOM is the subroutine defined in telephny.spt. The subroutine defines how to handle the calls which expire after 2 seconds waiting in queue. The call waiting expiration time for ofcom Jobs is defined through CONNTOLE:0

The typical definition for OUT wait1 f ofcom is as follows:

```
OUT_wait1_f_ofcom
rem ***** play message for ofcom call *****
deliver 1
let CODE CONNEXPIRE
return
```

For more information about, OUT wait1 f ofcom, see Telephny.spt configuration on page 177.

OFCOMTIMER is the time within which the customer must be connected to the agent or an OFCOM message must be played.

You can configure OFCOM METHOD for the value VOICE/OFFHOOK.

- When the OFCOM\_METHOD is set to VOICE, the OFCOM timer starts from the start of voice energy, that is, when the customer begins to speak.
- When the OFCOM\_METHOD is set to OFFHOOK, the OFCOM timer starts when the customer picks up the phone.

OFCOM False Positive Rate (OFCOMFR) is the percentage of acceptable false positives between 0 to 10. As per the OFCOM guidelines, the OFCOM False positive rate must be 3% or less than 3%.

The system enables the OFCOM False Positive Rate field only when the Job is configured with the strategy, where only Voice call must be passed to the agents. If the Job is configured with with

the strategy where both Voice and Auto Voice calls must be passed to the agents, then the OFCOM False Positive Rate value must be set to 0.

## Compcode.cfg configuration

To indicate ofcom call results, the system requires a unique completion code. The default code is 96. The default code appearance in compcode.cfg is listed as follows:

96:CONNEXPIRE:OP:YES:NO:NO:YES:NO:NO:CONNEXPIRE:connect to agent expired:OP:

## Telephny.spt configuration

The system configures the Job file for Jobs that are intended to have the OFCOM feature:

```
OFCOM:YES
RUNOFCOM:OUT_wait1_f_ofcom
CONNTOLE:0:
```

where OUT\_wait1\_f\_ofcom is the subroutine defined in telephny.spt file.

The definition for OUT\_wait1\_f\_ofcom is as follows:

```
OUT_wait1_f_ofcom
rem ***** play message for ofcom call *****
deliver 1
let CODE CONNEXPIRE
return
```

### Note:

You must know the following:

- 1. All ofcom Jobs must reference the call waiting script "OUT wait1 f ofcom".
- Before the script OUT wait1 f ofcom is run, 2 seconds have expired.
- 3. The script OUT\_wait1\_f\_ofcom tries to do the following:
  - a. Play the voice msg 1 to the customer.
  - b. Let the completion code be CONNEXPIRE which is defined in compcode.cfg for OFCOM feature.
- 4. You can change the Voice message played to fit the needs of the customers.

## \*.fdict configuration

To save the DATE, TIME, and CODE for the abandoned OFCOM calls, you require three additional fields. The OFCOM calls are not called again in the next 72 hours except on managed Jobs through record selection procedure.

Ensure that the following fields are present in all the \*.fdict files. If the fields are not present, add the fields:

```
ABDNDTE:10:D:Abandoned System Date:
ABDNTME:8:T:Abandoned System Time:
ABDNCODE:3:C:Abandoned Completion Code:
```



The length of ABDNCODE is 3, not 2 as entered in PDS12 systems.

## Rebuild the calling lists

You must perform the procedure to rebuild the calling lists only if you complete the procedure to Configure \*.fdict. For more information, see \*.fdict configuration on page 178. For example, if the \*.fdict files are changed with the three fields as specified in \*.fdict configuration on page 178. Rebuild the existing calling lists with the new \*.fdict as follows with list1 as an example here, and list1.fdict as the dictionary file name for list1:

```
cp list1 list1.orig
ext_list list1_new list1
cp list1_new list1
```

#### where

Usage: ext\_list (calling list) (new calling list) (new file dict.) [options]

#### Options:

```
-f first_rec
-l last_rec (0 to create empty list)
-i interactive
```

## **Call Jobs.dat configuration**

When you code a call as 96 (CONNEXPIRE), you must save the date, time and the code of the call in the three new fields so that only managed Jobs can call the same record again in the next 72 hours. To configure the Jobs when a call is marked as 96, configure outpostgene with three assignments for the fields ABDNCODE, ABDNDTE and ABDNTME. For example:



#### Note:

Add the following fields if they are not present in the allJobs.dat file:

```
outpostgene
increment COUNTER
test CODE = 93 copy CODE SVJCODE
test CODE = 96 copy CODE ABDNCODE
test CODE = 96 copy DTE ABDNDTE
test CODE = 96 copy TME ABDNTME
```

## latelst/latemrk configuration

You must change the configurations to carry forward values of the ABDNCODE, ABDNDTE, and ABDNTME fields.

1. list1.prep

For latelst/latemrk, add the following in the PREP section of /opt/avaya/pds/lists/ list1.app/list1.dnld file to include the following parameter or something similar to it as long as it includes code 96:

```
"LATELIST:
7,38,39,40,47,48,96,98"
```

1. latelist1.fdict

For latelst/latemrk, add changes to /opt/avaya/pds/lists/list1.app/latelist1.fdict file to include the following fields for which data is brought forward to the new calling list:

```
ABDNDTE:10:D:Abandoned System Date:
ABDNTME:8:T:Abandoned System Time:
ABDNCODE:2:C:Abandoned Completion Code:
```

app\_list1.prep for Infinite Jobs

For Infinite Job, add changes to /opt/avaya/pds/lists/app list1.app/ app list1.dnld file to include the LATELIST parameter as in list1.prep on page 179.

```
"LATELIST:
7,38,39,40,47,48,96,98"
```

## Sample for record selection criteria

The record selection criteria that intends to screen out the ofcom calls in the subsequent 72 hours is displayed. It is a sample and does not include the real business selection criteria.

For example, if the selection file is ofcom.S, then the contents of the file are:

```
DISPLAY: YES
IGNORETZ: NO
SELECTTYPE:
LIST: redlab06-list1
TZONE: *
RCODE: NOTCALLED, BUSY, AUTOVOICE, NOANSWER, HANG_OUT
SELECT: ABDNCODE: ~ 96:0:1
SELECT: ABDNCODE: 96:A:2
SELECT: ABDNDTE: <$TODAY-3:0:2
UNITFIELD:
STGYFILE: phone1
```

### Note:

For abandon code, it is necessary to have a 3-character compcode. If the code is two digit then a space is required before the two digits.

The description of the criteria would be "select the records whose ABDNCODE is not equal to 96, or ABDNCODE is 96 but its ABDNDTE is older than three days".

## OFCOM 72-hour compliance

The OFCOM 72-hour regulation specifies that you must have a 72-hour period before a telephone number receiving an abandoned call might be called again without the guaranteed presence of an agent. There must be a live operator if you are making a repeat call to a number to which a nuisance call was made. Proactive Contact supported the OFCOM 72-hour regulation on a perrecord basis. From Proactive Contact 5.1.2, Proactive Contact also supports the OFCOM 72-hour regulation on a phone number basis.

To comply with the OFCOM 72-hour regulation, Proactive Contact adds a new parameter, OFCOM72 in the master.cfg file. You can set the OFCOM72 parameter for a job, a tenant, or a dialer. If you set this parameter, without the guaranteed presence of a live operator, no repeat call is made to a number that received a nuisance call in the prior 72 hours.

### Important:

Avaya Proactive Contact Release 5.1.2 and later supports OFCOM 72–hour regulation on a phone number basis.

You must set the OFCOM parameter in the Job file for the OFCOM72 parameter to be effective

A completion code, CODE 9, is applied to calls that are a repetition of earlier attempted nuisance calls. You can use this completion code in the strategy file to set retries on other phones. You can also use the completion code in selection criteria to select the records for calling again.

# 2016 OFCOM implementation

### Supervisor

The existing Abandon Call Rate (ACR) formula is modified to reflect in existing OFCOM reports in both Monitor and Analyst application. The completion codes can be configured to allow the Agents to mark a false negative call. The number of false negative calls are excluded from the ACR formula. Also, the phone numbers associated with these calls are restricted for 24 hours as they were marked as answering machine by Agents. OFCOM reports are also modified to display the Short calls. If a call to one of the number in a record is abandoned, this enhancement also restricts all the numbers associated in that record for 72 hours.

### **Changes in Editor**

Following are the two new parameters introduced in the Editor in the job module:

- Completion codes excluded from Abandon rate User can select the completion codes to be excluded from ACR calculation.
- Short call Timer If Agent talk time is less than the value specified, then that call is considered as a Short call.

### Note:

To enable or modify ACR exclude codes in an OFCOM job, create a new job instead of adding the codes to an existing job. Creating a new job ensures that the ACR Excl Count and Abandon Rate columns in the summarized monthly OFCOM reports display correct information.

### **Changes in Monitor**

Following are the two new columns added:

- New column Calls Excluded from ACR is introduced in JobCompletionCode view. Calls Excluded from ACR column displays the number of calls marked as false negative by the agents and these calls are excluded from the abandon call rate formula.
- New column Short Calls Count is added in JobQuality view which displays short call count.

### Changes in Analyst

Following are the two new columns added in all OFCOM reports:

- ACR Excl Code Count Displays the number of calls marked as false negative by the agents and these calls are excluded from the abandon call rate formula.
- Short calls count Displays the Short call count.

#### **Dialer and Database**

The abandon call rate formula is modified to reflect in existing OFCOM reports in both Monitor and Analyst application. The completion codes can be configured to allow the Agents to mark a false negative call. The number of false negative calls are excluded from the abandon call rate formula. Also, the phone numbers associated with these calls are restricted for 24 hours as they were marked as answering machine by Agents.

OFCOM reports are also modified to display the Short calls. If a call to one of the number in a record is abandoned, this enhancement also restricts all the numbers associated in that record for 72 hours in either job, dialer, or tenant.

# **Chapter 14: Monitoring Agents**

### **Monitor Jobs**

With Administrator privileges you can monitor an agent's conversation and terminate a user's session. However, in a Multi-tenancy environment, an administrator cannot monitor an agent's conversation, and terminate a user's session while working in a non-default tenancy.

In a Multi-tenancy environment, a user can see only those agents that belong to the user's tenants.

If a Supervisor user has the Monitor privileges, with Write permissions, and Monitor Agent privileges, with Job Control permissions, the user can do the following:

- · send messages to agents
- · remove an agent from a Job
- · transfer an agent to another Job
- · monitor their conversation
  - Note:

These activities are not possible on Agent Owned Recall (shadow) Jobs.

### Security alert:

You must use Agent monitoring for troubleshooting purposes only as Agent monitoring can be illegal in your area if used for other purposes. The Proactive Contact system does not play an intrusion tone during monitoring. In countries where you cannot use agent monitoring without playing the intrusion tone, use this feature for installation, training, and maintenance purposes only.

### Monitoring agent lines

### **About this task**

You can monitor an agent's conversation.

### Security alert:

Monitoring agent lines system does not emit an intrusion tone during monitoring. In countries where monitoring without intrusion tones is prohibited, this feature must be used for installation, training, and maintenance purposes only.

To monitor an agent's line:

#### **Procedure**

- 1. From the Administrator Main Menu, select Administrative tasks > Monitor agent lines. Type Y at the prompt
- 2. Type Y at the prompt.

The system displays a warning. Type Y.

3. Enter key code.

The system displays the Job Monitor screen.

4. On the Job Monitor screen, select **Jobs > Open Job**. If more than one current Job is available, select a Job name from the list.

The system displays the Job Activity screen with statistics for the Job you selected.

- 5. Press Control+X to display the Job Monitor menu at the top of the screen.
- 6. From the Job Monitor menu, select **Control > Monitor Agents**.
- 7. Use the down arrow to select the agent you want to monitor.



If the agent is talking with a customer, the system immediately connects your headset to the agent's port. If the agent is not talking with a customer, the system displays a message telling you that the agent is not on a line.

### Stop monitoring agent lines

### About this task



### Security alert:

If you stop monitoring agent lines, the system does not play an intrusion tone during monitoring. In countries where monitoring without intrusion tones is prohibited, this feature must be used for installation, training, and maintenance purposes only.

To stop monitoring an agent's line:

#### **Procedure**

From the Job Monitor menu, select **Control > Disconnect Agent**.

# Ending a user session

#### About this task

To end a user session on the system:

### **Procedure**

1. From the Administrator Main Menu, select **Administrative tasks > Terminate a user session**. Type Y at the prompt.

The system displays a warning.

- 2. Type the login name for the session you want to terminate, or press Enter to exit.
- 3. Type Y at the prompt.

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

4. Press any key to return to the menu.

## Sending a message to an agent

### **Procedure**

 From the Supervisor Main Menu, select the Manage active jobs > Displays > Single Agent.

The system displays the text message box.

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

The system displays the Select Agent screen.

3. Use the down arrow to select an agent from the list of agent names and press Enter.

# Sending a message to all agents

### About this task

To send a message to all agents:

#### **Procedure**

 From the Supervisor Main Menu, select Manage active jobs > Displays > All Agents.

The system displays the text message box.

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

## Removing an agent from a Job

### **Procedure**

- 1. From the Supervisor Main Menu, select Manage active jobs > Manage active jobs > Jobs > Remove Agent.
- 2. Use the down arrow to select the agent you want to remove.

The system displays a countdown message. When the counter reaches 1, the system removes the agent from the Job and returns to the Job Monitor screen.

### Monitoring an agent

### About this task

To monitor an agent:

#### **Procedure**

- 1. From the Supervisor Main Menu, select Manage active jobs > Control > Monitor Agents.
- 2. Use the down arrow to select the agent you want to monitor.



#### Note:

If the agent is talking with a customer, the system immediately connects your headset to the agent's port. If the agent is not talking with a customer, the system displays a message telling you that the agent is not on a line.

# Transferring an agent to another Job

### About this task

To transfer an agent to another Job:

#### **Procedure**

- 1. From the Supervisor Main Menu, select Manage active jobs > Control > Transfer
- 2. Select **Yes** to confirm the transfer or **No** to cancel.



#### Note:

In a Multi-tenancy environment, a user can see only those agents that belong to the user's tenants. You can transfer an agent to another job only within your tenant space. You can transfer an agent to another job even if that job is not included in the job list of the agent.

Since Release 5.1.2, if the agent transfer is unsuccessful, the system displays a warning message that some agent transfers are unsuccessful and provides a list of agents who were not transferred.

# **Chapter 15: Monitoring Jobs**

Proactive Contact allows you to monitor real-time calling activities.

# **Job Activity screens**

The Job Activity screens display the activity status of outbound, inbound, and blend agents, the dialing statistics for outbound and inbound calls, and the operating status of each phone line. The system divides the screen into four sections:

- · job information header
- · agent activity area
- · line usage area
- · call activity area

The Job Activity Summary Statistics screen shows the activity for the current Job, including information about agent activity, line usage, and record status. Press Tabto cycle through three additional screens:

- Call Completion Code Results
- Phone Line Usage
- · All Lines on All Jobs

You can also gain access to Job activity screens directly from the Displays menu.

# Agent activity field description

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

Name	Description	
Logged in	The number and type of agents logged in to the Job	

Table continues...

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

# Line usage field description

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

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

# Calling activity field description for outbound calls

The following table describes the calling activity fields for outbound calls:

Name	Description
Records Selected	The number of records available for calling based on the record selection and initial phone type selected in the phone strategy.
Phone Calls made	The number of calls since the Job began.
Cur/Run Hit Rate	The percentage of connections for the last five minutes and the percentage of dialing attempts resulting in connections since the Job began.
Agent Connects	The number of calls passed to agents.
Queue	The number of calls that are currently in the wait queue.
Recalls	The number of records that the system scheduled for recall.
Phone Calls Left	The number of records that the system has not
	called or the number of subsequently loaded records after
	the Job began. It does not include the recalls.

# Calling activities field description for inbound calls

The following table describes the calling activities fields for inbound calls:

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

# **Job Monitor shortcut keys**

You can use the following shortcut keys on the Job Monitor screen:

Keys	Description
Control+A	Toggle an entry/action
Control+B	Move to bottom
Control+C	Open a Job
Control+D	Clear to end of line
Control+E	Shutdown the current Job
Control+G	Select cell type
Control+H	Move left one position
Control+I	Switch displays or tab
Control+J	Move down
Control+K	Move up
Control+L	Move right one position
Control+M	Return/Enter
Control+N	Next page
Control+O	Toggle insert/overstrike mode
Control+R	Refresh display
Control+T	Move to top
Control+U	Tab backward
Control+V	Get help on current key to command links
Control+W	Get help on current key to command links
Control+X	Exit current operation
Control+Y	Quit Job Monitor
Control+Z	Dump structures
DELETE	Delete character at cursor position
Down arrow	Move down
Up arrow	Move up
Left arrow	Move left one position
Right arrow	Move right one position
F1	Enter menu bar
F2	Display Job summary
F3	Display Job statistics
F4	Display phone line status
F10	Pop-up list of possible entries

Table continues...

Keys	Description
Delete	Delete line
Insert	Insert line
Page down	Next page
Page up	Previous page
ESC+D	Delete line
ESC+I	Insert line

# Opening a Job

### **Procedure**

1. From the Supervisor Main Menu, select Manage active jobs > Jobs > Open Job or press Control+C.

The system displays a list of active Jobs under the Item List. If only one active Job exists, the system automatically opens.

2. Use the down arrow to select the Job you want to manage.

The system displays the Job Activity Summary Statistics screen.

# Closing a Job

### **Procedure**

1. From the Supervisor Main Menu, select Manage active jobs > Jobs > Close Jobs.



### Note:

Selecting **Close Jobs** does not end the Job.

2. Select a different Job to monitor, or press Q and press Enter to return to the previous screen.

# Shutting down a Job

- 1. From the Supervisor Main Menu, select Manage active jobs > Control > Shutdown or press Control+E. Select Yes on the confirmation dialog box.
- 2. Press Control+X to return to the previous screen.

# Stopping a Job immediately

### **Procedure**

- From the Supervisor Main Menu, select Manage active jobs > Control > Abort.
   Avaya recommends clicking Shut down instead of Abort.
- 2. Select **Yes** on the confirmation dialog box.
- 3. Press Control+X to return to the previous screen.

# Linking a Job

### **Procedure**

- 1. From the Supervisor Main Menu, select Manage active jobs > Control > Job Link Modification.
- 2. From the Job Link screen, select Add.

To change a Job link, select **Change**. To delete a Job link, select **Delete**.

3. Select a Job to link.

The system displays a confirmation message at the bottom of the screen

4. Click OK.

# Setting Autocallsel\_Trigger

#### **Procedure**

- 1. From the Supervisor Main Menu, select Manage active jobs > Control > Autocallsel Trigger.
- 2. From the Set Autocallsel Trigger screen, enter any numeric value from 0-99. Tab to **OK**.

The system displays a confirmation message at the bottom of the screen.

# Setting escape recall Job

#### About this task

Use the Escape Recall Job option to pull in an agent from a different Job to address a recall for another Job. This functionality is applicable only for Infinite Jobs. You can select a running Job

from which an available agent must attend to the recall that was set for the original Job. You can define the Job from which the agent must be pulled in using Editor. However, you can change the Job in run time using Jobmon/Monitor.

### **Procedure**

- 1. From the Supervisor Main Menu, select Manage active jobsControlEscape Recall Job.
- 2. From the Escape Recall Job screen, select add, change, or delete a escape recall setting.

The system displays a confirmation message at the bottom of the screen.

Click OK.

# Viewing completion codes

### **Procedure**

 From the Supervisor Main Menu, select Manage active jobs > Displays > Completion Codes.

The system displays the Call Completion Code Results screen.

2. Press Control+X to return to the previous screen.

# Viewing phone line usage

#### **Procedure**

1. From the Supervisor Main Menu, select Manage active jobs > Displays > Phone Lines. or press F4.

The system displays the Phone Line Usage screen.

2. Press Control+X to return to the previous screen.

# Viewing call types

### **Procedure**

1. From the Supervisor Main Menu, select Manage active jobs > Displays > View Call Types.

If this is a unit work list Job, the system displays unit IDs.

- 2. Select a unit ID from the list, or select **Summary** to monitor all IDs (ALLID).
- 3. If this is a blend Job, you can select to view the Job's inbound or outbound call activity.

  The system displays the Job Statistics screen with data for the selected unit ID or detail for the outbound or inbound call activity of a blend Job.
- 4. Press Control+X to return to the previous screen.

# Viewing agent screens

### **Procedure**

1. From the Supervisor Main Menu, select Manage active jobs > Displays > Agent Screen.

The system displays the Agent screen.

2. Press Control+X to return to the previous screen.

# Changing phone line allocations

### **Procedure**

- 1. From the Supervisor Main Menu, select Manage active jobs > Control > Phone Line Allocation.
- Select Add or Delete.
- 3. Type or select the name of the group of lines to acquire or release and press Enter.



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

# Changing the maximum time a customer waits in the wait queue

### About this task

This procedure is applicable only for the inbound Jobs.

To change the maximum time a customer waits in the wait queue:

#### **Procedure**

- 1. From the Supervisor Main Menu, select Manage active jobs > Control > Inbound Service Time.
- 2. Enter the number of seconds (5-999) you want to allow customers to wait in the inbound queue and press Enter.

# Changing the maximum percentage of customers in the wait queue

### About this task

To change the maximum percentage of customers in the wait queue (Intelligent Call Blending systems only):

### **Procedure**

- 1. From the Supervisor Main Menu, select Manage active jobs > Control > Queue Factor.
- 2. Enter a number of 100 or greater and press Enter.

# Changing blend agent return time

#### **Procedure**

- 1. From the Supervisor Main Menu, select Manage active jobs > Control > Return Time.
- 2. Enter a number of seconds (0-999) and press Enter.

# **Changing Minimum Hit Rate**

### **Procedure**

- 1. From the Supervisor Main Menu, select Manage active jobs > Settings > Minimum hit rate.
- 2. Enter a number between 1-100 and press Enter.

The system displays a confirmation message at the bottom of the Job Activity screen.



#### Note:

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

# **Changing Expert Calling Ratio**

### **Procedure**

- 1. From the Supervisor Main Menu, select Manage active jobs > Settings > Expert Calling.
- 2. Type Q, W, or U and enter a number between 1-100 and press Enter.

The system displays a confirmation message at the bottom of the Job Activity screen.

# Changing the preview length for Managed Dialing

### **Procedure**

- 1. From the Supervisor Main Menu, select Manage active jobs > Settings > Preview Length.
- 2. Enter the new preview length from 0 to 999 (seconds) and press Enter.



### Tip:

Type **0** to allow unlimited preview time.

# Changing the cancel mode

- 1. From the Supervisor Main Menu, select Manage active jobs > Settings > Cancel Mode.
- 2. Select one of the following choices:
  - Activate to enable the Cancel
  - Inactivate to disable the Cancel

# Changing time zone ordering

### **Procedure**

- From the Supervisor Main Menu, select Manage active jobs > Settings > Order Time Zone(s).
- 2. Select one of the following choices:
  - Activate to turn time zone ordering on.
  - Inactivate to turn time zone ordering off.
  - Cancel to cancel the changes.

# Changing time zone status

### **Procedure**

- 1. From the Supervisor Main Menu, select Manage active jobs > Settings > Time Zone(s) Control.
- Select Inactivate or Activate.
- 3. On the Time Zones screen, select the time zone for which you want to change the status. Press Enter to switch the time zone status from active and inactive.

# **Unit Work List settings**

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

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

### Different quotas for each Unit Work List

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

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

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

# **Setting different quotas for each Unit Work List:**

### **Procedure**

- 1. From the Supervisor Main Menu, select Manage active jobs > Settings > Quota.
- 2. Press Tab to move to the Quota column.
- 3. If you have multiple Unit IDs, use the arrow keys to move to the quota you want to change.
- 4. Type the new quota.
- 5. To change the release code, tab to the **Release code** column, and type the new release code.
- 6. Press Enter.

### **Changing Unit Work List controls**

### **Procedure**

- 1. From the Supervisor Main Menu, select Manage active jobs > Settings > Unit Work List(s) Control.
- 2. Select one of the following choices:
  - Activate
  - Inactivate
- 3. Select the unit ID you want to activate or inactivate.
- 4. Press Enter.

# Changing phone strategy detection mode

- 1. From the Supervisor Main Menu, select Manage active jobs > Settings > Detection Mode.
- 2. On the Select Ring Count and Call Detection Mode screen, use the down arrow to move to the line you want to change.
- 3. Press Tab to move to the # of Rings column.
- 4. Type a new number. The new number replaces the old number.

5. Select **Yes** to save your changes.

# Changing phone strategy recall parameters

#### **Procedure**

- 1. From the Supervisor Main Menu, select Manage active jobs > Settings > Recalls.
- 2. On the Select System Set Recalls screen, type the phone type number (1, 2, 3 ...) to recall in the Phone Field column. Press Tab to move to the Call Result field.
- 3. Press Ctrl+A to display the completion codes.
- 4. To select the completion codes, use the arrow keys to move to a code and press Spacebar to mark it. Repeat the process until you have selected all the codes you want to include. Press Enter to return to the screen.
- 5. To change the time between retries, type a number in the Min (minutes) column and press
- 6. To change the number of retries, type a number in the Number column and press Tab.
- 7. To select a phone to call after the last retry, type a phone type number (1, 2, 3 ...) in the Next Phone column. Leave the Next Phone column blank if you do not want the system to call an alternate phone.
- 8. Press Control+X to exit the screen. Select Yes to save your changes and return to the previous screen.

# Changing alternate phone lines

### **Procedure**

From the Supervisor Main Menu, select Manage active jobs > Settings > Alternate.



On the Select Alternate Initial Phone screen, use Overstrike edit mode because **Tab** does not work in **Insert** mode.

- 2. Type the phone type number (1, 2, 3 ...) for the alternate initial phone in the Phone field and press Tab.
- 3. If the Time Zones column is blank, press Enter to display the time zones.
- 4. Move to the Time column and type the time (24-hour clock) to start calling that alternate initial phone. For example, type 18.00 for 6:00 PM.

- 5. Repeat steps 2 through 5 for each alternate initial phone you selected. Press Control+X to exit the screen.
- 6. Select **Yes** to save your changes and return to the previous screen.

# Chapter 16: Monitor system security and health

You can monitor security-related and health-related activity on the system or a group of systems. A group is also called a pod. Use Health Manager on the PC-based interface.

# **Health Manager**

Proactive Contact Health Manager provides information about programs and processes running on your system or a group of systems. You can also monitor the overall system health and start and stop services across several subsystem components. Health Manager is a PC application which is usually installed on your Administrator workstation. It is available from the Start menu or by double-clicking the **Health Manager** icon on the desktop.

Use Health Manager to see the status of the services that are running and restart the services that have stopped. You can also view the system activity using the many views available in Health Manager.



### Note:

You must schedule MTS maintenance only on the primary dialer in a pod.

If you are connected to an email system, you can subscribe to alerts that will notify you of changes in system health.

For more information on Health Manager, see *Health Manager online help*.

# Chapter 17: Creating custom Agent screen using Screenbuilder

The Proactive Contact system uses Screenbuilder to create custom agent screens.

Using Screenbuilder, an optional system tool set, you can change the information that agents see on their workstation screens. Use Screenbuilder to design up to 20 screens for each Job. With Screenbuilder's tools, you can customize screens of agents to meet the changing needs.

Before you change or create a Job screen, you must understand how it fits into the system.

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

Agents see Job screens on their workstations when the system passes them a call. More than one Job can use a screen. Before editing a screen, determine which Jobs use the screen. If a Job uses more than one screen, the agent uses the function keys to move to the subsequent screens. By pressing **F2**, the agent moves to the second screen. Similarly, by pressing **F3**, the agent moves to the third screen. The system fills some of the fields with customer information from the calling list. The agents can complete additional information.

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

## Screen information

Screens contain the following information for the agent:

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

• General Information provides function key names and system instructions.

### Hints and tips to build useful screens

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

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

Ask yourself the following questions when designing screens:

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

### Layout tips

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

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

# Tips for fields

Remember the following when naming fields:

- Name field labels carefully to save time and prevent confusion.
- Keep field labels less than 16 characters or not longer than four words.

- Start field labels with an uppercase letter, followed by lowercase letters. For example, Label a
  field Name instead of NAME. This helps to distinguish labels from data, which are always
  uppercase letters.
- Use consistent wording, abbreviations, and labels.

### Miscellaneous tips

With the following tips, agents can better use the screens:

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

### Screenbuilder

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

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

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

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

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

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

# Screenbuilder shortcut keys

Use the following shortcut keys when using Screenbuilder.

Action key	Function	
Shift+F1	Open Screen	
Shift+F3	Save Screen As	
Shift+F4	Close Screen	
F1	Enter Menu bar	
F2	Insert line	
F3	Delete line	
F4	Save Screen	
F5	Cut block	
F6	Copy block	
F7	Paste block	
F8	Clear block	
F9	Tag all fields	
F10	Quit Screenbuilder	
Control+A	Add field	
Control+B	Move to Bottom	
Control+C	Clear all tags	
Control+D	Clear to end of line	
Control+H	BackSpace One Character	
Control+I	Tab TABWIDTH characters right	
Control+J	Move Down One Line	
Control+K	Move Up One Line	
Control+L	Move Right One Character	
Control+M	Return/Enter	
Control+N	Next Page	
Control+O	Switch between insert and overwrite	
Control+P	Previous Page	
Control+R	Refresh the Screen	
Control+T	Move to Top	
Control+U	Tab TABWIDTH Characters Left	
Control+W	Screen Builder Help	
Control+X	Switch between menu and edit mode	

Table continues...

Action key	Function
Control+Z	Undo edit
Tab	Move through the drop-down menus
ESCAPE	Abort/Exit Action
ARROW_DOWN	Move down a line
ARROW_UP	Move up a line
ARROW_LEFT	Move left
ARROW_RIGHT	Move right

# **Starting Screenbuilder**

### **Procedure**

- 1. From the Supervisor Main Menu, select Calling List > Build screens > Screen.
- 2. Use the shortcut keys when you are in menu mode.

### Creating a screen

### **Procedure**

- 1. From the Screenbuilder Menu, select Screen > New Screen.
- 2. Type a name for the screen, which must not be more than 9 characters, to display the NEWSCRN: Select File Dictionary screen with the calling lists for your system.
- 3. Use the arrow key to move the cursor to the calling list you want to use. Press Enter to display a blank screen.

### Adding text to a screen

- 1. From the Screenbuilder Menu, do one of the following:
  - Select **Screen** > **Open Screen**, then use the arrow keys to move to the screen you want to open, and press Enter.
  - Select **Screen** > **New Screen**, then type a name for the screen and select the calling list you want to use. Press Enter to display a blank screen.
- 2. Use the arrow keys to move the cursor to where you want the text to begin.
- 3. Type the text you want to appear on the screen.
- 4. Repeat steps 1 and 2 for each text entry you want to add.

- 5. Press Control+X to switch to menu mode.
- 6. From the Screenbuilder Menu, select Screen > Save Screen, or press F4.
- 7. To close the screen, select **Screen > Close Screen**.

### Adding fields to a screen

#### **Procedure**

- 1. From the Screenbuilder Menu, do one of the following:
  - Select **Screen** > **Open Screen**, then use the arrow keys to move to the screen you want to open and press Enter.
  - Select **Screen** > **New Screen**, then type a name for the screen and select the calling list you want to use. Press Enter to display a blank screen.
- 2. Use the arrow keys to move to where you want the field to begin.
- 3. Press Control+A and Enter to display the field list.
- 4. Press down arrow to move to the field you want to add and press Enter.
- 5. Repeat steps 1 through 3 for each field you want to add.
- 6. Press Control+X to switch to menu mode.
- 7. From the Screenbuilder Menu, select Screen > Save Screen, or press F4.
- 8. To close the screen, select **Screen > Close Screen**.



For inbound screens, do not add fields that have the type as date.

# Changing text on a screen

- 1. From the Screenbuilder Menu, do one of the following:
  - Select **Screen** > **Open Screen**, then use the arrow keys to move to the screen you want to open and press Enter.
  - Select **Screen** > **New Screen**, then type a name for the screen and select the calling list you want to use. Press Enter to display a blank screen.
- 2. Use the arrow keys to move to the screen you want to edit.
- 3. Press Enter to display the screen.
- 4. Use the arrow keys to move to the text you want to change and make changes or additions to the screen.

- 5. Press Control+X to switch to menu mode.
- 6. From the Screenbuilder Menu, select Screen > Save Screen, or press F4.
- 7. To close the screen, select **Screen > Close Screen**.

# Deleting a field or text

### **Procedure**

- 1. From the Screenbuilder Menu, select Screen > Open Screen or press Shift+F2.
- 2. Use the arrow keys to move to the screen you want to open and press Enter.
- 3. Use the arrow keys to move the cursor to the information you want to delete.
- 4. Position the cursor at the beginning of the field label or text. Press F5 and use the right arrow to highlight the area to cut. Press Enter to select the highlighted area.
- 5. Press Control+X to switch to menu mode.
- 6. From the Screenbuilder Menu, select Screen > Save Screen, or press F4.
- 7. To close the screen, select **Screen > Close Screen**.

# Copying a screen

### **Procedure**

- 1. From the Screenbuilder Menu, select Screen > Open Screen or press Shift+F2.
- 2. Use the arrow keys to move to the screen you want to copy and press Enter.
- Select Screen > Save Screen As.
- 4. Type a new name for the screen. The original screen file remains unchanged and the copy is open on your screen.
- 5. To make changes, follow the steps in Changing text on a screen on page 207.

# Finding a screen

- 1. From the Screenbuilder Menu, select Jobs > All Jobs.
- 2. Select **Screen** (outbound) or **IN-SCREEN** (inbound).
- 3. Press down arrow to move to the Job you want to view.
- 4. Press Enter to display the screen list for the selected Job.
- 5. Note the screens the Job uses.

6. Press Control+X to exit the list.

### Adding a screen to a Job

### **Procedure**

- 1. From the Screenbuilder Menu, select Jobs > All Jobs.
- 2. Select **Screen** (outbound) or **IN-SCREEN** (inbound).
- 3. Press the down arrow to move to the Job you want to change. Press Enter to display the screen list for the selected Job.
- 4. Position the cursor where you want to add the screen name. To switch to Insert mode, press Control+O.
- 5. Type a comma and then the name of the screen that you want to add. Use the appropriate uppercase and lowercase letters. Use a comma to separate screen names. The order in which they appear is agent, outbound, inbound. List the agent screen name first, the outbound screen name, and then the inbound screen name.
- 6. Press Control+X to switch to menu mode.
- 7. From the Screenbuilder Menu, select Screen > Save Screen or press F4.

### Checking spelling on a screen

### **Procedure**

- 1. From the Screenbuilder Menu, select Screen > Open Screen or press Shift+F2.
- 2. Use the arrow keys to move to the screen name you want to check and press Enter.
- 3. Verify the spelling and capitalization. (Job1 is not the same as Job1 or JOB1.)
- 4. Use Control+X to exit the selection box without opening a screen.

# Deleting a screen from a Job

- 1. From the Screenbuilder Menu, select Jobs > All Jobs.
- 2. Select Screen (outbound) or IN-SCREEN (inbound).
- 3. Press the down arrow to move to the Job you want to change. Press Enter to display the screen list for the selected Job.
- 4. Move the cursor to the comma before the screen name you want to delete.

- 5. Press Spacebar repeatedly to type over the screen name up to the next comma or the end of the list, then press Enter. Screenbuilder cleans up the extra spaces and commas in the list.
- 6. Press Control+X to switch to menu mode.
- 7. From the Screenbuilder Menu, select Screen > Save Screen or press F4.

### Changing screen calling lists

### About this task

The calling list of screens determine the screen fields. If the Job's calling list changes, you must update the screens. You must change the calling list of a screen:

- When you change the calling lists of a Job
- When you use a copied screen in a Job that has a different calling list than the one used by the original screen
- When you change the name of the calling list

To change screen calling lists:

### **Procedure**

- 1. From the Screenbuilder Menu, select Screen > Open Screen or press Shift+F2.
- 2. Use the arrow keys to move to the screen name you want to open, then press Enter.
- 3. Select the **Field > Change Dictionary**.
- 4. Select **Deleting (D)** or **Remapping (R)**.
- 5. Select **OK** to proceed or **Cancel** to quit.
- Select a new calling list.
- 7. If you select **Remapping** in step 4, confirm the substitutions.
- 8. Press Control+X to switch to menu mode.
- 9. From the Screenbuilder Menu, select Screen > Save Screen or press F4.

# **Editing screen fields**

- 1. From the Screenbuilder Menu, select Screen > Open Screen or press Shift+F2.
- 2. Use the arrow keys to move to the screen name you want to open, then press Enter.
- 3. Use the arrow keys to move to the field you want to change.
- 4. Press T to tag the field. (Clear a tag by pressing T when the cursor is in a tagged field.)

- 5. Tag all the fields that you want to change.
- 6. From the Screenbuilder Menu, select Field > Change Field(s) to display the Field Attribute screen.
- 7. Select the first letter of the attribute for the first field to display the attribute list.
- 8. When you finish making changes to the first field:
  - a. Press Tab or select Next to move to the next field
  - b. Select **Previous** to move to the previous field.
  - c. Select **DONE** to save the changes and quit.
- 9. Press Control+C (Clear all tags) to clear all tags.
- 10. Press Control+X to switch to menu mode.
- 11. From the Screenbuilder Menu, select Screen > Save Screen or press F4.

### Changing field appearance

### **Procedure**

- 1. From the Screenbuilder Menu, select Screen > Open Screen or press Shift+F2.
- 2. Use the arrow keys to move to the screen name you want to open, then press Enter.
- 3. Use the arrow keys to move to the field you want to change.
- 4. Press D to display the fill attributes list.
- 5. Use Tab to switch between spaces and dots. Press Enter when the cursor is on the attribute you want to use.
- 6. Repeat steps 2 through 4 for each change.
- 7. Press Control+X to switch to menu mode.
- 8. From the Screenbuilder Menu, select Screen > Save Screen or press F4.

## Setting field edit capabilities

- 1. From the Screenbuilder Menu, select Screen > Open Screen or press Shift+F2.
- 2. Use the arrow keys to move to the screen name you want to open, then press Enter.
- 3. Use the arrow keys to move to the field you want to change.
- 4. Press F to display the **Edit Format** list.
- 5. Select Accessible, Protected, Optional, or Required.

- 6. Press Enter when the cursor is on the format you want to use.
- 7. Repeat steps 2 through 4 for each change.
- 8. Press Control+X to switch to menu mode.
- 9. From the Screenbuilder Menu, select Screen > Save Screen or press F4.

# Set field edit capabilities field description

The following table shows the different editing capabilities that each field has:

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

# Field sequence order

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

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

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

### Changing the field sequence order

- 1. From the Screenbuilder Menu, select Screen > Open Screen or press Shift+F2.
- 2. Use the arrow keys to move to the screen name you want to open and then press Enter.
- 3. Use the arrow keys to move to the field you want to change.
- 4. Press S to display the Sequencing Attribute list.

- 5. Type the new sequence number.
- 6. Repeat steps 2 through 4 for each change.
- 7. Press Control+X to switch to menu mode.
- 8. From the Screenbuilder Menu, select Screen > Save Screen or press F4.

### Field verification formats

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

Verification formats are valid for only three types of fields:

- time
- date
- numeric

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

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

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

## **Setting field verification formats:**

- 1. From the Screenbuilder Menu, select Screen > Open Screen or press Shift+F2.
- 2. Use the arrow keys to move to the screen name you want to open and then press Enter.
- 3. Use the arrow keys to move to the field you want to change.
- 4. Press V to display the Verification Edit list.
- 5. Type the appropriate format structure.
- 6. Repeat steps 2 through 4 for each change.

- 7. Press Control+X to switch to menu mode.
- 8. From the Screenbuilder Menu, select Screen > Save Screen or press F4.

### Validating delimiters

### **Procedure**

- 1. From the Screenbuilder Menu, select Screen > Open Screen or press Shift+F2.
- 2. Use the arrow keys to move to the screen name you want to open and then press Enter.
- 3. Use the arrow keys to move to the field you want to change.
- 4. Press V to display the Verification Edit list.
- 5. Type the appropriate format structure.
- 6. Repeat steps 2 through 4 for each change.
- 7. Press Control+X to switch to menu mode.
- 8. From the Screenbuilder Menu, select Screen > Save Screen or press F4.

### Setting acceptable field entries

### About this task

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

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



For PC Agent application, if you use the acceptable entry combo box, then keep sufficient space between the combobox field and the next field. It can overwrite the next field if the scroll bar width is added to the acceptable entry combo box.

Setting acceptable field entries

- 1. From the Screenbuilder Menu, select Screen > Open Screen or press Shift+F2.
- 2. Use the arrow keys to move to the screen name you want to open, then press Enter.
- 3. Use the arrow keys to move to the field you want to change.
- 4. Press A to display the Acceptable entry list.
- 5. Select the acceptable entry list number.

- 6. Repeat steps 2 through 4 for each change.
- 7. Press Control+X to switch to menu mode.
- 8. From the Screenbuilder Menu, select Screen > Save Screen or press F4.

### Setting field attribute information

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

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

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

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

- Appearance affects how the field is displayed on the screen. For example, do dots fill the blank spaces?
- The usage order affects the sequence in which agents use the fields.
- Acceptable entries limit the field entries of agents in three ways: edit capabilities, verification format, and acceptable entries. For example, you can require that certain fields always have an entry, accept only dates, or restrict entries to specific responses such as yes or no.

### Reference information for Screenbuilder application

Reference information contains the following information about the field: field name, maximum number of characters, field type, and field location on the screen.

Shortcut letter	Attribute	Value	Description
N	Name	Field names	The labels assigned to fields.
Р	Position	1-23 rows	Location on the screen.
		1-79 columns	
С	Comment	1-256 characters	Clarifies the use of a field. If CP are the first two letters in a comment, the field is a cut-and- paste field.
F	Edit format	Accessible	Determines if and how agents enter information in the field.
		Protected	
		Optional	
		Required	
V	Verification format	Time	Verifies that fields contain valid entries.
		Date	

Table continues...

Shortcut letter	Attribute	Value	Description
		Numeric	
Α	Acceptable entry list	Spaces	Displays the list of acceptable field entries.
		Dots	
L	Edit acceptable entry list		Alphanumeric - Lets you change the acceptable entries.
D	Filler characters		Specifies whether to fill field blanks with spaces or dots.
S	Sequence number		Specifies the order that agents use fields.

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

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

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

The field attributes screen includes five types of information or attributes for each field:

- 1. Name position, and comments
- 2. Width
- 3. Type
- 4. Position
- 5. Comments

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

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

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

### Note:

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

### Setting field reference information

#### **Procedure**

- 1. From the Screenbuilder Menu, select Screen > Open Screen or press Shift+F2.
- 2. Use the arrow keys to move to the screen name you want to open, then press Enter.
- 3. Use the arrow keys to move to the field you want to change.
- 4. Press C to display the Comment box.
- 5. Type the new comment. If the field is a CP field, add the comment after the CP. You cannot have more than 256 characters in a comment.
- 6. Repeat steps 2 through 4 for each change.
- 7. Press Control+X to switch to menu mode.
- 8. From the Screenbuilder Menu, select Screen > Save Screen or press F4.

### **Creating and viewing Screenbuilder reports**

#### **Procedure**

- 1. From the Screenbuilder Menu, select Screen > Open Screen or press Shift+F2.
- 2. Press Control+X to switch to menu mode.
- 3. From the Screenbuilder Menu, select Screen > Reports.
- 4. Press Control+X to switch to edit mode.
- 5. Select **Y** to create the report and press F10.
- 6. From the Supervisor Main Menu, select Reports.

Follow the procedures in Printing a Screenbuilder report on page 217.

### Printing a Screenbuilder report

- 1. From the Supervisor Main Menu, select Reports > View or print reports.
- 2. To view a report, press F4 or Control+V. Type the number that corresponds to the report you want to view and press Enter.

- 3. The report is displayed on the screen. Press Control+N or Control+P to see the entire report.
- 4. To print the report, press F2 or Control+O.
- 5. Press Control+X to return to the previous screen.

# **Chapter 18: Reports**

You can generate, view, and print report files including agent history, Job history, list distribution, calling list, and system. You can also use PC Analysis to view and download system statistics.

## **History reports**

You can generate two types of history reports:

- Agent History reports: Provide data on agent performance for a specific period. You have a
  choice of outbound, inbound, or blend reports. Each report shows data on all the Jobs that an
  agent worked on for a specified period. Information includes the total time an agent was on a
  Job and how the agent spent the time.
- Job History reports: Provide data on the Job performance for a specific period. Job History
  reports include the number of dials and connects, completion codes, agent work time, agent
  update time, and agent wait time between calls.

## Agent history report fields

Agent history reports provide data on agent performance. The menu offers two types of reports: Agent History reports, based on the Job type, and the Agent Activity report.

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

### Note:

You can group the Agent Activity report based on the following five fields:

- Agent ID
- Job Run Date
- · Job Run Week
- · Job Run Month
- System Name

If you use any other field, by default the report uses the Agent ID grouping for the non allowed field.

The following list describes the Agent History report fields:

Name	Description
For the period	Specifies the date or period when the system captured the report information.
Report date	Displays the date that the system created the report.
Time	Displays the time that the system created the report.
Agent name	Displays the login ID of the agent.
Job information	Describes the Job. The information includes the Job name, the system identification number, the Job type, and the record selection file name. The field displays the day and time that the Job was started and finished.
Total Activity time on Job (hh:mm)	Displays the total time that the agent spent on each Job. Active time is the time that the agent worked with the customer record, was on the phone, or waited between calls.
Total inbound connects	Displays the total inbound calls passed to the agent.
Total outbound connects	Displays the total dialing attempts passed to the agent.
Total connects per active hour	Displays the average call connects made each hour. The system calculates the total call connects, divides the number by the total active time on the Job, and displays the average hours to one decimal place.
Avg. Agent Related Time Intervals	Provides a heading for the report field that shows the average
	time that the agent took to perform specific tasks on each Job.
Time Agent Working with Record	Calculates the average work time that the agent talked with a
	customer and worked on customer records. Work time begins with the call connection and ends with the record release. This time is the total of Time Agent on Phone and Time Agent on Record After Call.
Time Agent on Phone	Calculates the average time that the agent was on the phone
	for each Job. The time begins with the call connection and ends
	with the phone line release.

Name	Description
Time Agent on Record After Call	Calculates the average time that the agent takes to update records. The time begins with the phone line release and ends when the record release.
Time Waiting Between Calls	Calculates the average time the agent waited between calls. If the average time is too long, change the Expert Dialing setting.

#### Sort field:: Use the following table to determine how to fill in each field in an agent history report:

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

#### **Totalling strategy:** The following table describes the totalling strategy:

Name	Description
0	Details by Job
1	Details by Job and totals for a selected period
2	Totals for a selected period
3	Subtotals for a selected period
4	Subtotals for each Job type and totals for a selected period
5	Details by Job, subtotals by Job type, and totals for a selected period

## Job history report fields

Using the Job History Reports menu you can generate reports for outbound Jobs, inbound Jobs, blend Jobs, or combination reports. The reports provide information on the selected Job for

a specific period. The reports include the number of dials and connects, completion codes, agent work time, agent update time, and agent wait time between calls.

The Job history reports provide data on Job performance. The menu offers two types of reports: Job History reports based on Job type, and the Previously Run Jobs report. The following table describes the items on the Job History Reports menu:

Name	Description
For the period	Specifies the date or period when the system captured the report information.
Report Date	Displays the date that the system created the report.
Time	Displays the time that the system created the report.
Job Information	Describes the Job. The information includes the Job name, system identification number, Job type, and the record selection file name. The information displays the day and time the Job started and finished.
Time System on Line (hh:mm)	Displays the active time for an outbound Job. It does not include the start up time and the Job suspension time.
Total Agent Hrs on Line	Displays the time agents were on the Job.
Average Agents On line	Records the average number of agents logged into each Job.
Total Number of Inbound Calls	Displays the total inbound calls received by the system.
Inbound Calls per System Hour	Displays the average number of inbound calls received per system hour.
Inbound Calls per Agent Hour	Displays the average number of inbound calls received per agent hour. The total calls are divided by the total agent hours logged to the Job.
Total Connects	Displays the total inbound calls passed to agents.
Total Number of Outbound Calls	Displays the total dialing attempts made by the system. Total Number of Outbound Calls includes all attempts, including those not passed to agents.
Dials per System Hour	Displays the average call connects made each hour. The system calculates the total call connects and divides by the total active time on the Job. The system calculates the average hours to one decimal place.
Dials per Agent Hour	Displays the average number of dial attempts per agent hour.
Total Connects	Displays the total outbound calls passed to agents.

Name	Description
Connects per System Hour	Displays the average number of connects for the time the Job was active.
Connects per Agent Hour	Displays the average number of inbound calls received per agent hour.
Rate of Connects to Calls (inbound)	Displays a decimal amount based on the number of inbound calls passed to agents divided by the number of inbound calls received by the system.
Rate of Connects to Calls (outbound)	Displays a decimal amount based on the total number of connects divided by the total number of dial attempts received by the system.
Average Agent Related Intervals	Provides a heading for the report fields that classify the average time agents spent performing specific tasks on each Job.
Time Agent on Record After Call	Calculates the average time to update records. Time begins with the line release and ends with the record release.
Time Agent Working with Record	Calculates the average time agents spent talking with a customer and working on the records. Time begins with the call connection and ends when the agent releases the record. The time duration between start and end is the total Time Agent on Record After Call and Time Agent on Call.
Time Agent on Call	Calculates the average time agents spent on the phone for each Job.
Time Waiting Between Calls	Calculates the average time agents waited between calls.
Queue Statistics	Displays the number of outbound and inbound calls that were placed in a queue.
Connect Release Classification (Agent)	Displays the different completion codes and the corresponding number of calls released by the agent.
System Release Classification	Displays the number of calls released by the system according to standard release classifications or completion codes such as NOANSWER and BUSY.

**Sort field:** Use the following table to determine how to fill in each field in a Job history report:

Name	Description
Job Name(s)	Specify one Job or a range of Jobs.
Job Description Label	Specify Job description, not more than 30 characters.
Record Selection file name(s)	Separate multiple files with a comma.

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

# **Compliance reports**

Compliance reports provide real-time statistics that describe how well individual Jobs and dialers are complying with legislative requirements for nuisance call auditing.

The reports contain nuisance data for each Job run on the connected dialers during the day, even if the Job is no longer running. A single row appears for each instance of each Job. For example, if you run a Job more than once during the day, there will be a separate row for each instance. Nuisance counts and rates are summed across all Jobs on a dialer, and across all dialers.

The following data appears in compliance reports:

Name	Description
Dialer	The name of the dialer where a Job is running
Job	The name of the Job
Status	The current status of the Job (Stopped or Active)
Start Time	The date and time the Job started
Stop Time	The time the Job stopped or "-:-" if the Job is still running
Calls Offered	The total number of calls detected by the dialer for a given Job, also known as the number of "hellos."
Nuisance Count	The total number of calls that classify as <i>nuisance call</i> . The nuisance call means that the customer said hello, but an agent did not receive the call within a specified time period. The default time limit is 2 seconds. In addition, calls that are disconnected by the dialer are included in the nuisance count. Although, the nuisance count is not

Name	Description
	a typical occurrence, the nuisance count can occur if the Job is set up without a wait queue.
Total Nuisance Rate	The rate of nuisance calls as a percentage of total calls offered (Nuisance Count/Calls Offered) * 100.
Current Nuisance Rate	The rate of nuisance calls as a percentage of the last 100 calls.
Current Calls	The total number of calls used to calculate the current nuisance rate. If fewer than 100 calls have been made, that number is used for the calculation.
<b>Current Nuisance Count</b>	The total number of nuisance calls during the last 100 calls.
Customer Hangups	The total number of calls abandoned by the customer while in queue during the specified time period that is, a call in queue for less than 2 seconds when the customer disconnects. Note: The disconnected calls are not included in the nuisance count or the nuisance rate.

## **List Distribution reports**

List Distribution is a reporting tool using which you can analyze the records in your outbound calling list. List Distribution creates reports that count the records in the categories or distributions you set.

Using List Distribution allows you to focus on your campaign objective by assisting with the following topics:

- Job planning: By understanding how many accounts are in different categories, you can
  estimate the size of the record selection. If the selection is too large, you can change the
  record selection criteria to select fewer records. The information helps you design effective
  record selections.
- Job analysis: By viewing the results of call activity during a Job, you can adjust your calling operations to get the best results.

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

### **List Distribution shortcut keys**

Use the following shortcut keys when working with List Distribution.

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

## List Distribution guidelines

Adhere to the following guidelines:

- Verify that the system sorts records in sets based on ranges that meet the following guidelines:
  - Ranges are numbers.
  - Ranges do not contain commas or decimals.
  - Ranges are in ascending order.
- Item selects records to match a value. For example, you can search for area codes in the 206 region. Use the following guidelines when using Item to sort report data:
  - Items can be in ascending or descending order.
  - Items can be letters, numbers, or symbols.

### List Distribution Filter Criteria screen

Use the List Distribution Filter Criteria screen to set List Distribution filters. Press F8with the cursor on any line in the List Distribution Field Selection screen to display the screen.

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

With List Distribution, use the following wildcard characters:

Wildcard Character	Description
>	greater than
<	less than

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

## Calling list data

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

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

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

**Filter data:** You can use filters to further refine your selection. The use of filters is always optional. A filter is a set of requirements that eliminates records that do not match the settings. Use filters to narrow your selection of records to specific values. You can also use a completion code filter to count the records based on completion codes. If you set filters, the filters apply to all the reports you generate from that List Distribution file.

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

### List distribution report design

After you are familiar with the types of reports, understand how you design them. Your first decision is the type of report: row, row and column, or table.

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

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

- To decide between columns and rows, use the field name with the largest number of categories for the row label. For example, you want to sort by AREA\_CODE and the amount in the LAST\_ORDER field. You have divided LAST\_ORDER into four separate ranges, and the calling list has 50 area codes. Make AREA\_CODE the row label because AREA\_CODE has 50 categories and is the largest. Make LAST\_ORDER the column label because LAST\_ORDER has 4 categories which makes it have the fewest number categories. You can enter the column criteria and the row criteria at the same time.
- To decide between row, column, and table groups, use the field name with the fewest categories for the table groups.
- The system identifies a zero (0) for the first increment in a range of values. You do not have to enter 0.

The List Distribution Field Selection screen has spaces to enter many row and column criteria. Keep the list distributions simple and create as many as you need to keep the reports simpler to read.

## List distribution report analysis

The top portion of each report lists the system completion codes. The codes indicate the number of records that you have left to call based on the last recorded calling result. These totals are independent of the list distribution criteria you enter. The totals can change if you have Jobs running.

The bottom portion of each report displays the number of records that match the criteria that you set when you defined your list distribution. You can design your record selections using this information. After you look at the results, go back and change the values of the criteria fields that you chose. For example, if you have a large number that is displayed between the balance ranges of \$1000 and \$5000, you can edit the criteria to add a \$2500 range.

## **Calling list reports**

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

- Days on System Report shows the nonproductive contact records. Nonproductive contact
  records are records for which no customer contact has occurred within a certain time. The
  time is determined during the system configuration. The system marks these records and
  includes them on a report after the specified number of days. Depending on your system
  configuration, the system will either continue or discontinue to call the records.
- **Reject Report** shows the records the system rejected due to duplicate account numbers, invalid phone numbers, or time zone sorting failures.

• Release Code Report (completion codes) shows all records with a specific completion code. For example, you can request a report of all calls that resulted in a customer who has promised to make a payment.

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

When you create a report with more than 80 columns, then the report displays the columns correctly on the screen in a single line. But when you print the report, the data spans multiple lines and truncates at 80 characters. Therefore, when you create a report of more than 80 columns, use the default dimensions specified as 55, 80, where the number of rows is 55 and the number of columns is 80.

# **System reports**

The system generates three system reports:

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



The PIF report is available only in the default tenant of the Lead administrator menu and default tenant of the Supervisor menu.

# System analysis reports using PC Analysis

Use PC Analysis to use system data to prepare reports, charts, mail merge letters, and spreadsheets using Proactive Contact software.

Use PC Analysis to extract statistics from the following categories:

- Job history
- · Agent history
- Calling information

- Calling transactions
- Calling lists

The extract is in a comma delimited file without headings. Import the information into a PC program such as Excel, Lotus, a word processing merge file, or database to create reports, charts, letters, and spreadsheets from the PC program. Deciding to run PC Analysis at the same time as running Jobs adversely impacts system performance. You can run extracts when there are no active Jobs.

#### Data sources

When the system places a call, information is put into buckets or files. An outcome of a call is written to the calling list (AGENT, DATE, TIME, and CODE) and to the statistics files.

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

Data sources include Job history files, agent history files, calling information statistics, calling transaction statistics, and calling list information.

A system binary application that uses totals from the information and transaction statistics creates Job history and agent history files. Depending on what you want to do, you can select the file that contains the information you need as your source file.



#### Tip:

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

### Job history file

The Job history file contains data on the last 200 completed Jobs. The system takes the information from the information and transactions statistics files and separates the data into inbound and outbound Job information. Unlike the statistics files, the Job history file provides averages and group totals.

Information in this file includes the following:

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

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

Name	Description
JOBNAME	The Job name.
JOBNUMBER	The system identification number assigned to a Job. The number increases each time the system runs the Job.
JOBTYPE	The Job type: inbound, outbound or blend.
UNITID	The unit work list key value for a unit work list Job. For example, if you base the unit work lists on ZIP codes, the field contains the ZIP codes used by that Job.
JOBDATE	The Job start date.
STARTTIME	The Job start time.
ENDTIME	The Job stop time.
ACTIVETIME	The total Job call processing time. It does not include start time or suspension time.
JOB_CLOCKTIME	The total agent hours on a Job JOB_TALKTIME + JOB_UPDATETIME + JOB_IDLETIME.
JOB_IDLETIME	The total time agents were idle. Does not include the time between an agent's login and the first call or the time between the release of an agent's final record and log off. For a blend Job, it includes the transfer time between Jobs.
JOB_TALKTIME	The total talk time for all agents on all Job.
JOB_UPDATETIME	The total update time for all agents on all Jobs.
JOB_WORKTIME	The total work time for all agents on all Jobs.  JOB_TALKTIME + JOB_UPDATETIME.
JOB_IDLECOUNT	The number of times agents were idle.
JOB_CALLSWORKED	The total calls handled by agents on all Jobs.
JOB_CALLSANSWERED	The total calls handled on inbound Jobs.
JOB_WAITQUEUETIME	The time (in seconds) customer spent in wait queue.
JOB_CALLSINWAIT	The total calls placed in wait queue.
OUT_CLOCKTIME	The total time agents were on outbound Jobs.
OUT_IDLETIME	The total idle time on outbound Jobs.
OUT_TALKTIME	The total talk time on outbound Jobs.
OUT_UPDATETIME	The total update time on outbound Jobs.
OUT_WORKTIME	The total work time on outbound Jobs OUT_TALKTIME + OUT_UPDATETIME.
OUT_IDLECOUNT	The number of times agents were idle on outbound Jobs.

Name	Description
OUT_CALLSWORKED	The total outbound calls handled by agents.
OUT_CALLSANSWERED	The total outbound calls answered.
OUT_WAITQUEUETIME	The total time outbound customer spent in the wait queue.
OUT_CALLSINWAIT	The total number of outbound calls placed in the wait queue.
OUT_CALLSPLACED	The total outbound calls placed.
OUT_RECALLSPLACED	The total recalls placed.
INB_CLOCKTIME	The total time on inbound calls INB_TALKTIME +
	INB_UPDATETIME + INB_IDLETIME.
INB_IDLETIME	The total idle time on inbound calls.
INB_TALKTIME	The total talk time on inbound calls.
INB_UPDATETIME	The total update time on inbound calls.
INB_WORKTIME	Total work time on inbound calls INB_TALKTIME + INB_UPDATETIME.
INB_IDLECOUNT	The number of times agents were idle on inbound calls.
INB_CALLSWORKED	The total inbound calls handled.
INB_CALLSANSWERED	The total inbound calls received per Job.
INB_WAITQUEUETIME	The total time customer spent in the inbound wait queue.
INB_CALLSINWAIT	The total calls placed in the inbound wait queue.
XOUT_CLOCKTIME	The total time spent as Person to Person (PTP) agent.
XOUT_IDLETIME	The total PTP idle time.
XOUT_IDLECOUNT	The number of times PTP agents were idle.
XOUT_CALLSWORKED	The total PTP calls.
PREVIEWTIME	The total time agents spent previewing records during Managed Dialing.
LISTNAME	The calling list name.
JOBLABEL	The Job description from Job file.
SELECTNAME	The record selection file name.
STRATEGYNAME	The phone strategy file name.
COMPCODE001-COMPCODE999	The completion codes 001-999.

## Agent history file

The agent history file contains data on the calling activity of each agent during the last 200 Jobs. Each agent has a file with information segregated into outbound and inbound calls.

The file provides the following data:

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

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

Name	Description
JOBNAME	The Job name
JOBNUMBER	The system identification number assigned to a Job. It increases each time a Job runs.
UNITID	The unit work list identification
JOBDATE	The Job run date
STARTTIME	The Job start time
ENDTIME	The Job end time
LOGINTIME	The first log in time of the agent.
LOGOUTTIME	The first log off time of the agent.
AGENTNAME	The user name of the agent.
JOB_CLOCKTIME	The total agent hours on a Job JOB_TALKTIME + JOB_UPDATETIME + JOB_IDLETIME
JOB_IDLETIME	The total agent idle time. Does not include time between an agent's login and the first call or time between the release of an agent's final record and log off. For a blend Job, includes transfer time between Jobs.
JOB_TALKTIME	The total talk time.
JOB_UPDATETIME	The total update time.
JOB_WORKTIME	The total work time JOB_TALKTIME + JOB_UPDATETIME.
JOB_IDLECOUNT	The number of times agent was idle.
JOB_CALLSWORKED	The total calls handled during a Job.
OUT_CLOCKTIME	The total time on outbound Jobs.
OUT_IDLETIME	The total idle time on outbound Jobs.
OUT_TALKTIME	The total talk time on outbound Jobs.

Name	Description
OUT_UPDATETIME	The total update time on outbound Jobs.
OUT_WORKTIME	The total work time on outbound Jobs OUT_TALKTIME + OUT_UPDATETIME.
OUT_IDLECOUNT	The number of times agent was idle on outbound Jobs
OUT_CALLSWORKED	The total outbound calls handled.
INB_CLOCKTIME	The total time on inbound calls INB_TALKTIME + INB_UPDATETIME + INB_IDLETIME
INB_IDLETIME	The total idle time on inbound calls.
INB_TALKTIME	The total talk time on inbound calls.
INB_UPDATETIME	The total update time on inbound calling.
INB_WORKTIME	The total work time on inbound calls INB_TALKTIME + INB_UPDATETIME.
INB_IDLECOUNT	The number of times agent was idle on inbound calls.
INB_CALLSWORKED	The total inbound calls handled.
XOUT_CLOCKTIME	The total time as Person to Person (PTP) agent.
XOUT_IDLETIME	The total PTP idle time.
XOUT_IDLECOUNT	The number of times PTP agent was idle.
XOUT_CALLSWORKED	The total PTP calls.
PREVIEWTIME	The total time agent spent previewing records during Managed Dialing.
LISTNAME	The calling list name.
OFFLINE	The total time spent off-line that is, logged in but not on a Job.
RELEASE	The time spent released to the ACD in Predictive Blend.
COMPCODE001-COMPCODE999	The completion codes 001-999.

# Calling information and transaction statistics files

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

The system stores the calling statistics in two files:

- · Information statistics
- Transaction statistics

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

The system generates statistics for the events at different intervals. For example, the system generates hit rate statistics every 10 minutes and line usage statistics every 2 minutes.

**Information statistics files:** The information statistics file provides information about the duration of certain events sorted by Job number.

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

Name	Description
INF_JOBNUM	The system identification number assigned to a Job. The number increases each time that the system runs the Job.
INF_DATE	The date on which the event occurred.
INF_TIME	The time when the event occurred.
INF_EVENTLABL	The name of the event being reported. For example, line
	usage, hit rate, acquire, release, and log on.
INF_FREE	The data for the event in the event label field. For example, the hit rate shows the current hit rate and the line usage shows the current line us.
INF_AGENTNAME	The user name of the agent.
INF_CLOCKTIME	The INF_CLOCKTIME has several uses: For LOG OFF events it is the total work time for last assignment, not the time since log on. For JOBTIME, the last entry in the file, it is the total.
INF_IDLETIME	The amount of idle time between calls of the same type.
INF_IDLETYPE	The Job type to which the idle agent is assigned.
INF_CALLTYPE	The type of call: outbound, inbound, blend.
INF_UNITED	The unit work list identification.
INF_LOGTYPE	The agent's log on type: outbound, inbound, blend, managed, PTP.

### Note:

If you transferred an agent from any other Job, the agent would be on time on the current Job.

**Transaction statistics files:** The transaction statistics file contains data about each call the system processed for a particular Job. The system stores the record numbers, phone numbers, recall attempt counts, agent names, talk and work times, and calling results for each call.

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

Name	Description
TRN_JOBNUM	The System identification number assigned to a Job.

Name	Description
TRN_DATE	The date the event occurred.
TRN_TIME	The time the event occurred.
TRN_WAITTIME	The total time this customer was in wait queue.
TRN_USERFIELD	The user defined field.
TRN_TELELINE	The line number used by this call.
TRN_COMPCODE	The completion code entered by system for this call.
TRN_RECNUM	The record number.
TRN_PHONENUM	The outbound phone number.
TRN_AGENTNAME	The user name of agent.
TRN_RECALLCNT	The number of times the system has recalled this record.
TRN_TALKTIME	The agent talk time for this call.
TRN_WORKTIME	The agent work time for this call.
TRN_V_TO_HANG	The time from customer answer to line release. An exception is when it is a managed or preview call. If there is no call progress analysis, the timer starts when the call is delivered to an agent and the call is marked as a connect.
TRN_OFF_TO_HNG	The time from the system initiating call to line release.
TRN_P_FIELDNUM	The phone field number called.
TRN_CONNECT	The connect flag.
TRN_UNITID	The unit ID for this call.
TRN_UPDATETIME	The agent update time for this record.
TRN_PREVTIME	The time agent spent previewing record on a managed Job.
TRN_TRANSTYPE	The call type: inbound or outbound.
TRN_AGCOMPCODE	The completion code entered by agent.
TRN_LOGTYPE	The agent log on type: outbound, inbound, blend, managed, PTP.

## **Calling list files**

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

**Calling list fields added by the system:** The following table describes the calling list fields added and required by the system:

Name	Description
OPER	The agent that took call. The field is left blank if no agent is present.
DTE	The date call was completed.
TME	The time call was completed.
CODE	The release code.
ENTRYDATE	The date that the record first loaded on the system and consecutively downloads.
STATUSFLAG	Record status: If the status is other than null, then the record is considered uncallable. The options are:
	T = Failed time zone
	B = Bad phone number
	D = Too many days on system
	R = Duplicate record
	E = Manual delete via record edit
	C = Call on inbound campaign, cancelled in outbound campaign
	N = Do Not Call
RECALLDATE	The date set for agent set recall.
RECALLTIME	The time set for agent set recall.
RECALLPHONE	The phone to call for agent set recall.
DAYSCNT	The number of days consecutively that the record has been loaded on system.
PHONESTAT	The system status of Phones.1 byte for each phone, position 1 for phone1 and so on.*
ZONEPHONE1	The time zone flag for PHONE1.
ZONEPHONE2	The time zone flag for PHONE2.
CURPHONE	The current active phone.
PHONECNT1	The number of attempts on PHONE1.
PHONECNT2	The number of attempts on PHONE2.
DUR4	The system talk time.
DUPE	The duplicate flag if field contains a star sign (*), duplicate records exist.
FRSTDATE1	The date of first attempt on PHONE1.
FRSTTIME1	The time of first attempt on PHONE1.
FRSTSTAT1	The result of first attempt on PHONE1.
FRSTDATE2	The date of first attempt on PHONE2.

Name	Description
FRSTTIME2	The time of first attempt on PHONE2.
FRSTSTAT2	The result of first attempt on PHONE2.
JOBNAME	The name of Job last attempting record.
CALLTYPE	The type of call that is, I=inbound, O=outbound.

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

- N = Not called
- B = Bad number
- C = Called
- O = Passed to agent
- A = Active/set for recall

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

### PC Analysis extract process

The PC Analysis download process includes the following:

- · extract file
- · download options
- download the output file

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

All data has quotes around the data unless Esc,T is used to remove the quotes. Otherwise, the default is with quotes.

## **Creating a Letter generation extracts**

#### About this task

Some spreadsheet, database, and word processing applications require fields to be separated by quotation marks. Using PC Analysis you can separate fields by quotation marks.

#### **Procedure**

- 1. At the system login prompt, type your login name and press Enter.
- 2. Do one of the following:
  - a. Type the PC Analysis password (pcanal or cdwanal), and press Enter. The system displays the PC Analysis Main Menu.
  - b. Type the supervisor password, and press Enter. From the Supervisor Main Menu, select Reports > PC Analysis extracts or PC Analysis Tools.
- 3. From the PC Analysis Extracts Menu, Select Execute a Letter Generation Extract. The output file will have a .txt extension.

#### Result

Check with your administrator to ensure that your format is acceptable for your work site.

### **Download extracts**

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

After you download your output file to your PC, you can manipulate your data by loading the data into a PC program.

## Display message for a blank report in CUI menu

Through the system menu, you can execute PC Analysis Extracts for a calling list. When the process is completed, the system displays the number of records selected and a report is generated. If no records are selected, then a blank report is generated. Earlier, the system displayed a blank screen if you selected a blank report for viewing. In this release, in such cases, the system displays a message mentioning that the report is blank.

## Generating agent history reports

- 1. From the Supervisor Main Menu, select Reports.
- 2. From the Agent History Reports menu, select one of the following reports:
  - Outbound agent history report
  - Inbound agent history report

#### · Blend agent history report

- 3. Type a **Sort Field** name and press Enter. The sort name labels the columns in your report and organizes the information in alphanumeric order.
- 4. Type a **Job name** and press Enter.
- 5. Type a Job description label and press Enter.
- 6. Type a **Selection file name** and press Enter.
- 7. Type a Strategy file name and press Enter.
- 8. Type a **Job start date** and press Enter.
- 9. Type a **Job number** and press Enter.
- 10. Type an **Agent name** and press Enter.
- 11. Type a Report description and press Enter.
- 12. Type the number of the **Totalling Strategy**.
- 13. Type Y at the prompt if the entries are correct or type N to edit your selections. The cursor returns to the first field.
- 14. Press Enter to move to the field you want to correct. When the entries are correct, type Y.

The system displays a message that the report is being generated. Then the system displays the Agent History Reports menu.

## Generating an agent activity report

#### **Procedure**

From the Supervisor Main Menu, select Reports > Agent history reports > Agent Activity Report. Press Enter to generate the report.

The system displays a prompt to tell you it's generating the report. The system displays the Agent History Reports menu when the report is complete.

## Generating Job history reports

- 1. From the Supervisor Main Menu, select ReportsJob History Reports.
- 2. From the Job History Reports menu, select one of the following options:
  - Outbound Job report

- Managed Job report
- Inbound Job report
- Blend Job report
- 3. Type a **Sort Field** name. The sort name labels the columns in your report and organizes the information in alphanumeric order.
- 4. To generate the report, type the report selection criteria.
- 5. Type the number of the **Totalling Strategy**.
- 6. Type Y at the prompt if the entries are correct or type N to edit your selections. The cursor returns to the first field.
- 7. Press Enter to move to the field you want to correct. When the entries are correct, type Y.

The system displays a prompt to tell you it's generating the report. The system displays the Job History Reports menu when the report is complete.

# Generating a previously run Job history report

#### **Procedure**

From the Supervisor Main Menu, select Reports > Job History Reports > Previously run Jobs report. Type Y to generate the report.

The system displays a prompt to tell you it's generating the report. The system displays the Job History Reports menu when the report is complete.

## Generating a list distribution report

#### **Procedure**

- 1. From the Supervisor Main Menu, select Reports > List distribution reports > Create a list distribution.
- 2. Type a List Distribution file name not more than 10 characters. Press Enter.



You must give the file the same name as the record selection that you create with the information.

- 3. Type a Report Description. Press Enter.
- 4. Type Y at the prompt.
- 5. Enter the list number.

The system displays the List Distribution Field Selection screen.

For more information, see the following sections:

### Selecting list distribution fields

#### **Procedure**

- 1. In the first field of the Row column, type a calling list field name in capital letters to use for the row, or you can press F4 to see the list of fields and then type the number associated with the field. Press Enter to move to the next field.
- 2. To select a Column label, type a calling list field name in capital letters or press F4 to see the list of fields and type the number associated with the field you want to use. Press Enter to move to the next field.
- 3. To select a Table label, type a calling list field name in capital letters or press F4 to see the list of fields and type the number associated with the field. Press Enter to move to the next field.
- 4. (Optional) If you want to select values for additional reports, complete the next line by repeating Step 1 through Step 3. You can design 15 reports for each List Distribution.
- 5. When you finish selecting fields, press F7(Change).

The system displays the List Distribution Field Value Selection screen. For more information, see the following sections:

### Selecting list distribution field values

#### **Procedure**

- 1. Type R for Range or I for Item (uppercase or lowercase) and press Enter. The cursor moves to the first blank line in the left column.
- 2. After you enter all the values for the first field, press F1.

The system displays the List Distribution Field Selection screen.

- 3. Move to the next field and repeat Step 1 and Step 2.
- 4. Press F1 when you have entered all the values or press F8 to enter filters.

### Selecting range in a list distribution report

#### **Procedure**

1. Type the first value in the range. The cursor moves down to the next line. The number represents the upper limit of the first range. For example, to include all records from 0-500, type 500.

- 2. Type the next value.
- 3. Repeat until you have set all the values. If you want an unlimited upper value, type 999999999 (ten nines).
- 4. Type the value for the items you want to include in the list. The cursor moves down to the next line.
- 5. Type the value for the next item.

### Setting list distribution filters

#### **Procedure**

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

### Moving fields and values in List distribution field selection Procedure

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

### Clearing fields and values

#### **Procedure**

- 1. On the List Distribution Field Selection screen, move the cursor to the field that you want to clear and press F11. Type Y at the prompt.
- 2. When you finish clearing fields, press F1.
- 3. Type C and press Enter to generate the report, or press Control+X to save the file and return to the previous menu.

### **Deleting fields**

#### **Procedure**

- 1. On the List Distribution Field Selection screen, move the cursor to the field you want to delete, and press F3. Press Y at the prompt.
- 2. When you finish deleting fields, press F1.

## Changing or deleting a value

#### **Procedure**

- 1. On the List Distribution Field Selection screen, move to the field whose value you want to change. Press F7.
- 2. Move the cursor to the value you want to change, press F3.
- 3. Type a new value to replace the previous value, press F1.

### **Editing filters**

- 1. On the List Distribution Field Selection screen, press F8 to display the Distribution Filter Criteria screen.
- 2. Move the cursor to the line you want to edit, and press F3 or F11.
- 3. To add a filter, press  $\mathbb{F}4$  and select a field from the list.
  - a. Type the field number.
  - b. Type a field value.
- 4. Press F1 to return to the List Distribution Field Selection screen.

5. If you want to generate the report now, type C and press Enter. Otherwise, press Control+X to save the file and return to the previous menu.

### Copying a list distribution report

#### **Procedure**

- From the Supervisor Main Menu, select the Reports > List distribution reports > Copy a list distribution.
- 2. Type the item number of a list distribution file. Type Y at the prompt.

The system displays the List Distribution Report Generation screen.

- 3. Type a new file name for the copy. Type Y at the prompt.
- 4. Press any key to return to the previous menu.

### Deleting a list distribution report file

#### **Procedure**

- 1. From the Supervisor Main Menu, select the Reports > List distribution reports > Delete a list distribution.
- 2. Type the item number of the list distribution file you want to delete. Type Y at the prompt.
- 3. Press any key to return to the menu.



#### Note:

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

## **Executing and print list distribution reports**

- 1. From the Supervisor Main Menu, select Reports > List distribution reports > Execute a list distribution.
- 2. Type the item number for the file.
- 3. Type an optional report title not more than 30 characters. Type Y at the prompt.
- 4. Select a list from the displayed list by typing a number corresponding to the listname.
  - The system displays the List Distribution Report Generation screen.
- 5. If you want to generate the report now, press C and press Enter, otherwise, press Control+X to store the List Distribution results and generate the report later.

6. Press any key to return to the menu.

# Generating a calling list report

#### **Procedure**

- 1. From the Supervisor Main Menu, select Reports > List distribution reports.
- 2. From the List Distribution menu, select one of the reports.
- 3. Enter the List distribution name.
- 4. Type a report description up to 30 characters and press Enter. Type Y at the prompt. The system generates the report.

## Generating a system report

#### **Procedure**

- 1. From the Supervisor Main Menu, select Reports > System reports.
- 2. Select one of the following:
  - Agent Login Report
  - Multiple Call Report
  - Program Information File Report
  - Hourly Inbound Activity Report
- 3. If you select **Multiple Call Report**, type a phone number in the format NNN-NNN-NNNN.
- 4. Type a report description up to 30 characters and press Enter. Type Y at the prompt. The system generates the report.

# Viewing or printing a report

#### About this task

You must generate a report before you can view it.



Tip:

You can also select **View or print reports** from any of the report submenus.

To view or print a report:

#### **Procedure**

1. From the Supervisor Main Menu, select Reports > View or print reports.

The system displays the Report Files Status screen that lists all generated reports on the system.

- 2. Select from the following options:
  - View to view the report on your screen.
  - **Print** to print the report on the printer connected to your system.

# **PC Analysis**

Use PC Analysis to create, edit, and execute extract files. An extract configuration file is a template that defines the data PC Analysis retrieves from a calling list, history file, or statistics file. Execute an extract configuration file to create a file you can download to your PC.

## Logging in to PC Analysis

#### About this task

To use PC Analysis, log in as a PC Analysis user with a password, if you have this option on your system, or log in as a supervisor.

Logging in to PC Analysis:

#### **Procedure**

- 1. At the system login prompt, type your login name and press Enter.
- 2. Do one of the following:
  - a. Type the PC Analysis password (pcanal or cdwanal), and press Enter. The system displays the PC Analysis Main Menu.
  - b. Type the supervisor password, and press Enter. From the Supervisor Main Menu, select Reports > PC Analysis extracts or PC Analysis Tools.



The procedures that follow the table assume that you are starting from the Supervisor Main Menu.

### PC Analysis shortcut keys

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

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

### Creating an extract file

#### **Procedure**

- 1. From the Supervisor Main Menu, select Reports > PC Analysis extracts > Create an extract file. Type Y at the prompt.
- 2. Type a name for the extract file.
- 3. Press Enter. Type Y at the prompt.
- 4. Select the type of extraction you want to perform. Type Y at the prompt.

The system displays the Input and Output File Definition screen. An input file is the information type and an output file is the filename (.cfg) of the configuration file to hold the extracted data.

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

#### **Extract selection information**

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

The available fields differ with the type of information you select. Generally, you must browse through more than two screens to see all the possible file selections. Use **Control+N** to go to the next screen, and **Control+P** to go to the previous screen.

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

### Setting up an extract file

#### **Procedure**

- 1. Select the information fields by pressing the down arrow to move to the field you want to select and press Enter.
- 2. To set the extract order, press Esc, S and move to the Select column. Type a number for each selected field in the Select column and press Enter. The cursor returns to the Field column.
- 3. If you do not want to specify an order, type 1 in all **Select** fields. The system processes the fields in the order that the fields appear.
- 4. To select field values, press Esc, C and move to the Criteria Column. Type the required value in the Criteria Column and then press Enter.
- Set values using commas as separators or set a range of values using a hyphen as a separator.
- 6. Repeat these steps for each field you want to use as a selection criteria.
- 7. Press Esc, X to save the extract configuration file.

### Editing an extract file

#### **Procedure**

- 1. From the Supervisor Main Menu, select **Reports > PC Analysis extracts > Edit an** extract file.
- Type the number of the extract file to edit. Type Y at the prompt.
   The system displays the PC Analysis Extraction Configuration Edit screen.
- 3. Press Esc, X to save your changes and return to the menu. Type Y at the prompt.

## Copying an extract file

- 1. From the Supervisor Main Menu, select Reports > PC Analysis extracts > Copy an extract file.
- 2. Type the extract file number to copy. Type Y at the prompt.
- 3. Type a name for the new output file. Type Y at the prompt.
- 4. Press any key to return to the menu.

### Deleting extract and output files

#### **Procedure**

- 1. From the Supervisor Main Menu, select Reports > PC Analysis extracts > Delete an extract file.
- 2. Type the extract file number to delete. Type Y at the prompt.
- 3. Press any key to return to the menu.

## **Executing an extract configuration file**

#### **Procedure**

- 1. From the Supervisor Main Menu, select Reports > PC Analysis extracts > Execute a PC Analysis extract file.
- 2. Type the number of the extract file to execute. Type Y at the prompt.

The system displays the number of records selected and the number of records checked.

3. Press any key to return to the menu.

### Displaying extract completion codes

#### **Procedure**

- 1. From the Supervisor Main Menu, select Reports > PC Analysis extracts > Display Call Completion Codes. Type Y at the prompt.
- 2. Type the name of the Job whose completion codes you want to view and then press Enter. Type Y at the prompt.
- 3. Press any key to return to the menu.

### Displaying available calling lists

#### **Procedure**

1. From the Supervisor Main Menu, select Reports > PC Analysis extracts > Display available calling lists. Type Y at the prompt.

The system displays the current date and time along with a breakdown of space available on the calling area of the hard disk.

2. Press any key to return to the menu.

## Copying an extract print file

#### **Procedure**

- 1. From the Supervisor Main Menu, select Reports > PC Analysis Tools > Copy an extract print file.
- 2. Type the item number of the file to copy. Type Y at the prompt.

### Deleting an extract print file

#### **Procedure**

- 1. From the Supervisor Main Menu, select Reports > PC Analysis Tools > Delete an extract print file.
- 2. Type the item number of the file to copy. Type Y at the prompt.

### Viewing and printing an extract file

#### **Procedure**

- 1. From the Supervisor Main Menu, select Reports > PC Analysis Tools > View or print an extract print file.
- 2. Type the number of the output file to display.
- 3. On the Report Files Status screen, press F2 to print or F4 to view the contents of the extract print file.

## Viewing the manual and field calling information

#### About this task

You can view the <jobnumber>dial.stat file using the PC Analysis tool. This information is not added to the database and is only stored in the <jobnumber>dial.stat file. To view the manual and field calling information:

- 1. Log in to the **PC Analysis extracts** tool.
- 2. On the PC Analysis Main Menu screen, type 2 to select the Extract analysis toolsoption.
- 3. On the PC Analysis Extracts screen, type 4 to select the **Execute a PC Analysis extract** option.
- 4. Type item number corresponding to all dial option.

- 5. Type Y at the confirmation prompt.
  - An execution message is displayed. After execution status is displayed
- 6. Press any key to continue. This creates an extract file with the default configuration.
- 7. Go to the PC Analysis Main Menu screen, type 3 to select the **Analysis tools** option.
- 8. On the PC Analysis tools screen, type 13 to select the View or print an extract file option.
- 9. Enter item number corresponding to the all dial option.
- 10. On the Report files status screen, press CTRL+V and then enter the number corresponding to the all dial.prn to view the manual and field calling extract.

## Creating a customized manual and field calling extract

#### **Procedure**

- 1. On the PC Analysis Main Menu screen, type 2 to select the **Extract analysis tools** option.
- 2. Go to the **Create an extract file** option on the PC Analysis Extracts screen.
- 3. Provide the necessary information on subsequent prompts to reach the **PC Analysis Setup** Select **Extraction Type** screen
- 4. On the PC Analysis Setup screen, select Extraction Type as M.
- 5. Press Enter to continue and provide necessary information for completing the creation of calling extract.

## **Generating compliance reports**

#### **Procedure**

- 1. From the Supervisor Main Menu, select Reports > Compliance reports > Generate a compliance report.
- 2. Select the item number. Press Enter.
- 3. At the prompt, type Y. Press Enter.
- 4. At the prompt, provide the name of the report. Press Enter.
- 5. At the prompt, type Y. Press Enter to generate the report.

### Note:

For English language, you can provide a name up to 80 characters for the Nuisance compliance report. For all non-CJK languages, the report name length is equal to that of English, that is, 80 characters. For all CJK languages, the report name length will be half the length of English, that is, 40 characters.

The system displays the Press any Key to Continue message. When you press any key the system displays the Compliance Reporting menu.

6. Refer to the Viewing or printing a report on page 246 to view or print reports.

# **Chapter 19: Auditor menus**

Using the Auditor menus, you can monitor the following:

- · The activities of the Lead Administrator
- The system calls
- · The job activities of the user
- · The system files
- The failed login attempts

# Viewing failed login attempts

## Viewing All failed login attempts

#### **Procedure**

- 1. Log in to the Auditor Main Menu.
- 2. At the Enter Command Number prompt, type 2. Press Enter.
- 3. At the Enter Command Number prompt, type 2. Press Enter.
- 4. At the All failed login attempts Are you sure? prompt, type Y.

The system displays the Failed Login Attempts report.

# Viewing Today's failed login attempts

#### **Procedure**

- 1. Log in to the **Auditor Main Menu**.
- 2. At the Enter Command Number prompt, type 2. Press Enter.
- 3. At the Enter Command Number prompt, type 3. Press Enter.
- 4. At the Today's failed login attempts Are you sure? prompt, type  ${\tt Y}$ .

The system displays the Failed Login Attempts of the current date.

# Viewing failed login attempts within a date range

#### **Procedure**

- 1. Log in to the Auditor Main Menu.
- 2. At the Enter Command Number prompt, type 2. Press Enter.
- 3. At the Enter Command Number prompt, type 4. Press Enter.
- 4. At the Failed login attempts within a date range Are you sure? prompt, type Y.
- 5. Enter the date range.

The system displays all the failed login attempts within the specified date range.

# Viewing user's job activities

## Viewing job activities

#### **Procedure**

- 1. Log in to the Auditor Main Menu.
- 2. At the Enter Command Number prompt, type 3. Press Enter.
- 3. At the Enter Command Number prompt, type 2. Press Enter.
- 4. At the User's job activities Are you sure? prompt, type Y.
- 5. At the Enter user name prompt, type the user name.
- 6. At the Are above entries correct? prompt, type Y.

The system displays the displays the user's activities.

# Viewing user's job activities on one day

#### **Procedure**

- 1. Log in to the Auditor Main Menu.
- 2. At the Enter Command Number prompt, type 3. Press Enter.
- 3. At the Enter Command Number prompt, type 3. Press Enter.
- 4. At the User's job activities Are you sure? prompt, type Y.

- 5. At the Enter user name prompt, type the user name.
- Enter the date.
- 7. At the Are above entries correct? prompt, type Y.

The system displays the displays the user's activities.

# Viewing user's job activities within a date range

#### **Procedure**

- 1. Log in to the Auditor Main Menu.
- 2. At the Enter Command Number prompt, type 3. Press Enter.
- 3. At the Enter Command Number prompt, type 4. Press Enter.
- 4. At the User's job activities within a date range- Are you sure? prompt, type Y.
- 5. At the Enter user name prompt, type the user name.
- 6. Enter the start date and end date.
- 7. At the Are above entries correct? prompt, type Y.

The system displays the displays the user's activities within the date range.

## Monitoring system calls and syslog

#### **Procedure**

- 1. Log in to the **Auditor Main Menu**.
- 2. At the Enter Command Number prompt, type 4. Press Enter.
- 3. At the Enter Command Number prompt, type 2. Press Enter.
- 4. At the Monitor system calls and syslog Are you sure? prompt, type  ${\tt Y}$ .

The system displays the System Calls and syslog Report.

## **Monitoring sysfiles**

#### **Procedure**

- 1. Log in to the **Auditor Main Menu**.
- 2. At the Enter Command Number prompt, type 5. Press Enter.
- 3. At the Enter Command Number prompt, type 2. Press Enter.
- 4. At the Monitor sysfiles Are you sure? prompt, type Y.

The system displays the System Files Report.

# **Viewing Lead Administrator's activities**

## Viewing Lead Administrator activities

#### About this task

To view Lead Administrator activities:

#### **Procedure**

- 1. Log in to the **Auditor Main Menu**.
- 2. At the Enter Command Number prompt, type 6. Press Enter.
- 3. At the Enter Command Number prompt, type 2. Press Enter.
- 4. At the Lead Administrator activities Are you sure? prompt, type Y.

The system displays the Lead Administrator's Activities Today report.

# Viewing Lead Administrator activities on one day

#### About this task

To view Lead Administrator activities on one day:

#### **Procedure**

- 1. Log in to the **Auditor Main Menu**.
- 2. At the Enter Command Number prompt, type 6. Press Enter.
- 3. At the Enter Command Number prompt, type 3. Press Enter.
- 4. At the Lead Administrator activities on one day Are you sure? prompt, type Y.
- 5. Enter the date.
- 6. At the Are above entries correct? prompt, Type Y.

The system displays the Lead Administrator's Activities report.

# Viewing Lead Administrator activities within a date range

#### About this task

To view Lead Administrator activities within a date range:

#### **Procedure**

- 1. Log in to the **Auditor Main Menu**.
- 2. At the Enter Command Number prompt, type 6. Press Enter.
- 3. At the Enter Command Number prompt, type 4.
- **4.** At the Lead Administrator activities within a date range Are you sure? prompt, type Y.
- 5. At the Enter user name prompt, type the user name.
- 6. Enter the start date and end date.
- 7. At the Are above entries correct? prompt, type Y.

The system displays the displays the user's activities within the date range.

# **Chapter 20: Voice Messages**

# Listening to messages on the system

#### About this task

You can play voice messages present on the system to a phone. The playing of voice messages utility uses the first outbound line and will terminate any call that exists on that line. Ensure that the first outbound line is available before using this menu item.

#### **Procedure**

1. From the Administrator Main Menu, click Voice messages > Listen to messages on the system.



#### Note:

If the messages are not saved in the correct format, the messages will not play back correctly on the Dialer. Not all recording software has the ability to save the recordings in the correct format. Verify that your recording software can save files in the following format:

FILE TYPE: Next\Sun (.au)

SAMPLE RATE: 8000

CHANNELS: Mono

RESOLUTION: 8-bit

- 2. To select a phone number, type 2, and press Enter.
  - a. Enter the phone number to use for listening to the messages. Ensure the number is properly formatted for dialling from the system. Do not enter dashes or other punctuation marks when entering the phone number and press Enter.
  - b. At the Is this an ISDN phone? prompt, type Y if yes, type N if no, and press Enter.
- 3. Type 3 and press Enter to Select message (s) to play
  - a. Enter the number of the message that you want to play and press Enter.
  - b. Provide an approximate duration of the message between 1 second to 60 seconds and press Enter.
  - c. Type 1 if you want to add another message or type 0 if you do not want to add another message and press Enter.

4. Type 4 and press Enter to Play the selected message(s). When you select the option to play the selected messages, the system will display the prompt Are you ready to dial the phone number and play the message(s) now?. Type 1 to play or type 0 to exit.

# Option to show all audio files on the system

The option to show all audio files on the system displays all the audio files, for a particular tenant, present in the /opt/avaya/pds/switch/voice directory of the dialer.

# Option to show all configured messages

The option to show all configured messages displays all the configured messages, for a particular tenant, present in the /opt/avaya/pds/config/voicemsg.cfg directory of the dialer.

# **Appendix A: Agent Blending**

Agent Blending is a tool that integrates outbound calling activities on your Proactive Contact system with inbound calling activities on your Automatic Call Distribution (ACD).

Using the Agent Blending tool, you can manage the ACD domains and domain groups. A domain is an ACD call queue. Every domain is a member of a domain group.

# Types of Agent Blending

Agent Blending integrates outbound calling activities on your Proactive Contact with inbound calling activities on your ACD. Proactive Contact provides two types of Agent Blending: Predictive Agent Blending and Proactive Agent Blending.

Both types of Agent Blending systems use a pool of ACD blend agents for outbound calling. The ACD agents log in to the dialer and the ACD. Agent Blending monitors the activity on the ACD to determine when to move agents between inbound and outbound calling activities.

The dialer acquires the pooled agents for outbound calling when the inbound calling activity decreases. The dialer releases the pooled agents to inbound calling when the inbound calling activity increases. The movement between inbound and outbound calling keeps the ACD blend agents busy and the ACD service level within your prescribed limits.

Use Predictive Agent Blending if your priority is servicing your inbound customers and your inbound volume is high.

Use Predictive Agent Blending if your call center caters to the following:

- Moderate to heavy inbound traffic
- More than 25 agents in an inbound pool

# **Predictive Agent Blending**

Use Predictive Agent Blending if your priority is servicing your inbound customers and your inbound volume is fairly high.

Predictive Agent Blending focuses on the inbound mission. Predictive Agent Blending uses events from the ACD to forecast call volume and determine when to move ACD agents between inbound and outbound calling. The dialer predicts when too many agents receive inbound calls. The dialer then acquires agents from the ACD to handle outbound calls until the inbound volume increases.

Proactive Contact acquires agents for outbound calls when either the settings for the **Average Speed to Answer** or **Service Level** domain groups are above the desired value.

To configure Predictive Agent Blending, set up an Average Speed to Answer or a Service Level domain group that contains more than one acquire domains and at least one inbound domain.

**Average Speed to Answer (ASA):** The ASA domain group type uses the target ASA field (MAAS) to calculate when to acquire and release agents.

- The dialer acquires agents for outbound calls when the average speed to answer for all inbound domains in the group is less than or equal to the targeted value.
- The dialer releases agents when the value rises above the target.

Service Level (SL): This domain group type uses the Service Criterion (SC, seconds), Desired Service Level (DSL, %), and Abatement Service Level (ASL, %) fields for calculating when to acquire and release agents.

- The dialer acquires agents for outbound calls when the percentage of inbound calls answered within the Service Criterion is greater than or equal to the Desired Service Level percentage.
- The dialer no longer acquires agents when the actual service level reaches the Abatement Service Level value.
- The dialer releases agents to inbound calls when the service level falls below the desired value.

The actual service level is calculated using all inbound domains in the group.

# **Proactive Agent Blending**

Use Proactive Agent Blending if your focus is on outbound calling, but you also service a low volume of inbound customers. In a real-world scenario, Proactive Agent Blending can handle volumes of inbound calls by quickly providing an agent to handle each inbound customer call. The tested and supported minimum limit for Proactive Agent Blending is of 8 active agents per domain group. Note that the blend might not work as expected if there are less than 8 active agents.

Proactive Agent Blending focuses on outbound calls and releases agents to inbound calls only when an inbound call enters a monitored queue on the ACD.

When an ACD agent logs in, the dialer immediately acquires the agent for outbound calling. When an inbound call arrives in the ACD queue, the dialer releases the agent to handle the call. If inbound calls continue to arrive, the dialer continues to release agents. When the queue is empty, the dialer acquires agents for outbound calls.

## Note:

For each OB\_ONLY domain group, you configure the number of queued calls before agents release to inbound calls.

# Supported ACDs and switch terminology

Each ACD switch has unique settings and terminology. For each supported ACD, the dialer uses domains and domain groups to control Agent Blending.

## Note:

The *Planning for Avaya Proactive Contact* contains a full description of the requirements for each supported switch.

## **Aspect CallCenter**

Name	Description
Agent group	A set of agents handling similar types of calls. Agents log in to an agent group when they log on to the Aspect CallCenter. Agent groups can be a part of an agent super group.
	Agent groups correspond to Agent Blending domains. Agent Blending monitors events for domains configured on the system as inbound or acquire.
Agent Super Group	A collection of more than two agent groups. Aspect CallCenter simultaneously selects all agent groups in the agent super group. Aspect CallCenter delivers a call to the agent in the super group that has been available for the longest time. Agents do not log on to agent super groups.
	If you set up the super group as a domain on Proactive Contact, Agent Blending monitors the activity in the super group.
Call Control Tables (CCTs)	Part of the Aspect CallCenter database. CCTs control call routing, queuing, and messaging for agent groups and agent super groups. You can view, set up, edit, or delete CCTs from Aspect CallCenter management workstation. Each agent group and agent super group can have multiple CCTs.

Name	Description
Data System Interlink Table:	Part of the Aspect CallCenter database. The table controls communication between the Aspect CallCenter and the dialer. You can view the Data System Interlink Table and set application parameters using the Aspect CallCenter management workstation. However, only an Aspect representative can set system-level parameters.

# **Avaya Communication Manager**

Name	Description
Expert Agent Selection (EAS)	An optional Avaya Communication Manager feature. Using Expert Agent Selection, you can assign skill types to a call type or Vector Directory Number (VDN).
Hunt group	An agent queue on an ACD configured without EAS. The ACD hunts for the next available agent in each hunt group using the method defined on the ACD.
Skill	A method for call center managers to match the needs of a caller to the talents of the agents. A skill designates a work category such as sales or collections. Skills enable the ACD to route types of calls to queues. Administrators can assign up to four skills or sets of skills to each agent login ID.
Skill hunt group	Replaces ACD splits when the ACD is configured with EAS. The ACD can be queued to up to three different skill hunt groups at one time.
Split	Is a hunt group that is designed for a high volume of similar calls. Members of a split are called agents. At any one time, an agent can be logged in to a maximum of three splits.
Vector	Settings that determine how the switch handles incoming calls based on the number dialed. When Avaya Aura®(R) Communication Manager is configured with EAS, the vector directs the incoming call to a split, a hunt group, or a skill hunt group.
Vector Directory Number	The extension number that accesses a vector. Agent Blending uses the Vector Directory Number for the domain address and domain extension.

# **Rockwell Spectrum**

Name	Description
Agent Group	A collection of agents, based on equivalent skills or a specific call center need. In Spectrum, agents can have a primary and a secondary group assignment. However, the dialer requires that agents belong to only one group.
	In addition to the agent's skill level, you must assign agents to groups as inbound or acquire. Inbound agents take only inbound calls. Acquire agents either take both inbound and outbound calls or outbound-only calls.
Application	The system treats applications as domains. In Spectrum, incoming calls are routed to applications. An application is a type or category of call that you want handled in a similar way. Applications can include:
	Company functions, for example, Customer Service, Accounts Payable.
	Special skill groups, for example, bilingual or technical troubleshooters.
	Types of products, for example, Savings, Checking Accounts, Mortgages. For each application, the Spectrum tracks performance data such as average speed to answer, number of calls offered, and average handling time.
	You associate each application with an Application Telescript. The telescript contains a set of instructions for handling calls. For Agent Blending, the transcript places agent groups and calls in queues. The dialer can track the call while the call is on the Spectrum.
Application Directory Number (DN)	You assign an Application Directory Number in Applications Parameters when you create the Spectrum application. When dialed, the number calls the application. The Application Directory Number is used as the domain extension in Agent Blending.
Class of Service	A collection of attributes associated with agents and devices within the Spectrum. One of the class of service attributes is the Host Transaction feature. Host Transaction controls the generation of call

Name	Description
	progress messages on the Transaction Link for the associated agent or device by the Spectrum. Agent Blending requires that you enable the Host Transaction feature.
Host	The host for Spectrum is Proactive Contact
Provisioning	A set of actions that add, alter, or delete system parameters. In the Proactive Contact documentation, configuring has the same meaning as provisioning in Spectrum documentation.
Telescript	A user-programmable sequence of steps associated with various call routing points within Spectrum. During inbound call routing, error processing, and call queuing, Spectrum uses Routing, Intercept, and Application Telescripts. Feature Telescripts operate as subroutines for the other telescript types.
	To ensure that Agent Blending works with Spectrum, you must configure an Application Telescript to route to the desired agent groups.
Transaction Link	The Spectrum name for the computer telephony interface (CTI) link. Transaction Link is a communications channel between the Spectrum and the dialer that operates over an X.25 or TCP/IP transport facility.
Trunk Group	A collection of trunk ports that have common processing characteristics, such as ANI and DNIS. One of the characteristics is the Host Transaction Link feature. The Host Transaction Link feature controls whether Spectrum generates call progress messages for calls associated with the trunk group members.
	You must enable the Host Transaction Link feature to allow the dialer to monitor calls on Spectrum.
Application Number (also called the Application ID)	You assign an Application Number in Applications Parameters when you create the Spectrum application. The Application Number is used as the domain address in Agent Blending.

# **Northern Telecom Meridian**

Name	Description
ACD-DN (directory number)	The ACD address for a call queue. The ACD-DN is the Agent Blending domain address.
ACD Agent Position ID	The number that identifies an agent's phone extension. Agent Blending agents log in to Proactive Contact as ACD agents using their ACD Agent Position ID as the ACD extension. During calling operations, managers can assign agents to Agent Blending domains by assigning agent positions to call queues, or agents can log in to call queues that are Agent Blending domains.
Multiple queue assignment	A Meridian option that agents can use to log in to multiple call queues.
	The domains and domain groups you define and how your agents log into call queues depends on whether your Meridian uses multiple queue assignment.

# **PINNACLE**

Name	Description
Call queue	A destination for call routing, defined by an ACD address. A call queue can be an Agent Blending domain.
Queue ID	The ACD address associated with a call queue. Queue IDs are Agent Blending domain addresses.
Queue pilot number	The ACD extension associated with an ACD address. Queue pilot numbers are Agent Blending domain extensions.
Serving Team	A group of agent identifiers for agents who work on the same task. PINNACLE can route calls to the serving team for a call queue. Agent Blending inbound agents belong to an inbound serving team. Agent Blending outbound and blend agents belong to an acquire serving team.

# Siemens ROLM 9751, Release 900

Name	Description
ACD group or agent group	A group of agent extensions that receives calls from the same pilot number. Each ACD group has phones and members.
Call-progress event	Any change in a call's state in ROLM 9005. CallBridge passes call-progress event messages from ROLM 9005 to CallPath. Call-progress event messages provide the information Agent Blending needs to acquire and release agents.
Class of service	A code indicating the features, extensions, and trunk access available to an ACD address. Agent Blending uses agent groups with the CallPath class of service.
Directory Number (DN)	An ACD address or extension associated with an ACD-defined group or with a device such as a phone or a Voice Response Unit (VRU) port. An ACD-defined group can be an agent group or a hunt group.
Dummy hunt group	A hunt group with no members defined on ROLM 9005. A dummy hunt group unconditionally forwards calls to an agent group. Agent Blending requires dummy hunt groups to collect call-progress event messages. Agent Blending uses the dummy hunt group's pilot number as the auxiliary domain's extension number.
Pilot Number	A directory number associated with a group of extension numbers that comprise one ACD group. Agent Blending uses pilot numbers as the domain address. Agent Blending uses the dummy hunt group's pilot number as the domain extension.

# **Domains**

The dialer requires domains and domain groups for each type of switch. Domains are the ACD call queues that are defined on the ACD and on the dialer.

Each domain is a member of a domain group. Agent Blending collects calling events for each domain and totals them by domain group for statistic calculation. The dialer uses the statistics to determine when to move ACD agents between inbound and outbound calling. The dialer does not do the following activities:

· Total statistics across domain groups

Monitor activity in call queues that are not part of a domain group

## Types of domains

The types of domains that you configure depend upon the ACD. The two main domain types are inbound and acquire. All Agent Blending systems must have an acquire domain.

Agent Blending uses inbound domains to determine agent availability by monitoring and analyzing the traffic. The dialer uses acquire domains to acquire agents for outbound calling.

In addition to inbound and acquire domains, the dialer recognizes two additional domains. Some ACDs use auxiliary domains to monitor all calling activity in a domain group. Meridian switches without multiple queues assignment (MQA) use transient domains to temporarily hold agents who are moving between inbound and outbound.

## Agent assignments to domains

After your system is installed, assign your agents to domains based on a skill set. For example, you can divide agents into three sets:

- Agents who handle credit card customers
- Agents who handle consumer loan customers
- · Agents with skills to handle both credit card customers and consumer loan customers

# **Domain groups**

Define each domain group with one of the following four configurations:

- Outbound without inbound domain, which uses the OB\_ONLY control method.
- Predictive-Average Speed to Answer, which uses the ASA control method.
- Predictive-Service Level, which uses the SL control method.
- Outbound with inbound domain, which uses the Proactive Blend OB\_ONLY control method.

## **Outbound Agent Blend**

Outbound Agent Blending acquires ACD agents to handle outbound calls as soon as the agents log on to the dialer and the ACD.

Since the OB\_ONLY domain group does not have an inbound domain, agents who are assigned to an Outbound domain are not released to handle inbound calls.

# Domain groups control method

During site preparation, identify which domains you want grouped. A domain group contains multiple domains. A domain can belong to only one domain group. There are three domain group control methods: **Outbound Only**, **Average Speed to Answer**, and **Service Level**. The Agent Blending Administrator window changes dynamically depending on the control method that you select.

# **Outbound Only**

The dialer acquires outbound-only agents to handle outbound calls as soon as the agents log in to Proactive Contact and the ACD. Using Outbound Agent Blending, you can take advantage of the least-cost routing available on your ACD and use the detailed reports available on the ACD.

To configure an Outbound Agent Blending Job, set up an outbound domain that contains at least one acquire domain. Select Outbound as the domain group type. Assign at least one acquire domain to the group. Do not set up an inbound domain.

If you select Outbound Only, you must enter a Minimum Queued for Release value. Type a value between 0 and 999. The default value is 0.

## **Average Speed to Answer**

f you select **Average Speed to Answer**, your dialog box changes dynamically, and you must set values for the required fields.

# Field description for Average Speed to Answer

The following table describes the Average Speed to Answer fields:

Name	Description
Time Interval (required)	The interval that the dialer uses to calculate the Average Speed to Answer. The interval influences how responsive the dialer is to fluctuations in answer delays. The interval begins each time that you start the dialer or restart Agent Blending.
	Select a value greater than 0.25, in increments of 0.25. The interval is in hours, so 0.25 is 1/4 of an hour or 15 minutes. The default is 0.50 or 30 minutes. The setting represents an average

Name	Description
	calculated over the Average Speed to Answer interval.
Average Speed to Answer (required)	The average time within which agents must answer calls.
	Enter a value between 1 and 999. The default value is 60.
Agent Utilization Threshold (required)	The percentage of agents available to take calls. Agent Utilization Threshold determines how quickly the system moves agents between inbound and outbound calls. The goal is to prevent agents from being acquired or released too frequently.
	Agents are available if they are not taking calls or updating records.
	Agent Blending tracks calling statistics and uses this information to predict future availability.
	To calculate the threshold, the dialer divides the projected inbound call volume by the projected number of available agents.
	Enter a value between 1 and 999. The default value is 200.
Minimum Agents on Outbound (required)	The minimum number of ACD blend agents, in this domain, dedicated to handling outbound calls.  Minimum Agents on Outbound setting overrides Desired Level. For example, no matter how low the Average Speed to Answer is, a certain number of agents will always be unavailable to
	handle inbound calls.
	Use the Minimum Agents on Outbound setting when meeting outbound goals is more important than servicing inbound calls.
	Enter a value between 0 and 999. The default value is 0.
Initial Traffic Rate (optional)	The estimated number of calls each second. The dialer uses this rate for the first 30 calls. Initial Traffic Rate ensures that there are enough agents to handle the first 30 calls.
	Enter a value between 0 and 999.
Talk Time (optional)	The estimated minimum seconds agents spend connected on each inbound call. The system adds Talk time and After Call Work Time to determine agent availability. Agent availability is sometimes called service capacity.

Name	Description
	Enter a value between 1 and 999.
After Call Work Time (optional)	The estimated minimum seconds agents spend, after a call, updating records and processing information.
	Enter a value between 1 and 999.

## **Service Level**

If you select **Service Level**, your dialog box changes dynamically, and you must set values for the required fields.

# Field description for Service Level

The following table describes the Service Level fields:

Name	Description
Desired Service Level (required)	The percentage of calls agents must answer within the Service Criteria.
	Enter a value between 0 and 100. The value must be less than Abatement Service Level. The range is 70.0 to 99.0. The default value is 80.0.
Abatement Service Level (required)	The maximum percentage of inbound calls agents must answer within the Service Level interval.  Select a setting from 40 percent to 100 percent.  When the service level goes above the abatement service level, the system acquires ACD blend agents for outbound calling. When the service level drops below the abatement service level, the system releases ACD blend agents for inbound calling.
	Enter a value from 0 to 100. The value must be greater than Desired Service Level. The default value is 95.
Service Criterion (required)	The maximum time within which an agent must answer a call. The system measures the time in seconds for which an inbound call is in the ACD queue.
	Enter a value from 1 to 999. The default value is 60.
Time Interval (required)	See Time Interval (required) on page 270.

Name	Description
Agent Utilization Threshold (required)	See Agent Utilization Threshold (required) on page 270.
Minimum Agents on Outbound (required)	See Minimum Agents on Outbound (required) on page 270.
Initial Traffic Rate (optional)	See Initial Traffic Rate (optional) on page 270.
Talk Time (optional)	See Talk Time (optional) on page 270.
After Call Work Time (optional)	See After Call Work Time (optional) on page 270.

# **Starting Agent Blending**

#### About this task

To start Predictive Agent Blending in Supervisor Main Menu in default tenant and Lead administrator main menu:

#### **Procedure**

From the Supervisor Main Menu, select Monitor Predictive Agent Blend > Start Predictive Blend.

The system starts accumulating new statistics on call performance.

# **Stopping Agent Blending**

#### **Procedure**

From the Supervisor Main Menu, select Monitor Predictive Agent Blend > Stop Predictive Blend.



#### Note:

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

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

# Resetting Agent Blending

#### **Procedure**

From the Supervisor Main Menu, select Monitor Predictive Agent Blend > Reset Predictive Blend

The system stops Predictive Blend and immediately restarts Predictive Blend.

# Resynchronizing agents (Meridian systems only)

#### About this task

Use this command after you reassign agents to different domains.

To resynchronize agents:

#### **Procedure**

From the Supervisor Main Menu, select Monitor Predictive Agent Blend > Resynch Agents.

The system updates the ACD agent queue assignments.

# Exiting a menu

#### **Procedure**

- 1. To exit a drop-down menu, press Control+X.
- 2. To exit the main menu, press Q and press Enter.

# Domain groups and statistics display

Use commands on the <code>Domain Group</code> menu to view domain groups and statistics. You cannot ensure that the settings are absolutes because the calling environment has innumerable variables, including agent availability and talk time.

# Displaying all SL groups

#### **Procedure**

From the Supervisor Main Menu, select Predict > Domain > Display SL Group.

The system displays the status of the following fields:

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

## Displaying all ASA groups

#### **Procedure**

From the Supervisor Main Menu, select Predict > Domain > Display ASA Group.

The system displays the status of the following fields:

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

## Displaying all outbound only groups

#### **Procedure**

From the Supervisor Main Menu, select Predict > Domain > Display OB\_ONLY Group.

## Displaying group optional fields

#### **Procedure**

From the Supervisor Main Menu, select Predict > Domain > Display Group Optional Fields.

The system displays the status of the following fields:

- Talk Time
- Talk Time
- After Call Work Time

# **Displaying ACD statistics**

#### **Procedure**

From the Supervisor Main Menu, select Predict > Domain > Display Statistics.

The system displays the following statistics:

- **Performance**: The average delay in answer (Service Level).
- Releases: The number of completed releases that the system requested. Releases does not
  include the releases caused by the agent ending the acquired call or the agent logging off the
  system. If the domain is outbound only, the releases represent the number of agents that
  logged off or disconnected an acquired call.
- Acquisitions

# Modifying domain groups and control methods

# **Modifying Service Level domain groups**

#### **Procedure**

- 1. From the Supervisor Main Menu, select Predict > Domain > Modify SL Group.
  - The system displays all SL domain groups.
- 2. Move to the field that you want to modify and make your changes, or move to the last line and add a domain group.
- 3. Press Control+X to exit.

## **Modifying ASA domain groups**

#### **Procedure**

- 1. From the Supervisor Main Menu, select Predict > Domain > Modify ASA Group.
  - The system displays all ASA domain groups.
- 2. Move to the field that you want to modify and make your changes, or move to the last line and add a domain group.
- 3. Press Control+X to exit.

# Modifying outbound only groups

#### **Procedure**

 From the Supervisor Main Menu, select Predict > Domain > Modify OB\_ONLY Group.

The system displays all outbound only (OB\_ONLY) domain groups listed.

- 2. Move to the last line and add the new domain.
- 3. Press Control+X to exit.

## Modifying domain group optional fields

#### **Procedure**

1. From the Supervisor Main Menu, select Predict > Domain > Modify Domain Group Optional Fields.

The system displays all domain groups.

- 2. Move to the field that you want to modify and make your changes.
- 3. Press Control+X to exit.
- 4. Press Enter to accept Yes or press Tab to move to Cancel and press Enter.

## Modifying control methods

#### About this task

Agent Blending manages agents within each domain group based on a control method you select.

The three control methods are:

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

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

An outbound-only domain group uses the OB ONLY control method.

To modify control methods:

#### **Procedure**

From the Supervisor Main Menu, select Predict > Domain > Modify Control Method.
 The system displays all the domains.

- 2. Use the down arrow to move to the domain you want to change and press Enter.
  - The system displays the Select a Control Method screen. To leave the screen without making a change, use Tab to move to Cancel and press Enter.
- 3. Use the down arrow to move to the method you want to use and press Enter.
  - The system displays the Modify screen.
- 4. Enter settings as appropriate for your ACD.
- 5. Press Control+X to exit the screen. The system displays a confirmation prompt.
- 6. Press Enter to accept Yes or press Tab to move to Cancel and press Enter.

#### **Deleting domain groups**

#### **Procedure**

- 1. From the Supervisor Main Menu, Select Predict > Domain > Delete Group.
- 2. Select the group to delete from the list of domain group names.
- 3. Press Enterto accept Yes or press Tabto move to Cancel and press Enter.
- 4. Reset Predictive Agent Blending for your changes to take affect. For more information, see Resetting Agent Blending on page 274.

## **Deleting a domain**

#### **Procedure**

- 1. From the Supervisor Main Menu, select Predict > Domain > Delete Domain.
- 2. Use the down arrow to select the domain to delete and press Enter.
- 3. Reset Predictive Agent Blending for your changes to take affect. For more information, see Resetting Agent Blending on page 274.

## **Adding extensions**

#### **Procedure**

- 1. From the Supervisor Main Menu, select Predict > Extension > Add.
- 2. Type an SCAI Link ID and press Tab to move to the next column.
- 3. Type an Extension number and press Tab.
- 4. Press Control+X to return to the menu.

## **Listing extensions**

#### **Procedure**

- 1. From the Supervisor Main Menu, select Predict > Extension > List.
- 2. Press Control+X to return to the menu.

# **Deleting extensions**

### **Procedure**

- 1. From the Supervisor Main Menu, select Predict > Extension > Delete.
- 2. Press Control+X to return to the menu.

# Appendix B: Interactive Voice Response Administration

## IVR administration

You can set up and configure an Interactive Voice Response (IVR) system connection. You can also connect to, disconnect from, or reset a connection to an IVR system, or request a script download from an IVR system.

When you have an IVR system connection, you must set additional parameters on the Job Run Verification screens. For more information, see IVR integration parameters on page 154.

# Setting up IVR

## **IVR Administration shortcut keys**

Use the following shortcut keys on the IVR Administration screen:

Shortcut Keys	Description
Control+L	Add a new IVR connection
Control+C	Change a field
Control+D	Delete displayed connection
Control+F	Find an IVR connection
Control+X	Exit screen

# Setting up IVR connections

#### About this task

By setting up the IVR connections, you can enter the ID, IP address, and description for a particular IVR. Enter the ID and IP address in the /etc/hosts file and the ID and enter the description in the \$VOICEDIR/ivr/ivr id.lst file.

To set up IVR connections:

#### **Procedure**

1. From the Administrator Main Menu, select IVR administration > Set up IVR connections.

The system displays the Set Up IVR Connections screen.

- 2. Press Control+L to add a new IVR connection.
- 3. Type the IVR ID, and then press Enter.
- 4. Type the IVR IP address, then press Enter.
- 5. Type the IVR description, then press Enter.
- 6. Press Control+X to exit the screen and return to the IVR Administration menu.

## Connecting to IVR

#### About this task

You can open a communication channel to an IVR system and start a pool Job for the IVR agents from that IVR system. The system also obtains a list of scripts from the IVR and places them in \$VOICEDIR/ivr/<ivr id>.scr, where <ivr\_id> is the IVR system ID, for use with the Job.

To connect to an IVR system:

#### **Procedure**

- 1. From the Administrator Main Menu, select IVR administration > Connect to IVR.
- 2. Enter the IVR system ID, then press Enter.

The system returns to the previous menu.

## **Disconnecting from IVR**

#### About this task

You can shut down the pool Job for a specified IVR system and close the communication channel to IVR system.

To disconnect from an IVR system:

#### **Procedure**

- 1. From the Administrator Main Menu, select IVR administration > Disconnect from IVR.
- 2. Enter the IVR system ID, then press Enter.

The system returns to the previous menu.

## Resetting connection to IVR

#### About this task

Resetting the IVR connection closes the communication channel between the system and the specified IVR, and then reopens the channel. Then, resetting the IVR connection re-establishes the connection and restarts the pool Job.

To reset a connection to an IVR system:

#### **Procedure**

- 1. From the Administrator Main Menu, select IVR administration > Reset connection to IVR.
- 2. Enter the IVR system ID, then press Enter.

The system returns to the previous menu.

# **Updating list of IVR scripts**

#### About this task

You can get an updated list of scripts from a specified IVR system.

To update the list of IVR scripts:

#### **Procedure**

- 1. From the Administrator Main Menu, select IVR administration > Update list of IVR scripts.
- 2. Enter the IVR system ID, then press Enter.

The system returns to the previous menu.

# Configuring the integration software on the Dialer

#### About this task

To configure the integration files on the Dialer, make the following changes to the system configuration files.

#### **Procedure**

- 1. services Verify that the following entries exist in /etc/services:
  - agent 22700/tcp
  - ivr conn 22800/tcp
- 2. master.cfg Verify or set these parameters for master.cfg in opt/avaya/pds/etc:

#### **PORTS**

Increase the PORTS parameter by one to allow for a dummy

Inbound line for the IVR pool Jobs.

LINEASSIGN

Append this string to the end of the LINEASSIGN parameter:

;IVR,I=X

where X is the new value of the PORTS parameter.

AUTORELEASE

Set AUTORELEASE to YES.

AUTORELAGENT

Set AUTORELAGENT to NO.

AGENTCONNECTION

Set AGENTCONNECTION to DIRECT.

INBNDSYS

Set this parameter to YES because the Inbound feature has been installed. If not, ensure that the Dialer Administrator installs the Inbound feature.



#### Note:

Inbound configuration files are available on the dialer. You must create an empty list before proceeding.

IVR INTEGRATION

This parameter must be set to YES because the CONVERSANT Integration feature has been installed. If not, contact the Dialer System Administrator.

3. dgswitch.cfg - At the end of the Inbound Ports section of /opt/avaya/config/dgswitch.cfg, add the following line:

N:X:1216:0::#DUMMY PORT for IVR POOL JOBS

where X is the new value of the PORTS parameter.



#### Note:

This port is assigned for use by the IVR pool Jobs even though there is no physical equipment for this port. This assigning of ports ensures that IVR agents take no calls while on the IVR pool Job.

4. blend.edt - Verify or set this parameter in /opt/avaya/pds/config/blend.edt:

IVR POOL: Job is a pool for IVR agents: NO: NO: YES: YES::::3:

Setting IVR\_POOL to YES indicates that the Job is a pool Job for IVR agents to join when the agents first log on to the Dialer.

- 5. inbound.edt Verify or set four new parameters in /opt/avaya/pds/config/inbound.edt:
  - IVR\_POOL:Job is a pool for IVR agents:NO:NO:YES:YES::::3:

Setting IVR\_POOL to YES indicates that the Job is a pool Job for IVR agents to join when they first log on to the Dialer.

IVR ID:IVR Identifier::YES:NO:NO::::10:

This parameter specifies which IVR is to be used by the Job.

• IVR INITSCRIPT:Initial script to run on the IVR::NO:NO:NO::::11:

The IVR\_INITSCRIPT parameter specifies which script to run on the IVR when an agent joins a Job other than the pool Job. You must set a value to IVR\_INITSCRIPT only if you must run the Agent API command SetNotifyKeyField.

• IVR SCRIPT:Script to run on the IVR::YES:NO:NO::::11:

The IVR\_SCRIPT parameter specifies which script to run on the IVR when a call is passed to an agent.

#### Note:

The system administrator sets IVR\_ID, IVR\_SCRIPT, IVR\_INITSCRIPT when the administrator transfers IVR agents from the pool Job to an inbound or outbound Job.

- 6. outbound.edt Verify or set three new parameters in /opt/avaya/pds/config/outbound.edt:
  - IVR ID:IVR Identifier::YES:NO:NO::::10:

The IVR\_ID parameter specifies which IVR is to be used by the Job.

• IVR INITSCRIPT:Initial script to run on the IVR::NO:NO:NO::::11:

The IVR\_INITSCRIPT parameter specifies which script to run on the IVR when the agent joins a Job other than the pool Job. IVR\_INITSCRIPT needs to have a value set only if it is necessary to run the Agent API command SetNotifyKeyField.

• IVR SCRIPT:Script to run on the IVR::YES:NO:NO::::11:

The IVR\_SCRIPT parameter specifies which script to run on the IVR when a call is passed to the agent.

In case of Proactive Contact with CTI, provide the VDN number when you start Job using config\_ed.

For example: config\_ed outbound outbnd.

# **Appendix C: Pattern matching rules**

Proactive Contact supports pattern matching syntax including wildcard characters. In Editor, you use basic pattern matching syntaxes when creating and editing phone strategies and record selections. You can also use more complex pattern matching syntaxes.

Proactive Contact also supports the following pattern matching syntaxes:

- Integer
- · Floating point
- Date
- Time
- String
- Shell-style
- · Extended regular expression-style

# **Expected pattern syntax for field types**

The following table shows which pattern syntax is the default for each field type:.

Field type symbol	Field type description	Default pattern syntax
\$	Currency Amount	Floating point numeric comparison syntax
N	Number	numeric comparison syntax
D	Date	Date conversion + Time conversion
Т	Time	Time conversion + numeric comparison syntax
С	Character	String comparison syntax, then Shell-style pattern syntax

If the pattern fails to compile with the default syntax, the system tries other syntax types in turn, until a syntax succeeds or fails. If all compile attempts fail, the system reports only the error message for the first failure.

# **Explicit pattern syntaxes**

You can explicitly designate a pattern syntax by beginning your pattern with the field type symbol of the comparison followed by an '@' character.

The following table lists the explicit syntax for data types:

@ Type	Data description	Syntax
\$@	Currency amount	Floating point numeric comparison syntax
F@	Floating point	Floating point numeric comparison syntax
N@	Integer	Numeric comparison syntax
D@	Date	Date conversion + numeric comparison syntax
T@	Time	Time comparison syntax + numeric comparison syntax
C@	Character	String comparison syntax, then Shell-style pattern syntax
S@	String	String comparison syntax
P@	Any	Shell-style pattern syntax
E@	Any	Extended regular expression syntax

For example, if you are working with a number field but want to use shell-style pattern matching syntax instead of numeric comparison syntax, you can begin the pattern with P@.

This specification is known as explicit pattern syntax specification. For example P@12\* will match with any numeric value beginning with 12.

# **Supported syntaxes**

# **List separators**

Proactive Contact supports the following syntaxes:

!	List separator ('or' operator)
,	List separator ('or' operator)
&	List separator ('and' operator)

To use any of these symbols explicitly in a pattern, and not as list separators, you must precede the symbol with a backslash. For example: \!.

# Numeric comparisons of type N, \$, F

A numeric comparison pattern must contain at least one numeric value and one legal numeric comparison operator. A numeric comparison pattern can contain one or more list separators such as, ! &..

==	Match if equal to
<>	Match if not equal to
>	Match if greater than
<	Match if less than
>=	Match if greater than or equal to
<=	Match if less than or equal to
-	Match if within inclusive range

Floating point numeric values can be given in any legal floating point notation, such as the following syntax:

<optional spaces> <optional + or -> <one or more digits>.<one or more digits>.

Example numeric Comparisons	
> 123	Match if greater than 123
>=123.45	Match if greater than or equal to 123.45
<-123.	Match if less than -123
<=+12.34	Match if less than or equal to 12.34
= 123.0	Match if equal to 123
==123	Match if equal to 123
123-456.78	Match if in the range of 123 to 456.78
-200100	Match if in the range of -200 to -100
=123,456	Match if 123 or 456
=123!>456	Match if 123 or greater than 456
>123&<>456	Match if greater than 123 and not 456

# **Date Comparisons (Type D)**

To handle date comparisons, first convert each date in the pattern to an 8-digit integer with the digit order CCYYMMDD. Then compile the resulting pattern using integer numeric comparison syntax. Perform the same conversion to the target date during the comparison operation.

To use this comparison syntax, the dates must follow the format in the DATEFORM parameter of master.cfg. Otherwise, dates can be compared as simple strings using a shell-, ERE-, or string-style pattern notation.

A relative date feature is supported for date comparisons.

Instead of an explicit date, you can use any of the notations "\$TODAY", "\$TODAY + n", or \$TODAY - n", where n is an integer. These dates are converted into the current date, plus or minus n days.

Example Date Comparisons	
2007/12/31	Match if the date is 2007/12/31.
=2007/12/31	Match if the date is 2007/12/31.
>2007/12/31	Match if the date is greater than 2007/12/31.
>=2007/01/01	Match if the date is greater than or equal to 2007/01/01.
<\$TODAY	Match if the date is less than today.
<\$TODAY-30	Match if the date is less than 30 days ago.
2007/02/15-\$TODAY	Match if the date is within range of 2007/02/15 and today.
\$TODAY,\$TODAY+1	Match if the date is today or tomorrow.
\$TODAY-2007/03/15	Match if the date is within the range of today and 2007/03/15.
\$TODAY-1-2007/03/15	Match if the date is within the range of yesterday and 2007/03/15.
\$TODAY!>\$TODAY+30	Match if the date is today or greater than 30 days from today.
>\$TODAY&<\$TODAY+30	Match if the date is between tomorrow and 29 days out.

# Time Comparisons (Type T)

To handle time comparisons, first convert each time in the pattern to a 6-digit integer with the digit order HHMMSS then compile the resulting pattern using integer numeric comparison syntax. Perform the same conversion to the target date during the comparison operation.

# **String Comparisons (Type S)**

A string comparison pattern must begin with a legal numeric comparison operator.

If the string comparison does not begin with a legal numeric comparison operator, the pattern compiles as if it does not contain any special characters.

=	Match if equal to
==	Match if equal to
<> or ~	Match if not equal to
>	Match if greater than
<	Match if less than
>=	Match if greater than or equal to
<=	Match if less than or equal to

#### Note:

The range operator '-' does not work for string comparisons.

To compare a range of strings, use the '&' list separator. For example, ">ABC&<ADZ".

## **Shell-style Pattern syntax (Type P)**

The pattern must not look like a legal numeric comparison.

To match any regular character, use the regular character in the pattern.

To match any special character, such as  $\sim$  ? + \* , ! & | [ ] { } ( ) - ^ \$, precede the character with a backslash.

Character (	Character Class Shorthand Notation					
*	Match anything (wildcard).					
?	Match any single character.					
\a	Match any single alphabetic character.					
\c	Match any single control character.					
\d	Match any single digit.					
VI	Match any single lowercase character.					
\p	Match any single punctuation character.					
\s	Match any single space (space, tab, nl) character.					
\u	Match any single uppercase character.					
\w	Match any single word (alphanumeric) character.					
\A	Match any single character not matched by \a.					
/C	Match any single character not matched by \c.					
\D	Match any single character not matched by \d.					
\L	Match any single character not matched by \l.					
\P	Match any single character not matched by \p.					
\S	Match any single character not matched by \s.					
\U	Match any single character not matched by \u.					
\W	Match any single character not matched by \w.					

Modifie	Modifiers					
~	Match everything except what the pattern matches. Must be the first character in pattern.					
[]	Match any single character or character range in set.					
[^]	Match any single character or character range not in set.					
-	Character range. Sets only.					

Table continues...

Modifiers				
{}	Subset. Subsets can be nested.			
1	List separator ('or' operator)			

Patterns without wildcards are considered complete, and do not match on substrings. The following are example patterns:

	Match if the string is empty.
~?*	Match if the string is empty.
ABC	Match if the string is ABC.
~DEF	Match if the string is not DEF.
F00*	Match if the string starts with FOO.
*BAR	Match if the string ends with BAR.
SPL?T	Match if the string is SPL?T where ? can be any character.
[AD-F]	Match if the string is the single character A or D - F.
A[^AD-F]*	Match if the string starts with an A, whose second character is not the character A or D - F, and ends with anything.
ABC DEF	Match if the string is ABC or DEF.
BAZ!FUB*	Match if the string is BAZ or starts with FUB.
~{205,425}	Match if the string is not 206 or 425.
{DOG CAT}	Match if the string is DOG or CAT. Subset is unnecessary here.
CA{NA,LI,RG}*	Match if the string begins with CA; has NA, LI, or RG as its 3rd and 4th characters; and ends in anything. (Would match CANADA, CALIFORNIA, CARGO).
\d\d\d\-\d\d\d\d\d	Match if the string looks like a SSN.

## **Extended Regular Expression syntax (Type E)**

The expression must begin with the symbol 'E@', which is stripped prior to compiling the pattern with regcomp ().

The following extensions are supported:

- Negation ('~')
- Character class shorthand notation (\a, \c, \d, etc...)

The pattern must not look like a legal numeric comparison (above).

To match any regular character, use that character in the pattern.

To match any special character, such as  $\sim$  ? + \* , ! & | [ ] { } ( ) - ^ \$, precede the special character with a backslash.

Charact	Character Class Shorthand Notation					
-	Match any single character					
\a	Match any single alphabetic character					
\c	Match any single control character					
\d	Match any single digit					
VI	Match any single lowercase character					
\p	Match any single punctuation character					
\s	Match any single space (space, tab, nl) char					
\u	Match any single uppercase character					
\w	Match any single word (alphanumeric) char					
۱A	Match any single char not matched by \a					
/C	Match any single char not matched by \c					
\D	Match any single char not matched by \d					
\L	Match any single char not matched by \l					
\P	Match any single char not matched by \p					
\S	Match any single char not matched by \s					
\U	Match any single char not matched by \u					
\W	Match any single char not matched by \w					
\n	Where n is a number, match previously matched subset number n					

Modifi	Modifiers					
~	Match everything except what pattern matches. Must be the first character in pattern after '@'),					
۸	Anchor pattern to beginning. For example, the pattern must match from the beginning of the string.					
\$	Anchor pattern to end. For example, the pattern must match from the end of the string.					
*	Match the preceding character 0 or more times.					
+	Match the preceding character 1 or more times.					
?	Match preceding character 0 or 1 time,					
{}	Match preceding character n or n, m times where n is a number and n,m is a number range.					
[]	Match any single char or character range in set.					
[^]	Match any single char or character range not in set.					
-	Character range for sets only.					
()	Subset and nested subsets. Subsets are numbered by the order of occurrence of the '(' character.					
	List separator 'or'.					

Patterns without anchors are considered incomplete or fragments. Each pattern matches substrings. For example, 'E@RES' matches 'FRESNO'.

Example Patterns	
E@^\$	Match if the string is empty.
E@^ABC\$	Match if the string is ABC.
E@~^ABC\$	Match if the string is not ABC.
E@^ABC	Match if the string begins with ABC.
E@^ABC\$	Match if the string ends with ABC.
E@ABC	Match if the string contains ABC.
E@A.*Z	Match if the string contains any sequence where A precedes Z.
E@FOO?BAR	Match if the string contains FOBAR or FOOBAR.
E@FO+BAR	Match if the string contains FOBAR or FOOBAR or FOOOBAR or
E@^SPL.T\$	Match if the string is SPL?T where? can be any character.
E@^[AD-F]\$	Match if the string is the single character A or D - F.
E@^A[^AD-F]	Match if the string starts with an A, where the second character is not the character A or D - F, and ends with anything.
E@ABC DEF	Match if the string contains ABC or DEF.
E@^CA(NA LI RG)	Match if the string begins with CA, has NA, LI, or RG as the third and fourth characters, and ends in anything. For example, this pattern matches CANADA, CALIFORNIA, CARGO.
E@^\d{3}\-\d{2}\-\d{4}\$	Match if the string looks like a SSN.

## **Appendix D: Configuration Of Protocols**

## **Configuring Secure File Transfer Protocol without Password**

#### About this task

As Proactive Contact migrates to more secure systems, convenient utilities such as FTP and TELNET will be replaced with more secure systems. Secure Shell (ssh) and Secure Copy (scp) are the standard replacements for FTP and TELNET. Here, machine B is the name of server to which you want to connect and machine A is the client. The server will not ask for the password and secure connection is established between the server and the client.

#### **Procedure**

- 1. Login as user1, for example, admin, on machine A, for example, machine A is 135.27.151.17.
- 2. Generate a pair of Authentication keys:
  - a. On the terminal session, type ssh-keygen -t rsa and press Enter.
  - b. Press Enter for the next three questions.

The above command creates the .ssh directory under the home directory of the users.

3. Type # ssh-keygen -t rsa and press Enter.

This command ensures that the permissions of the home directory of the client, the \$HOME/.ssh directories, and all files under the \$HOME/.ssh directory match the permissions listed as follows.

```
Type #11 -d $HOME and press Enter.
```

The system displays the permissions of the \$HOME directory. Ensure you set the following permissions for the \$HOME directory:

```
$HOME (home directory) drwx----- OR drwxr--r--
```

Type #11 -d \$HOME/.ssh and press Enter.

The system displays the permissions of the \$HOME/ .ssh directory. Ensure you set the following permissions for the \$HOME/ .ssh directory:

```
$HOME/.ssh drwx----- OR drwxr--r--
```

Type #11 \$HOME/.ssh/ and press Enter.

The system displays the permissions of the \$HOME/ .ssh/ directory. Ensure you set the following permissions for the \$HOME/ .ssh/ directory:

```
$HOME/.ssh | drwx----- OR drwxr--r-

$HOME/.ssh/id_rsa and id_dsa -rw-r--r OR -rw-----

$HOME/.ssh/id_rsa.pub and id_dsa.pub -rw-r--r- OR -rw-----

$HOME/.ssh/config -rwx-----
```

- Use ssh to create a .ssh directory as user2, that is, craft on machine B that is, 123.45.678.92. Many Linux distributions create this folder by default. You still require the password.
- 5. Run command #ssh -1 craft 123.45.678.92 mkdir -p .ssh
- 6. Set the directory and file permissions on the server (MachineB) to the following:

```
$HOME (home directory) drwx----- OR drwxr--r--
$HOME/.ssh drwx----- OR drwxr--r--
$HOME/.ssh/authorized keys -rw-r--rOR -rw---
```

- 7. Copy the user1 (admin) public key to user2 (craft) user2@machineB .ssh folder into authentication\_hosts file and re-type the password.
- 8. Ensure that you are in \$HOME directory.
  - a. Type cd \$HOME and press Enter.
  - b. Type #cat \$HOME/.ssh/id\_dsa.pub ssh -1 admin 123.45.678.92 'cat
    >> .\$HOME/.ssh/authorized\_keys' and press Enter.
- 9. To enable public-key authentication, set the PubkeyAuthentication to **Yes** in the server configuration file /opt/ssh/etc/sshd\_config.
  - Note:

For any machine other than dialer, you must set this value. For dialer the value is already set to **Yes**.

**10**. **Type** #ssh -l craft 123.45.678.92 **and press** Enter.

#### Result

After you complete all the steps correctly, the server does not prompt you for the password. The secure connection is established between the server and the client.

## **Configuring FTP**

#### **Procedure**

- 1. Log into the dialer as a sroot user.
- 2. Open the /etc/firewall/conf/cs-rules.sh file.
- 3. Remove the # sign from the #\$IPTABLES -A INPUT -p tcp --dport 21 -j ACCEPT line.
- 4. Find the service name:
  - #chkconfig --list|grep ftp
  - gss ftp.orig:off
  - qss ftp:off
- 5. Turn on the service using the command #chkconfig gssftp on.
- 6. Configuration

Change the server args = -I -a parameter from the /etc/xinetd.d/gssftp file to the server\_args = -I

7. Restart the system using the command:

/sbin/shutdown -r now



#### Note:

You cannot use gssftp to configure ftp with an anonymous user.

## **Configuring Telnet**

#### **Procedure**

1. Log in as sroot and add the following lines in /etc/firewall/conf/cs-rules.sh.

\$IPTABLES -A INPUT -p tcp --dport 23 -j ACCEPT

\$IPTABLES -A INPUT -p udp --dport 23 -j ACCEPT

Add the following lines after:

# ftp

#\$IPTABLES -A INPUT -p tcp --dport 21 -j ACCEPT

2. Find the service name:

#chkconfig --list|grep telnet

krb5-telnet: off

3. Turn on the service using the command #chkconfig krb5-telnet on.

4. Restart the system using the following command:

/sbin/shutdown -r now

## **Configuring Network Printer**

#### **Procedure**

- 1. Log in to the dialer as sroot user.
- 2. Go to the path /usr/share/cups/model/.
- 3. Unzip the tar file of the printer as per the available network or the desktop printer using the command: gunzip. Do not use tar -xzvf...
- 4. Copy the HP\_LaserJet\_4250.ppd file to /usr/share/cups/model directory.
- 5. Go to path /usr/sbin/
- 6. Run the following commands:

```
./lpadmin -p LaserJet -E -v socket:"//148.147.212.12" -m
HP_LaserJet_4250.ppd
./lpadmin -d LaserJet
```

#### Where:

1."//148.147.212.12/ is the IP of the printer

2.HP\_LaserJet\_4250.ppd is the name of the unzipped file in /usr/share/cups/model/

7. Restart the following service:

service cups restart

#### Result

For more information about other printer configurations such as desktop printers, read the help of lpadmin.

For printing, use the lp file name command.

For checking the printer queue, use the lpq command.

## **Installing and Configuring LDAP Server**

#### About this task

You must configure Lightweight Directory Access Protocol (LDAP) when configuring a dialer in a pod environment. Proactive Contact does not allow a pod without LDAP. For more information, see High Availability LDAP Configuration Guide.

#### Note:

After installing LDAP, the passwords of all the users automatically expire. Users must change their passwords on the next login.

# Appendix E: Opt-Out Configuration And Pg230 Updates For New Features

## **Configuring Opt-out on Avaya PG230RM**

#### About this task

On Proactive Contact with Avaya PG230RM Proactive Contact Gateway, the dialer is involved in the Opt-out process. The dialer can either transfer the call, both voice and data, to a specified Inbound/Blend Job, or can transfer the call to a specified Inbound VDN which queues the call on an ACD.

You must install Generic 18.0.2 or later on PG230RM switch. To download and install the latest Switch Generic, see *Upgrade Configuration Work Order for SRK ENBC Generic 18.0* document.

Ensure that you have a spare span on a DSP2 card on PG230RM. A spare span only supports 192 DTMF receiver ports, if the business needs to dial on more than 192 lines simulatneously, the business needs more spans.

To Opt-out to VDNs, configure transfer trunks on PG230RM.



Each call that you opt out to a VDN requires one transfer trunk until the call is disconnected. Keep sufficient transfer trunks free during an operation of Opt-out virtual campaign. Ensure that the number of trunks are more than or equal to the lines used in the virtual Job. The Opt-out Job does not report a lack of transfer trunks until the Opt-out Job reaches the transfer trunk limit.

For the Opt-out feature to work, you must configure a separate Resource Group consisting of DTMF Receivers on the PG230RM Switch associated with the Proactive Contact dialer.

#### **Procedure**

- 1. Log in to the PG230RM switch as admin user.
- 2. Type C to select MAINTENANCE MENU and press Enter.
- 3. On the MAINTENANCE MENU screen, type A to select **Card Maintenance** and press Enter.
- 4. On the CARD MAINTENANCE screen, type A to select Add, press Ctrl + N, and enter the R,L,S values for the spare span on a DSP2 card. Press Enter.

C A R D R L S	M A I N T E N A N C CARD TYPE		RLS	CARD TYPE	V.RV S
1 1 1	Enhanced Manuals Suc	15 02 .	1 1 12 1	06 Base 0d #1	3 00 11
	Enhanced Network Bus				3.00 M
1 1 2-1	Tone Generator DSP2-41	1.01 A	1 1 12-2	96-Port Quad T1	3.00 M
1 1 2-2	Call Progress DSP2-41	1.01 A	1 1 12-3	96-Port Quad T1	3.00 M
1 1 2-3	Conference DSP2-41	1.01 A	1 1 12-4	96-Port Quad T1	3.00 M
1 1 2-4	Tone Generator DSP2-41			4-Span Quad E1 PRI-120	0
1 1 3	Large Port Voice Card2	1.01 A	1 1 16-2	4-Span Quad E1 PRI-120	0
	DTMF Receiver DSP2-41			4-Span Quad E1 PRI-120	
1 1 4-2	Tone Generator DSP2-41	1.02 A	1 1 16-4	4-Span Quad E1 PRI-120	0
1 1 4-3	Call Progress DSP2-41	1.02 A	1 1 17-1	4-Span Quad E1 PRI-120	0
1 1 4-4	Conference DSP2-41			4-Span Quad E1 PRI-120	
A)DD, D)E	ELETE, C)HANGE, P)ORT:	A 1 1 4-	1_ DTMF	Receiver DSP2-41 PORTS	: 192 A
				1111 11111111 11111111	
		the last two last . The last last last	a dear last last last last last last last last	1111 11111111 11111111	the last that the last that the last
TC2-T25.	TTTTTTT TTTTTTT TTTT	<b></b>			****

#### 193-248:

- 5. Press Ctrl +A till you find DTMF Receiver DSP2 and press Enter.
- 6. Press Ctrl +X two times to go back to the main menu.
- 7. Type A to select Data Base Administration Menu and press Enter.
- 8. In the DATABASE ADMINISTRATION MENU screen, type B to select **Resource Group Summary** and press Enter.
- 9. In the RESOURCE GROUP SUMMARY screen, navigate to an empty slot for name, type a name for the Resource Group, and press Ctrl + N.
- 10. Press Ctrl + A to select **HUNT TYPE** as **CYCLIC** and press Ctrl + N till you reach DSP and press Enter.
- 11. On the RESOURCE GROUP CONFIGURATION screen, type A to select Add.
- 12. Press Ctrl + N, type 1 as POS, type the newly added DTMF Receiver span in the R, L, S, fields, and press Enter.

	PORT	L	OCA	TION			PORT	L	OCA	TION	
POS	NAME	R	L	S	P	POS	NAME	R	L	S	P
		-	-					-	-		
1		1	1	4-1	1	13		1	1	4-1	13
2		1	1	4-1	2	14		1	1	4-1	14
3		1	1	4-1	3	15		1	1	4-1	15
4		1	1	4-1	4	16		1	1	4-1	16
5		1	1	4-1	5	17		1	1	4-1	17
6		1	1	4-1	6	18		1	1	4-1	18
7		1	1	4-1	7	19		1	1	4-1	19
8		1	1	4-1	8	20		1	1	4-1	20
9		1	1	4-1	9			1	1	4-1	21
10		1	1	4-1	10	21 22		1	1	4-1	22
11		1	1	4-1	11	23		1	1	4-1	23
12		1	1	4-1	12	24		ī	1	4-1	21 22 23 24

13. Press Ctrl + X three times to go to the main menu.

- 14. Type C to select MAINTENANCE MENU and press Enter.
- 15. In the MAINTENANCE MENU screen, type A to select **Card Maintenance** menu and press Enter.
- 16. Type C to select Change, press Ctrl + N and enter the R, L, S of the new DTMF receiver. Press Enter.
- 17. Type A and press Enter to activate the card.
- 18. Press Ctrl +X to go back to the MAINTENANCE MENU screen.
- 19. Type A to select Card Maintenance and press Enter.
- 20. Ensure that the status of the newly added DTMF receiver span shows as A.

#### Note:

An inactive/non-existent DTMF Receiver Card and Resource Group causes the Optout feature to fail. The dialer can detect and log this failure only during runtime.

#### Note:

DTMF Receivers are limited, for example, the number of DTMF receivers mentioned in the above CARD MAINTENANCE screen is 192. Every call on an Opt-out enabled virtual campaign consumes one DTMF Receiver while the call plays the voice message. Therefore, Avaya recommends that you keep more number of DTMF receivers than the total number of outbound ports in Opt-out enabled virtual campaigns.

The system adds the DTMF Receiver span in the Resource Group that you create.

## **Configuring Opt-out on Communication Manager**

#### About this task

You must install the Avaya Call Center Deluxe package or Avaya Call Center Elite package on Avaya Aura® Communication Manager to collect digits. The collect digits command is also available with the Automated Attendant RTU.

At least one TN744 Call Classifier circuit pack or TN2182 Tone Clock circuit pack must be in the system unless the command is used only to collect digits returned by a VRU or sent by the network and never to collect digits from a caller. For more information, refer to the books on Avaya Aura® Communication Manager documentation at <a href="http://support.avaya.com">http://support.avaya.com</a>.

#### **Procedure**

Configure the following feature on Communication Manager for the Opt-out feature to work:

- Vector Directory Number (VDN) for Opt-out feature.
- Announcement for Virtual Campaign.

- Vector Routing Table describing the pattern for Digit Collection.
- Skill to which Opt-out call will be gueued.

### Creating a VDN with a Vector

#### **Procedure**

- 1. Play the announcement, that is a voice message, intended for the virtual campaign.
- 2. Collect digits during or after the voice message.
- 3. Look for a specific digit in the digits collected.
- 4. If the digit is present, queue the call to a particular skill on an ACD.
- 5. Otherwise, just disconnect the call.

#### Result

#### Example:

01 collect 5 digits after announcement 3000 for none

02 goto step 4 if digits in table 2

03 stop

04 queue-to skill 13 pri h

05 stop

In the previous example:

- 3000 is the announcement number.
- 5 is the number of digits to be collected during or after the voice message.
- Table 2 is a Vector Routing table of the following type.

#### **VECTOR ROUTING TABLE**

Number: 2 Name: Alok VRT Sort? n

1:9+17:

2: ?9+ 18:

3: ??9+ 19:

4: ???9+ 20:

5: +9 21:

6: 22:

The entries in the tables are essentially patterns that detect if 9 is one of the 5 digits collected. The ? wildcard represents a single digit. On the other hand, the + wildcard represents any number of digits at the beginning or end of the collected digits.

### Note:

The **Prompting Timeout** field on page 11 of the Feature-Related System Parameters on the Avaya Aura<sup>®</sup> Communication Manager represents the digit collection timeout on the Avaya Aura<sup>®</sup> Communication Manager. The minimum value for the timeout is 4 seconds and the maximum is 10 seconds. This timeout determines the amount of time the Avaya Aura<sup>®</sup> Communication Manager will wait before responding to a digit press.

```
display system-parameters features
FEATURE-RELATED SYSTEM PARAMETERS

CALL CENTER SYSTEM PARAMETERS

EXPERT Agent Selection (EAS) Enabled? y
Minimum Agent-LoginID Password Length:
Direct Agent Announcement Extension:
Message Waiting Lamp Indicates Status For: station
VECTORING

Converse First Data Delay: 0 Second Data Delay: 2
Converse Signaling Tone (msec): 100 Pause (msec): 70
Prompting Timeout (secs): 4
Interflow-qpos EWT Threshold: 2
Reverse Star/Pound Digit For Collect Step? n
Available Agent Adjustments for BSR? n
BSR Tie Strategy: 1st-found
Store VDN Name in Station's Local Call Log? n
SERVICE OBSERVING
Service Observing: Warning Tone? y or Conference Tone? n
Allow Two Observers in Same Call? N
```

## Configuring PG230 for Autorelease to Ready Mode for Voicemail

#### About this task

To configure the PG230 for the Autorelease to Ready Mode for Voicemail feature perform the following steps:

#### **Procedure**

- 1. Log in to the PG230RM switch as an admin user.
- 2. To select **Data Base Administration Menu**, Type A.
- 3. Press Enter.
- 4. On the DATABASE ADMINISTRATION MENU screen, type H to select Answer Supervision Templates.
- 5. Press Enter.

#### 6. Update the Answer Supervision Template 5 as shown below:

	1	2	3	4	5	6	7	8
Dial Tone	OKREP	REP	OKREP					
Ringback	REP	REP		REP				
Busy	OKREP	OKREP	OKREP	OKREP				
Reorder	REP	OKREP		OKREP				
SIT Tones	REP	OKREP		REP				
Ring Cess.	REP	REP						
Voice Det.	REP	REP		REP	REP	OKREP		Č.
Voice Cess.	REP	OKREP		OKREP	OKREP			
Wink	OKREP	REP	OKREP					
Answer	2	OKREP		REP				
Time	OKREP	OKREP	OKREP	OKREP	OKREP	OKREP		-
Hook Flash	REP	REP						
Tones	REP	OKREP		REP	OKREP			

## **Appendix F: Users in Proactive Contact**

The following table lists the users across Proactive Contact and their respective functions:

Users	Group	Function
bin, daemon, adm, sync, shutdown, nobody, rpm, sshd, rpc, pcap, ntp, , rpcuser, nfsnobody, avaya, dbus, haldaemon, xfs, nscd	OS users	Linux OS users
sysadm	pds_sysadm	System administrator.
		See the menus in Administering Proactive Conatct 5.1 Guide.
system	pds_system	Supervisor.
		See the menus of system in Administering Proactive Conatct 5.1 Guide.
craft	susers	User created while OS installation. Used to install Dialer after OS installation.
cust	users	Test user
client1	pds_agent - Primary	Test user
	pds_system - Secondary	
rasaccess	remote	
sroot, root, csroot	root	root user
oracle	oinstall - primary	Oracle database user. To access
	dba - secondary	database
auditor	auditor - PDS auditor	To audit user logins, secure file modification
roleadm	pds_RBAC - RBAC User	Role administrator, used by the Supervisor
leadadm	pds_leadadm	Tenant administrator for the
	pds_system	default tenant along with the permissions for user management
	pds_agent	and tenant management.
	pds_sysadm	Ţ.,

Table continues...

Users	Group	Function
	pds_RBACAdmin	
analysis	pds_extract - PC Analysis	Default analysis user. Refer to menus of analysis in Using Proactive Conatct 5.1 Guide.
admin, dadmin, cust1	pds_system	Administrator.
		Used by Dialer processes and scripts.
agent1, agent2, agent3, agent4, agent5, agent6, agent7, agent8, agent9, agent10	pds_agent	Default agents
smntr1, dstat1, rtdsv1, syshl1, srvac1, dsvmn1, benfr1, enfr1, dpmp1, statp1, stact1, cmdct1, rbmcu1	Corba users These usernames will vary based on DialerIDs	Internal users. Used by CORBA processes to log in to Dialer Naming Services.

### Note:

Out of the default users mentioned in the previous table, the users that are newly added in Avaya Proactive Contact 5.1 are: csroot, cust1, dadmin, and leadadm.

## **Appendix G: Resources**

## **Documentation**

The following table lists the related documents for the Avaya Proactive Contact product. You can download the documents from the Avaya Support website at <a href="http://support.avaya.com">http://support.avaya.com</a>.

Title	Description	Audience
Avaya Proactive Contact Overview	Provides an overview of Avaya Proactive Contact, the new	Business partners
	features, capacities and interoperability.	<ul><li>Avaya Professional Services</li><li>Customers</li></ul>
Using Avaya Proactive Contact Supervisor	Provides detailed description of the Avaya Proactive Contact	Contact center supervisors
Cop o vico.	Supervisor suite of	Customers
	applications.	
Planning for Avaya Proactive	Provides detailed description of	Sales engineers
Contact	the planning process for Avaya Proactive Contact.	Avaya Professional Services
		Design engineers
Maintaining and	Provides detailed information	Avaya Professional Services
Troubleshooting Avaya Proactive Contact	about hardware and software	Business partners
Troactive Contact	maintenance of Avaya Proactive Contact.	
Safety and Regulatory for	Provides information about	Avaya Professional Services
Avaya Proactive Contact	safety regulations	Customers
Using Avaya Proactive Contact	Provides detailed description of	Contact center agents
Agent	Avaya Proactive Contact Agent.	Customers
Avaya Proactive Contact	Provides detailed information	Avaya Professional Services
Software Technical Reference	about the binaries, scripts, and configuration files of Avaya Proactive Contact.	Business partners

## Finding documents on the Avaya Support website

#### About this task

Use this procedure to find product documentation on the Avaya Support website.

#### **Procedure**

- 1. Use a browser to navigate to the Avaya Support website at <a href="http://support.avaya.com/">http://support.avaya.com/</a>.
- 2. At the top of the screen, enter your username and password and click **Login**.
- 3. Put your cursor over Support by Product.
- 4. Click Documents.
- 5. In the **Enter your Product Here** search box, type the product name and then select the product from the drop-down list.
- 6. If there is more than one release, select the appropriate release number from the **Choose**Release drop-down list.
- 7. Use the **Content Type** filter on the left to select the type of document you are looking for, or click **Select All** to see a list of all available documents.
  - For example, if you are looking for user guides, select **User Guides** in the **Content Type** filter. Only documents in the selected category will appear in the list of documents.
- 8. Click Enter.

## **Training**

The following courses are available on the Avaya Learning website at <a href="https://www.avaya-learning.com">www.avaya-learning.com</a> Enter the course code in the **Search** field, and click **Go** to search for the course.

Course code	Course title
1C00010W	What's New with Proactive Contact 5.1
AVA00989H00	Avaya Proactive Contact 5.0 Basic System Supervisor
AVA00990H00	Avaya Proactive Contact 5.0 Advanced System Supervisor
AVA01013WEN	Avaya Proactive Contact Solutions 5.0 Overview - Assessment

## **Viewing Avaya Mentor videos**

Avaya Mentor videos provide technical content on how to install, configure, and troubleshoot Avaya products.

#### About this task

Videos are available on the Avaya Support website, listed under the video document type, and on the Avaya-run channel on YouTube.

#### **Procedure**

- To find videos on the Avaya Support website, go to <a href="http://support.avaya.com">http://support.avaya.com</a> and perform one of the following actions:
  - In Search, type Avaya Mentor Videos to see a list of the available videos.
  - In **Search**, type the product name. On the Search Results page, select **Video** in the **Content Type** column on the left.
- To find the Avaya Mentor videos on YouTube, go to <a href="www.youtube.com/AvayaMentor">www.youtube.com/AvayaMentor</a> and perform one of the following actions:
  - Enter a key word or key words in the Search Channel to search for a specific product or topic.
  - Scroll down Playlists, and click the name of a topic to see the available list of videos posted on the website.



Videos are not available for all products.

## **Support**

Go to the Avaya Support website at <a href="http://support.avaya.com">http://support.avaya.com</a> for the most up-to-date documentation, product notices, and knowledge articles. You can also search for release notes, downloads, and resolutions to issues. Use the online service request system to create a service request. Chat with live agents to get answers to questions, or request an agent to connect you to a support team if an issue requires additional expertise.

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