

NEC



XEN IPK

ACD PLUS SUPERVISOR MANUAL

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633 - 647 Springvale Road
Mulgrave Vic 3150

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Introduction to IPK ACD Plus

SECTION 1 INTRODUCTION

IPK ACD Plus is a feature-rich call handling system that consists of the following main functions:

- ① Auto Attendant (AA)
- ① Automated Call Distributor (ACD)
- ① After Hours Attendant (Night Mode)

IPK ACD Plus performs as an AA only, ACD only, or both an AA and an ACD. The entire functionality (AA and ACD) exists and is enabled in every unit. IPK ACD Plus may be programmed to answer some lines with the auto attendant while sending others directly into the ACD functionality. IPK ACD Plus allows call transfers to both on-premises and off-premises destinations via Centrex transfer.

SECTION 2 OVERVIEW

The IPK Automatic Call Distribution (ACD) Plus is a series of Windows-based software programs designed to enhance the ACD features of the IPK Key Telephone System. The software displays both real-time data and historical reports.

IPK ACD Plus has many beneficial features:

- ① Easy installation
- ① Cost-effective call and staff management tool
- ① Quick access to both real-time and historical data
- ① Easy to read reports and graphs
- ① User-friendly screens

The IPK ACD Plus saves your company money by providing a cost-effective method of capturing, displaying, and reporting ACD group call traffic and staff activity. These reporting tools help your company evaluate its staffing requirements and agent performance.

In addition to providing an excellent means of monitoring call activity and agent performance, IPK ACD Plus ensures quick access to call traffic reports, wait time reports, and agent time logs. You receive valuable information when you need it in a clear format.

The IPK ACD Plus program suite requires a Personal Computer (PC) running Windows 95/98, NT, 2000, XP, or XP Professional operating system.

Due to updates in software after the publication of this document, some of the screen displays shown in this manual and listed features may differ slightly from your version of IPK ACD Plus.

SECTION 3

IPK ACD PLUS COMPONENTS

IPK ACD Plus has four main system components:

- ① IPK ACD Plus Server
- ① IPK ACD Plus Monitor Client
- ① IPK ACD Plus Administration Client
- ① IPK ACD Plus RTD Client

3.1 IPK ACD Plus Server

The IPK ACD Plus Server program is responsible for setting up communication with the NEC KSU and recording call activity to an external database. The server should be left running at all times so that call records can be properly stored. The server is capable of running in a foreground or background window. The server application is added to the startup tasks so that it will auto-start when the PC is turned on.

NEC recommends that the Server PC be a dedicated system reserved exclusively for IPK ACD Plus programs.

Once initiated, the program begins to accept data from the KSU after 15 ~ 20 seconds.

IPK ACD Plus must be running in order to properly collect all call record activity (i.e. the program must be active or must be minimised). Refer to *<Blue Text> Installing & Configuring Elite ACD Plus on page -11.*

3.2 IPK ACD Plus Monitor Client

The IPK ACD Plus Monitor Client program can run on the Server PC, or run on a networked PC (client). No password is required to run the Monitor client, however, there is a maximum number of five simultaneous Monitors that can be active. The number of simultaneous Monitors is dependent upon the product licensing. In addition, each PC running client software must have a **Client Key** installed. For more information, refer to *<Blue Text>Chapter 3, <Blue Text>Figure 3-5: Client Key Error Message on page -17.*

If IPK ACD Plus Monitor is started on the same PC as the server, it

registers with the server and begins displaying ACD group data immediately. If the program determines that it is running on a network machine, then the operator must enter the network address or network machine name of the Server PC. At that time the monitor is registered with the server and the ACD group data is then displayed. The monitor displays real-time queue information.

When running in real-time mode, the Monitor displays a real-time screen upon start-up that depicts real-time queue information. From within the real-time screen, select a particular report from the Reports menu to obtain historical call information for viewing or printing.

The Monitor user interface provides real-time queue information for all ACD groups:

- ① The current status of all agents.
- ① The selected report in chart format.
- ① The queue status (number of agents logged in, number of calls in queue, and longest wait time of calls in queue).
- ① An ACD group task summary for user-defined period (average time talking with agent and average hold time, number of abandoned calls, and number of answered calls).

3.3 IPK ACD Plus Administration Client

The IPK ACD Plus Administration Client program (Admin) is used to set up and configure the ACD operation to match the KSU telephone set up.

The Administration Client allows you to perform all facets of IPK ACD Plus programming via a personal computer (PC) connected to the network, or on the same PC as the Server. The operator can also save a configuration to a local file and upload that configuration to the ACD at a later time.

The capability to transfer custom voice files from the PC to the IPK ACD Plus is also provided. These voice files can be used for any of the Auto Attendant (AA), ACD, or Night Mode messages and would take the place of the default messages provided by NEC.

3.4 IPK ACD Plus Real Time Display Client

The Real Time Display (RTD) feature consists of a server application that will be installed on the same PC running the ACD Plus server software, and client software that will be installed on the Agent PCs. This application provides real time queue and agent information to the individual desktop. This provides a cost effective alternative to expensive wall displays that display queue status information. In addition to the queue and agent status information, the application

will also allow text messaging to be sent to individual agents and groups of agents.

IPK ACD Plus Software Suite V2.01 or higher is required to support the RTD feature.

An optional RTD License Key is available to support additional RTD clients.

- ① Without an RTD License Key, up to three RTD clients are supported.
- ② With an RTD License Key, up to 100 RTD clients are supported.

SECTION 1 FEATURES

This chapter describes the following features of IPK ACD Plus.

- ④ Line Monitoring
- ④ Direct Extension Dialling
- ④ IPK ACD Plus Message Buffering

1.1 Line Monitoring

IPK ACD Plus continually monitors its ports for messages from the Xen IPK indicating a call is present on a trunk line that is assigned to be answered by IPK ACD Plus. Lines are assigned in the Administration Program. IPK ACD Plus lets you program the number of rings (0~9) prior to answer.

1.2 Direct Extension Dialling

You can dial an extension at any time while the call is active on the port (i.e. a message is playing).

The number that you dial must meet certain requirements. IPK ACD Plus accepts only Directory Numbers (DNs) as direct extension dialling destinations (no off-switch numbers). The number of digits dialled must correspond with the number of digits programmed in the dialling plan of the associated Xen IPK and not exceed seven digits.

IPK ACD Plus never allows you to enter more than seven digits. If you dial a non-valid extension, IPK ACD Plus plays a message stating "That is not a valid extension" followed by replaying the prompt that was playing when the caller attempted to dial an extension.

IPK ACD Plus automatically enables Direct Extension Dialling if the AA functionality is enabled. Direct Extension Dialling is enabled/disabled for each ACD group in the Administration Program and is disabled by default.

1.3 IPK ACD Plus Message Buffering

If there is no device connected, IPK ACD Plus retains (buffers) all the call record messages for later export to a computer running IPK ACD Plus. Once the buffer file size reaches four megabytes, no further records are saved. The buffer file is uploaded by the Administration Program. IPK ACD Plus also acts as a buffer when the device connected to the RS-232 port is not receiving data. Once IPK ACD Plus has determined the device has resumed receiving data, IPK ACD Plus transmits the stored call records.

SECTION 2

AUTO ATTENDANT (AA)

IPK ACD Plus has a single tree, nine option Automated Attendant (AA). In Auto Attendant mode, IPK ACD Plus answers the assigned lines and plays an Auto Attendant message. While the message is playing, IPK ACD Plus monitors the line for signals indicating the caller's transfer choice. The AA has the following capabilities:

- ④ Internal Transfers
- ④ External Transfers - Centrex
- ④ Transfer to ACD Queue
- ④ Default Transfer

2.1 Internal Transfers

The Auto Attendant can transfer a call to any valid DN on the key system. Dialling or programming the AA to transfer to "0" (zero) will transfer the call to the station port programmed as the operator. IPK ACD Plus does not monitor an AA transfer to ensure completion of a call. KSU programming will dictate the call flow for unanswered transfers (call forward busy, call forward no answer).

2.2 External Transfers - Centrex

The AA can transfer a call to any valid telephone number using Centrex service. The call is transferred at the Central Office and once transferred does not use any Xen IPK trunk lines.

2.3 Transfer to ACD Queue

The AA will transfer to the ACD queue if so programmed. If the agent is unavailable, the ACD greeting message will play. Refer to [Section 4 ACD on page -7](#).

2.4 Default Transfer

If the caller does not select an AA transfer option within eight seconds after the AA message has finished playing, IPK ACD Plus will automatically transfer to the transfer destination number for that line. The transfer destination number can be any internal or external number and will utilize Centrex features if available and so programmed. If there is no transfer destination number assigned, IPK ACD Plus replays the AA message after eight seconds.

SECTION 3

FREQUENTLY ASKED QUESTIONS (AA)

Listed below are some frequently asked questions concerning the Automated Attendant feature:

- ④ What is the default Auto Attendant message?

The AA message is not recorded at default. The AA message can be recorded on a supervisor telephone or recorded on a PC and transferred as part of the administration program. An example of an AA message is:

“Thank you for calling. If you know your party’s extension dial it now. If you wish to speak with the operator, press 0.”


- ④ What happens if the caller selects an invalid option?

If a caller selects an AA option that does not have a transfer destination or selects an un-programmed transfer option (including an erased option), IPK ACD Plus responds with the following message:

“You have made an invalid selection, please try again.”

After this message plays, IPK ACD Plus will repeat the AA message.

- ④ How can the caller replay the Auto Attendant message?

The caller presses  to replay the AA message.

SECTION 4

ACD

IPK ACD Plus allows up to 108 Agent and Supervisor IDs, but only 40 active agents plus 12 supervisors can be logged in at one time. They can be placed into a maximum of four Automatic Call Distributor (ACD) queues. The default setting for the ACD function in the IPK ACD Plus is disabled.

ACD Distribution Methods

IPK ACD Plus has two methods of distributing calls to call takers (agents): *longest idle* and *preferred routing*. Longest idle is simply the agent who has been idle the longest. Preferred routing allows the end user to assign priority distribution to agents. Each method is described next in more detail.

4.1 Longest Idle ACD Distribution Method

The Longest Idle ACD Distribution Method distributes a call to the logged in agent who has been idle the longest. Calculations for longest idle time begin when an agents' status becomes IDLE. Wrap and Non-ACD call states have an affect on the agent distribution order for longest idle call distribution.

4.2 Preferred Agent ACD Distribution Method

The Preferred Agent ACD Distribution Method distributes a call to agents in preferential order based upon an agent’s level (1~9). IPK ACD Plus allows nine levels of agents. Level One agents are tried first, Level Two agents tried second, etc. Within each agent level, IPK ACD Plus uses Longest Idle distribution. For instance if there

are three available agents in level one, the agent that has been IDLE the longest will be distributed the next call. All Longest Idle rules apply within each preferred level.

4.3 Agent States ACD Distribution Method

The Agent States ACD Distribution Method tracks agent states using the IPK ACD Plus Monitor software program. The table below shows the valid agent states and state descriptions for IPK ACD Plus.

Table 2-1: Agent States and Descriptions

State	Description
Idle	Agent is available to take an ACD call (must also be logged in)
ACD Call	Agent is off-hook on an ACD call
Wrap	Agent is in Wrap mode and can finish entering important data concerning the previous call
Non-ACD	Agent is off-hook on a non-ACD call
Logged-Out	Agent is logged out of the ACD queue
Break	Agent is on a break

Agents login to the ACD by dialling the ACD port pilot number. The IPK ACD Plus system will answer this call and prompt the caller for their ID and password via the telephone's display. Once logged in, an agent can manually change states for Login/Logout, Break/Breakoff, and Wrap/Wrapoff by pressing softkeys on their terminal.

The remaining states are controlled by IPK ACD Plus and will depend upon call activity. In most cases, an agent is allowed to enter a state change request (using softkeys) while in another state. The requested state will become active only after the current state is changed. For instance, if an agent is on a call, the agent may request to be placed in wrap mode. Wrap would not become the active state until the call is released. If an agent enters the same request multiple times without exiting the current state, the last state request is the only request that is honored. For example, an agent that is logged in and on a call and requests a WRAP three times, once the call is released the agent is in the WRAP state (Wrap On, Wrap Off, and Wrap On). The table below shows the affect different stimuli have on agent states.

Table 2-2: Agent States and Stimuli

State	Stimulus	New State
Idle	LOUT (Logout) request	Logged out
Idle	Wrap request	Wrap
Idle	ACD call presented	ACD call
Idle	Off-hook	Non-ACD call
Idle	Break Mode request	Break
Wrap	Wrap off request	Idle
Wrap	LOUT (Logout) request	Logged out
Wrap	Off-hook	Non-ACD call
Wrap	Break Mode request	Break
ACD Call	LOUT (Logout)	Logged out
ACD Call	Wrap request	Wrap
ACD Call	Release	Idle
ACD Call	Break Mode request	Break
Non-ACD Call	LOUT (Logout)	Logged out
Non-ACD Call	Wrap request	Wrap
Non-ACD Call	Release	Idle
Non-ACD Call	Break Mode request	Break
Break	Break off request	Idle
Break	LOUT (Logout) request	Logged out
Break	Off-hook	Non-ACD

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Installing & Configuring XenIPK Plus

SECTION 1 HARDWARE AND SOFTWARE REQUIREMENTS

The following items are required for IPK ACD Plus.

1.1 ACD Plus Software Requirements

- ④ Microsoft Windows 95/98, 2000, NT, XP, or XP Professional operating system.

1.2 ACD Plus Hardware Requirements

- ④ IBM-compatible machine with at least a Pentium III 500 MHz CPU system or equivalent.
- ④ Minimum 40 MB of available hard disk space
- ④ Minimum 128 MB of RAM
 - I If the PC will be used for all applications, RTD, Administration, Monitor, and Server, 256 MB of RAM is required.
 - I The ACD Server with RTD Server running on the same PC needs 256 MB of RAM and 128 MB RAM for RTD client is required.
- ④ CD-ROM drive
- ④ Unused serial port for connecting to the KSU
- ④ Mouse
- ④ Printer (optional)

As with most Windows applications, running the software on a faster PC with increased memory can improve operation. Applications that work in real-time, like IPK ACD Plus, are especially sensitive to the need for an efficient hardware system. If your system processes several applications, or is slow in processing real-time data, NEC suggests upgrading the speed and/or RAM capacity of your PC.

- ④ NEC **strongly** suggests running the server on a dedicated PC.

SECTION 2

PARTS LISTS

The various items required for running IPK ACD Plus are listed next.

2.1 Xen ACD Plus Kit

The following items are included in the IPK ACD Plus Kit:

- ④ (1) IPK ACD Plus Suite CD-ROM
- ④ (1) IPK ACD Plus Documentation CD-ROM (includes IPK ACD Plus Installation Manual and Supervisor's Guide)
- ④ (1) Client Key
- ④ (1) Flat ribbon serial cable
- ④ (20) Agent User's Guide

The following items are not included in the IPK ACD Plus Kit, but may be needed:

- ④ DB-9 to DB-25 adaptor, if needed
- ④ Serial cable

2.2 Optional Wallboard Unit

The following items are included with the Wallboard:

- ④ 4-wire non-reversing cord
- ④ Wallboard
- ④ AC adaptor

🔧 To connect the wallboard, the Wallboard Installation Kit is required.

2.3 Wallboard Installation Kit

The following items are included with the Wallboard Installation Kit:

- ④ DB-9 RS-232 splitter cable
- ④ DB-9 to DB-25 adaptor, if needed (not provided)
- ④ RS-232 to RS-485 converter

2.4 Upgrade for 2-Line Sign Requirements

To upgrade to a 2-Line Sign, the following items must be purchased:

Optional Wallboard Unit

Wallboard Installation Kit

2.5 KTS Requirements

In order for the IPK ACD Plus feature to properly run, these items are required:

- ④ Xen IPK Telephone System revision 1.00 or higher or Xen IPK software revision 6.00 or higher

- ④ *D^{term}* Series i, *D^{term}* Series E, Xen, or Xen IPK Telephones with softkeys

SECTION 3

CONNECTING THE IPK ACD PLUS SERVER TO THE KSU

3.1 Connecting the IPK ACD Plus Server to the KSU without a Wallboard

To connect the IPK ACD Plus Server to the KSU without a wallboard:

1. Connect the Server PC to the LAN.
2. Connect the ACD(8)-U30 ETU to the same LAN.

OR

1. Connect one end of the serial cable into the available serial port on the Server PC. Use a DB-9 to DB-25 converter (not provided), if necessary.
2. Connect the other end of this cable to the ACD(8)-U30 ETU port's ribbon extension cable, located toward the front of the KSU.

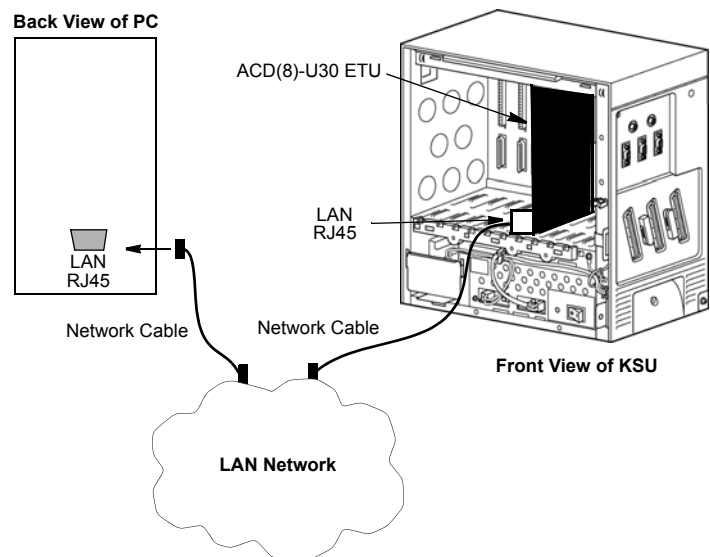


Figure 3-1: Connecting IPK ACD Plus Server to the LAN Network

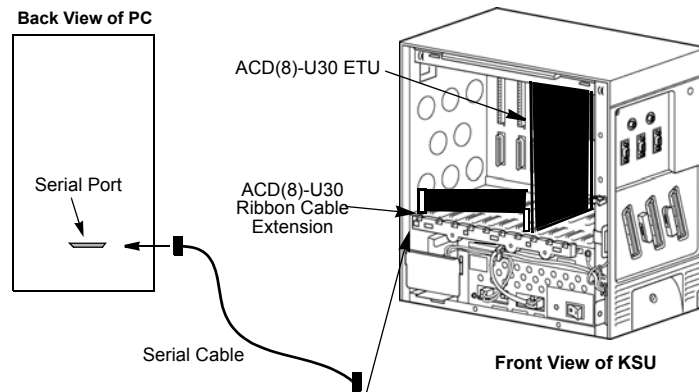


Figure 3-2: Connecting IPK ACD Plus Server without a Wallboard

3.2 Connecting the IPK ACD Plus Server to the KSU with a Wallboard

To connect the IPK ACD Plus Server to the KSU with a Wallboard:

1. Connect the serial cable to the available serial port on the Server PC or connect via the LAN to the ACD(8)-U30. If using the LAN, skip to step 4.
2. Connect the serial cable to the ribbon cable.
3. Connect the ribbon cable to the J11 connector jack on the ACD(8)-U30 ETU.
4. Verify that another serial port is connected to the DB-9 RS-232 to RS-485 converter (provided).
5. Run a 4-wire non-reversing line cord (house wiring may be used) between the DB-9 RS-232 to RS-485 converter and wallboard display.
6. Turn on the Run/Shutdown switch located on the ACD(8)-U30 ETU.

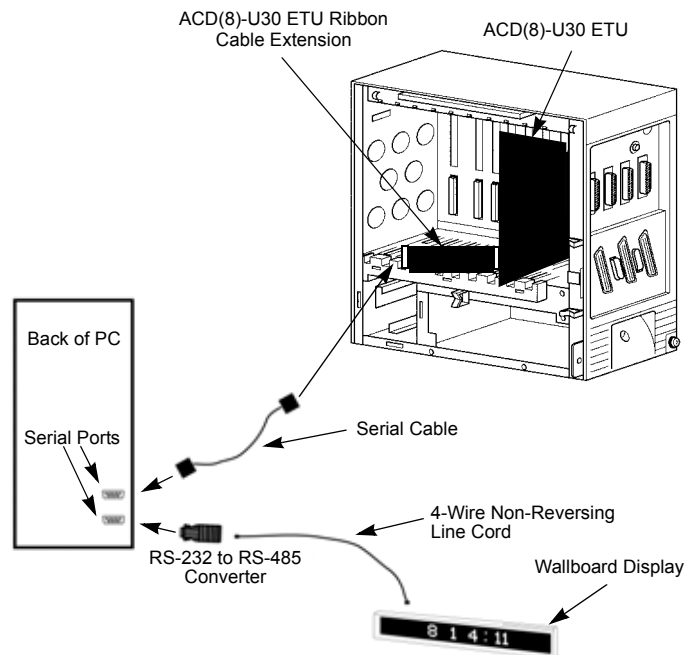


Figure 3-3: Connecting IPK ACD Plus Server to the KSU with a Wallboard

3.3 Connecting the IPK ACD Plus Monitor to the Wallboard

When using the Monitor Client on a remote network PC, you can connect the remote PC to a Wallboard.

To connect the IPK ACD Plus Monitor to the Wallboard:

1. Connect the RS-232 to RS-485 converter to the available COM port on the Monitor PC. Use a DB-9 to DB-25 converter (not provided), if necessary.
2. Run a 4-wire non-reversing cord (house wiring may be used) between the RS-485 converter and the wallboard

display(s).

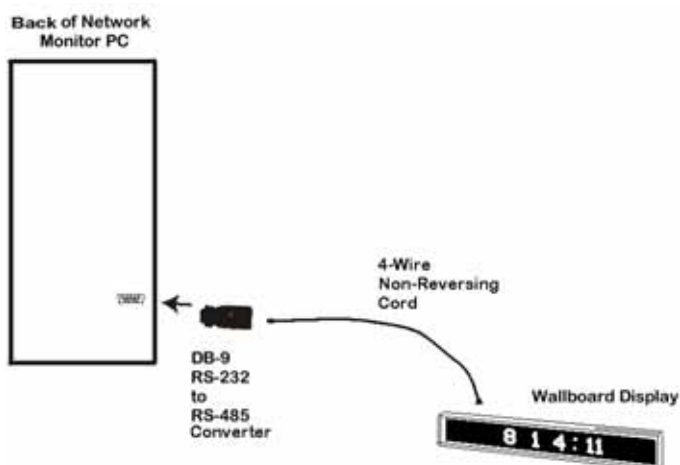


Figure 3-4: Network PC Connected to a Wallboard and Running Monitor Client

SECTION 4

NETWORK SUPPORT

The IPK ACD Plus programs can be configured to communicate on a TCP/IP or NETBIOS network. Network support is available depending on the software license that is purchased.

It is assumed that the network configuration is already functioning. If network support is needed, contact the network administrator.

Remember that the Monitor and ADMIN programs require the IP address, or machine name, of the Server PC. If the Server PC has a roving address, make sure that a valid name server is present on the network so the machine name can be used in place of the hard-coded IP address.

Installation Complexity with Shared Office 97™ Resources

The IPK ACD Plus Server utilises a Microsoft Access™ database for historical archive of call records originating from the KSU ACD.



The Elite ACD Plus Server requires installation of the Microsoft Data Access Components version 2.1 or higher. If Microsoft Office is accessed from the network, an administrator with write access to the Office installation directory will need to perform the Server installation.

SECTION 5

INSTALLING IPK ACD PLUS SOFTWARE


This section outlines the basic installation procedure for installing IPK ACD Plus on a computer via the CD-ROM.

5.1 Client Key

For the client software (**Admin** and/or **Monitor**) to run on a PC, that PC must have a Client Key attached to the LPT1 or printer port. If the Client Key is not installed, the following error will be displayed and the application will stop functioning.



Figure 3-5: Client Key Error Message

 A maximum of five **active** Clients can be simultaneously connected to one Server.


5.2 Installing IPK ACD Plus Suite

Before installing IPK ACD Plus, be sure that any previously installed versions of IPK ACD Plus are completely removed.

To remove previous versions of IPK ACD Plus or Demo:

1. From the Windows Control Panel, select **Add/ Remove Programs**.
2. Select previously installed versions of IPK ACD Plus or Demo for uninstall.
3. If prompted to delete files, click **Yes**.

All Windows programs and applications must be closed prior to executing this startup procedure.

1. Insert the IPK ACD Plus Suite CD into the CD-ROM drive.
2. Choose **Run** from the Start menu.
3. In the Command Line box, type **d:\Disk1\setup.exe**.
 -  If the CD-ROM drive is associated with a different drive letter, type the appropriate letter (i.e., **e:\Disk1\setup.exe**).

OR

- ④ Click **Browse** and locate **setup.exe** on the CD-ROM.
- ④ Double click on **setup.exe**.

4. Click the **OK** button.
5. IPK ACD Plus prompts for the necessary input.
6. You will be asked to select which components of the IPK ACD Plus to install.
 - ④ Install all of the components: *Server, Monitor, Administration,* and the *RTD Client* Programs

OR

- ④ Install two Client components: *Monitor* and the *Administration* Program

OR

- ④ Install *Server* application only

OR

- ④ Install *Real Time Display Client* Application only

7. After a successful setup:
 - ④ The ACD Plus Server icon appears in the Windows Startup program group
 - ④ The IPK ACD Plus Suite program group appears in the Windows Program Manager

5.3 Setting the IP Configuration on the ACD(8)-U30 ETU

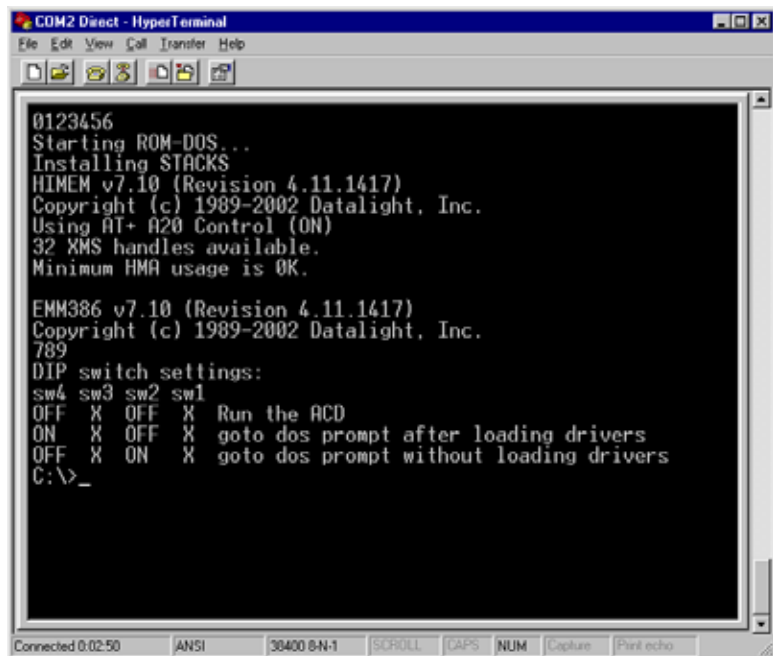
ACD Plus can communicate with the ACD Plus MIS Server using either a direct serial connection between the ACD(8)-U30 ETU and the server PC, or by using the Ethernet port on the ACD(8)-U30 ETU. If the Ethernet port is being used, then the ACD(8)-U30 ETU will need to be configured to communicate with the ACD Plus MIS server across the IP network. ACD Plus will support using either DHCP or a fixed IP address for the MIS server. The following instructions describe how to set the IP configuration on the ACD(8)-U30 ETU for the ACD Plus application.

5.3.1 Requirements

- ④ Host PC with available serial port
- ④ Serial cable
- ④ HyperTerminal

5.3.2 Instructions

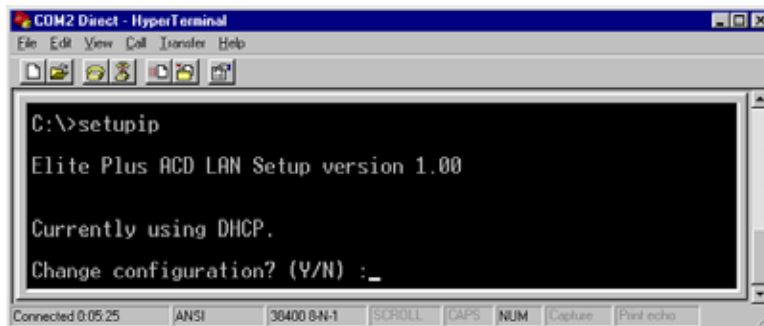
1. Connect the serial cable from the host PC to the serial port on the ACD(8)-U30 ETU.
2. Open a HyperTerminal session for the serial port with the following settings: (**38K baud, 8/N/1**).
3. On the ACD(8)-U30 ETU, set dipswitch #2 to **ON** and dip switches #1, #3, and #4 to **OFF**.
4. Slide the RUN/SHUTDOWN switch on the ACD(8)-U30 ETU to **SHUTDOWN**, and wait for the Shutdown LED to turn on, and then slide the switch back to **RUN**.
5. When the ACD(8)-U30 ETU reboots, HyperTerminal will display the following messages:



```
COM2 Direct - HyperTerminal
File Edit View Call Transfer Help
0123456
Starting ROM-DOS...
Installing STACKS
HIMEM v7.10 (Revision 4.11.1417)
Copyright (c) 1989-2002 Datalight, Inc.
Using AT+ A20 Control (ON)
32 XMS handles available.
Minimum HMA usage is OK.
EMM386 v7.10 (Revision 4.11.1417)
Copyright (c) 1989-2002 Datalight, Inc.
789
DIP switch settings:
sw4 sw3 sw2 sw1
OFF X OFF X Run the ACD
ON X OFF X goto dos prompt after loading drivers
OFF X ON X goto dos prompt without loading drivers
C:\>_
Connected 0:02:50  ANSI  30400 8-N-1  SCROLL  CAPS  NUM  Capture  Print echo
```

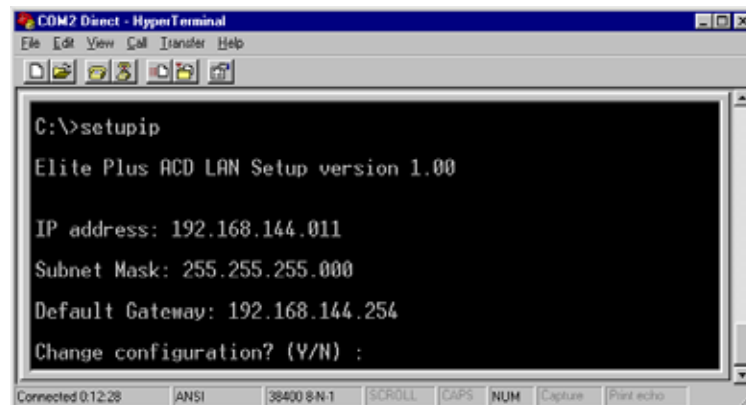
6. Enter the following command to start the configuration utility: **setupip**.

The setup utility will display the current IP settings. If the current settings specify DHCP, then the following messages will be displayed.



```
COM2 Direct - HyperTerminal
File Edit View Call Transfer Help
C:\>setupip
Elite Plus ACD LAN Setup version 1.00
Currently using DHCP.
Change configuration? (Y/N) : _
```

If the current settings specify a fixed IP address, then messages similar to the following will be displayed.



```
COM2 Direct - HyperTerminal
File Edit View Call Transfer Help
C:\>setupip
Elite Plus ACD LAN Setup version 1.00
IP address: 192.168.144.011
Subnet Mask: 255.255.255.000
Default Gateway: 192.168.144.254
Change configuration? (Y/N) :
```

7. To change the current settings, enter **Y** in response to **Change configuration? (Y/N) :**
8. If IP addresses are assigned on your network using DHCP, then enter **Y**, in response to the prompt **Use DHCP? (Y/N) :**

```

COM2 Direct - HyperTerminal
File Edit View Call Transfer Help
C:\>setupip
Elite Plus ACD LAN Setup version 1.00

IP address: 192.168.144.011
Subnet Mask: 255.255.255.000
Default Gateway: 192.168.144.254

Change configuration? (Y/N) :y
Use DHCP? (Y/N) :y
The card must be reset for the changes to take effect.

C:\>
Connected 0:13:29  ANSI  30400 8-N-1  SCROLL  CAPS  NUM  Capture  Print echo

```

Proceed to step 11 to reset the ACD(8)-U30 ETU.

9. If the ACD(8)-U30 will need a fixed IP address, then enter **N**, in response to the prompt **Use DHCP? (Y/N)** :
10. Enter the IP address, Subnet Mask address, and Default Gateway address in response to the prompts. The format for the IP, Subnet, and Default Gateway addresses is (www.xxx.yyy.zzz), for example 192.168.144.011.

```

COM2 Direct - HyperTerminal
File Edit View Call Transfer Help
C:\>setupip
Elite Plus ACD LAN Setup version 1.00

Currently using DHCP.

Change configuration? (Y/N) :y
Use DHCP? (Y/N) :n
Enter IP address (www.xxx.yyy.zzz) : 192.168.144.011
Enter Subnet Mask (www.xxx.yyy.zzz) : 255.255.255.000
Enter Default Gateway (www.xxx.yyy.zzz) : 192.168.144.254
The card must be reset for the changes to take effect.

C:\>_
Connected 0:11:40  ANSI  38400 8-N-1  SCROLL  CAPS  NUM  Capture  Print echo

```

11. Reset the ACD(8)-U30 ETU by sliding the RUN/ SHUTDOWN switch to the **SHUTDOWN** position and wait for the Shutdown LED to turn on.
12. Set dipswitch #2 to the **OFF** position.

13. Connect the Ethernet cable to the Ethernet port on the ACD(8)-U30 ETU.

14. Slide the RUN/SHUTDOWN switch to the **RUN** position.

Start the ACD Plus MIS Server application.

Logging Into Xen IPK Plus Server

SECTION 1 STARTING IPK ACD PLUS SERVER FOR THE FIRST TIME

To start IPK ACD Plus Server for the first time:

1. From the Windows Start menu, choose **Programs**.
2. Select **IPK ACD Plus Suite**, then choose **ACD+ Server** from the IPK ACD Suite menu.

The following Welcome display will appear:




Figure 41: Server Welcome Screen

3. From the Preferences Menu, select **ACD Communications** if the serial port is not COM1 or if you are connecting via the LAN. COM1 is the default. Refer to [1.2 Selecting the COM or LAN Port for the KSU on page -25](#), if needed.
4. From the Preferences Menu, select **Network** if the network is NETBIOS. TCP/IP is the default. Refer to [Section 1.3 Selecting the Network Preferences for the KSU on page -26](#), if needed.
5. Enter the username: **nec** (default).
6. Enter the password: **password** (default).

7. Click **Continue** to connect to the KSU/ACD.

If the username or password is entered incorrectly, a status message will inform you that your entry is invalid. After entering both a correct username and password, IPK ACD Plus Server completes initialization and displays the real-time screen.

It is recommended, but not required, to use the **ADMIN** program for changing the default username and password.

 The IPK ACD Suite setup program includes the IPK ACD Suite icon in the Windows Startup program group. IPK ACD Plus Server automatically starts each time you start Windows. For more information about starting programs automatically from within Windows, refer to your Microsoft Windows documentation.

1.1 Describing the IPK ACD Plus Server Welcome Screen Information

The Welcome window contains the following information:

Startup Date/Time

The Startup Date/Time box on the IPK ACD Plus Server Welcome Window displays the current date and time from the PC's clock/calendar.

ACD Port Status

The ACD Port Status box displays the current status of the PC's serial port(s). OK indicates that the port is operational.

System Errors

The System Errors box displays an information message if there are any system problems. If the system is functioning properly, OK will appear as the status. The program uses pop-up boxes to display various error messages about the system (i.e. insufficient memory, hard disk full, etc.). These error messages are recorded in a file named **error.log**. IPK ACD Plus error messages are not displayed here.

ACD Version

The ACD Version box displays the current version of the ACD operating system.

Server Version

The Server Version box displays the current version of the IPK ACD Plus Server software program.

UserName

The user name of the system is entered in this box. The default username is **nec** (lowercase) until the system administrator changes the user name in the Administration Program. After entering a correct username and password, IPK ACD Plus completes initialization and displays the real-time screen.

Password

The program password is entered in this box. The default password is **password** (lowercase) until the system administrator changes it in the Administration Program. After entering a correct password and username, IPK ACD Plus completes initialization and displays the real-time screen.

1.2 Selecting the COM or LAN Port for the KSU

1. From the Preferences menu on the Server Welcome Window, select **ACD Communications**.
2. Select the COM port that connects to the KSU or the LAN if you are using the network to make the connection.
3. Click **OK**.



Figure 4-2: Port Selection Window Example

1.3 Selecting the Network Preferences for the KSU

1. From the Preferences menu on the Server Welcome Window, select **Network**.
2. The Network options are:
 - TCP/IP (default)
 - NETBIOS
 - NONE

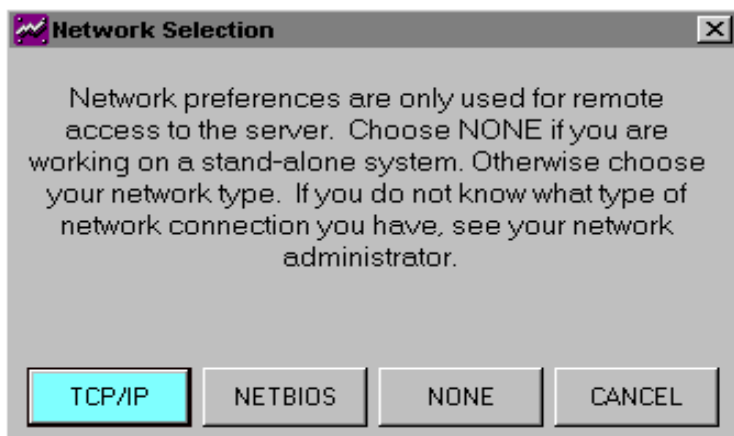


Figure 4-3: Network Selection Window Example

3. Click **OK**.

SECTION 2

UNDERSTANDING WHAT HAPPENS UPON STARTUP

The Server retrieves the configuration information (such as agent IDs and queue configuration) from the KSU/ACD upon startup. The IPK ACD Plus Monitor retrieves the status of all agents at startup and displays all current information. If a call is in progress when the IPK ACD Plus Server starts, it is displayed on the screen, but the statistics are ignored. IPK ACD Plus Server may take as long as 30~45 seconds to establish a connection and begin showing the real-time data.

Configuring IPK ACD Plus Server

SECTION 1 TOURING THE MAIN IPK ACD PLUS SERVER WINDOW

The IPK ACD Plus Server Window contains three menus (File, Preferences, and Help) and a Queue Status panel.

The IPK ACD Plus Server program is responsible for setting up communication with the NEC KSU and recording call activity to an external database. Statistics are stored in the database for historical reference. The server should be left running at all times so that call records can be properly stored. The server is capable of running in a foreground or background window. The server application is added to the Startup tasks so that it will auto-start when the PC is turned on. NEC recommends that the Server PC be a dedicated system reserved exclusively for IPK ACD Plus Server, IPK ACD Plus Monitor, and IPK ACD Plus Administration programs.

Once initiated, the program begins to accept data from the KSU in approximately 30~45 seconds.

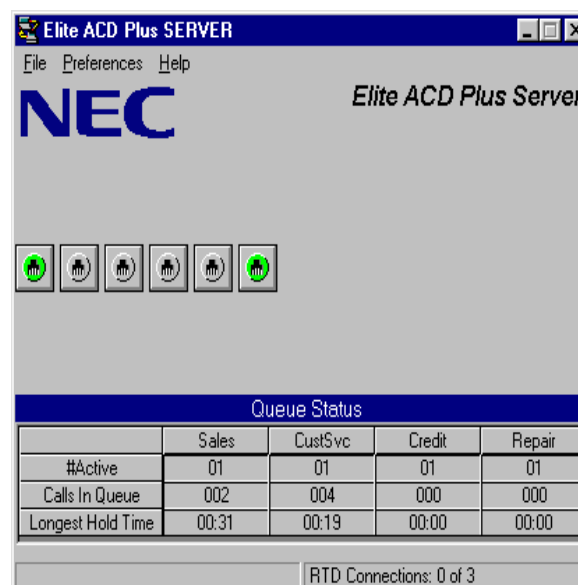


Figure 5-1: IPK ACD Plus Server Main Window

1.1 Queue Status Panel

The Queue Status panel appears on the Main Screen Window. It displays queue information for only those ACD groups that are active. For instance, if there are two ACD groups assigned, then the queue status panel displays only those two groups and the associated information. The queue status panel is a fixed panel that is sized relative to the active window and the number of active ACD groups.

The Queue Status panel shows three types of information for an active ACD group.

1.1.1 Number of Active Agents

The # Active Agents row on the Queue Status panel gives the number of agents logged into each ACD group (i.e. in any status other than LOG OUT). The format is XX.

1.1.2 Number of Calls In Queue

The Calls In Queue row on the Queue Status panel gives the number of calls in queue for each ACD group. The format is XXX.

1.1.3 Longest Hold Time

The Longest Hold Time row on the Queue Status panel gives the longest time a caller has been on hold to speak to an agent for each ACD group. The format is mm:ss/hh:mm.

SECTION 2 FILE MENU

The File Menu selections are listed in *Figure 5-2: File Menu*.

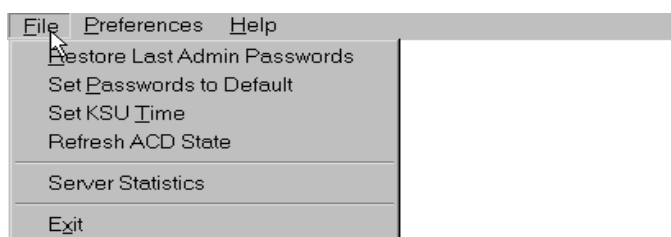


Figure 5-2: File Menu

2.1 Restoring Last Administration Passwords

From the File menu, select **Restore Last Admin Passwords**.

2.2 Setting Passwords to Default

From the File menu, select **Set Passwords to Default** to set passwords to their default values. Default username is **nec** and the password is **password**.

2.3 Set KSU Time

From the File menu, selecting **Set KSU Time** synchronises the ACD processor time to the PC time.

2.4 Refresh ACD State

From the File menu, select **Refresh ACD State** to request fresh state information from the ACD application. The new data is sent to each open Monitor application.

2.5 Server Statistics

From the File menu, select **Server Statistics**. This selection allows viewing of vital Server data.

2.6 Exiting IPK ACD Plus Server

From the File Menu, select **Exit** to close the Server application.

SECTION 3 PREFERENCES MENU

The Preferences Menu includes three options: Thresholds, Server Wallboard, and RTD Clients.

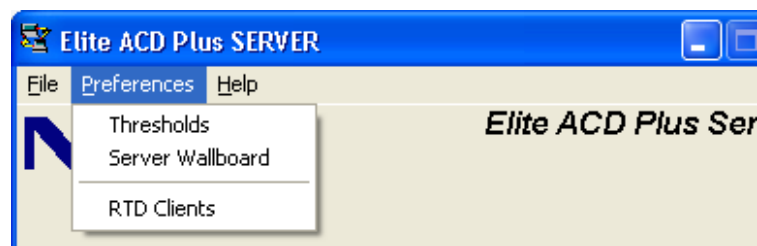


Figure 5-3: Preferences Menu

3.1 Setting Thresholds

Selecting **Thresholds** from the Preferences menu displays the User Definable Thresholds screen. From this screen you can review or define two different threshold settings for the following Real-Time Display fields:

- ☉ Active Agents
- ☉ Average Answer Time (sec.)
- ☉ Average Idle Time (sec.)
- ☉ Average Non ACD Time (sec.)
- ☉ Average Time on Call (sec.)
- ☉ Calls In Queue
- ☉ Calls Abandoned
- ☉ Calls Received
- ☉ Longest Hold Time (sec.)

- ④ Number Non ACD Calls
- ④ Agent Break Time (sec.)
- ④ Agent Wrap Time (sec.)
- ④ Agent Call Time (sec.)

You can set the thresholds from IPK ACD Plus Server. However, you will only see the colours responding on the main server window in the Queue Status panel for the following items:

- ④ Active Agents
- ④ Calls In Queue
- ④ Longest Hold Time

A threshold's configuration is valid for all ACD groups. IPK ACD Plus Monitor requires that the second threshold is greater than the first threshold (except for the Active Agents thresholds). You have the option to configure either one or two thresholds. Keep in mind that if you only configure one threshold, the application uses only one threshold on the real-time display.

Each field has two thresholds that you can assign a corresponding colour from a Windows colour palette. The colour settings for these two thresholds visually notifies an administrator of potential call handling problems when viewing information from the main screen.

For instance, meeting or exceeding the first threshold level changes the background colour of the field to the assigned colour for that threshold (i.e. Active Agents background colour changes from gray to blue). Meeting or exceeding the second threshold level changes the background colour of the field to the selected colour for that threshold (i.e. Active Agents background colour changes from blue to red). Refer to *Figure 5-4: User-Definable Thresholds Window* for an example of this window.

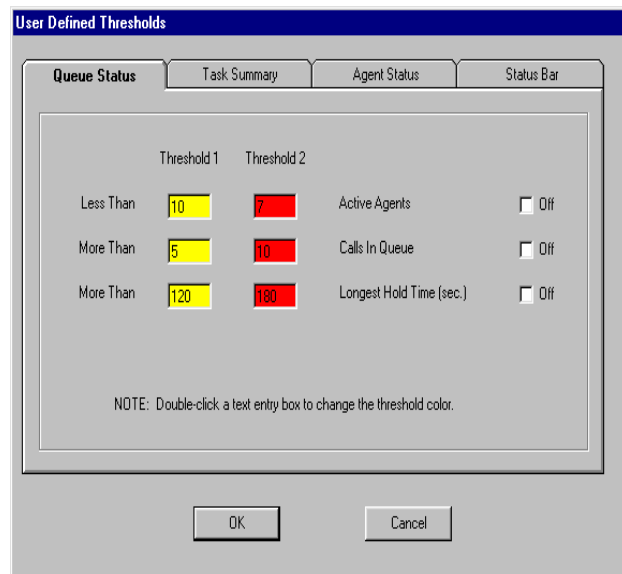


Figure 5-4: User-Definable Thresholds Window

To set the Threshold Configuration:

1. From the Preferences Menu, select **Thresholds**. Refer to *Figure 5-3: Preferences Menu*.
2. Uncheck the **Off** box.
3. Click a text entry box.
4. Enter a valid number. Valid threshold levels are all positive integers as well as zero and OFF (*OFF is the default setting*). If you make an invalid entry, the application displays a error message and gives you the correct format for that entry.
5. Double-click a text entry box.
6. Make a colour selection. The default threshold colours are yellow for Colour Threshold 1 and red for Colour Threshold 2. Notice that after you select a colour, the background of the text entry box displays the selected colour.
7. Continue steps 2 through 6 as needed.
8. Click **OK**.

3.2 Setting Wallboard Options

When you are setting the wallboard options, you will choose the type of signs that are on your network (either one or two-line signs).

You can daisy-chain wallboards. If you daisy-chain wallboards, each sign will display the same data because you cannot mix a two line and a one line sign on the same RS-485 network.

To set wallboard options:

1. From the Preferences menu, select **Server Wallboard**.

2. Select one of the following types of signs:

- NONE
- One Line
- Two Line

3. Select the COM Port to which the wallboard is connected.

Refer to *Figure 5-5: Wallboard Options* for an example of this window.

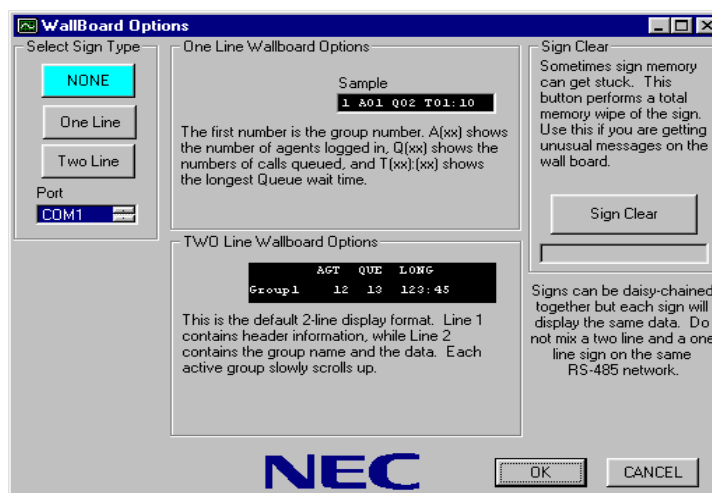


Figure 5-5: Wallboard Options

4. Click **OK**.

3.3 Clearing Wallboard Memory

If the sign is not working correctly or you receive unusual messages, you can clear the sign's memory.

To clear the wallboard memory:

1. From the Preferences menu, select **Server Wallboard**.
2. Click the **Sign Clear** button.

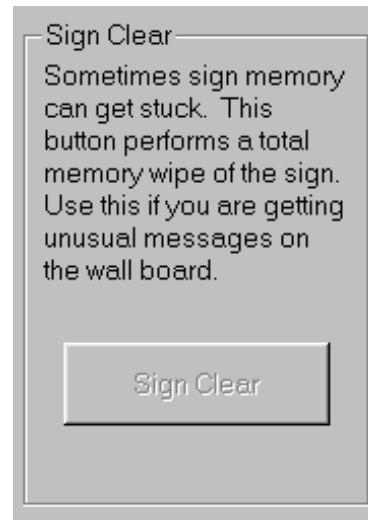


Figure 5-6: Clearing Sign Memory

3. Click **OK**.

3.4 Setting RTD Client Privileges

The Real Time Display (RTD) is a client application that provides real-time queue statistics to the agent desktop. By installing the RTD Client software on an agent PC, the agent can monitor the status of individual ACD queues and help control the overall efficiency of the call center.

The ACD Plus Server controls which agents are allowed to use the RTD Client software and which features are available to each client. To set the RTD Client privileges, select the **RTD Clients** option from the Preferences menu.

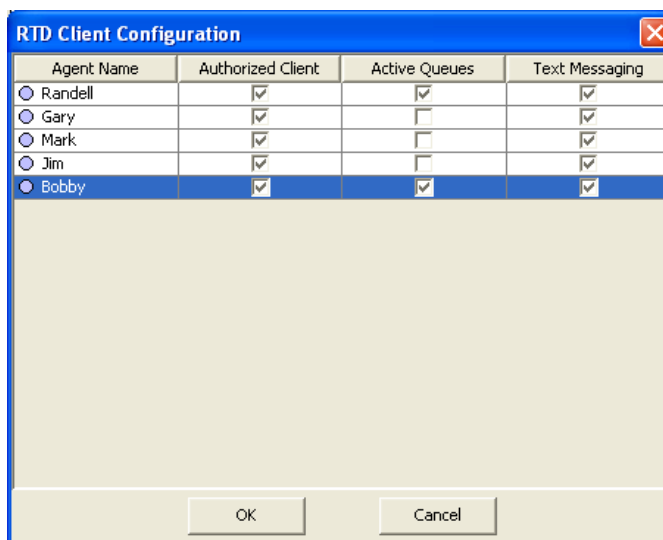


Figure 5-7: RTD Client Configuration

This menu lists all of the agents that are currently defined within the ACD. An indicator next to each agent name designates if the agent is currently running RTD Client software and connected to the ACD Plus Server. A green indicator signifies that the agent is currently using the RTD software.

The other three columns in the menu control the privileges that each agent has when using the RTD Client software. A check in a column indicates that the agent has been given the specific privileges.

- ⓘ **Authorised Client** - a check in this column indicates that the agent is allowed to use the RTD Client software. If an agent that is not authorised attempts to login using the RTD Client software, they will receive an error message and the client application will be terminated.
- ⓘ **Active Queues** - by default, the RTD Client displays all queues to which an agent is assigned, as defined within the ACD Plus Admin configuration. By checking the Active Queues option, the RTD Client will only display the queues that an agent is actively logged into.

- ④ **Text Messaging** - the RTD Client has a feature that allows a user to send text messages to other RTD clients. If this column is not checked, then the Message feature is disabled on the options menu for the specific agent.

3.5 Obtaining Server and System Information

To obtain information about the IPK ACD Plus Server and system information:

1. From the Help menu, select **About Server**.



Figure 5-8: IPK ACD Plus Server Help Menu

2. Click **System Info** button.

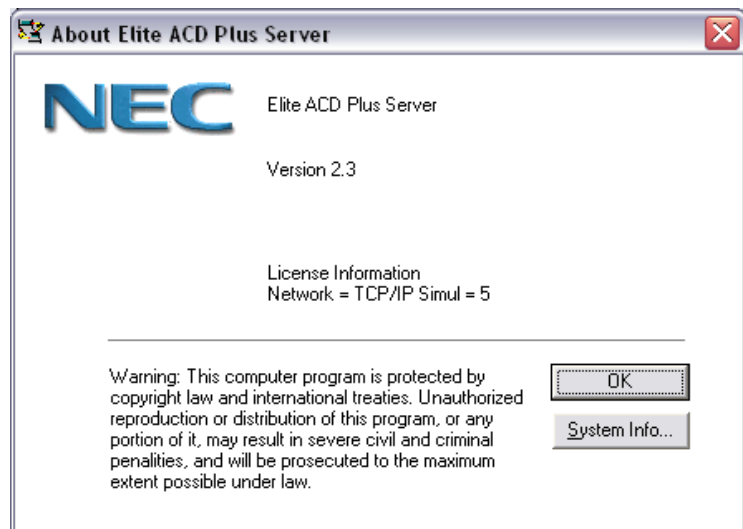


Figure 5-9: About IPK ACD Plus Server Window

3. Click **OK**.

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Learning About IPK ACD Plus Monitor

SECTION 1 STARTING IPK ACD PLUS MONITOR FOR THE FIRST TIME

To start IPK ACD Plus Monitor for the first time:

1. From the Windows Start menu, choose **Programs**.
2. Select **ACD+ Monitor** from the IPK ACD Plus Suite menu.
3. No password is requested. However, if you are running IPK ACD Plus Monitor on a remote PC, you will need the IP (Internet Protocol) address or machine name of the server PC. See the network administrator if the server's IP address (or name) can not be determined.
4. Click **Connect**.



Figure 6-1: Monitor Login Screen

SECTION 2 EXITING IPK ACD PLUS MONITOR

To exit IPK ACD Plus Monitor:

From the IPK ACD Plus Monitor's File menu, select **Exit**.

OR

Click the **Close** button in upper right-hand corner of the IPK ACD Plus Monitor window.

SECTION 3 DESCRIBING THE MAIN SCREEN

After entering a valid server name, the IPK ACD Plus Monitor main screen appears on the monitor. This screen consists of a menu bar and five panels containing information.

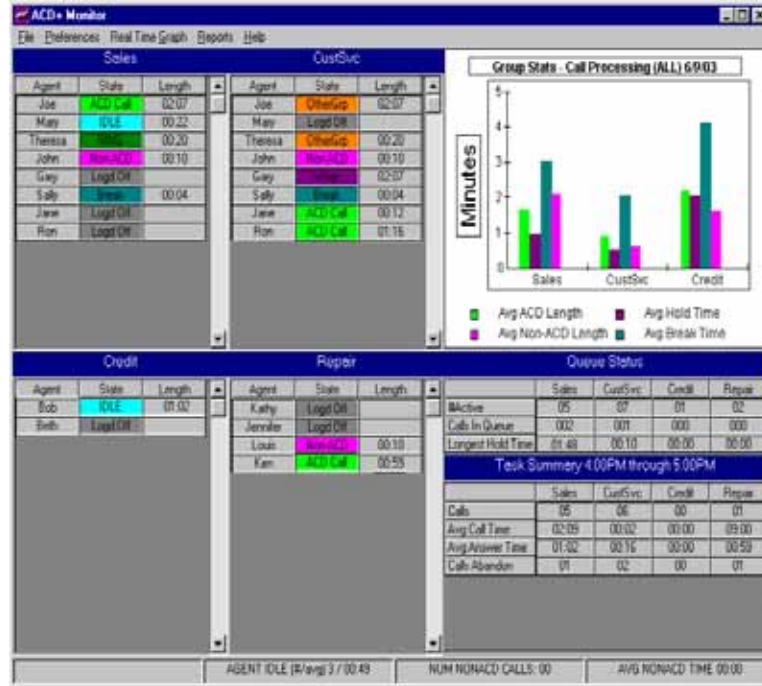


Figure 6-2: IPK ACD Plus Monitor Main Screen

3.1 Panels

The screen divides information into the following five panels.

3.1.1 Agents Panel

The Agents panel shows the current status of every group/agent tracked by the IPK ACD Plus Monitor program.

The agents' information appears for up to four ACD groups. Each group displays the agent's ID, status, and time. The maximum number of agents/supervisors is 108.

Each group has its own window. You can navigate within each group via scroll bars (vertical and horizontal) using the mouse.

The Agent panel of the real-time display shows all programmed groups and all agents within each group. This panel appears in the upper left portion of the IPK ACD Plus Monitor window. Agents are listed by the way that the IDs were assigned in the Agent and Supervisor's ID tabs.

Only those groups that are “active” displays in the panel. For instance, if only two groups are utilised, the agent panel displays two group windows instead of the maximum total of four group windows.

The Agent Panel gives information about each agent in the following three columns on the Agent Panel.

Sales			CustSvc		
Agent	State	Length	Agent	State	Length
Joe	ACD Call	02:07	Joe	OtherGrp	02:07
Mary	IDLE	00:22	Mary	Logd Off	
Theresa	RING	00:20	Theresa	OtherGrp	00:20
John	Non ACD	00:10	John	Non ACD	00:10
Gary	Logd Off		Gary	Wrap	02:07
Sally	Break	00:04	Sally	Break	00:04
Jane	Logd Off		Jane	ACD Call	00:12
Ron	Logd Off		Ron	ACD Call	01:16

Credit			Repair		
Agent	State	Length	Agent	State	Length
Bob	IDLE	01:02	Kathy	Logd Off	
Beth	Logd Off		Jennifer	Logd Off	
			Louis	Non ACD	00:10
			Ken	ACD Call	00:59

Figure 6-3: Agent Panel

Agent Column

The Agent column is the text ID given (in IPK ACD Plus Admin MIS configuration) to an agent.

This field is a maximum of 10 characters in length.

State Column

The State column gives the current status of that agent.

The following table lists the status codes.

Table 6-1: Agent Status Code Descriptions

Status	Description
NO STAT	The NO STAT status code indicates that no data has been received for that agent since starting IPK ACD Plus Monitor.
BREAK	The BREAK status code indicates that the agent is in Break mode. While in Break mode, the agent will not receive any ACD calls.
WRAP	The WRAP status code indicates that the agent is in Wrap mode. While in WRAP mode, the agent will not receive any ACD calls.
IDLE	The IDLE status code indicates that the agent is logged in and available to take an ACD call.
LOG OUT	The LOG OUT status code indicates that the agent is logged out of IPK ACD Plus.
ACD CALL	The ACD CALL status code indicates that the Agent is on an ACD call.
NON ACD	The NON ACD status code indicates that the agent is on a NON ACD call.
RING	The RING status code indicates that the ACD call is ringing for the agent.
OTHER	The OTHER status code indicates that the agent is servicing another group.

Each status code is assigned a specific background colour for easy recognition. The background for each agent status is defined in the Preference-Agent Colours menu.

When starting IPK ACD Plus Monitor, each agent has a **NO STAT** status until the agent's status changes.

Length Column

The Length Column contains the length of time that each agent has been in the current status. The time format is mm:ss/hh:mm.

3.1 Viewing Agent Statistics for the Day

To view Agent statistics for the day:

1. Double click anywhere in the Agent Panel area of the main screen.
2. A dialogue box is presented that contains a list of each available agent. Select an agent and press the **GET DATA** button to retrieve detailed information for each agent.

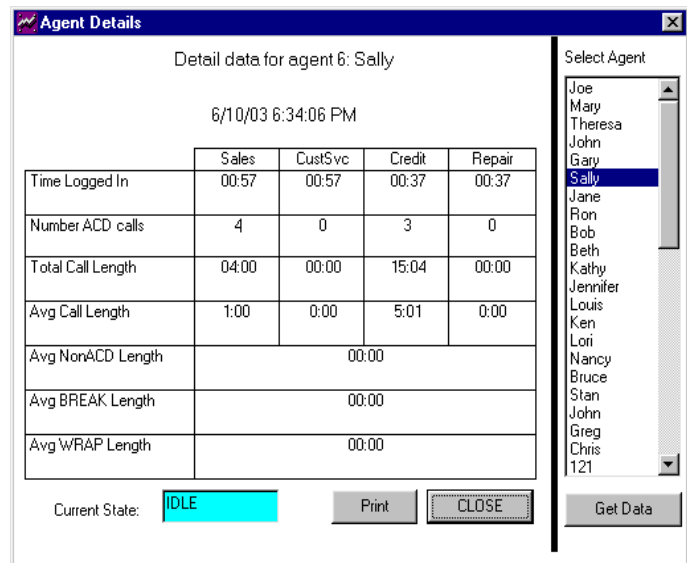


Figure 6-4: Agent Detail Screen

3. The statistics provides the following information about the agent:
 - Current status
 - Total time logged in for each active group
 - Number of ACD calls for each active group
 - Average ACD call length for each active group
 - Average Non ACD time (time on a call, but not an ACD call)
 - Average BREAK length (average time spent in BREAK mode)
 - Average WRAP length (average time spent in WRAP mode)
 - Total Call Length for each active group

Non ACD calls less than 10 seconds in length do not appear in the statistics.
4. Click the **CLOSE** button to exit to the main screen, or click on **PRINT** to print out an agent data page. The print button uses

the Windows default printer.

3.1.1 Real-Time Graph Panel

The Real-Time Graph panel displays in the upper right corner. It updates, in real-time, a graph of the end-user's choice. The Real-Time Graph appears in graphical (bar chart) format. The size of this panel is relative to the size of the main window.

Refer to *7.1 Selecting a Real-Time Graph to Display on the Main Screen on page -53* for more information.

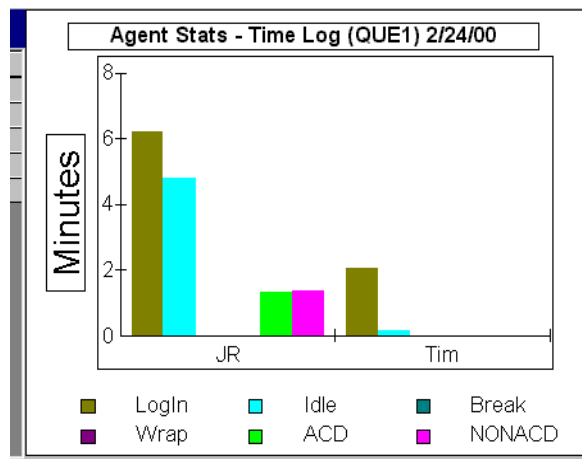


Figure 6-5: View of Real-Time Graph Panel

3.1.2 Queue Status Panel

The Queue Status panel is another section of the Monitor main screen. It displays queue information for only those ACD groups that are active. For example, if there are two ACD groups assigned, then the queue status panel displays only those two groups and the associated information. The queue status panel is a fixed panel that is sized relative to the real-time display and the number of active ACD groups.

Queue Status				
	Sales	CustSvc	Credit	Repair
#Active	05	07	01	02
Calls In Queue	002	001	000	000
Longest Hold Time	01:48	00:10	00:00	00:00

Figure 6-6: View of the Queue Status Panel

The Queue Status panel shows three types of information for an active ACD group.

Number of Active Agents

The # Active row on the Queue Status panel gives the number of agents logged into each ACD group (i.e., in any status other than LOG OUT). The format is XX.

Number of Calls In Queue

The Calls In Queue row on the Queue Status panel gives the number of calls in queue for each ACD group. The format is XXX.

Longest Hold Time

The Longest Hold Time on the Queue Status panel gives the longest time a caller has been on hold to speak to an agent for each ACD group. The time format is mm:ss/hh:mm.

3.1.3 Task Summary Panel

The Task Summary panel displays summary information for all active ACD groups for the selected period which you specify. Refer to [6.2 Setting the Statistics Period for the Task Summary Panel on page -50](#) for more information on setting the statistics period. Only those ACD groups that are utilised appear in the task summary panel. The panel appears in the lower right corner of the IPK ACD Plus Monitor screen.

Task Summary 4:00PM through 5:00PM				
	Sales	CustSvc	Credit	Repair
Calls	05	06	00	01
Avg Call Time	02:09	00:02	00:00	09:00
Avg Answer Time	01:02	00:16	00:00	00:59
Calls Abandon	01	02	00	01

Figure 6-7: Task Summary Panel

The Task Summary panel contains the following four rows of information per active ACD group during the selected period:

Calls

The Calls row gives the number of calls received by that ACD group during the selected period. The system considers a call received once the call reaches the ACD group (i.e. rings on an agent set, ACD greeting is played, etc.) or queue. The calls received number format = XX.

Average Call Time

The Avg Call Time row gives the average time for the selected period that agents spend per ACD call per ACD group. Format = mm:ss/hh:mm.

Average Answer Time

The Avg Answer Time row gives the average time for the selected period (including ring time) that callers spent in queue before speaking to an agent.

Format = mm:ss/hh:ss.

Calls Abandon

The Calls Abandon row gives the number of callers that hung up prior to being connected to an agent during the selected period. The calls abandoned number format = XX.

3.1.4 Status Bar Panel

The Status Bar Panel is another section of the Monitor main screen. It shows a summary of information for all the queues combined for the selected period that is specified. Refer to [6.2 Setting the Statistics Period for the Task Summary Panel on page -50](#). The panel appears on the bottom of the Monitor main screen.

The Status Bar Panel displays three types of information:

Idle Agent

Idle Agent (#/avg) shows the total number of agents that were idle and the average time they were idle for the selected period. If an agent was idle and then takes an ACD call and then goes back idle, that will show up as two total idle agents. Format = XXX/(mm:ss/hh:mm).

Number NONACD Calls

NUM NONACD CALL shows the total number of Non-ACD calls for the selected period. Non-ACD calls less than 10 seconds in length do not appear in the statistics. Format = XXX.

Average NONACD Time

AVG NONACD TIME shows the average time on Non-ACD calls for the selected period. Non-ACD calls less than 10 seconds in length do not appear in the statistics. Format = mm:ss/hh:mm.

SECTION 4

ACCESSING A MENU

To a display a menu, either click on the menu name or while holding down **Alt**, press the underlined letter of the menu name.

4.1 Getting Help

The IPK ACD Plus Monitor program provides on-line help through a comprehensive menu.

You can access help information by selecting **Monitor Help** from the Help Menu. Refer to *Figure 6-8: Help Menu* for an example of this window.

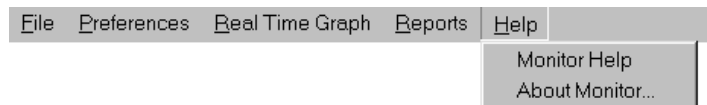


Figure 6-8: Help Menu

4.1 File Menu

The File menu contains the following items for selection.

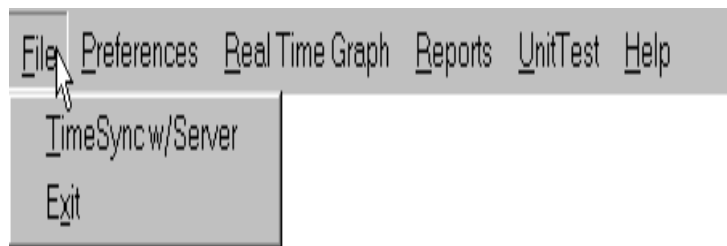


Figure 6-9: File Menu

4.1.1 Synchronizing Time with the Server

From the File Menu, select **TimeSync w/Server**.

If on same PC as the Server, the option is grayed out. On Remote PC, time on the PC is changed to time on Server PC.














4.1.2 Exiting IPK ACD Plus Monitor

From the File Menu, select **Exit** to close the application.

SECTION 5


SETTING THE THRESHOLD CONFIGURATION

Selecting Threshold Configuration from the Preferences menu displays the User Definable Thresholds screen. From this screen you can review or define two different threshold settings for the following Real-Time Display fields.

-  Active Agents
-  Average Answer Time (sec.)
-  Average Idle Time (sec.)
-  Average Non ACD Time (sec.)
-  Average Time on Call (sec.)
-  Calls in Queue
-  Calls Abandoned
-  Calls Received
-  Longest Hold Time (sec.)
-  Number Non ACD Calls
-  Agent Break Time (sec.)
-  Agent Wrap Time (sec.)
-  Agent Call Time (sec.)

A threshold's configuration is valid for all ACD groups. IPK ACD Plus Monitor requires that the second threshold is greater than the first threshold (except for the Active Agents thresholds). You have the option to configure either one or two thresholds. Keep in mind that if you only configure one threshold, the application uses only one threshold on the real-time display.

Each field has two thresholds that you can assign a corresponding colour from a Windows colour palette. The colour settings for these two thresholds visually notifies an administrator of potential call handling problems when viewing information from the main screen.

 The **Off** box must be deselected before any changes to a threshold can be made.

For example, meeting or exceeding the first threshold level changes the background colour of the field to the assigned colour for that threshold (i.e., Active Agents background colour changes from gray to blue). Meeting or exceeding the second threshold level changes the background colour of the field to the selected colour for that threshold (i.e., Active Agents background colour changes from blue to red).

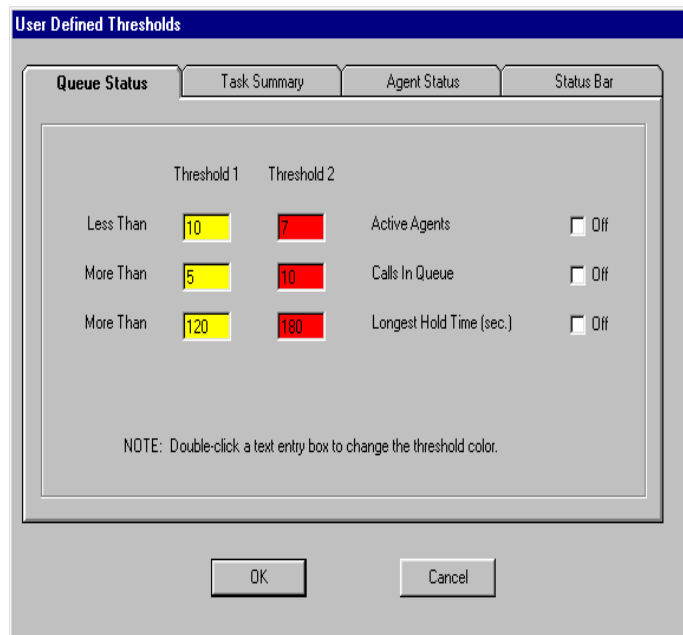



Figure 6-10: User-Definable Thresholds Window

To Set the Threshold Configuration:

1. From the Preferences Menu, select Threshold Configuration.
 -  The **Off** box must be deselected before any change to a threshold can be made.
2. Click on a text entry box.
3. Enter a valid number. Valid threshold levels are all positive integers, as well as zero and OFF (*OFF is the default setting*). If an invalid entry is made, the application displays an error message and gives the correct format for that entry.
4. Double-click a text entry box.
5. Make a colour selection. The default threshold colours are *yellow* for Colour Threshold 1 and *red* for Colour Threshold 2. Notice that after you select a colour, the background of the text entry box displays the selected colour.
6. Continue steps 2 through 5, as needed.
7. Click **OK**.

SECTION 6

SETTING WALLBOARD PREFERENCES

Selecting the Wallboard option from the Preferences menu allows you to select the wallboard functions according to your requirements.

There must be an available COM port for this option before you can select the Wallboard. If a COM port is not available, the Wallboard option is grayed out if it is on the same PC as the server, the wallboard settings will not take affect if changed in the monitor application.

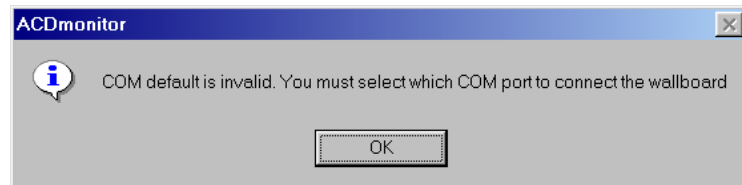


Figure 6-11: COM Default is Invalid Message

To set the Wallboard Preferences:

1. From the Preferences Menu, select **Wallboard**.
2. Set the Wallboard options, as needed. The COM port must be selected, as well as whether a one-line, two-line, or no sign support is needed.
3. Click **OK**.

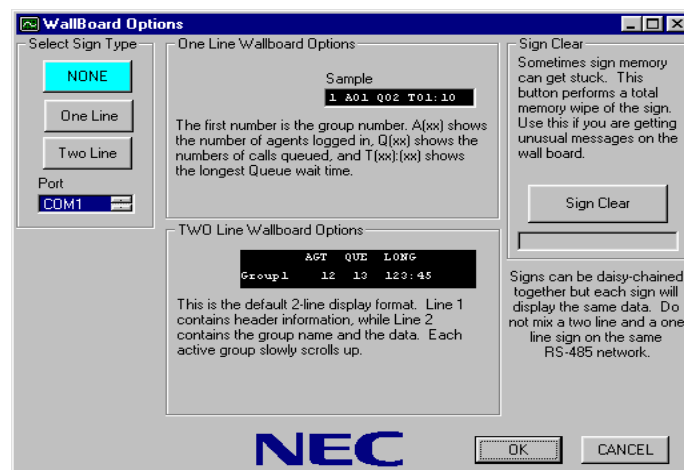


Figure 6-12: Wallboard Options

6.1 Agent Status Code Colours

Selecting the Agent Colours option from the Preferences menu displays the Agent Colour definitions window.

From this window the Agents' colours are defined for the following ACD states:

- 🌀 NOSTAT- When status is not known
- 🌀 BREAK- Agent on break
- 🌀 WRAP- Agent in Wrap-up mode
- 🌀 IDLE- Agent ready to receive task
- 🌀 LOGOUT- Agent is logged out
- 🌀 ACD CALL- Agent on ACD call
- 🌀 NONACD- Agent on NONACD call
- 🌀 RING- Agent phone ringing (ACD)
- 🌀 OTHER- Agent is servicing another group

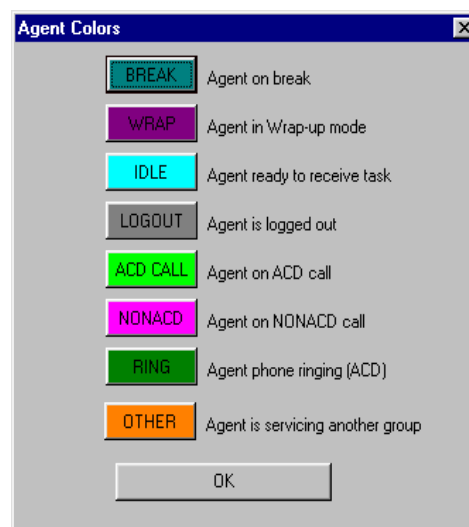


Figure 6-13: Agent Colour Selection Window

6.2 Setting the Statistics Period for the Task Summary Panel

Selecting the **Statistics Period** option from the Preferences menu allows you to set the period of time used to calculate information in the Task Summary Panel on the real-time display. The statistics period is valid for all groups. Setting the statistics period has no effect on storing or displaying historical information.

The Statistics Period screen provides six options:

- 15 minutes
- 1 hour
- 4 hours
- 8 hours
- 12 hours
- 24 hours

You can also select the start time for the first period. The default statistics period is *one hour*. Refer to [Figure 6-14: Statistics Period Window](#) for an example of this screen.

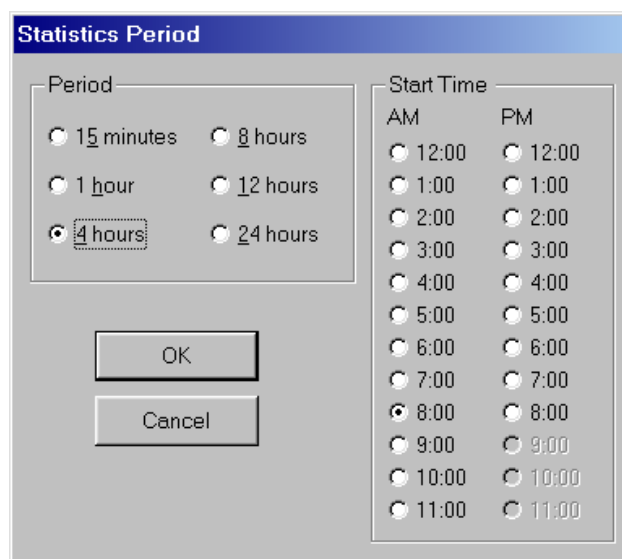


Figure 6-14: Statistics Period Window

To set the Statistics Period for the Task Summary panel:

1. From the Preferences Menu, select **Statistics Period**.
2. Select the amount of time used to calculate information in the Task Summary Panel. The time options are:
 - 15 minutes
 - 1 hour
 - 4 hours
 - 8 hours
 - 12 hours
 - 24 hours

If 15 minutes, 1 hour, or 24 hours is selected, a start time will not have to be selected for the period. However, for the 4, 8, or 12 hour settings, a start time can be selected to begin. This provides maximum flexibility in deciding which periods are to be displayed in the Task Summary area.

3. Click **OK**.

6.1 Changing the Font Setting

Selecting the Font option from the Preferences menu displays the Font screen. From the Font screen you can configure the following elements for your printed reports and on-screen statistics:

- Font Type
- Font Style
- Font Size

It may be necessary to change the fonts when the size of the main form is changed. For example, some people like their windows as large as possible. If the Monitor screen is maximised, the font does not automatically enlarge. Changing the font from the Preferences menu allows choosing the right font type and size for proper viewing.

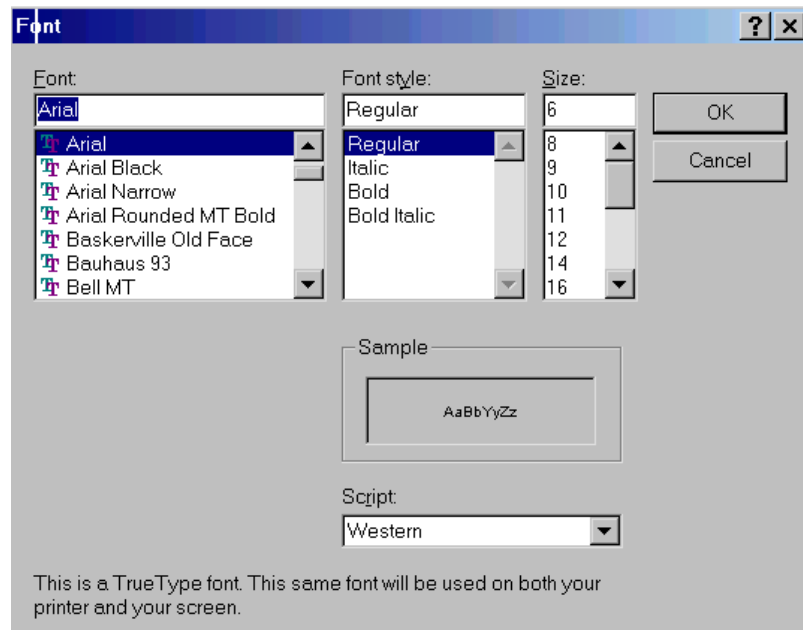


Figure 6-15: Font Window

To change the Font setting for the screen display:

1. From the Preferences Menu, select **Font**.
2. Change the following options as needed.

Font Type

Click the name of the font that you would like to use for your reports. A sample of how the font will look appears in the Sample box.

Font Style

Choose one of the following formats for the font type:

- Regular
- Italic
- Bold
- Bold Italic

Font Size

Choose one of the available font sizes.

SECTION 7

REAL-TIME GRAPH MENU

7.1 Selecting a Real-Time Graph to Display on the Main Screen

You can select which graph displays in the real-time graph panel on the main screen for a specific group from the Real-Time Graph Menu. The Real-Time Graph displays data for only one group. The Group option provides a pull down menu with Group 1 through Group 4 as the options.

To set your report times, choose the Set Times option. Refer to *Figure 6-16: Real-Time Graph Menu* for an example of this window.

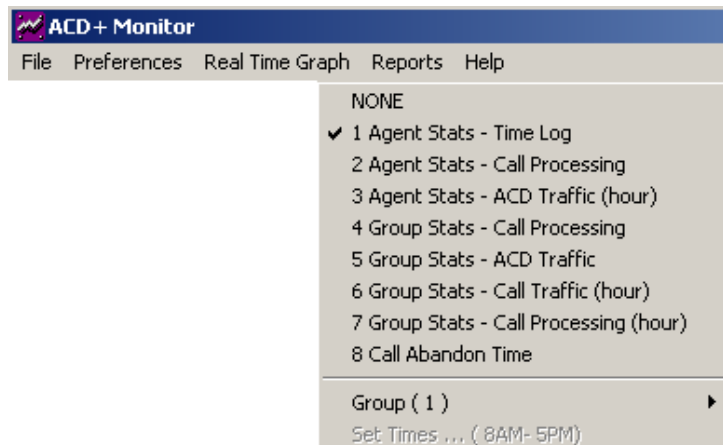


Figure 6-16: Real-Time Graph Menu

To Select a Real-Time Graph to Display on the Main Screen:

1. From the Main screen, select **Real-Time Graph**.
2. Select the graph that you would like to display.

The options are:

NONE

If **NONE** is selected, the Real-Time Display is removed.

Agent Stats - Time Log

Agent Stats - Call Processing

Agent Stats - ACD Traffic (hour)

Group Stats - Call Processing

Group Stats - ACD Traffic

Group Stats - Call Traffic (hour)

Call Abandon Time

Group Stats - Call Processing (hour)

3. Click **OK**.

7.1 Reviewing System Information and Version

To review System Information:

1. From the Help Menu, select **About Monitor**.

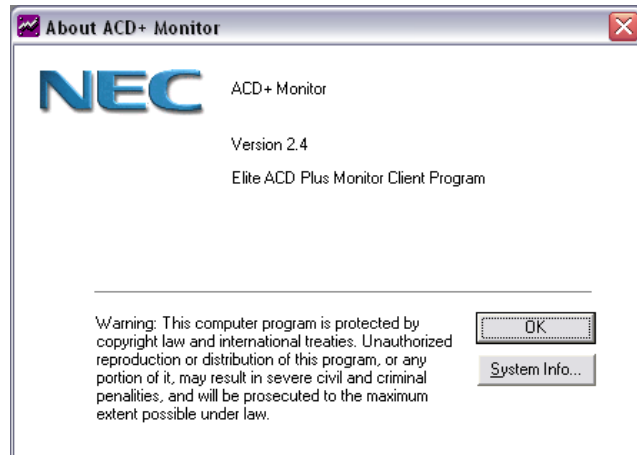


Figure 6-17: About IPK ACD Plus Monitor Screen

2. If you wish to return to the Main Window, Click **OK**.
OR
If you want to review the System Information, click System Info.
Close the window when done.
Refer to the Microsoft Windows documentation regarding more information about the System Information window.

IPK ACD Plus

Monitor Reports

SECTION 1

ENTERING THE IPK ACD PLUS REPORTS WINDOW

To enter the IPK ACD Plus Reports window:

1. From the main screen, select the **Reports** menu.

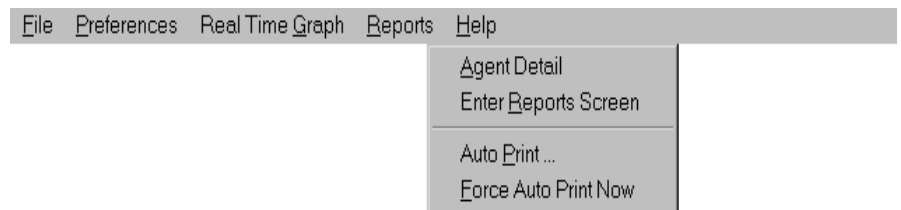


Figure 7-1: Reports Menu

2. Choose from the following selections:
 - Ⓞ **Agent Detail**
Selecting this works the same way as double-clicking in the agent area of the screen. This will display an agent detail dialogue box.
 - Ⓞ **Enter Reports Screen**
Enters the Reports screen selections.
 - Ⓞ **Auto Print**
Sets the automatic print options.
 - Ⓞ **Force Auto Print Now**
Setting this forces the selected autoprint reports to print now, instead of their preselected time.
3. From the Reports menu, select **Enter Reports Screen**.
The IPK ACD Plus Reports window allows configuring and viewing report data.



Figure 7-2: Configuring and Viewing Report Data

SECTION 2

SELECTING A DATE RANGE FOR REPORTS

Choosing the Set Dates option from the ACD Reports' Preferences Menu allows for entering the date range for the data retrieval by selecting a start date and an end date.

The default reporting period is the last period selected. For instance, if the last start date was 5/20/00 and the end date 5/23/00, the default reporting period starts on 5/20/00 and ends on 5/23/00. The default dates remain until you alter either the start date or end date. If no one has ever selected a date range, the default start and end date is the day that Monitor was installed.

To select a Date Range for reports:

1. From the Main Screen, select the **Reports** menu.
2. From the Reports menu, select **Enter Reports Screen**.
3. From the **Preferences** menu, choose the **Set Dates** option.



Figure 7-3: Preferences Menu - ACD Reports Window

4. Set a date range for the reports by performing one of the following:
Click a **Start Date**, then an **Stop Date** from the calendars.

OR

Click one of the following buttons:

- Today Only
- This Week
- This Month
- This Year

Refer to *Figure 7-4; Select Date Range for Reports Window on page 57* for an example of this window.

If you set the Start Date to be greater than the Stop Date, it will change the Stop Date to be equal to the Start Date. Also, if you set the Stop Date to be less than the Start Date, it will change the Start Date to be equal to the Stop Date.

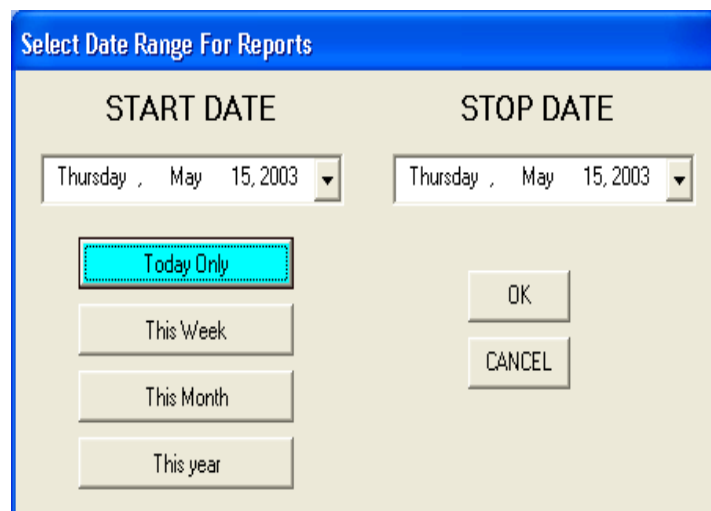


Figure 7-4: Select Date Range for Reports Window

5. Click **OK**.

2.1 Setting Times for “By Hour” Reports

Choosing the **Set Times** option from either the Real-Time Graph Menu or the ACD Reports Preferences Menu allows for changing the hours on only the “**By Hour**” reports.

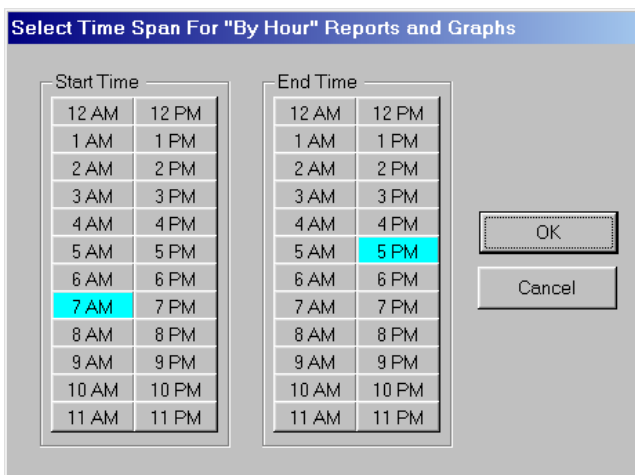


Figure 7-5: Time Span “By Hour” Reports Screen

2.2 Selecting a Group for the Real-Time Graph

Choosing the **Set Group** option from either the Real-Time Graph menu or the ACD Reports Preferences menu allows for selecting which group to view.

To select a group for the Real-Time Graph:

1. From the Main Screen, select the **Reports** menu.
2. From the Reports menu, select **Enter Reports** Screen.
3. From the Preferences menu, select **Set Group**.
4. Choose a group for the Real-Time Graph.

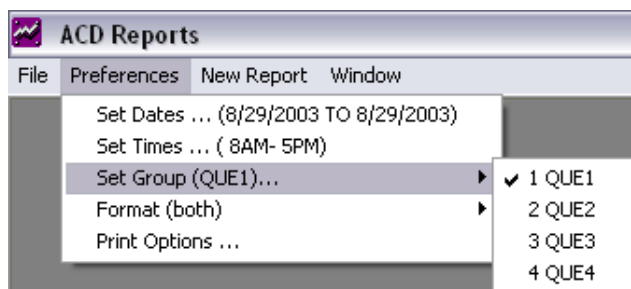


Figure 7-6: Real-Time Graph Group Selection

2.3 Formatting the Real-Time Display

Choosing the **Format** option from the ACD Reports Preferences menu allows for selection of one of the following report styles.

- Text Only
- Chart Only
- Both Text and Chart

To select the Real-Time Display format:

1. From the Main screen, select the **Reports** menu.
2. From the Reports menu, select **Enter Reports Screen**.
3. From the Preferences menu, choose **Format**.
4. Check one of the following:
 - Text Only
 - Chart Only
 - Both Text and Chart

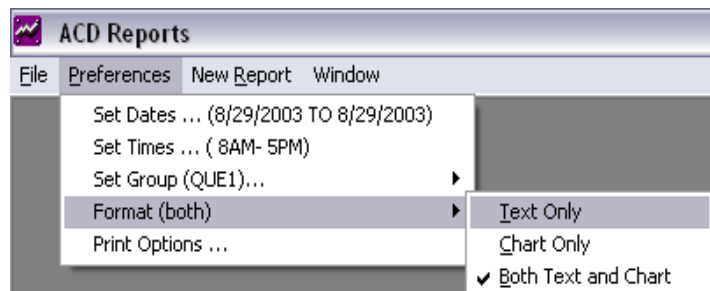


Figure 7-7: Real-Time Display - Format Options

2.4 Selecting a New Report

To select a New Report:

1. From the Main Screen, select the **Reports** menu.
2. From the Reports menu, select **Enter Reports Screen**.

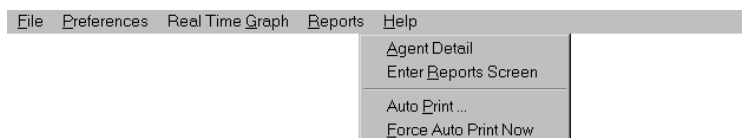


Figure 7-8: Reports Menu

3. From the **New Report** menu, choose a report.

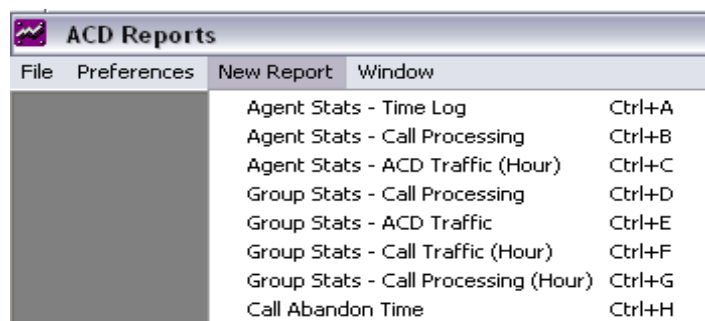


Figure 7-9: New Report Menu - ACD Reports Window

After selecting a report from the Reports menu, the screen displays the report in text mode or chart mode for a specified group during the user-defined period.

The type of mode that appears (text or chart) depends upon the style of report that you select from the Format menu. The report gives information about the group you select from the Group menu.

The time scale format changes from mm:ss to hh:mm if the number is greater than 60 minutes. The number format for the number of calls is XXX.

IPK ACD Plus Monitor considers a call “abandoned” if the caller disconnects before the caller speaks with an ACD agent.

There are two types of abandoned calls:

Queue Abandoned Calls

The number of callers that hang up before reaching the ACD group.

Agent Abandoned Calls

The number of callers that reach the ACD group (Call Received - Agent Ringing) but hang up before speaking with an agent.

- ☞ Calls that overflow are considered as abandoned calls, because they left the queue without speaking to an agent.

The screen displays readable fonts for the report. The report window contains scroll bars. These scroll bars allow you to scroll left, right, up, or down to view information that does not fit on the screen.

The reports, and the information included for each report, are listed next. Refer to *2.5 Describing the Reports on page -62*.

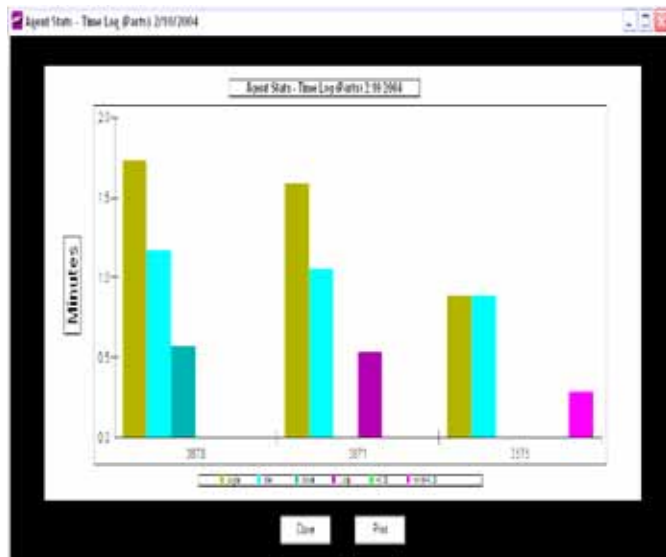


Figure 7-10: Example of Displaying Report (Chart Only)

Agent Stats - Time Log (Sales) 1/1/00 TO 12/31/00								
Agent	Logged In Time	Idle Time	Break Time	WrapUp Time	ACD Call Time	NONACD Call Time	ACD Calls	NONACD Calls
Bill	6:32:27	6:31:28	00:00	00:00	00:00	00:00	0	0
Jack	6:32:27	6:31:06	00:00	00:00	00:00	00:00	0	0
Sally	6:32:27	6:32:06	00:00	00:00	00:00	00:00	0	0
Tipper	6:32:27	6:31:51	00:00	00:00	00:21	00:00	1	0
Alvin	6:32:27	6:31:49	00:00	00:00	00:00	00:00	0	0
Shiley	6:32:28	6:31:47	00:00	00:00	00:00	00:00	0	0
George	6:32:28	6:31:42	00:00	00:00	00:26	00:00	1	0
Mark	6:32:28	6:31:44	00:00	00:00	00:00	00:00	0	0
John	6:32:29	6:31:31	00:00	00:00	00:00	00:00	0	0
Ruby	6:32:29	6:31:23	00:00	00:00	00:00	00:00	0	0

Figure 7-11: Example of Displaying Report (Text Only)

2.5 Describing the Reports

IPK ACD Plus Monitor provides several reports.

- ④ Agent Stats - Time Log
- ④ Agent Stats - Call Processing
- ④ Agent Stats - ACD Traffic (Hour)
- ④ Group Stats - Call Processing
- ④ Group Stats - ACD Traffic
- ④ Group Stats - Call Traffic (Hour)
- ④ Call Abandon Time
- ④ Group Stats - Call Processing (Hour)

Each type of Real-Time Report is described in detail on the following pages.

Call Abandon Time Report

The Call Abandon Time report displays either in text mode or chart mode depending upon which style is selected from the Format menu.

Call Abandon Times Report (Text Mode) report includes the following information for every active group during each hour of the user-defined period:

- ④ # Calls Abandoned
- ④ Average time to abandon
(Format = mm:ss/hh:mm)
- ④ Longest wait
- ④ Hours

This report displays the average time a caller waits before abandoning a call. If callers consistently abandon calls during the same time period each day, the department may need more resources to answer calls during those time periods.

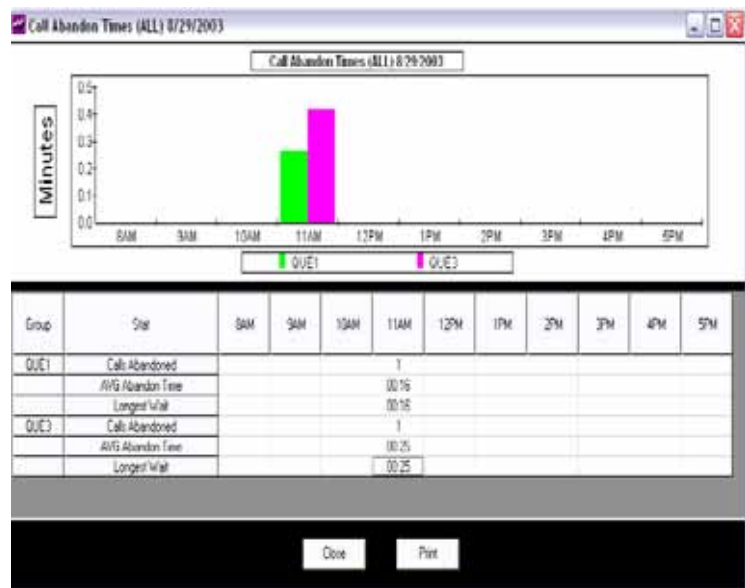


Figure 7-12: Call Abandon Time Report (Chart/Text)

Agent Stats - Call Processing Report

The Agent Stats - Call Processing report displays either in text mode or chart mode depending upon which style is selected from the Format menu.

In text mode, this report includes the following information for each agent in the specified group during the user-defined period:

- 🕒 Agent ID
 - 🕒 Number of ACD calls
 - 🕒 Average time spent on ACD calls
(Format = mm:ss/hh:mm)
 - 🕒 Number of time in Wrap
 - 🕒 Average time spent in Wrap mode
(Format = mm:ss/hh:mm)
 - 🕒 Number of Non-ACD calls
 - 🕒 Average time spent in Non-ACD calls
(Format = mm:ss/hh:mm)
 - 🕒 Number of times in Break
 - 🕒 Average time spent in Break
(Format = mm:ss/hh/mm)
- 📖 Non-ACD calls less than 10 seconds in length do not appear in the statistics.

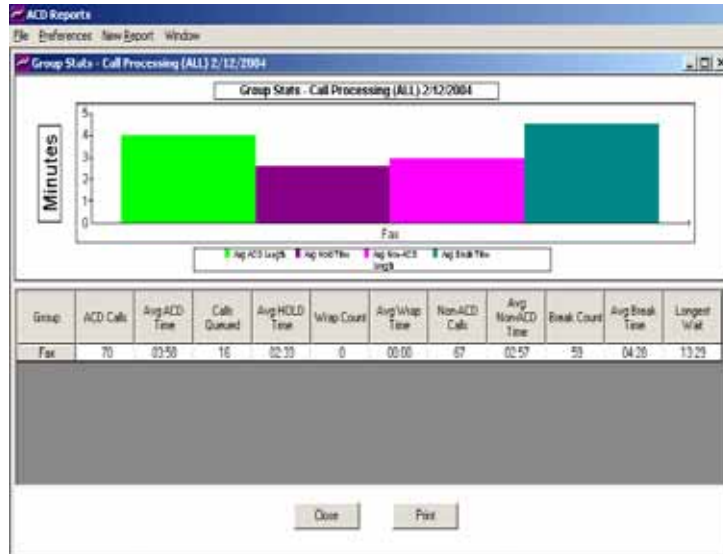


Figure 7-13: Agent Stats - Call Processing Report (Chart/Text Mode)

Agent Stats - ACD Traffic by Hour Report

The Agent Stats - ACD Traffic by Hour report displays either in text mode or chart mode depending upon which style is selected from the Format menu.

In text mode, this report includes the following information for each agent in the specified group during the user-defined period:

- ④ Agent ID
- ④ Hours
- ④ Number of ACD Calls Answered

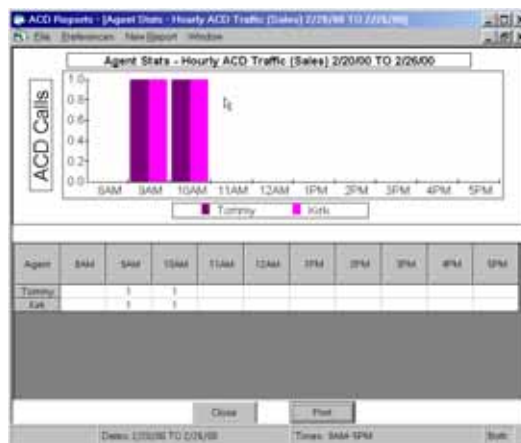


Figure 7-14: Agent Stats - ACD Traffic by Hour Report (Chart/Text Mode)

Agent Stats - Time Log Report

The Agent Stats - Time Log report displays either in text mode or chart mode depending upon which style is selected from the Format menu.

This report includes the following information for each agent in the specified group during the user-defined period:

- 🕒 Agent ID
- 🕒 Logged-in time (Format = mm:ss/hh:mm)
- 🕒 Idle time (Format = mm:ss/hh:mm)
- 🕒 Time spent in Break mode (Format = mm:ss/hh:mm)
- 🕒 Wrap up time (Format = mm:ss/hh:mm)
- 🕒 Time spent on ACD calls (Format = mm:ss/hh:mm)
- 🕒 Time spent on NONACD calls (Format = mm:ss/hh:mm)
- 🕒 Number of ACD calls (text mode only) (Format = XXX)
- 🕒 Number of NONACD calls (text mode only) (Format = XXX)
 - 👉 NONACD calls less than 10 seconds in length do not appear in the statistics.



Figure 7-15: Agent Stats - Time Log Report (Chart/Text Mode)

Group Stats - Call Processing Report

The Group Stats - Call Processing report displays either in text mode or chart mode depending upon which style is selected from the Format menu.

In text mode, this report includes the following information for every active group during the user-defined period:

- ☉ Group ID
 - ☉ Number of ACD calls
 - ☉ Average ACD Time
 - ☉ Number of Calls Queued*
(Format = mm:ss/hh:mm)
*Calls Queued are calls that had to wait (played an ACD Message) before being transferred to an available agent.
 - ☉ Average Hold Time (Format = mm:ss/hh:mm)
 - ☉ Wrap Count
 - ☉ Average Wrap Time
(Format = mm:ss/hh:mm)
 - ☉ Number of Non-ACD Calls
 - ☉ Average Non-ACD Time
(Format = mm:ss/hh:mm)
 - ☉ Break Count
 - ☉ Average Break Time
(Format = mm:ss/hh:mm)
 - ☉ Longest Wait (Format = mm:ss/hh:mm)
- ☞ Non-ACD calls less than 10 seconds in length do not appear in the statistics.

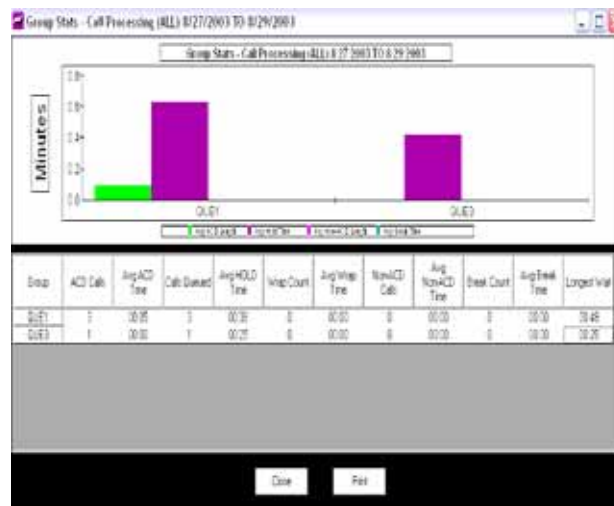


Figure 7-16: Group Stats - Call Processing Report (Chart/Text Mode)

Group Stats - ACD Traffic Report

The Group Stats - ACD Traffic report displays either in text mode or chart mode depending upon which style is selected from the Format menu.

In text mode, this report includes the following information for every active group during the user-defined period:

- ④ Group ID
- ④ Number of Calls Answered
- ④ Number of Abandoned Calls
- ④ Number of Calls Queued*
*Calls Queued are calls that had to wait (played an ACD Message) before being transferred to an available agent.
- ④ Number of Calls Overflowed

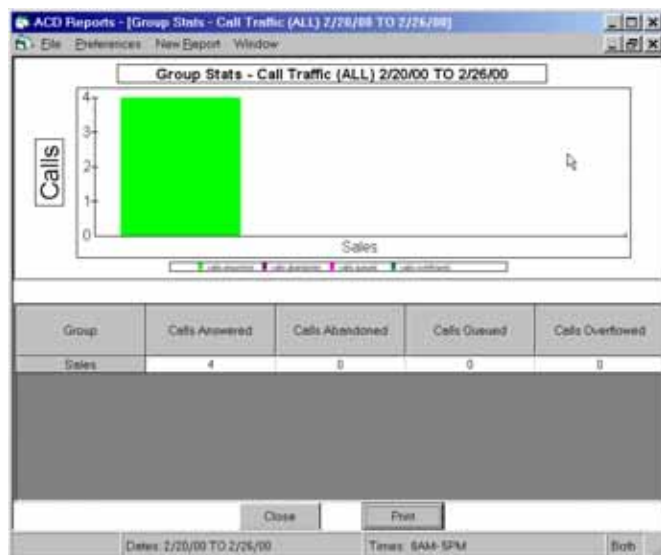


Figure 7-17: Group Stats - ACD Traffic Report (Chart/Text Mode)

Group Stats - Call Traffic by Hour Report

The Group Stats - Call Traffic by Hour report displays either in text mode or chart mode depending upon which style is selected from the Format menu.

In text mode, this report includes the following information for the specified group during each hour of the user-defined period:

- ④ Hours
- ④ Calls Answered
- ④ Calls Abandoned
- ④ Calls Queued*
*Calls Queued are calls that had to wait (played an ACD Message) before being transferred to an available agent.
- ④ Calls Overflowed

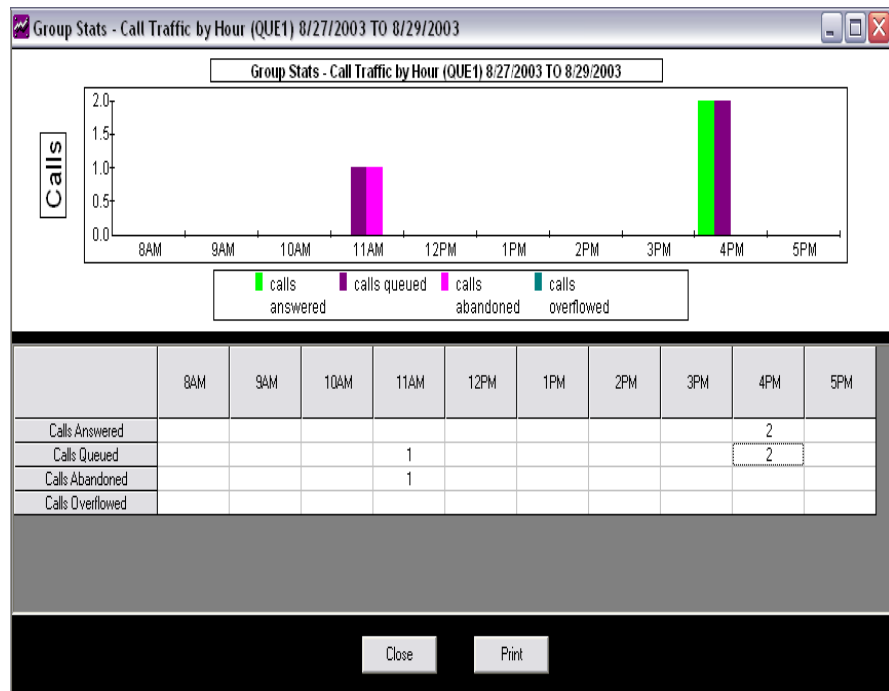


Figure 7-18: Group Stats - Call Traffic by Hour Report (Chart/Text Mode)

Group Stats - Call Processing by Hour Report

The Group Stats - Call Processing by Hour report displays either in text mode or chart mode depending upon which style is selected from the Format menu.

In text mode this report includes the following information for the specified group during each hour of the user-defined period:

- Ⓞ Hours
- Ⓞ Average time spent on ACD calls
(Format = mm:ss/hh:mm)
- Ⓞ Average Hold Time
(Format = mm:ss/hh:mm)
- Ⓞ Average time to Abandon
(Format = mm:ss/hh:mm)
- Ⓞ Longest Wait
(Format = mm:ss/hh:mm)

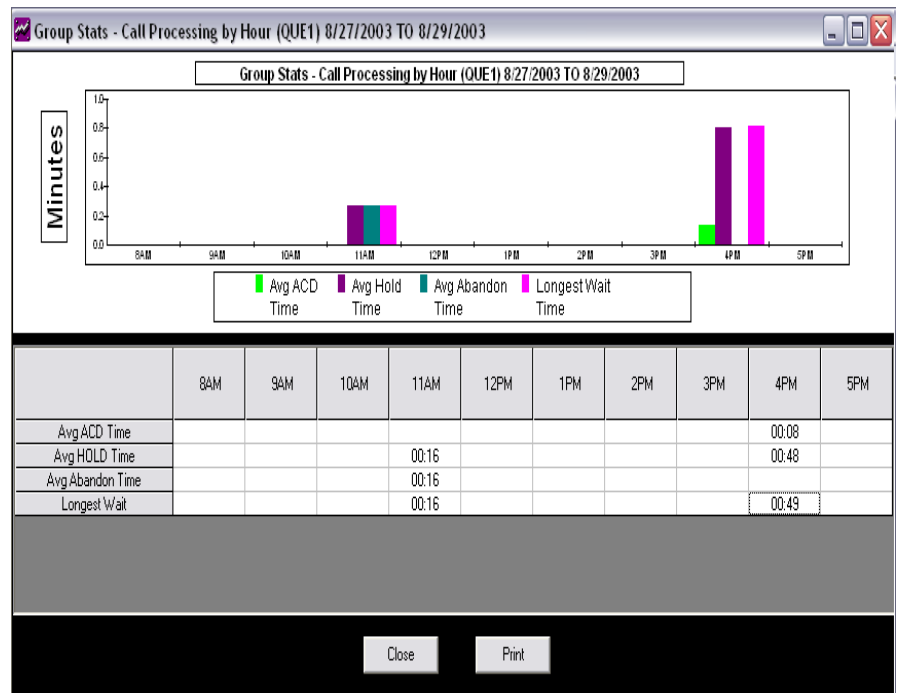


Figure 7-19: Group Stats - Call Processing by Hour Report (Chart/Text Mode)

SECTION 3 EXITING FROM THE ACD REPORTS WINDOW

To exit from the ACD Reports Window and return to the main window:

From the ACD Reports Window's File Menu, select **Exit to Monitor** or double-click on the close window button.



Figure 7-20: File Menu - Exit to Monitor

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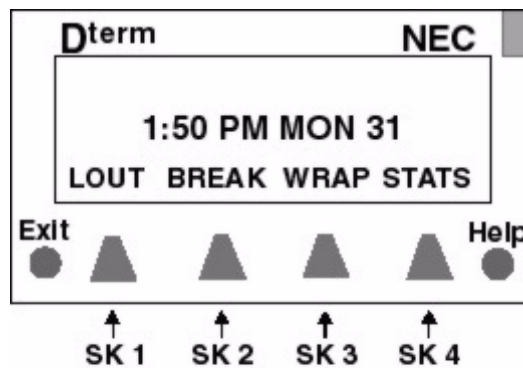
IPK ACD Plus Terminal Interface

SECTION 1 TERMINAL INTERFACE

This chapter describes the IPK ACD Plus Terminal Interface for agent and the supervisor terminals. IPK ACD Plus allows any Xen IPK terminal with an LCD display to function as either an agent or supervisor terminal, if it is identified in the Administration Program.

An agent becomes part of the ACD group by dialling the ACD port pilot number from an Xen IPK terminal. IPK ACD Plus will answer a login request only for terminals that are defined in the Administration Program. IPK ACD Plus requests the user's ID and password (defined in the Administration Program) then grants that person access to their appropriate queue(s). Agents can log into more than one queue at a time.

IPK ACD Plus controls the LCD area on the terminal and assigns menu options to the softkeys (SK). Softkeys are physically located below the LCD area. The actual buttons on the terminal are not labelled. Although, the instructions for completing terminal tasks reference the softkey numbers with each LCD option for optimum clarification. The remainder of this chapter provides visual examples of how the softkeys are referenced in this manual.



EXAMPLE: Pressing SK 1 (LOUT) will log you out of Elite ACD Plus

Figure 8-1: Terminal Softkeys (SK)

1.1 Logging into IPK ACD Plus Terminal Interface

To log into IPK ACD Plus Terminal Interface:

1. Dial the ACD Plus port pilot number.
2. Enter your ID.
3. Press **OK**.

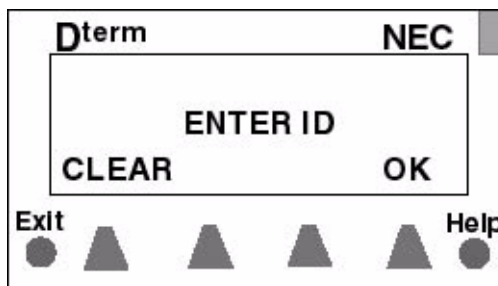


Figure 8-2: Enter ID Prompt

- CLEAR** Pressing SK 1 (CLEAR) clears any digits that are entered.
- OK** After a valid ID is entered, pressing SK 4 (OK) gives a prompt for entering a password.
- EXIT** Pressing the EXIT button returns the terminal to standard Xen IPK operation.

If you entered an invalid ID, the following prompt will appear for five seconds, then the initial **ENTER ID** prompt will appear again.

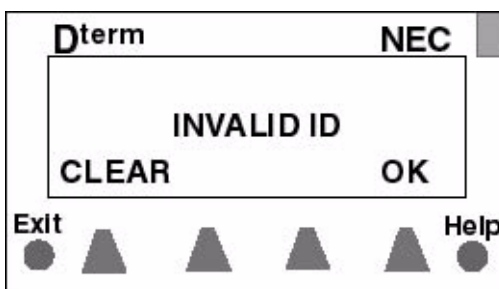



Figure 8-3: Invalid ID Screen

4. Enter the password. The password can be up to eight characters in length and may consist of any digit (0~9), the * key, and the # key.
 -  The password is defined in the IPK ACD Plus Administration program.
5. Press **OK**.

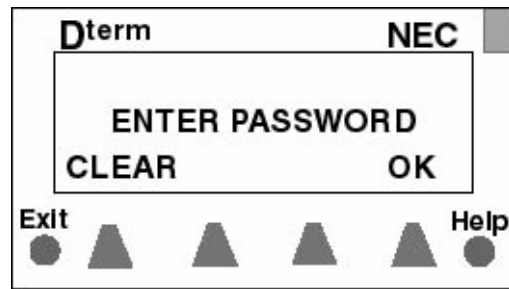


Figure 8-4: Enter Password Prompt

- CLEAR** Pressing SK 1 (CLEAR) clears any digits that you have entered.
- OK** After you enter a valid password, pressing SK 4 (OK) will begin agent operation if you are assigned to only one group. If you are assigned to more than one group, the 'Select Groups' prompt will appear. At that time, you will need to supply the groups that you wish to join.
- EXIT** Pressing the EXIT button returns the terminal to standard Xen IPK operation.

If you entered an invalid password, the following prompt will appear for five seconds then the initial **ENTER PASSWORD** prompt will appear again.

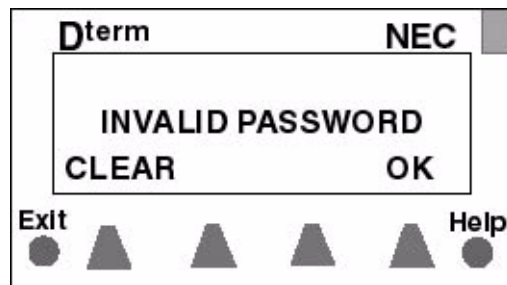



Figure 8-5: Invalid Password Display

-  **SUPERVISORS:** If your ID has supervisor's rights, IPK ACD Plus will display the '**LOG ON AS AGENT**' prompt at which time press SK 3 (YES) to log in as an agent or SK 4 (NO) to log in as a supervisor. Refer to *Figure 8-6: Log on as an Agent Prompt for Supervisor on page 8-74.*

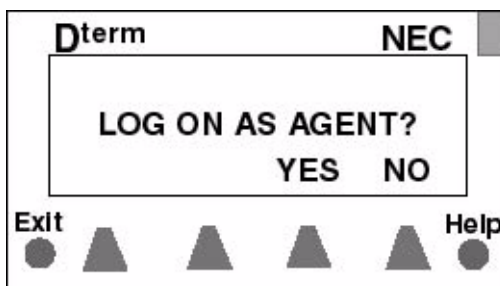


Figure 8-6: Log on as an Agent Prompt for Supervisor

Logging On As Agent:

If you are assigned to only one group, after you enter a valid ID and password, you are logged into IPK ACD Plus as an agent.

OR

If you participate in more than one group, after you enter a valid ID and password, the display prompts you to enter the ACD group(s) that you want to join. Continue with step 6.

6. Enter a valid group number or numbers (1~4) using the telephone dialling pad for the group(s) you would like to join.

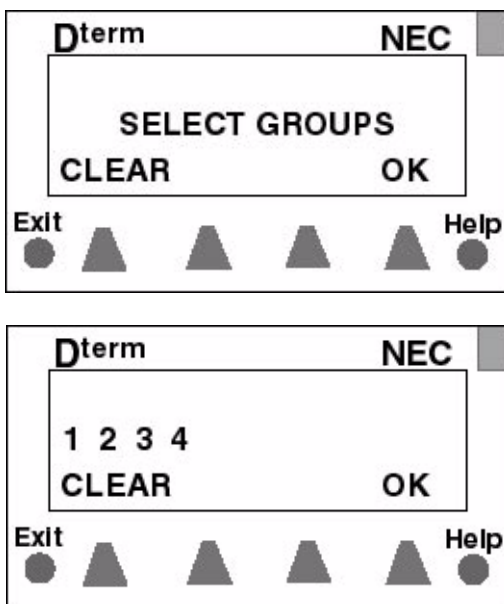


Figure 8-7: Select ACD Groups to Join

- CLEAR** Pressing SK 1 (CLEAR) clears any digits that you have entered.
- OK** After you enter a valid group number or numbers (1~4), pressing SK 4 (OK) will begin agent operation in the ACD Groups selected.
- EXIT** Pressing the EXIT button returns the terminal to standard Xen IPK operation.

7. Press **OK**.

If you have entered valid group number(s), you are logged into IPK ACD Plus.

If you entered an invalid group number, the following prompt will appear for five seconds then the initial **SELECT GROUPS** prompt will appear again.

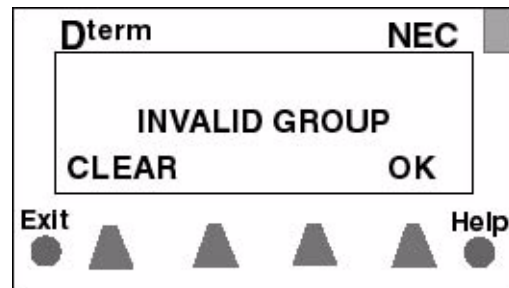


Figure 8-8: Invalid Group

1.2 Agent Terminal after Logging In

Once you have successfully logged into IPK ACD Plus as an Agent, IPK ACD Plus displays the following on your terminal LCD.

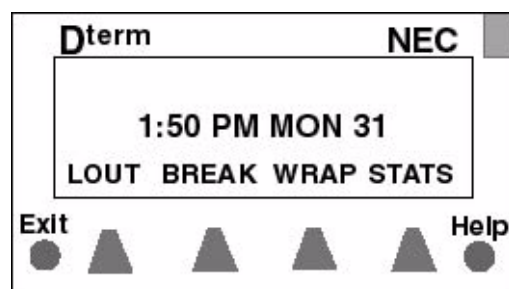


Figure 8-9: Agent Terminal LCD when Logged In

1.3 Supervisor Terminal After Successfully Logging Into IPK ACD Plus

Once you have successfully logged into IPK ACD Plus, IPK ACD Plus displays the following on your terminal LCD.

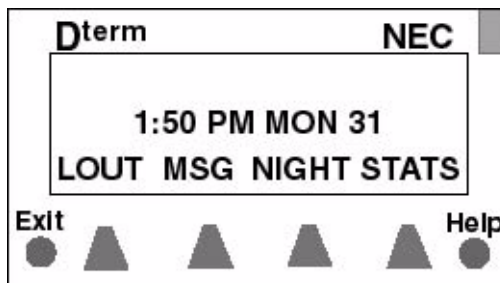


Figure 8-10: Supervisor Terminal LCD when Logged In

SECTION 2

AGENT TERMINAL INTERFACE

2.1 Break Mode

While in Break Mode, the terminal will not receive any ACD calls but the terminal will continue standard (non-ACD) operation. IPK ACD Plus will continue to monitor the agent's terminal for softkey messages and will generate call records for non-ACD calls.

2.1.1 Placing Terminal in Break Mode

To place terminal in Break Mode:

Press **SK 2 (BREAK)**. IPK ACD Plus places the terminal in Break Mode and changes the LCD. Refer to *Figure 8-11: Agent Terminal in Break Mode on page 8-76.*

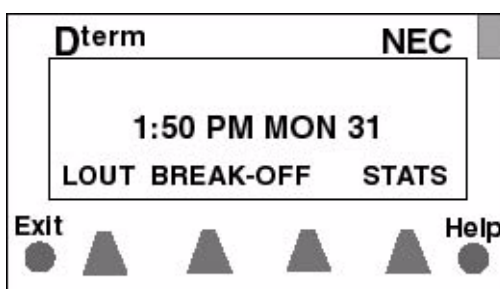


Figure 8-11: Agent Terminal in Break Mode

2.1.2 Exiting Break Mode

To exit Break Mode:

Press **SK 2 (BREAK-OFF)**. The terminal will resume normal IPK ACD Plus operation.

2.2 Wrap Mode

While in Wrap Mode, IPK ACD Plus will continue to monitor the agent's terminal for softkey messages and will generate call records for non-ACD calls.

2.2.1 Placing Terminal in Wrap Mode

To place the terminal in Wrap Mode:

Press **SK 3 (WRAP)**. IPK ACD Plus places the terminal in Wrap Mode and changes the LCD. Refer to *Figure 8-12: Agent Terminal in Wrap Mode* on page 8-77..

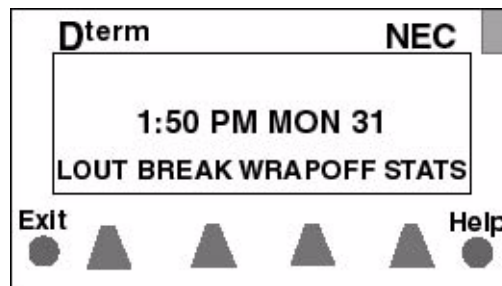


Figure 8-12: Agent Terminal in Wrap Mode

2.2.2 Exiting Wrap Mode

To exit Wrap Mode:

Press **SK 3 (WRAPOFF)**. The terminal will resume normal IPK ACD Plus operation.

SECTION 3

QUEUE STATISTICS

The following statistics will appear on the terminal LCD for each queue that you are a member of:

- ④ Name of the ACD queue
- ④ Number of agents logged in
- ④ Number of callers in queue (on hold)
- ④ Length of time that longest caller has spent in queue (minutes:seconds)

3.1 Displaying Queue Statistics

To display queue statistics:

Press **SK 4 (STATS)**. IPK ACD Plus will display the queue statistics. If you are a member of more than one queue, IPK ACD Plus will display the statistics of each queue for five seconds each. The terminal's LCD will appear similar to the example. Refer to *Figure 8-13: Agent Terminal Displaying Queue Statistics on page 8-78.*

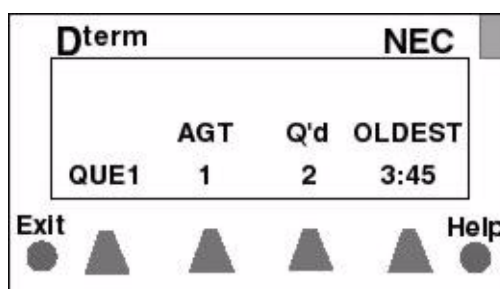


Figure 8-13: Agent Terminal Displaying Queue Statistics

3.2 Agent Terminal When Answering an ACD Call

IPK ACD Plus will send call information to the agent with every ACD call that it transfers. This information is displayed on the answering terminal's LCD and will have the following format (QID is the name of the ACD group and mm:ss is the hold time of this caller in minutes:seconds format).

While on an ACD Call you can find out which Queue that the call was transferred from by hitting the **Help** soft key.

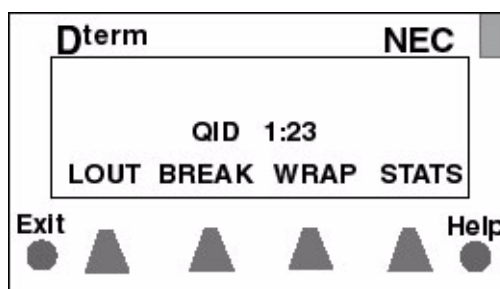


Figure 8-14: Agent Terminal Answering an ACD Call

SECTION 4

SUPERVISOR TERMINAL INTERFACE

IPK ACD Plus will allow any terminal to become a supervisor terminal. The terminal must be defined in the Administration Program. As a supervisor, you are allowed to log into more than one queue at a time. Refer to [1.1 Logging into IPK ACD Plus Terminal Interface on page -72](#).

As described in that section, a supervisor logs into IPK ACD Plus the same way except that after successfully logged in, IPK ACD Plus will ask if you wish to become an agent.

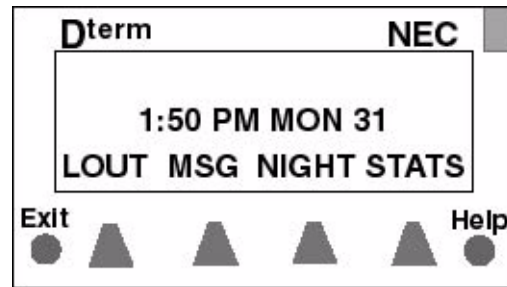


Figure 8-15: Supervisor Terminal Main LCD Display

SECTION 5

RECORDING MESSAGES

This section provides information about recording Automatic Attendant (AA) messages and numbers.

5.1 Recording an AA Message or AA Error Message

To record an AA message:

1. Press **SK 2 (MSG)**.
2. Press **SK 1 (AA)**.

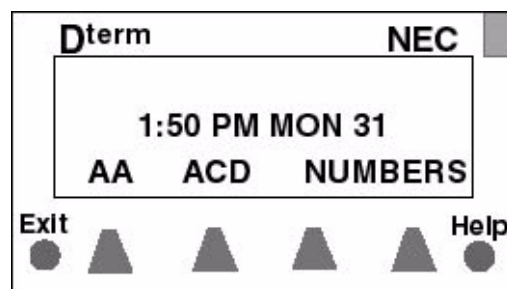


Figure 8-16: Selecting an AA Message to Record

3. Press **SK 1 (AA MSG)** to record the AA greeting.

OR

Press **SK 4 (AA ERROR)** to record the AA error message that informs callers of their invalid selection.

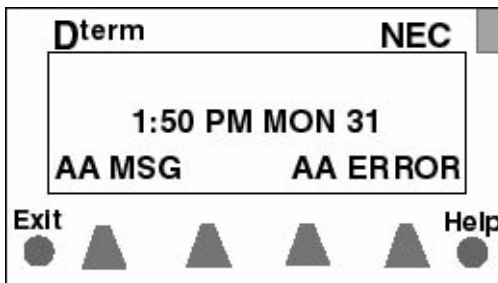


Figure 8-17: Selecting AA Message to Record

4. Press **SK 4 (RECORD)**.

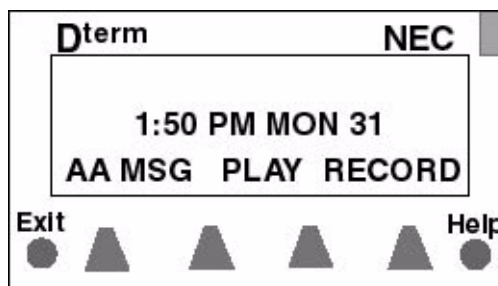


Figure 8-18: Selecting RECORD to Begin Recording

5. Record your message.
6. Press **SK 4 (STOP)** when you are finished recording your message.

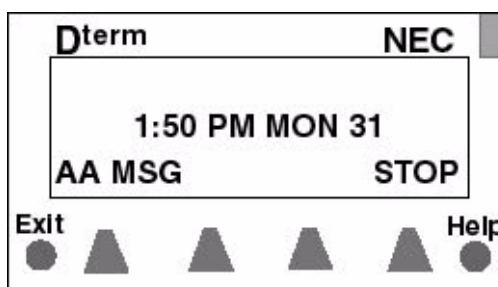


Figure 8-19: Press STOP when Done Recording

STOP Pressing SK 4 (STOP) will stop recording.
EXIT Pressing the EXIT button returns the terminal to the message recording menu.

7. Do one of the following at the Accept/Play/Redo Message menu:
 - a) If you are satisfied with your recording, press **SK 1 (ACCEPT)**. IPK ACD Plus will replace the current AA message with your newly recorded message.
 - b) If you want to hear the newly recorded message, press **SK 3 (PLAY)**.
 - c) If you want to redo the recording, press **SK 4 (REDO)**.

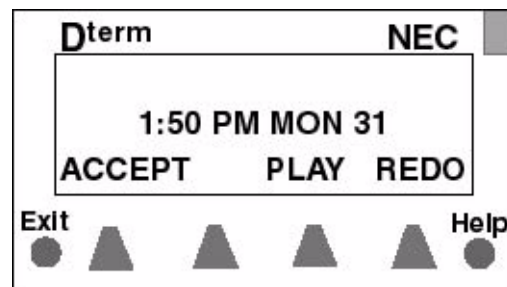


Figure 8-20: Accept/Play/Redo Message Menu

- ACCEPT** Pressing SK 1 (ACCEPT) will replace the current AA message with your newly recorded message.
- PLAY** Pressing SK 3 (PLAY) plays back (through the terminal) the newly recorded message.
- REDO** Pressing SK 4 (REDO) will start the recording of the message over.
- EXIT** Pressing the EXIT button returns the terminal to the message recording menu.

8. After you press **SK 1 (ACCEPT)**, IPK ACD Plus will display the AA recording menu. You can continue recording or press the **EXIT** button to return to the AA/ACD/NUMBERS recording menu. Pressing the **EXIT** button again will return you to the main menu.

SECTION 6

RECORDING AN ACD MESSAGE

There are eight different IPK ACD Plus messages that you can record from your terminal. These ACD messages are stored on the Voice Mail hardware.

You can program the time between the ACD messages in the Administration Program. The range for this period is 30 to 999 seconds (*default is 45 seconds*). The time setting is the time IPK ACD Plus waits between all of the ACD messages (i.e. the ACD greeting and the ACD refresher message 1). For a description of each type of ACD message, refer to *Table 8-1: ACD Messages (Description and Default Message) on page 8-82.*

Table 8-1: ACD Messages (Description and Default Message)

ACD Message Name	Description	Default Message
Greeting Message	The ACD Greeting Message greets callers only if there are no agents available to take a call.	"All agents are busy. Please hold."
Hold Message	The Hold Message plays between the ACD Greeting Message and ACD Refresher Message 1 (also between ACD Refresher Message 1 and Refresher Message 2). You can enable or disable the ACD On-Hold message per queue. The default is disabled.	There is no default message.
Night Message	The Night Message plays when IPK ACD Plus is placed in Night Mode. The Night Message per Queue can be enabled or disabled. The default is disabled.	"We are closed. Please call back during business hours."
Auto Attendant Error Message	The Error Message informs callers if they have made an invalid selection.	"You have made an invalid selection. Please try again."

Table 8-1: ACD Messages (Description and Default Message) *(continued)*

ACD Message Name	Description	Default Message
ACD Refresher Message 1	<p>The Refresher Message 1 greets callers who have remained on hold (in queue) for a defined period.</p> <p>You will define the amount of time between queue messages. This message may be enabled or disabled per queue. The default is enabled.</p> <p>This message is automatically enabled if ACD Refresher Message 2 is enabled. If ACD Refresher Message 2 is enabled, ACD Message 1 will alternate at a user-defined interval with ACD Refresher Message 2 for as long as the caller is in queue.</p>	<p>“Please continue to hold. An agent will be with you shortly.”</p>
Refresher Message 2	<p>The Refresher Message 2 greets callers who have remained on hold (in queue) for a defined period. You will define the amount of time between the first refresher message and the second message. You can enable or disable the message per queue. The default is enabled. If Refresher Message 2 is enabled, the message will alternate at a user-defined interval with Refresher Message 1 for as long as the caller is in queue.</p>	<p>“Please continue to hold. Your call is important to us.”</p>

Table 8-1: ACD Messages (Description and Default Message) *(continued)*

ACD Message Name	Description	Default Message
Queue Status Header Message	<p>The Queue Status Header Message will greet callers at the end of the following messages: Greeting Message, Refresher Message 1 and Refresher Message 2.</p> <p>You will not be required to record the number (x). The number (x) is a factory-recorded message and must handle numbers from 1 to 64. IPK ACD Plus will update the queue status information to represent the actual status of the queue. You can enable or disable the Queue Status Header Message per queue. The default is enabled.</p>	<p>“You are caller number x”, where x (spoken by the IPK ACD Plus) represents the caller’s order in their specific queue group.</p>
Queue Status Trailer Message	<p>The Queue Status Trailer Message will play after the Queue Status Header Message. You can enable or disable the Queue Status Trailer Message per queue. The default is enabled.</p>	<p>“In queue.”</p>

To Record an ACD Message:

1. Press **SK 2 (MSG)**.
2. Press **SK 2 (ACD)**.

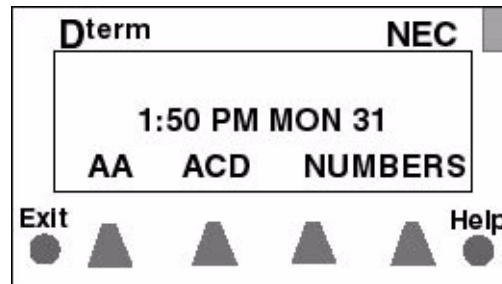


Figure 8-21: Selecting ACD Message to Record

3. Press the softkey (SK) that corresponds with the queue that you want to record the ACD message(s). Only those groups that have been established, or you are assigned as a supervisor for, are displayed (i.e. if only two ACD groups are active then only two are displayed.)

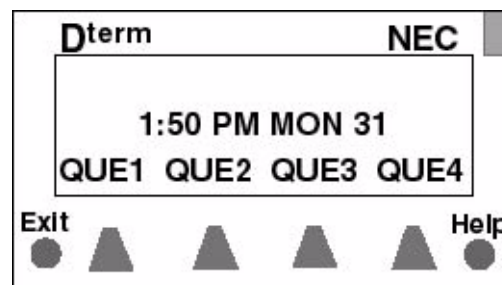


Figure 8-22: ACD Selection Menu

4. Select the type of ACD message to record. Refer to the following instructions and [Figure 8-23: ACD Messages to Record on page 8-86.](#)

ACD Greeting:	Press SK 1 (GREET)
Hold message:	Press SK 2 (HOLD)
Night message:	Press SK 3 (NIGHT)
Error message:	Press SK 4 (more) then press SK 1 (ERROR)
Queue Status message:	Press SK 4 (more), press SK 3 (Q STATUS), then press SK 1 (HEADER) to record the Queue Status Header message or press SK 4 (TRAILER) to record the Queue Status Trailer message.
Refresh message:	Press SK 4 (more), press SK 4 (REFRESH), then press SK 1 (REFRESH 1) to record the first Refresher message or SK 4 (REFRESH 2) to record the second Refresher message.

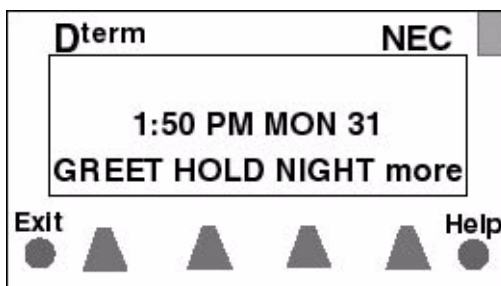


Figure 8-23: ACD Messages to Record

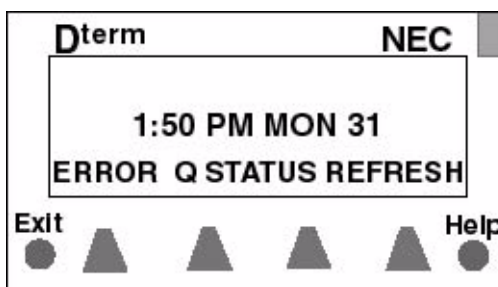


Figure 8-24: Display After Pressing SK 4 (More)

5. Press **SK 4 (RECORD)** then record your message. Each message can be up to 90 seconds long.
6. **SK 4 (STOP)** when you are finished recording your message.
7. Do one of the following at the Accept/Play/Redo Message menu:
 - a) If you are satisfied with your recording, press **SK 1 (ACCEPT)**. IPK ACD Plus will replace the current ACD message with your newly recorded message.
 - b) If you want to hear the newly recorded message, press **SK 3 (PLAY)**.
 - c) If you want to redo the recording, press **SK 4 (REDO)**.
8. After you press **SK 1 (ACCEPT)**, IPK ACD Plus will display the ACD recording menu. You can continue recording or press the **EXIT** button to return to the AA/ACD/NUMBERS recording menu. Press the **EXIT** button again will return you to the main menu.

6.1 Recording Numbers

Once you begin to record the numbers, you must continue until the ACCEPT prompt is displayed or the recording will be abandoned.

To record the numbers:

1. Press **SK 2 (MSG)**.
2. Press **SK 4 (NUMBERS)**.

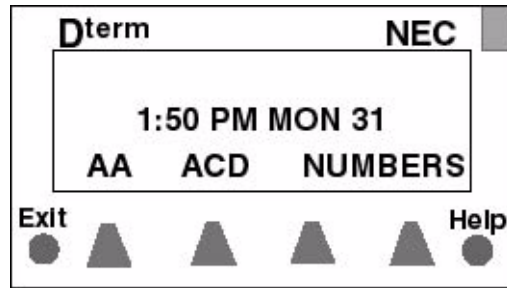


Figure 8-25: Selecting Numbers to Record

3. Press **SK 4 (RECORD)** then record your message. The display will show the number to be recorded.

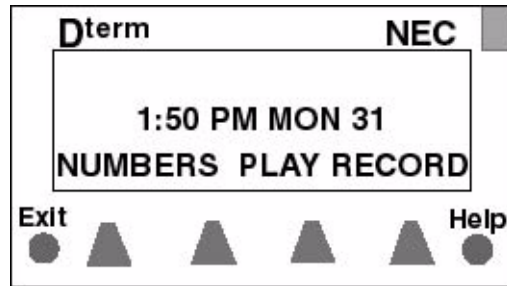


Figure 8-26: Numbers Play/Record Menu

4. Press **SK 4 (STOP)** when you are finished recording your message.

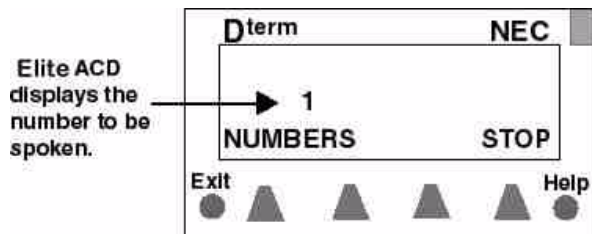


Figure 8-27: Recording Numbers with Stop Option

5. Do one of the following at the Accept/Play Message menu:
 - a) If you are satisfied with your recording, press **SK 1 (ACCEPT)**. IPK ACD Plus will replace the current numbers with your newly recorded message.
 - b) If you want to hear the newly recorded message, press **SK 3 (PLAY)**.
 - c) If you want to redo the message, press **SK 4 (REDO)**.

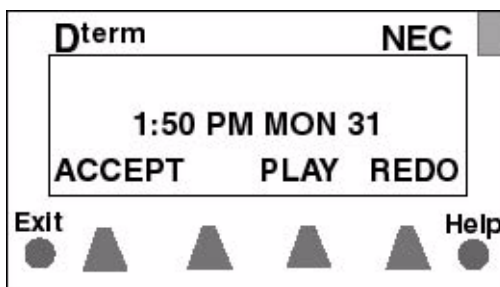


Figure 8-28: Accept, Play, Redo Menu

6. After you press **SK 1 (ACCEPT)**, IPK ACD Plus will display the Numbers Recording menu. You can continue recording, or press the **EXIT** button to return to the AA/ACD/NUMBERS recording menu. Pressing the **EXIT** button again will return you to the main menu.

SECTION 7

NIGHT MODE (SUPERVISOR TERMINAL)

7.1 Enabling/Disabling Night Mode For ACD Group(s)

To enable/disable Night Mode for ACD Group(s):

1. From the supervisor's main LCD menu, press **SK3 (NIGHT)**.
2. Press softkeys (SK) of the queue/ACD group you want to enable/disable the Night Mode. The current mode (Day Mode or Night Mode) of IPK ACD Plus for the ACD Group, determines which of the following prompts IPK ACD Plus will display.

Currently In Day Mode

If IPK ACD Plus is currently in Day Mode for the ACD Group, IPK ACD Plus displays the following prompt:

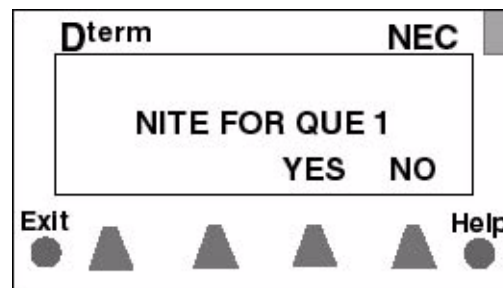


Figure 8-29: Night Prompt While in Day Mode

Currently In Night Mode

If IPK ACD Plus is currently in Night Mode for the ACD Group, IPK ACD Plus displays the following prompt:

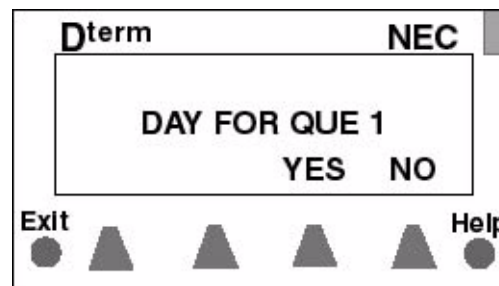


Figure 8-30: Day Prompt While in Night Mode

3. Respond to the prompts accordingly by either pressing **SK 3 (YES)** or **SK 4 (NO)**.

7.2 Night Mode Operation

When IPK ACD Plus is in Night Mode, Night Mode overrides all other modes of operation. Night Mode may be set for each individual queue. Night Mode operation can function in three ways: it can play a user-recorded message and hang up, it can play a message and transfer the caller to any valid internal phone number, or it can directly transfer to any valid phone number via Centrex transfer. Night mode can be initiated from an external supervisor terminal or can be programmed to “follow” the Xen IPK into Night Mode. Refer to *7.3 Transfer Methods (Night Mode) on page -90*.

7.3 Transfer Methods (Night Mode)

The following transfer methods are available while in Night Mode.

7.3.1 Message Without Transfer (Night Mode)

If there is an IPK ACD Plus message enabled but no transfer number is programmed, IPK ACD Plus plays the message then releases the call.

7.3.2 Message With Transfer (Night Mode)

If there is an IPK ACD Plus message enabled and a transfer number is programmed, IPK ACD Plus plays the Night Mode Message then transfers the call. The transfer number may be any valid extension or external phone number using a Centrex transfer.

7.3.3 Transfer Only (Night Mode)

If there is no IPK ACD Plus message enabled but a transfer number is programmed, IPK ACD Plus transfers the call immediately.

7.4 Logging Out of IPK ACD Plus

Press **SK 1 (LOUT)** on the terminal will log the agent out of the ACD queue(s) and will return the terminal's LCD to standard Xen IPK operation. IPK ACD Plus will no longer monitor the terminal.

IPK ACD Plus Administration Program

SECTION 1 INTRODUCTION

The NEC IPK Automated Call Distribution (ACD) Plus Administration Program is a windows-based software application that allows you to perform all facets of IPK ACD programming via a personal computer (PC) connected to a serial port or LAN port on the ACD Plus card. You will also be able to transfer voice files from the PC to the IPK ACD Plus. These voice files can be used for any of the Auto Attendant (AA), ACD, or Night Mode messages and would take the place of manually recording those messages.

SECTION 2 LOGGING ON

To log on:

1. From the Windows Start Menu, choose **IPK ACD Plus Suite**, then choose **ACD+ Admin**, or if you have an icon on your desktop, click the icon.
2. Click on the **Get Configuration from KSU** button.

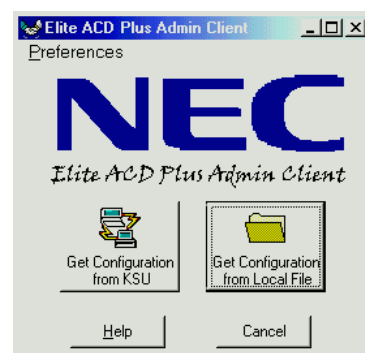


Figure 9-1: Logon Window

3. Type in the **server name** or **IP (Internet Protocol) address** if running ACD Plus Admin on Remote PC. See the network administrator if the server IP address or name cannot be determined.
4. Type your **Login Name**. (The default Login name is **nec**.)
5. Type your **Password**. (The default password is **password**.)

If you have an invalid user name and/or password, the following message box will appear:

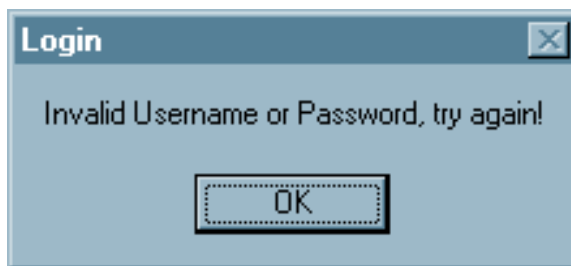


Figure 9-2: Invalid Password Message

- ☞ If you enter an incorrect user name and/or password **three** consecutive times, the Administration Program will automatically close.

SECTION 3

LOGGING OFF

To log off:

1. From the File menu, choose **Exit**, or click the close icon in the upper right-hand corner of the window.
2. Click **Yes** at the 'Do you want to exit IPK ACD Plus Admin?' prompt.

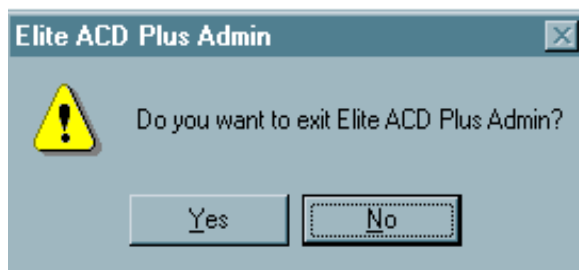


Figure 9-3: IPK ACD Plus Administration Exit Message

3. Click **Yes** at the 'Do you want to save changes made in IPK ACD Plus Admin?' prompt.

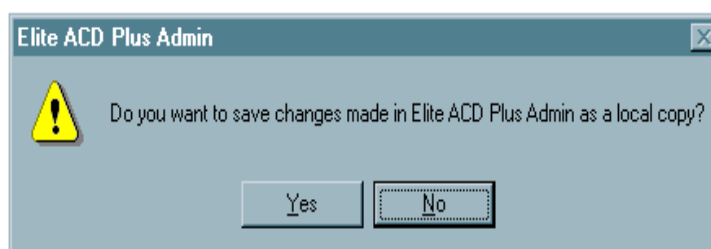


Figure 9-4: Save Changes Prompt

SECTION 4

WORKING LOCALLY (NOT CONNECTED TO A SERVER)

1. From the Windows Start Menu, choose **IPK ACD Plus Suite**, then choose **ACD+ Admin**, or if you have an icon on your desktop, click the icon.
2. Click the **Get Configuration from File** button.
3. Select the configuration file by clicking **Open**.

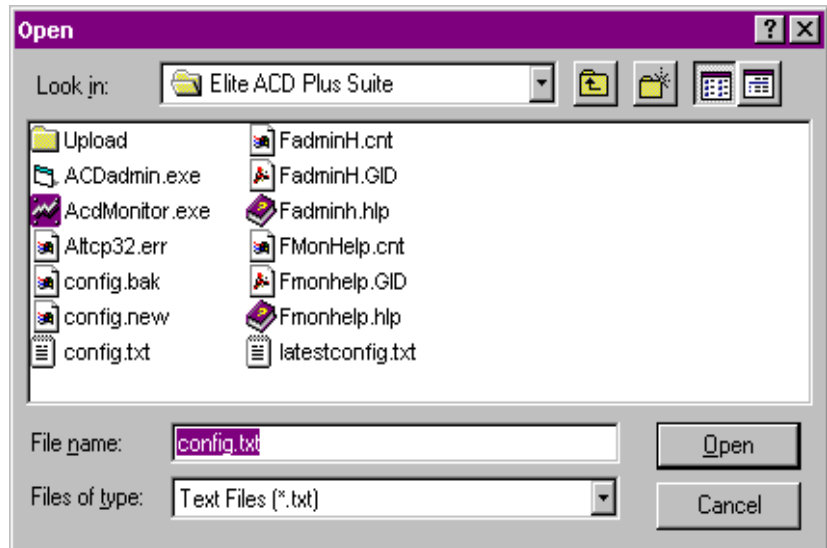


Figure 9-5: Opening the Configuration File

SECTION 5

QUEUES TAB

From the **Queues** tab, you can assign agent ID numbers to ACD Groups. Agent IDs that were setup from the ID/Administration tab will appear in the Agents box. From this area, you can click and drag an Agent ID to one or more queues. Each queue lists the Agent's ID, Name, and Level in Agent ID order.

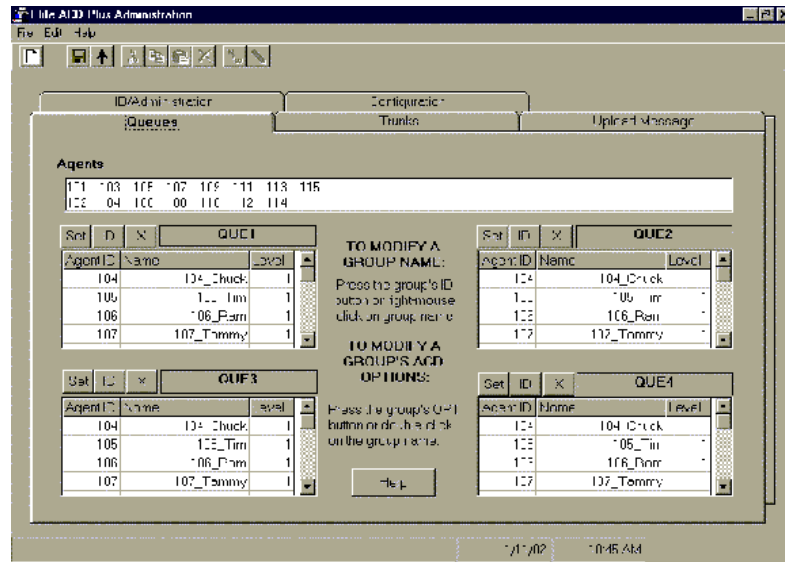



Figure 9-6: Queues Tab

5.1 Adding an Agent to a Queue or to Multiple Queues

To add an agent to a queue:

1. From the Queues tab, click the **Agent ID** located in the Agent's box that you want to move.
2. Drag and drop to your queue of choice.

 You can add an agent ID to multiple queues. If so, you will need to confirm your action by clicking **Yes** at the 'Agent already in Group' pop-up message box.

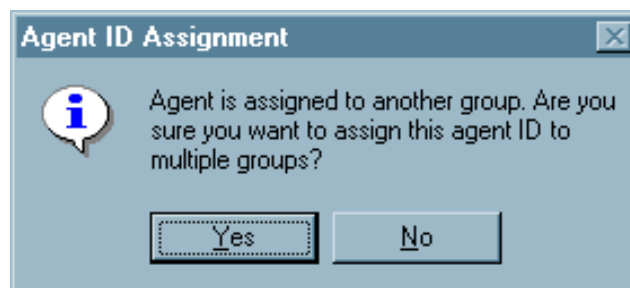


Figure 9-7: Agent Already in Group Pop-up Message

5.2 Copying an Agent to a Different Queue

To copy an agent to a different queue:

1. From the Queues tab, left mouse click and then right mouse click on the **Agent** cell to be copied to another queue.
2. Choose **Copy**.
3. Click the cell of the new queue where the agent is to be placed.
4. Right mouse click and choose **Paste**.

5.3 Moving an Agent to a Different Queue

To move an agent to a different queue:

1. From the Queues tab, left mouse click and then right mouse click on the Agent cell that is to be moved to another queue.
2. Choose **Cut**.
3. Click the cell of the new queue where the agent is to go.
4. Right mouse click and choose **Paste**.

5.4 Deleting an Agent from a Queue

To delete an agent from a queue:

1. From the Queues tab, left mouse click and then right mouse click on the **Agent ID** to be deleted from the queue.
2. Choose **Delete**.
3. Click **Yes** at the 'Are you sure you want to delete agent?' prompt.

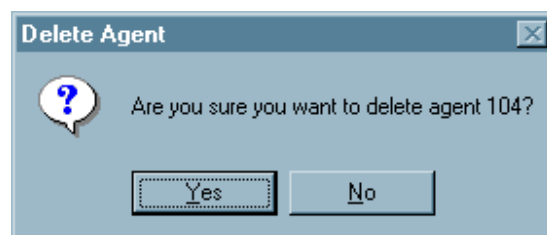


Figure 9-8: Delete Agent Confirmation Prompt

5.5 Changing an Agent's Preferred Level in the Queue

To change an Agent's preferred level in the queue:

1. From the Queues tab, left mouse click and then right mouse click on the preferred level cell of the Agent.
2. Select the preferred level from the drop-down list. Preferred levels are 1~9. *The default preferred level is 1.*

5.6 Changing a Queue Name

To change a queue name:

1. Right mouse click on the **ACD Group Name** or select the **ID icon**.
2. Type a new name with a maximum length of eight digits. Once a name has been changed, the name will remain resident in the program.
3. Click **Accept**.

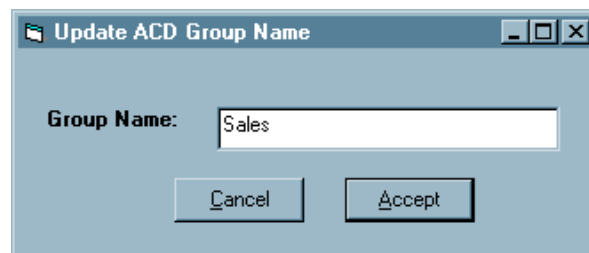


Figure 9-9: Update an ACD Group Name

5.7 Changing Queue Settings

To change queue settings:

1. From the Queues tab, select the **Set** icon or double-click the **ACD Group Name**.
2. From the Options Menu, make changes to the defaults, as needed.
3. Click **Exit** to save any changes and exit the screen.

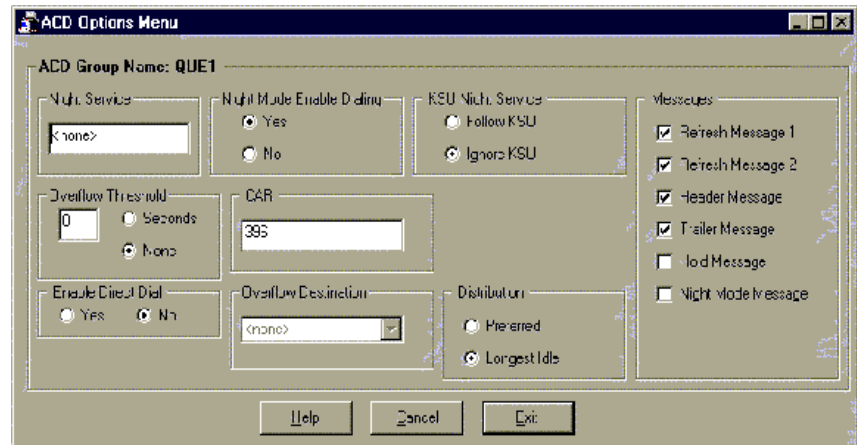


Figure 9-10: ACD Options Menu

The options available on the ACD Options Menu include:

Night Service

In night mode, all calls are directed to the ACD Group that is routed to the Night Service number. *The night service box is blank by default.*

Night Mode Enable Dialling

Enables or disables direct dialling to a valid extension by the caller when the queue is in Night Mode. The caller can only dial while the greeting is played.

KSU Night Service

Sets the group to follow the telephone system Night Mode, or to ignore it.

Enable Direct Dialling

Enables or disables Direct Dialling to a valid extension by the caller during Day Mode. The caller can only dial while the greeting is played.

CAR

The CAR box is used to enter the pilot number for this queue's Call Arrival Key (CAR). This is where a call would be directed for a particular queue.

Messages

Check the messages that you want to apply. Refer to *Section 7 Upload Message Tab on page -100* for a complete description of each message type.

Overflow Threshold

Overflow Threshold will send a caller from the queue to the Overflow Destination. You can set the Overflow Threshold by the time spent in queue into the text entry box. After you enter the number of seconds, click the Seconds box. The default value is a blank text entry box with the None option checked.

Overflow Destination

The Overflow Destination number is the number to transfer the caller to when the Overflow Threshold has been reached. Valid entries in this area include other queues, extensions, external numbers using the trunk access code and/or a Centrex hookflash (⊛) followed by the destination number. Spaces, dashes, and parentheses are allowed. If the Overflow Threshold has been selected to be "None", then the Administration Program automatically enters "None" as the Overflow Destination number. A drop-down list offers a "None" choice and names of the queues.

Distribution

Choose the distribution by selecting the correct value. The values are: **Preferred** and **Longest Idle**.

SECTION 6

TRUNKS TAB

The Trunks tab allows you to assign trunk lines that are to be answered by the IPK ACD Plus Auto Attendant and ACD groups. IPK ACD Plus Administration will allow a trunk to be answered by only one single function (AA, ACD Group1, ACD Group 2, etc.).

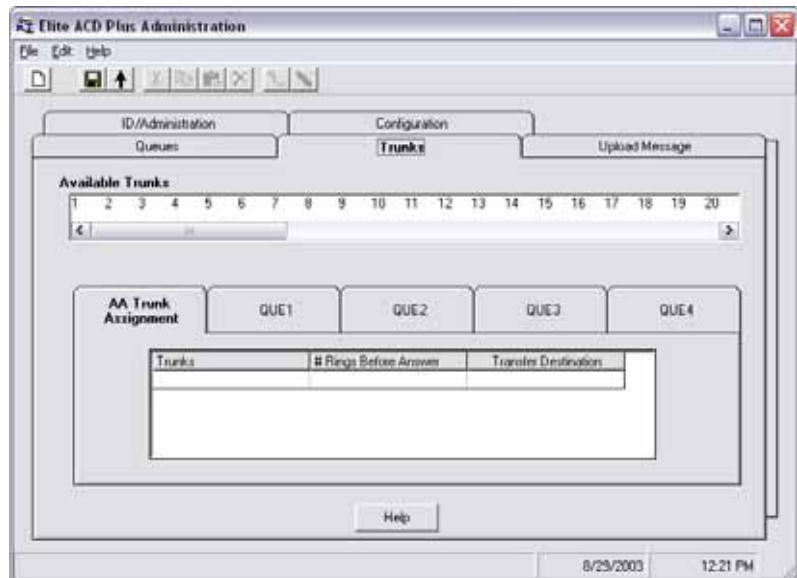


Figure 9-11: AA Trunk Groups Tab

The options available on the AA Trunk Groups tab menu include:

Available Trunks

The Available Trunks area shows all available trunk lines that you can choose to assign to the appropriate AA or ACD Trunk Group. You can drag and drop the trunks into a group using the mouse. A trunk can be added to only one group or Auto Attendant.

Trunks

The list of trunks for that particular group.

Rings Before Answer

You can set the number of rings (0~9) for each line before IPK ACD Plus greeting. To change the number of rings before answering, click the right mouse button on the number desired to change.

Transfer Destination

Enter the AA transfer destination number in the "Transfer Destination" field. Valid entries in this field include extensions, external numbers, and a Centrex "hook-flash" (⊛) followed by the destination number. Spaces, dashes, and parentheses are allowed. The Transfer Destination for ACD groups are automatically set to N/A, and data can not be entered into the field.

6.1 Moving a Trunk from a Queue

To move a trunk from a queue:

1. From the Trunks tab, left mouse click and then right mouse click on the cell to be moved to another queue.
2. Choose **Cut**.
3. Click the tab of the queue the trunk is to be moved to.
4. Left mouse click and then right mouse click and choose **Paste**.

6.2 Deleting a Trunk from a Queue

To delete a trunk from a queue:

1. From the Trunk tab, left mouse click and then right mouse click on the trunk cell that is to be deleted from the queue.
2. Choose **Delete**.

SECTION 7 UPLOAD MESSAGE TAB

The Upload Message Tab allows anyone with administrator privileges to upload message files from a PC into IPK ACD Plus. The time limit on any single message is 90 seconds.

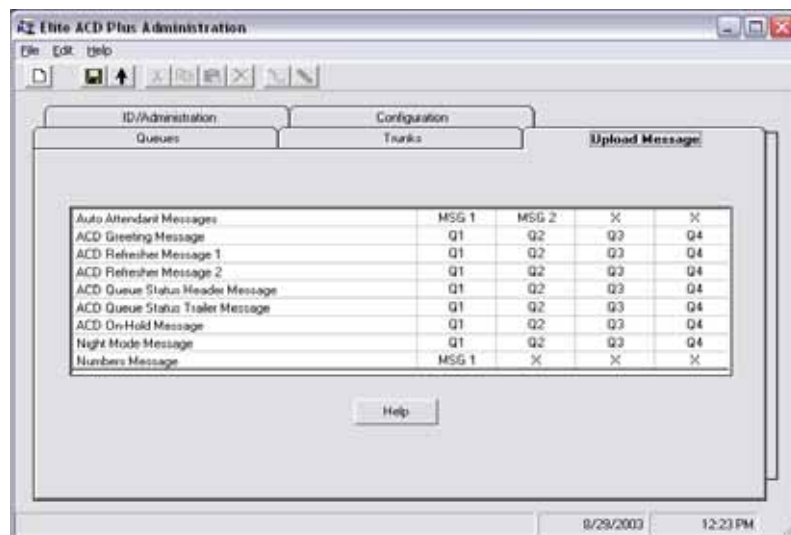


Figure 9-12: Upload Message Tab

The messages available on the Upload Message Tab include:

Auto Attendant Messages

The greeting recorded here is used for all queues. There is no message at default. It can be used to prompt a caller for action.

ACD Greeting Message

The ACD Greeting Message greets callers only if there are no agents available to take a call or transfer after Greeting is checked in the Configuration of the KSU Parameters tab. If an agent is available, the call is sent directly to that agent. This message only plays if the ACD functionality is enabled.

The default message is:

“All agents are busy. Please hold.”

ACD Refresher Message 1

The ACD Refresher Message 1 greets callers who have remained on hold (in queue) for a defined period.

The default message for the ACD Refresher Message 1 is:

“Please continue to hold. An agent will be with you shortly.”

The amount of time between queue messages can be defined. This message may be enabled or disabled per queue. The default is enabled (provided the ACD functionality is enabled). This message will automatically be enabled if ACD Refresher Message 2 is enabled. If ACD Refresher Message 2 is enabled, ACD Message 1 will alternate at a user-defined interval with ACD Refresher Message 2 for as long as the caller is in queue.

ACD Refresher Message 2

The ACD Refresher Message 2 greets callers who have remained on hold (in queue) for a defined period.

The default message for the ACD Refresher Message 2 is:

“Please continue to hold. Your call is important to us.”

The amount of time between the first ACD refresher message and the second message can be defined. This messages can be enabled or disabled per queue. The default is enabled (provided the ACD functionality is enabled). If ACD Refresher Message 2 is enabled, the message will alternate at a user-defined interval with ACD Refresher Message 1 for as long as the caller is in queue.

ACD Queue Status Header Message

The ACD Queue Status Header Message will greet callers at the end of the following messages: ACD Greeting Message, ACD Refresher Message 1 and ACD Refresher Message 2.

The default ACD Queue Status Header Message is:

“*You are caller number x*”, where x (spoken by the IPK ACD Plus) represents the caller’s order in their specific queue group.

The number (x) is not required to be recorded by the user. The number (x) will be a factory-recorded message. IPK ACD Plus will update the queue status information to represent the actual status of the queue. You can enable or disable the ACD Queue Status Header Message per queue. *The default is enabled.*

ACD Queue Status Trailer Message

The ACD Queue Status Trailer Message will play after the ACD Queue Status Header Message.

The default ACD Queue Status Trailer Message is:

“In queue.”

You can enable or disable the ACD Queue Status Trailer Message per queue. *The default is enabled.*

ACD On-Hold Message

The ACD On-Hold Message will play between the ACD Greeting Message and ACD Refresher Message 1 (also between ACD Refresher Message 1 and Refresher Message 2). There will be no default ACD On-Hold Message. You can enable or disable the ACD On-Hold message per queue. *The default is disabled.*

Night Mode Message

The Night Mode Message plays when IPK ACD Plus is placed in Night Mode. This message can be enabled or disabled per queue. The default is disabled.

7.1 Uploading a Message

1. To upload a message file, select a message from the message grid by double-clicking the cell. For all messages except the Auto Attendant Message, you will be required to select the name of the ACD group (indicated below by Q1-Q4) for which they wish to upload a message.
2. When a message (and an ACD group, where appropriate) has been selected, you are prompted for the path to the sound file using a pop-up message box. Refer to *Figure 9-13: Locating Path for Message Window on page 9-103.*
3. The message name and ACD group designation will appear at the top. The path will be a text box that allows the user to enter the path and file name. If you need to browse, change drives, and/or open file folders, as needed, until the file name appears in the path box.
4. Click **OK**.



All prompts must be formatted as 8kHz ADPCM OKI. If not properly formatted, the message will not function.

In addition the Numbers prompt must be in Index Play format. If not properly formatted, the queue depth feature will not function.

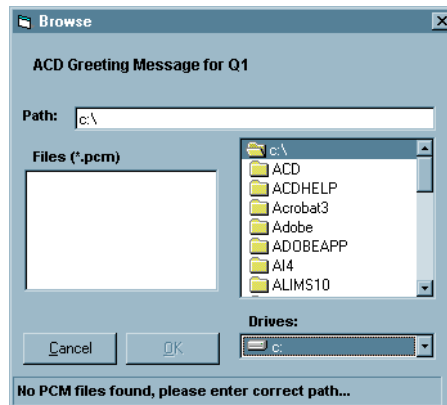


Figure 9-13: Locating Path for Message Window

SECTION 8 CONFIGURATION TAB

The Configuration Tab contains three sub-tabs for customising IPK ACD Plus features.

8.1 Terminals Tab

The Terminals sub-tab allows information about the terminal to be entered.

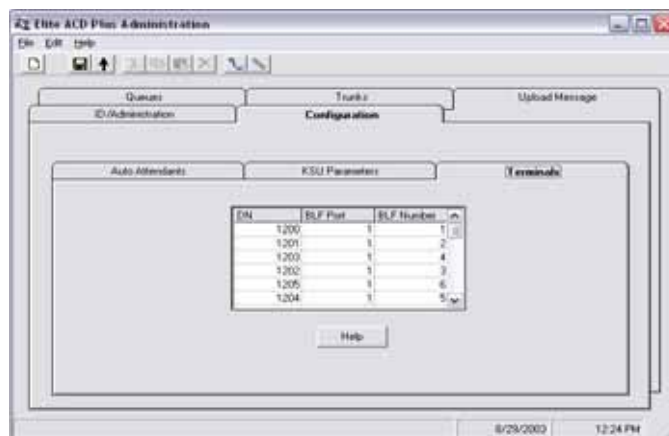


Figure 9-14: Terminals Tab

The following items are available on the Terminals Tab:

DN

Destination Number. Any valid DN that is allowed as an agent or supervisor terminal.

BLF Port

Port on the ACD card on which the agent/supervisor terminal indication will appear.

BLF Number

One touch key on the ACD port that represents a particular agent/supervisor terminal.

To add a new terminal:

1. From the Configuration tab, the Terminals tab shows BLF Port and BLF Number for each DN. Right mouse click on the DN.
2. Choose **New**.
3. Enter the **DN**.
4. Enter the **BLF Port Number** (ACD port number 1~8).
5. Enter the **BLF Number** (one-touch key on ACD port 1~20).
6. Click **Accept**.

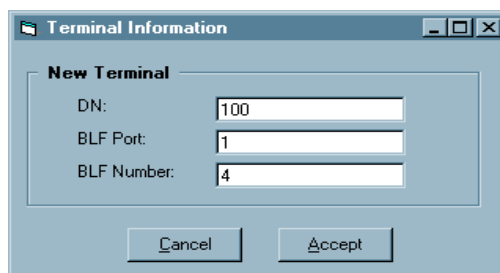


Figure 9-15: New Terminal

8.2 Auto Attendants Tab

The Auto Attendants sub-tab allows defining of the transfer destinations for the Auto Attendant (AA) options.

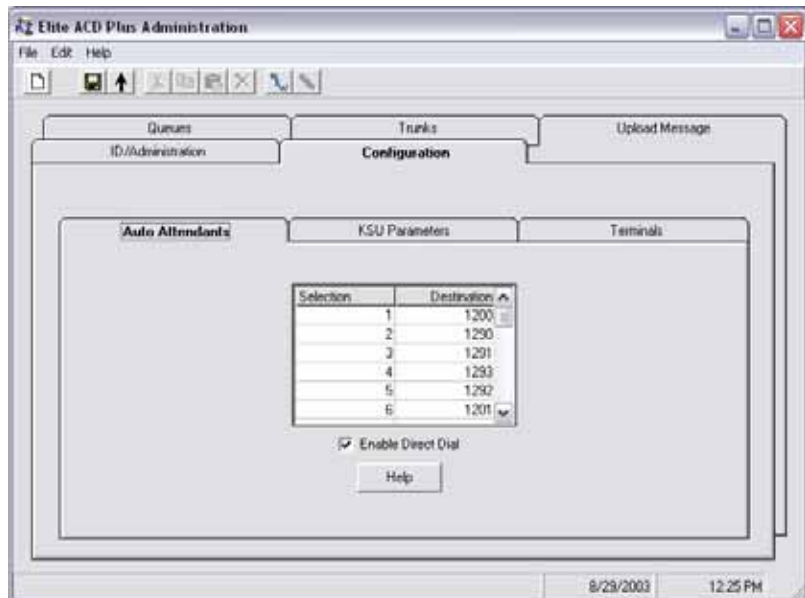


Figure 9-16: Auto Attendants Tab

Selection

AA option (the number selected by the caller).

Destination

The Transfer destination may be one of the following:

- ④ ACD Group
- ④ DN (Destination Number)
- ④ Offsite number (Offsite numbers **must** always start with a “(*)”, to provide a hook-flash to the CO for a Centrex transfer.)

Enable Direct Dial

Direct Dial allows a caller to dial an extension directly while a message is being played. The “Enable Direct Dial” box is used to enable/disable this feature.

8.3 KSU Parameters Tab

The KSU Parameters sub-tab allows Key System Unit information to be entered.

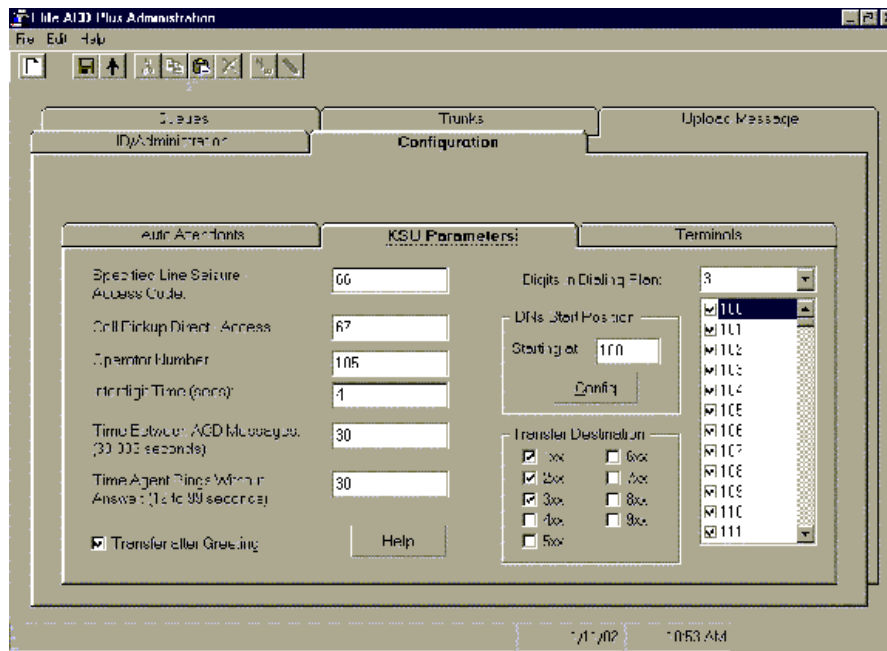


Figure 9-17: KSU Parameters Tab

Line Seizure Access Code

Dial access code for Line Seizure Access.

Digits in Dialing Plan

One-digit number corresponding to the Dialling Plan being used.

Operator Number

Extension number for the operator switchboard.

Call Pickup Direct Access Code

Access code used for picking up calls.

Interdigit Time (secs)

The time a caller can wait between digits when dialling an extension or following an Auto Attendant prompt. Default is four seconds.

Time Between ACD Messages (secs)

Time that the system waits between playing the ACD messages. Time can be set from 30 seconds to 999 seconds. Default is 45 seconds.

Time Agent Rings Without Answer (secs)

Time the system rings the Agent before the call is recalled. Time can be set from 12 seconds to 99 seconds. Default is 15 seconds.

DNs

Stations that will be used as agents and supervisor's terminals. Up to 108 may be selected.

To add DNs:

1. Select Digits in Dialling Plan, if needed. Permitted values are 2, 3, or 4 digits.
2. Click on the box next to the extension number of the station that is to be used as an agent.
3. Enter the BLF Port and the BLF Number for that extension. Refer to *8.1 Terminals Tab on page -103* for instructions on how to add a new terminal.

OR

Enter the first extension number of the stations in the DNs Start position and select **Configuration**. This will automatically assign the next 108 DNs. You can deselect the DNs you do not want. If more than 108 DNs are selected, a pop-up error message will appear. Refer to *Figure 9-18: Only 108 Terminals Maximum Allowed Message on page 9-107.*

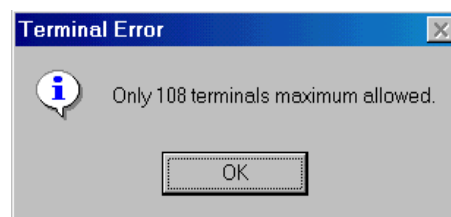


Figure 9-18: Only 108 Terminals Maximum Allowed Message

Transfer After Greeting

This is a system-wide setting effecting all queues. When this box is checked, the system will always play the ACD Greeting before transferring the call to an available agent for each new call to each queue. When this box is not checked, a new call will be sent to an agent, if available, without playing any greeting. If no agents are available, the system will play the appropriate greetings until an agent becomes available.

Transfer Destination

The Transfer Destination setting is used to set the first digit for valid extension number designations in the KSU for the ACD to transfer calls to. Whatever extension numbers are allowed in the KSU programming should be checked here. For example, in KSU programming (at default) extension numbers can start with 1, 2, or 3. In this case, the boxes 1XX, 2XX, and 3XX should be checked. If the valid numbers had been changed in KSU programming to the 400, 500, and 800 range you would check 4XX, 5XX, 8XX.

SECTION 9

ID/ADMINISTRATION TAB

The ID/Administration Tab contains three sub-tabs.

From the ID/Administration Tab you can add and change passwords for agents, supervisors and the administrator.

9.1 Agent Tab

The Agent tab allows you to add, change, or delete agent logon information.

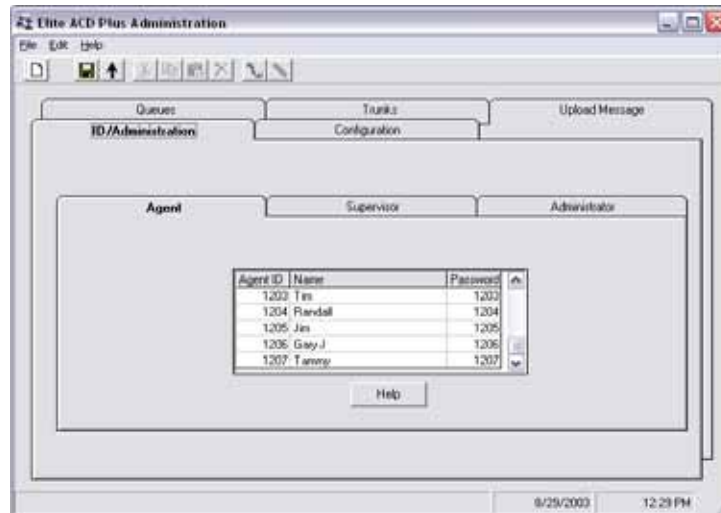


Figure 9-19: Agent Tab

Agent ID

Number assigned to the agent.

Name

Name of the agent (keep names short to help with the display of graphs).

Password

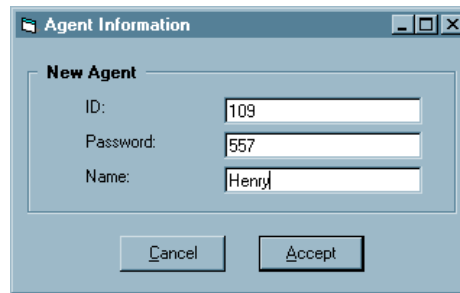
Up to an eight digit password for the agent to log in to IPK ACD Plus using the telephone keypad. Valid entries include: 0 OPER ~ 9 WXYZ ,

* , # .

To add an Agent ID:

1. From the ID/Administration's Agent tab, right mouse click on **Agent ID** and select **New**, or click the **New** tool button.
2. Type the Agent's **ID**. The ID can be up to four digits long.
3. Type the Agent's **Password**. The password can be up to eight digits long, including the * and # keys.
4. Type the Agent's **Name** (up to ten characters).

5. Click **Accept**.

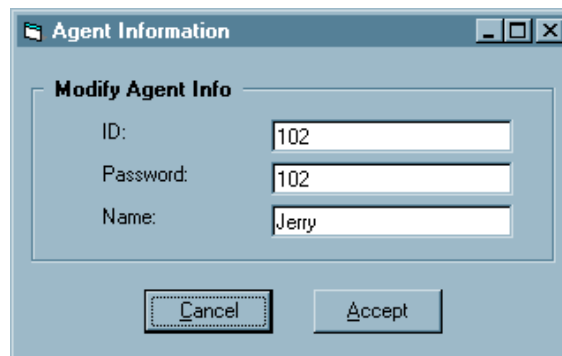


The image shows a dialog box titled "Agent Information" with a "New Agent" section. It contains three input fields: "ID:" with the value "109", "Password:" with the value "557", and "Name:" with the value "Henry". At the bottom, there are two buttons: "Cancel" and "Accept".

Figure 9-20: Adding an Agent ID

To modify an agent ID:

1. From the ID/Administration's Agent tab, right mouse click on the Agent's **Name**, then choose **Modify**, or click the Change tool button.
2. Change the Agent's **ID** (can be up to four digits long), **Password** (can be up to eight digits long, including the * and # keys), and **Name** (can be up to ten characters).
3. Click **Accept**.



The image shows a dialog box titled "Agent Information" with a "Modify Agent Info" section. It contains three input fields: "ID:" with the value "102", "Password:" with the value "102", and "Name:" with the value "Jerry". At the bottom, there are two buttons: "Cancel" and "Accept".

Figure 9-21: Modify Agent Information Window

To delete an agent ID:

1. From the ID/Administration's Agent tab, highlight the Agent's ID, right mouse click on **Agent ID**, then select **Delete**, or click the Delete tool button.
2. Click **Yes** at the 'Are you sure you want to delete Agent?' prompt.

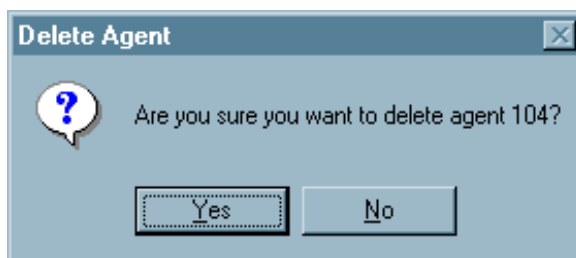


Figure 9-22: Deleting an Agent ID

9.2 Supervisor Tab

From the Supervisor Tab, you can add, change, or delete the supervisor's logon information.

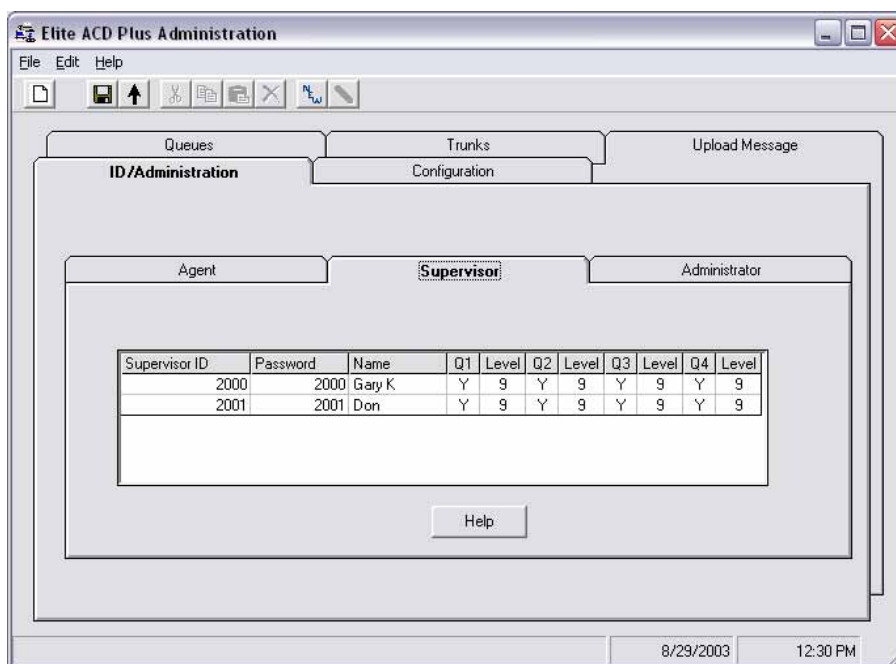


Figure 9-23: Supervisor Tab

Supervisor ID

Number assigned as the supervisor's identification number for logging onto IPK ACD Plus.

Supervisor Password

Number assigned as the supervisor's password for logging onto IPK ACD Plus.

Supervisor Name

Name of the Supervisor (keep names short to help with the display of graphs).

Q1, Q2, Q3, Q4

Y/N (Y=Supervisor can monitor and record messages for that queue).

Level

1~9 (What preferred agent level is the supervisor if they log in as an agent).

To add a Supervisor ID and Password:

1. From the ID/Administration's Supervisor tab, right mouse click on **Supervisor ID**, then select **New** or click the New tool button.
2. Type the **Supervisor ID**. The ID number can be up to four digits long.
3. Type the **Supervisor's Password**. The password can be up to eight digits long, including the * and # keys.
4. Type the **Supervisor's Name** (up to 10 digits).
5. Click **Accept**.
6. Left mouse click, then Right mouse click. Choose **Yes** for the Queue number(s) that you want the Supervisor ID to be a Supervisor of.

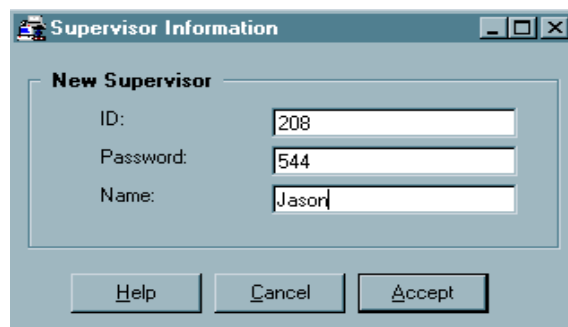


Figure 9-24: Adding a New Supervisor Information

To modify a Supervisor ID:

1. From the ID/Administration's Supervisor tab, highlight the **Supervisor's Name**, right mouse click on the **Supervisor's Name**, then choose **Modify** or click the Change tool button.
2. Change the **Supervisor's ID** (can be up to four digits long), **Password** (can be up to eight digits long, including the * and # keys), and **Name** (can be up to 10 characters).
3. Click **Accept**.

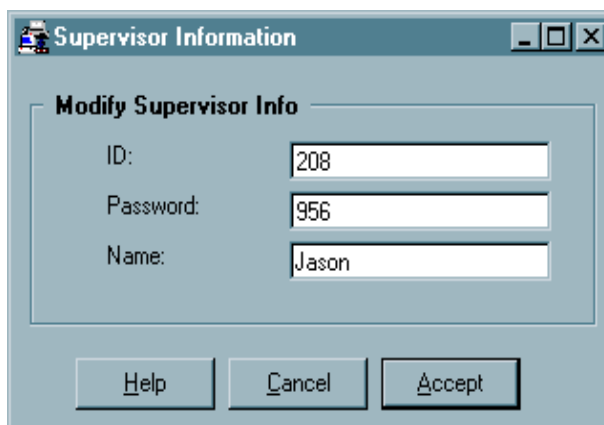


Figure 9-25: Modifying a Supervisor ID and/or Password

To delete a Supervisor ID:

1. From the ID/Administration's Supervisor tab, highlight the Supervisor's name, right mouse click on **Supervisor ID**, then select **Delete**, or click the Delete tool button.
2. Click **Yes** at the 'Are you sure you want to delete Supervisor?' prompt.

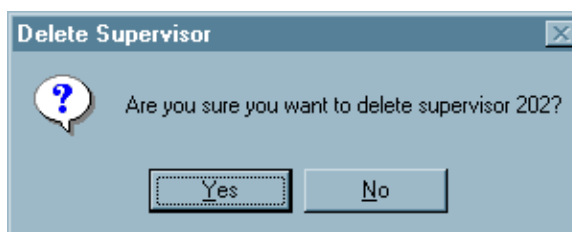


Figure 9-26: Deleting a Supervisor ID

9.3 Administrator Tab

From the Administrator tab you can add, change, or delete Administrator logon information.

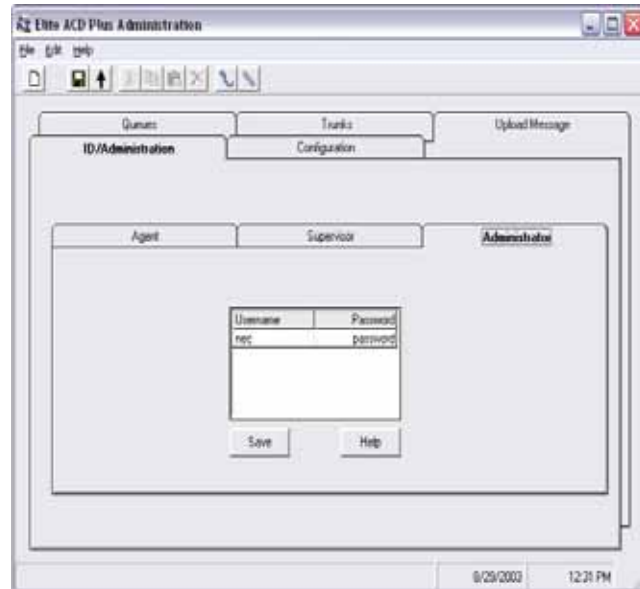


Figure 9-27: Administrator Tab

To add a New Administrator ID:

1. From the ID/Administration's Administrator tab, right mouse click on **Username ID**, then select **New** or click the New tool button.
2. Type the Administrator's **User Name**. The name must be at least four characters long.
3. Type the Administrator's **Password**. The password must be at least four digits and a maximum of eight digits, including the * and # keys.
4. Click **Accept**.

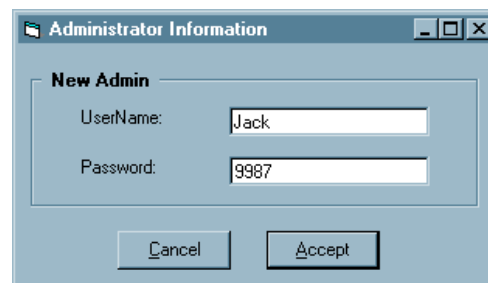


Figure 9-28: Adding a New Administrator ID

To modify an Administrator ID:

1. From the ID/Administration's Administrator tab, highlight the Username, right mouse click on **Username ID**, then choose **Modify** or click the Change tool button.
2. Change the **UserName ID** (must be at least four characters long), and **Password** (can be up to eight digits long, including the * and # keys).
3. Click **Accept**.



Figure 9-29: Modifying an Administrator ID

To delete an Administrator ID:

1. From the ID/Administration's Administrator tab, highlight the Username, right mouse click on **Username ID**, then select **Delete** or click the Delete tool button.
2. Click **Yes** at the 'Are you sure you want to delete Administrator?' prompt.

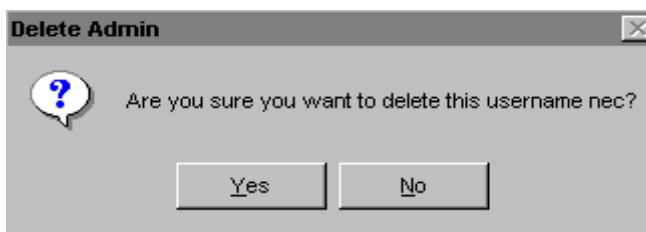


Figure 9-30: Deleting an Administrator ID

Optional Wallboard Support

SECTION 1 **WHAT DRIVES THE WALLBOARD?**

The server will drive a wallboard using a different serial port on the PC than the one utilised by the KSU.

The monitor program will drive a wallboard using any open COM port on the PC.

In either case, wallboard support must be turned on by utilising the wallboard menu under the Preferences Menu.

SECTION 2 **HOW DOES THE WALLBOARD DISPLAY INFORMATION?**

The wallboard displays each active queue's information (queue name, number of agents logged in, number of callers on hold, and the time the longest caller has been on hold).

Statistics for each queue is displayed for five seconds after which the statistics for the next queue appears. For installations with only one queue, the queue information remains on the wallboard.

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Learning About the Real Time Display (RTD)

SECTION 1 LAYOUT OF THE DISPLAY

The Real Time Display (RTD) provides current statistics for each of the ACD queues. Refer to Figure 11-1; Real Time Display on page 117.

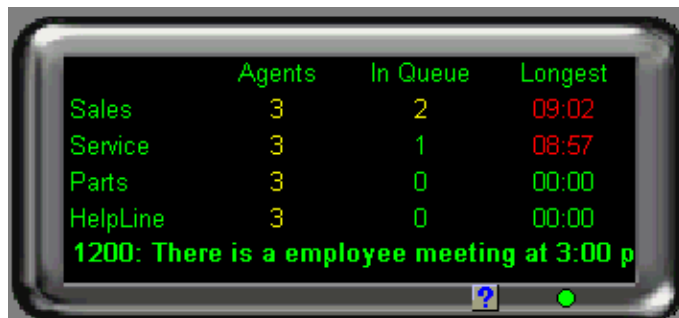


Figure 11-1: Real Time Display

For each queue, the RTD lists the following statistics:

- Agents:** Number of agents logged into the queue.
- In Queue:** Number of calls waiting in the queue.
- Longest:** Wait time for the call that has been in queue the longest.

By default, the top line on the RTD shows the headers for each statistic column. The bottom row of the RTD shows text messages, as they are received from other users.

The bottom of the RTD frame provides a menu button and connectivity indicator. Refer to Figure 11-2:, Menu and Connectivity Buttons on page 118.



Figure 11-2: Menu and Connectivity Buttons

Details on customising the appearance of the RTD will be discussed next.

1.1 Turning Headers Off/On

To disable headers from being displayed:

1. Click the **Menu** button on the RTD image.
2. Select the **Setup** option on the RTD menu.
3. On the Setup menu, click on **Display Headers** to disable this option.
4. Click on **OK** to save the changes.

To enable the display of headers:

1. Click the **Menu** button on the RTD image.
2. Select the **Setup** option on the RTD menu.
3. On the Setup menu, click on **Display Headers** to enable this option.
4. Click on **OK** to save the changes.

1.2 Resizing the RTD Image

The RTD image can be displayed in two different sizes: **Large View** and **Small View**. The image can also be set to a minimised state in the taskbar.

The following steps can be used to select a different image size.

To select the Large View:

1. Click the **Menu** button on the RTD image.
2. Select the **Large View** option on the RTD menu.

To select the Small View:

1. Click the **Menu** button on the RTD image.
2. Select the **Small View** option on the RTD menu.

To minimize the RTD Image:

1. Click the **Menu** button on the RTD image.
2. Select the **Minimize** option on the RTD menu.

1.3 Repositioning the RTD Image

To move the RTD Image:

1. Position the mouse cursor within the RTD image.
2. While holding down the *left* mouse button, drag the image to the new screen position.
3. Release the mouse button to drop the image at the new location.

1.4 Keeping the RTD Image Visible

To keep the RTD Image on the topmost applications:

1. Click the **Menu** button on the RTD image.
2. Select the **Setup** option on the RTD menu.
3. On the Setup menu click on **Always On Top** to enable this option.
4. Click on **OK** to save the changes.

SECTION 2

TEXT MESSAGING CAPABILITY

The Real Time Display (RTD) application allows text messages to be sent between RTD clients. This capability can be used to send general announcements to groups of users or direct comments to individual agents. All RTD clients can receive text messages, however, the ability to send text messages is controlled through settings in the server (**Elite ACD Plus Server**).

- ☞ Only RTD clients that are connected at the time a text message is sent will receive the message.

When an RTD client receives a text message, the message is scrolled across the bottom line of the display. The message will continue to scroll until the message duration has expired or the user selects the Clear function. If multiple messages are received, the messages will be displayed in sequence in the order in which they were received.

2.1 Sending a Text Message

To send a text message:

1. Click the **Menu** button on the RTD image.
2. Select the **Message** option on the RTD menu.
3. Type the desired text into the message area.
4. To change the text colour, use the mouse to select the text string to be changed. Click on the **Set Colour** button and select the new colour from the colour palette.
5. Double-click on each entry in the **Agents** list to receive the text message. Each selected entry is listed in the **Recipients** list.
6. To remove an entry from the **Recipients** list, use the right mouse button to select the entry and click on the **Delete** option.
7. Set the display period for the message by entering a numeric value in the **Duration** field, and then select the desired time units (seconds, minutes, hours, or Continuous). Selecting the **Continuous** option will display the message until the recipient uses the **Clear** function to remove the message.
8. Click on **Send** to deliver the message.

2.2 Clearing Text Messages

To clear text messages from the display:

1. Click on the **Menu** button on the RTD image.
2. Select the **Clear** option on the RTD menu.

2.3 Setting a Text Message Alert

The RTD client can be configured to play an alert tone when a new message arrives, and the application can also be set up to pop up from a minimised state when a message arrives.

To play an alert tone when text messages arrive:

1. Click on the **Menu** button on the RTD image.
2. Select the **Setup** option on the RTD menu.
3. On the Setup menu, click on **Chime on Message** to enable this option.
4. Click on **OK** to save the changes.

To set a pop up when a text message arrives:


1. Click on the **Menu** button on the RTD image.
2. Select the **Setup** option on the RTD menu.
3. On the Setup menu, click on **Popup on Message** to enable this option.
4. Click on **OK** to save the changes.

SECTION 3

QUEUE THRESHOLDS

Thresholds can be defined on the server (**ACD Plus Server**) for each of the statistics shown on the Real Time Display. The thresholds represent critical levels that indicate the efficiency of the call center operations.

Threshold levels are shown on the RTD by changing the colour of the individual statistic when the threshold is reached. A *green* level represents the value for that field being in an acceptable range. A value is displayed in *yellow* when a warning level has been reached for that field. A critical threshold level is indicated by a *red* value.

 The green/yellow/red progression is the default colour scheme defined within the server. Your system may have been configured to use other colours.

The RTD can also be set to play a tone as a threshold level is met, or to pop up the application when a threshold level is reached.

3.1 Playing a Tone for Threshold Levels

To play a tone when a threshold level is reached:

1. Click on the **Menu** button on the RTD image.
2. Select the **Setup** option on the RTD menu.
3. On the Setup menu, click on **Beep on Threshold** to enable this option.
4. Click on **OK** to save the changes.

3.2 Popping up the Application for Threshold Levels

To pop up the minimised application when a threshold is reached:

1. Click on the **Menu** button on the RTD image.
2. Select the **Setup** option on the RTD menu.
3. On the Setup menu, click on **Popup on Threshold** to enable this option.
4. Click on **OK** to save the changes.

SECTION 4 TROUBLESHOOTING

This section provides helpful tips for troubleshooting certain problems that may develop when running RTD.

“No Active Queues” message

If the RTD application starts, and the message “No active queues” is displayed without a user prompt to login, then this indicates the RTD client cannot establish communication with the server.

Perform the following checks to ensure that the RTD client is setup to successfully communicate with the server.

- ④ Ensure that the server (**ACD Plus Server**) is running on the server PC.
- ④ Open the **Setup** menu on the RTD client and ensure that the correct IP name/address is set in the **Server Name** field. The Port Number field must be set to 6543.
- ④ On the RTD client PC, open a DOS window and try to “ping” the server PC.
- ④ After communication between RTD client PC and server has been verified, select the **Login** function on the RTD client.

Statistics stop updating

If the connection indicator turns red and the statistics are no longer updating, then this indicates that the RTD client has lost communication with the server.

Perform the following checks to help determine the cause of the problem:

- ④ Ensure that the server (ACD Plus Server) is still active on the server PC.
- ④ On the RTD client PC, open a DOS window and try to “ping” the server PC.
- ④ After communication between RTD client PC and server has been verified, select the **Connect** function on the RTD client.

“Agent Already Connected” message

When attempting to login, if the message “Agent Already Connected” is displayed, this indicates that another PC has logged into the server using the specified ID. Determine the location of the other user that is using the ID and have that user exit the RTD client application. Then, select the Login function at the new location and proceed with the login process.

“Maximum Number of Users Exceeded” message

When attempting to login, the message “Maximum Number of Users Exceeded” indicated the server cannot currently accept any additional logins from RTD clients. The **ACD Plus Server** is configured with a fixed number of client licenses that control the number of RTD applications that can be connected to the server.

To check the number of clients allowed by the server, look at the bottom status bar on the server main window. This area displays a message such as **RTD Connections: 2 of 3**, which indicates the number of users currently connected and the maximum number of clients allowed.

RTD Client Key

Three RTD Clients can be connected without the using a RTD Client Key. If more than three RTD Clients are needed, the RTD Client Key must be placed on the PC running Elite ACD Plus SERVER. This RTD Client Key will allow up to 100 RTD Clients to be connected.

Agent ID Not Included in Agent List

During the login sequence the Agent List displays the agent IDs for all users that are allowed to use the RTD. If your agent ID does not appear in this list, then either you do not have access to login to the RTD, or your agent ID is already logged into the RTD on another PC.

To determine which of these situations is causing the problem, go to the server PC and perform the steps listed next.

1. On the **Preferences** menu, select the RTD Clients option.
2. Find your **Agent Name** within the RTD Client table.

3. If the icon next to your Agent Name is green, this indicates that a client PC is already connected to the server.
4. If the **Authorised Client** column is not checked, then this agent is prohibited from connecting to the server.

Display Only Shows Logged In Queues

Each RTD client can be configured to display all queues that the agent is authorised to log into or just the queues that the agent is currently logged into. This option is set in the server on an agent by agent basis.

To change the displayed queues for an individual client:

1. On the **ACD Plus Server**, open the **Preferences** menu and select the RTD Clients option.
2. Find the row within the agent list that contains the agent entry to be changed.
3. Click on the **Active Queues** column to change the current setting for the desired agent.
4. Click **OK** to save the settings.

Message Option is Disabled

The ability to send text messages from the RTD client is controlled on an agent by agent basis. The settings that determine which agents have this feature are defined within the server.

To enable the Message option for an individual agent:

1. On the server (**ACD Plus Server**), open the **Preferences** menu and select the **RTD Clients** option.
2. Find the row within the agent list that contains the agent entry to be changed.
3. Click on the **Text Messaging** column for the desired agent to change the current setting.
4. Click **OK** to save the settings.

Changing the Default Colour for Text Messages

When the Message feature is selected, the **Create Text Message** window opens and allows the user to define the characteristics of the text message. The colour of individual words or phrases can be changed to emphasize certain elements of the text.

To change the colour of a section of text:

1. Position the mouse cursor at the beginning of the phrase to be altered.
2. While holding down the *left* mouse button, drag the mouse cursor to the end of the phrase. This will highlight the entire phrase to be

modified.

3. Click on the **Set Colour** button to open the colour palette.
4. Select the desired colour and click on **OK**.

Within the Create Text Message menu, the **Sample Text** area shows the default colour that will be used when text is entered. This will be the default colour each time the Create Text Message menu is opened, unless the colour is changed using the steps that follow.

To change the default colour for text messages:

1. When the Create Text Message menu is first opened, press the **Set Colour** button before entering any text.
2. Select a new default colour from the colour palette menu.
3. Click **OK** on the colour palette menu to return to the Create Text Message menu.
4. Enter the message text and specify the desired recipients.

Click on **Send** to deliver the text message.

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