Avaya™ Predictive Dialing System

Administration Manager User's Guide

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Avaya Predictive Dialing System
Administration Manager User's Guide

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- System administration documents
- Security documents
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- Avaya provided software applications, as well as their underlying hardware/software platforms and interfaces
- Any other equipment networked to your Avaya products

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

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

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

Contents

About this information product

Purpose

The purpose of this guide is to provide detailed information about Administration Manager 3.0.

Intended audience

The audience for this manual includes customers, integration consultants, and application consultants.

Changes

The following provides information that has changed for Administration Manager 3.0 This information should be used in reference to the Avaya™ Predictive Dialing System (PDS) version 12.0 Service Pack 1 release.

What's new in this release

Administration Manager 3.0 User's Guide changed as follows:

- This User's Guide has been branded to reflect the product name change from Producer to Administration Manager 3.0.
- A separate login to protect the list configuration area. Please contact your Customer Support Engineer for access.
- A new upload definition for removing duplicates has been added.

1 Administration Manager overview

Overview

Purpose

Administration Manager™ 3.0 is an Avaya™ Predictive Dialing System (PDS) configuration tool which enables you customize your Avaya PDS. Administration Manager works in conjunction with the Avaya PDS and Campaign Director to make your system responsive to your changing needs.

Contents

This section contains the following topic:

Administration Manager

Overview

Administration Manager allows you to:

- Add or edit completion codes
- Change agent key assignments
- Specify processing schedules
- Create, edit, and record voice messages
- Change download, calling list, and upload settings

Administration Manager lets you choose and change settings, then transfer those settings to the Avaya PDS using an Install Data feature. Once you run the Install Data feature, the changes are transferred to “holding” area until the next Avaya PDS reboot. After the Avaya PDS reboot, use the Empty Install Data feature to make your changes “live” on the Avaya PDS.

To prevent loss of data and operational problems, you should update Avaya PDS files with Administration Manager files only if the databases are the same (in sync). To ensure that the Administration Manager database and the Avaya PDS are in sync, Administration Manager performs a data synchronization query.

Caution

If Administration Manager displays a message that your files are out of sync, contact your Avaya PDS vendor to determine which files have changed. Your vendor will tell you how to update your files. If you do not follow this procedure, Administration Manager may overwrite your Avaya PDS files with outdated information.

System setup

The Administration Manager database contains the configuration information required for your Avaya PDS. The Avaya PDS Integration Consultant selects a system’s features from various lists in Administration Manager. Administration Manager stores the selections in tables.

The information the Avaya PDS Integration Consultant defines during system setup includes:

- Avaya PDS number (used to identify the system you want to configure)
- Company name, address, and contact information

- Products (for example, Campaign Director, Agent API) and features (for example, Record Edit or Managed Dialing) installed on the system
- System configuration information (for example, agent and supervisor licenses, workstation software, phone lines, host application, and ACD type)
- Network information for system components (for example, TCP/IP address, component name, and alias)
- Time zone information

This data defines which Administration Manager and system features are available. When the settings are completed, the Integration Consultant connects Administration Manager to the Avaya PDS and uses the Install Data feature to transfer the configuration to the system.

Shared database

If you have more than one Administration Manager installed to configure the same Avaya PDS, you have a shared database.

Administration Manager supports a shared database environment in which two or more Administration Manager workstations connect to one common Administration Manager database. To start the Administration Manager database, log onto the database machine (server) as Administrator. For security purposes, the Administrator can log out of the server, leaving the database running. To run Administration Manager, log onto the server or any Administration Manager workstation as dsi.

Note

In a shared database environment, Administration Manager displays a warning when you try to open a file that another person is using. You can override the warning, but doing so can compromise data integrity.

System configuration

After the installer completes the system setup, you and the installer review the system configuration. The configuration applies to a specific system and influences all applications on that system.

System configuration includes the following tasks:

- Assigning call completion codes
- Defining agent keys
- Describing messages
- Assigning messages to wait queues
- Recording messages

- Setting up file transfers
- Scheduling processes

Application definition

In Administration Manager, an application consists of is a calling list and its associated files, such as download and upload definitions.

Application definition includes the following tasks:

- Defining download and upload fields
- Defining file structure and transfer method
- Defining outbound calling lists and inbound lists

Important tips

Use the following guidelines when working with Administration Manager:

- Remember to perform a system backup, including calling lists, prior to making any changes with Administration Manager.
- Make only one change at a time. For example, create/change messages, then perform Install Data. If this change occurs without problems after the nightly reboot, you can perform other changes the next day, and so on. This makes it easier to troubleshoot should problems occur.
- If you performed an Install Data to transfer files to the Avaya PDS from Administration Manager, remember to perform an “Empty” Install Data following the reboot of your Avaya PDS. If your email program contains a calendar feature, use it to set a reminder for yourself.

2 Install Data and Empty Install Data

Overview

Purpose

Administration Manager uses the Install data and Empty install data features move file changes from Administration Manager to the Avaya™ Predictive Dialing System (PDS).

Contents

This section contains the following topics:

Status codes

Status codes

All Administration Manager files have an assigned status code: In Process, Complete, Pending, or Live. Status codes help both you and Administration Manager keep track of configuration changes. The following table describes how each status code is used.

In Process	You assign this status when you save a file but are not ready to transfer the file to the Avaya PDS. Administration Manager assigns this status to files copied when you use the Application Copy command.
Complete	You assign this status when you save a file and want Administration Manager to automatically select the file for transfer in the Export dialog box. Administration Manager assigns this status to files when an Install Data transfer was unsuccessful.
Pending	Administration Manager assigns this status to files transferred to the Avaya PDS. After the next system reboot, Administration Manager changes the status of Pending files to Live if the transfer was successful or Complete if the transfer was unsuccessful.
Live	Administration Manager assigns this status to files that have been successfully transferred to the Avaya PDS.

Data synchronization

During data synchronization, Administration Manager compares the date and time stamps of the active Avaya PDS files with the date and time of the last synchronization. This determines whether any Avaya PDS files have changed since they were last synchronized with your Administration Manager database.

If data is in synch, no further action is required until the next Avaya PDS reboot. Administration Manager exports your selected files to a “pending updates” directory on the system. Administration Manager file statuses are changed to Pending. The pending updates are installed as the active configuration when the Avaya PDS reboots and you perform an Empty Data Install.

Out of synch conditions

Out of synch situations may occur if your Avaya PDS vendor has made changes to the files on the Avaya PDS. If data is out of synch, a pop-up notification message appears. Administration Manager copies the active system files, overwriting Administration Manager's Live data with the new information.

Contact your Avaya PDS vendor to determine which files have changed. Your vendor will tell you how to update your files. If you do not follow this procedure, Administration Manager may overwrite your Avaya PDS files with outdated information.

After you make the necessary changes to match your Administration Manager data to the current system data, set the status to Complete and run the Install Data command again. This exports your corrections to a pending updates directory on the Avaya PDS. The corrected files are installed after the next system reboot and "Empty" Install Data. Administration Manager file statuses are changed to Pending.

Verifying data synchronization

Following the reboot, perform an "empty" install by running the Install Data command without selecting any files in the Export dialog box (clear any pre-selected files). This updates the Administration Manager database to show whether the new files are successfully installed on the system.

If there were no errors during the installation, the Pending Administration Manager files become the new Administration Manager Live files. If a critical error was encountered, the Pending Administration Manager files return to the Complete status, and the Avaya PDS data remains unchanged.

Note

It is recommended that you not edit Administration Manager files while files with a Pending status exist. Run an empty install, then edit files with Live or Complete statuses.

Using Install Data

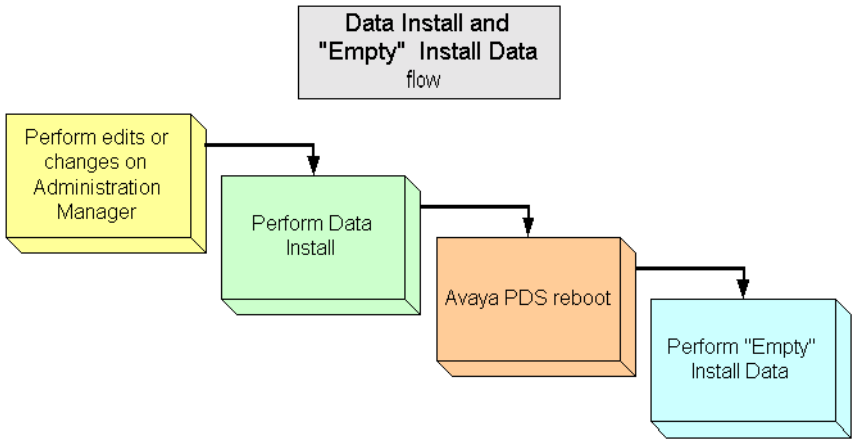
When you select Install Data from the **Data** menu, the Export dialog box displays each file with a Complete or In Process status.

Caution

In a shared database environment, changes made to Administration Manager files after you select the Install Data menu option can cause unexpected results or data corruption. Do not change Administration Manager files until the export completes. Coordinate with other Administration Manager users before running the Install Data

command. Also, run the Install Data command for only one Avaya PDS at a time.

The following illustration describes the Install Data and Empty Install Data flow:



Install Data

Install Data

When you enter or update information in Administration Manager, use the Install Data feature to transfer the information to the Avaya PDS.

The Install Data process performs three functions:

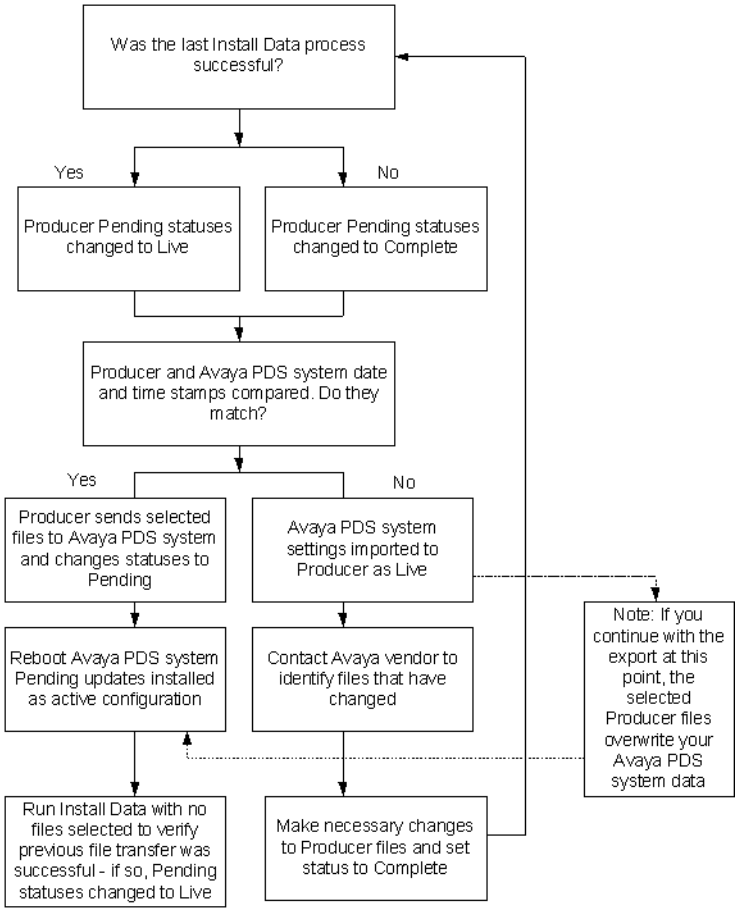
- Updates the Administration Manager database with the results of the last set of files exported to the Avaya PDS.

  If the files were installed successfully as an active configuration on the Avaya PDS, the statuses of the exported files are changed from Pending to Live. If the files could not be installed, the statuses are changed from Pending to Complete. For more information about file statuses, see Status codes.

- Performs data synchronization.

  Data synchronization ensures that the Avaya PDS files have not been changed manually.

- Exports configuration changes to the Avaya PDS.When you select the Install Data command, Administration Manager displays the Export dialog box. Administration Manager automatically selects files with a Complete status for export to the system. You can clear Complete files from the transfer list and select In Process files for transfer.


Was the last Install Data process successful?
Yes
No
Producer Pending statuses changed to Live
Producer Pending statuses changed to Complete
Producer and Avaya PDS system date and time stamps compared. Do they match?
Yes
No
Producer sends selected files to Avaya PDS system and changes statuses to Pending
Avaya PDS system settings imported to Producer as Live
Note: If you continue with the export at this point, the selected Producer files overwrite your Avaya PDS system data
Reboot Avaya PDS system Pending updates installed as active configuration
Contact Avaya vendor to identify files that have changed
Run Install Data with no files selected to verify previous file transfer was successful - if so, Pending statuses changed to Live
Make necessary changes to Producer files and set status to Complete

Perform Install Data

Perform Install Data

Use the following procedure to perform an Install Data.

1. Select **Data** > **Install Data**.

2. Select the system. Administration Manager displays a **Processing System Initialization** message box and then displays the install tree. The install tree lists all of the files with a **Complete** or **In Process** status.

3. Select additional **In Process** files or clear **Complete** files by selecting the file name.

4. Click **OK**. Administration Manager displays the **Export confirmation** dialog box.

5. Click **Yes**.
   Administration Manager notifies you that it will now update the status of the last files sent to the Avaya PDS.

6. Click **OK**. If Administration Manager and the Avaya PDS are not in synch, a dialog box notifies you. Go to step 7. If there are no errors, a dialog box notifies you that synchronization is complete. Go to step 8.

7. Click **OK**, but do not continue with export. Stop and either contact your Avaya PDS vendor or research the data to determine which elements have changed since the last data synchronization.
   When there is a data synchronization error, Administration Manager overwrites the Live data with the active Avaya PDS information.

8. Click **OK**.

9 The **Beginning Export** dialog box appears. Click **OK**.
Administration Manager exports your selected files to the “pending updates” directory on the Avaya PDS.

10 An **Export confirmation** dialog box appears.Click **OK**.

11 After the next system reboot, run an “empty” Install Data (see Perform Empty Install Data)
Administration Manager updates its Pending statuses to Live for each file that was successfully transferred during the last Install Data. If the transfer was unsuccessful, Administration Manager changes Pending statuses to Complete.

Perform “Empty” Install Data

Perform “Empty” Install Data

Use the following procedure to perform an “Empty” Install Data.

1. Select **Data** > **Install Data**.
2. Select the system. Administration Manager displays a **Processing System Initialization** message box and then displays the install tree. The install tree lists all of the files with a **Complete** or **In Process** status.
3. Right-click with your cursor inside the main pane of the Export window and select **Deselect** > **All**, and then click **OK**. The **Export confirmation** dialog box appears.
4. Click **Yes** when asked **Install the files on the Avaya PDS?**. Administration Manager notifies you that it will now update the status of the last files sent to the Avaya PDS.
5. Click **OK** to continue past the dialog box stating **Previous update to the Avaya PDS must be processed first.**
6. Click **OK** to continue past the dialog box stating **Database will now be synchronized with the Avaya PDS.**
7. Click **OK** to continue past the dialog box stating **The database is not synchronized with the Avaya PDS. The database will now be synchronized to reflect Avaya PDS settings. Check current edits for this system after the process completes.** The Synchronize and Import Status dialog box appears.
8. Click **OK** after **The synchronization is complete**.

9 Click **OK** to continue past the dialog box stating **Previous updates and synchronization are complete. Beginning export**.

10 Click **NO** to continue past the dialog box asking **Send Cool Edit Message?**

11 Click **OK** to continue past the dialog box stating **There was nothing to export. Install cancelled.** This indicated the “Empty Install Data was performed correctly.

You will receive a dialog box stating REMINDER: It is recommended that you make backups of your Avaya PDS on a regular basis.

12 Click **OK** to complete the “Empty” Install Data process.

3 Completion codes

Overview

Purpose

When a customer answers a phone call, the system transfers the call to an agent. At the end of the call, the agent records the outcome. The Avaya™ Predictive Dialing System stores the result as a completion code. If the Avaya PDS does not pass the call to an agent, the Avaya PDS generates the completion code.

The Avaya PDS uses completion codes to select records for calling and reports. The Avaya PDS identifies completion codes by a code number, call result, and description. The call result is a short name that makes the code easier for agents to identify. The description is a more detailed. Each Avaya PDS has one set of completion codes.

Contents

This section contains the following topics:

Completion codes

Completion code terms

System codes System codes are defined by the Avaya PDS. You cannot change their description, call result, or code number. You can change the Allow Retries setting, which allows the you to use Campaign Director to set up automatic recalls. Some system codes are assigned to calls by the Avaya PDS. For example, BUSY or NOANSWER. These codes appear in the completion code list with an asterisk before their descriptions. A few system codes are available for use by agents.

Agent codes Agent codes are the completion codes that agents use during calling activities. The Avaya PDS includes some predefined agent codes that appear in the completion code list without an asterisk before their descriptions. You cannot change their description, call result, or code number. However, you can change the Allow Retries setting.

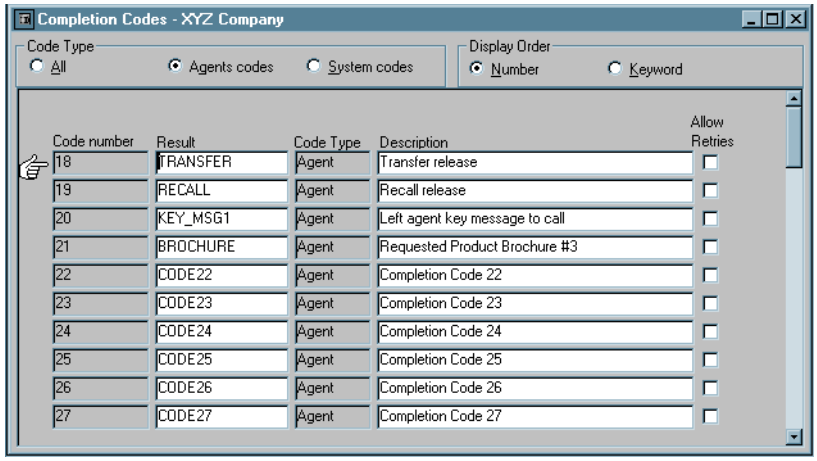
Vendors use Administration Manager to define the agent codes during the planning phase of your Avaya PDS. You can use Administration Manager to add or edit codes after setup.

Planning

When you need to create or modify completion codes, consider the following questions before using Administration Manager:

- What types of agent call activity do you want to track (for example, successful sales, promises to pay, messages left)?
- What kinds of completion codes will agents use during a job?
- How do you want to select records for calling?
- What kinds of call result information do you want to include in reports?
- How will you set up your numbering scheme for completion codes?

Example


Completion Codes - XYZ Company
Code Type
All
Agents codes
System codes
Display Order
Number
Keyword
Code number
Result
Code Type
Description
Allow Retries
18 TRANSFER Agent Transfer release
19 RECALL Agent Recall release
20 KEY_MSG1 Agent Left agent key message to call
21 BROCHURE Agent Requested Product Brochure #3
22 CODE22 Agent Completion Code 22
23 CODE23 Agent Completion Code 23
24 CODE24 Agent Completion Code 24
25 CODE25 Agent Completion Code 25
26 CODE26 Agent Completion Code 26
27 CODE27 Agent Completion Code 27

Completion codes available for agent keys

Completion codes

The following table lists the completion codes that you can assign to agent keys.

Code	Call result	Definition
16	RINGING	Ringing phone (passed to agent). This is a predefined system code that cannot be edited but may be assigned to an agent key.
17	CUSTHU	Customer hung up in queue. This is a predefined system code that cannot be edited but may be assigned to an agent key.
18	TRANSFER	Transfer release. This is a predefined agent code that can be edited and assigned to an agent key.
19	RECALL	Recall release. This is a predefined agent code that can be edited and assigned to an agent key.
20-34	AGENT CODES	These are unused completion codes that can be edited and assigned to agent keys.
35 89 90	CANCEL MANAGEDA MANAGEDB	These are predefined Managed Dialing codes that can be assigned to agent keys.
51-88	AGENT CODES	These are unused completion codes that can be edited and assigned to agent keys.
93 94 95	SOLD VERIFIED UNVERIFIED	These are predefined Sales Verification codes that can be assigned to agent keys.
98	AORECALL	Agent Owned Recall. This is a predefined agent code that can be edited and assigned to an agent key.

Next Steps

To enable agents to use new completion codes, you must assign them to agent keys.

After you install the new completion codes on the system, you must make the same changes in Monitor and Analyst on each Campaign Director workstation.

Add a completion code

Add a completion code

Use the following procedure to add a completion code.

1. Select **System** > **Completion Codes**.
2. Select the system and click **OK.**
3. In the **Code Type** area, select **Agents codes**.
   This limits the display to only agent codes. You must select Agents codes to add or modify completion code results and definitions.
4. In the **Display Order** area, select **Number** or **Keyword**.
5. In the **Result** box, type a call result for an unused code (up to 14 alphanumeric characters.
6. In the **Description** box, type a description.
7. In the **Allow Retries** check box, select the box to indicate yes, or leave the box blank to indicate no.
8. Repeat steps 5 through 7 for each code you want to add.
9. Select **File** >**Save**.
10. In the Save dialog box, select **In Process** or **Complete**. If you have completed all your changes and want the new file transferred to the system, select **Complete**. If you are not ready to replace the files, select **In Process**.

Edit a completion code

Edit a completion code

Use the following procedure to edit a completion code.

1. Select **System** > **Completion Codes**.
2. Select the system and click **OK**
   If the system displays a Live or Pending status, Administration Manager displays the View or Edit dialog box. Select **Edit** to create a copy of the file.
3. In the **Code Type** area, select **Agents codes**.
   This limits the display to only agent codes. You must select Agents codes to add or modify completion code results and definitions.
4. In the **Display Order** area, select **Number** or **Keyword**.
5. In the **Result** box, type a call result for an unused code (up to 14 alphanumeric characters.
6. In the **Description** box, type a description.
7. In the **Allow Retries** check box, select the box to indicate yes, or leave the check box blank to indicate no.
8. Repeat steps 5 through 7 for each code you want to edit.
9. Select **File** >**Save**.

10 In the Save dialog box, select **In Process** or **Complete**. If you have completed all your changes and want the new file transferred to the system, select **Complete**. If you are not ready to replace the files, select **In Process**.

Note

After you define and save an Agent code, you can modify the Result, Description, and Allow Retries settings. If you change the Result field to change the meaning of the completion code (for example, from SALE to CALLBACK), it may affect system statistics and reports.

Delete a completion code

Delete a completion code

Use the following procedure to delete a completion code.

1. Select **System** > **Completion Codes**.
2. In the Select System dialog box, select the system and click **OK**.
   If the system displays a Live or Pending status, Administration Manager displays the View or Edit dialog box.
3. In the **Code Type** area, select **Agents codes**.
   This limits the display to only agent codes. You must select **Agents codes** to delete completion code results and definitions.
4. In the **Display Order** area, select **Number** or **Keyword**.
5. Select the completion code that you want to delete.
6. Select **Edit** > **Delete Row**.
   Administration Manager replaces the Result and Description information with NOTUSED.
7. Repeat steps 5 and 6 for each code you want to delete.
8. Select **File** > **Save**.
9. In the Save dialog box, select **In Process** or **Complete**.
   If you have completed all your changes and want the new file transferred to the system, select **Complete**. If you are not ready to replace the files, select **In Process**.

Note

When you remove a completion code, Administration Manager automatically checks all agent keys files for that code. Administration Manager clears the code from each agent key file and lists the affected keys files. Edit the **In Process** or **Complete** copy of each listed keys file to assign a new completion code or clear the key.

4 Agent keys

Overview

Purpose

Agent keys are the computer function keys that agents use to complete Avaya™ Predictive Dialing System (PDS) tasks. Agents use these keys to record the result of a call or to start an action such as playing a recorded message for a customer, logging off the job, or switching screens.

Contents

This section contains the following topics:

Agent keys

Overview

Agent keys perform actions that are available on your system, such as releasing a call, transferring a call, displaying an agent screen, and logging an agent out of a job. See Predefined agent key actions for a list of predefined agent key actions.

Depending on the selected action, you can also set up agent keys to assign a completion code to a record, display an agent screen, or play an automated message to the customer.

You can design one key set that is available to all jobs, or you can have multiple key sets.

Use Administration Manager to add or edit keys to meet your call center's changing needs. Agent keys are F1 through F12 or higher, depending on the type of keyboard. In addition to the function keys, you can assign key combinations to increase the number of available keys. For example, the agent can press and hold the Ctrl key or Alt key while pressing the function key.

Note

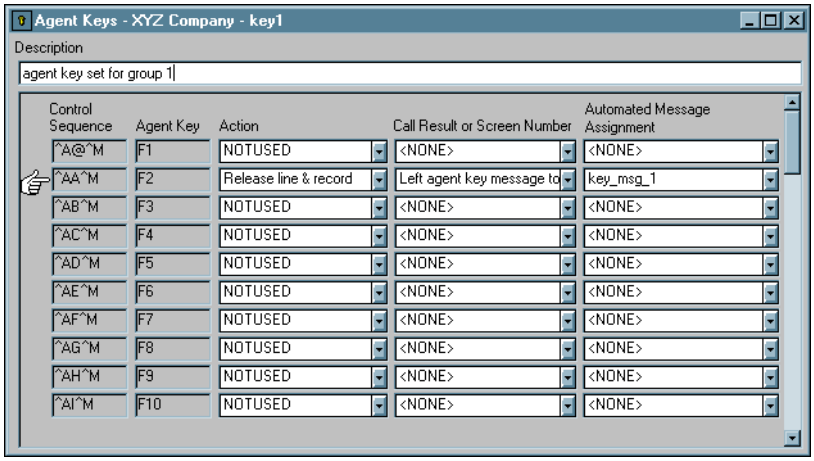
Your agents may have one or more keys assigned to Cut and Paste information. Do not use these key combinations for agent keys assigned in Administration Manager. The key combination Alt + F4 is used by Windows and cannot be changed.

Plan

When you need to add or modify agent keys, consider the following questions before using Administration Manager:

- How many function keys are available on agent keyboards?
- What are the most frequently used completion codes or actions? Consider assigning these to a single function key rather than a key combination.
- If agents typically use more than one screen, can you designate the first few keys to go to a screen (for example, F2 displays screen 2)?
- Do you need one set of keys for all jobs or multiple sets?
- Can you take advantage of any mnemonic association with a code and a key? (For example, Ctrl+Shift+T plays an automated message containing a technical tip.)

Example


Agent Keys - XYZ Company - key1
Description
agent key set for group 1
Control Sequence
Agent Key
Action
Call Result or Screen Number
Automated Message Assignment
^A@^M F1 NOTUSED <NONE> <NONE>
^AA^M F2 Release line & record Left agent key message to key_msg_1
^AB^M F3 NOTUSED <NONE> <NONE>
^AC^M F4 NOTUSED <NONE> <NONE>
^AD^M F5 NOTUSED <NONE> <NONE>
^AE^M F6 NOTUSED <NONE> <NONE>
^AF^M F7 NOTUSED <NONE> <NONE>
^AG^M F8 NOTUSED <NONE> <NONE>
^AH^M F9 NOTUSED <NONE> <NONE>
^AI^M F10 NOTUSED <NONE> <NONE>

Add an agent key

Add an agent key

Use the following procedure to add an agent key.

1. Select **System** > **Agent Keys**.
2. Select the system and then click **New**.
3. Type a name (up to 5 alphanumeric characters) and description for the key set and then click **OK**. The Avaya PDS adds the prefix **ag_** to the file name.
4. Select an action for the agent key from the **Action** list.
5. Select a call result, screen number, or NONE in the **Call Result or Screen Number** list.
   If you selected **Go To Screen** in the **Action** box, select a screen number.
   If you selected an action that does not require a call result or screen number, such as **Adjust ear volume**, select NONE.
   Some codes can be assigned to multiple keys.
6. Select the message file in the **Automated Message Assignment** box if you want to assign this agent key to an automated message. The drop-down list displays any messages you have assigned to Automated Message queues
7. Repeat steps 4 through 6 for each agent key you want to define.
8. When you complete the set, select **File** > **Save**.

9 In the Save dialog box, select **In Process** or **Complete**.
If you complete all your changes and want the new file transferred to the system, select **Complete**. If you are not ready to transfer the file to the system, select **In Process**.

Predefined agent key actions

Predefined agent key actions

The following table lists predefined agent key actions. Depending on how your system was set up, your system may not have all of these agent key functions available.

Action	Description
Adjust ear volume	Displays a dialog box used to adjust the ear piece volume. (See your Avaya PDS administrator to determine if this action is available on your system.)
Adjust mouth volume	Displays a dialog box used to adjust the mouth piece volume. (See your Avaya PDS administrator to determine if this action is available on your system.)
Agent assistant key	Displays a message on the system supervisor screen requesting assistance.
Blind trans to INB	Releases the outbound call and associated Avaya PDS record to an inbound or blend job, freeing the agent for another call. (See your Avaya PDS administrator for available transfer methods.)
Dial pad enable	Displays a dialog box with a telephone keypad (if VLTERM is used).
Display values	Displays a list of acceptable entries for the selected field.
Field call	Dials the phone number in the selected field.
Go to first editable field	Moves the cursor to a predetermined position on the screen.
Go to screen	Displays the selected screen on the agent’s workstation monitor. Select a screen in the Call Result or Screen Number column.

Action	Description
Hookflash blind trans	Transfers the call and associated Avaya PDS record using the hookflash method and frees the agent for another call. (See your Avaya PDS administrator for available transfer methods.)
Hookflash supv trans	Transfers the call and associated Avaya PDS record using the hookflash method but keeps the agent on the line with the customer. (See your Avaya PDS administrator for available transfer methods.)
Log out of job	Requests to remove the agent from the job (required for each key set).
Managed cancel call	Releases the Managed job preview record without dialing.
Managed dial ahead	Dials the preview record during a Managed job before the preview time expires.
Manual call	Allows the agent to type a phone number for the system to dial.
Manual hangup	Releases the customer from the phone line but retains the agent's connection to the line to make a manual or field call.
Mark as Do Not Call	Marks the customer's record as Do Not Call for all calling lists included in the job's Do Not Call group.
NOTUSED	Indicates the key has no defined function.
Place call on hold	Places the call on hold
Re-connect headset	Reconnects the agent to the customer that he or she placed on hold.
Refresh screen	Redisplays the dialog box without the agent's entries.

Action	Description
Release line	Codes the call and releases the customer connection (the record is still available).
Release line and record	Codes the call and releases the agent's connection with the customer and record.
Release record	Releases the record, freeing the agent for another call.
Set recall	Displays the recall appointment dialog box.
Supv trans to INB	Transfers the outbound call and associated record to an inbound or blend job but keeps the agent on the line with the customer. (See your Avaya PDS administrator for available transfer methods.)
Toggle Key	Switches between the host and the Avaya PDS sessions.
Transfer call	Transfers the call and frees the agent for another call. (See your Avaya PDS administrator for available transfer methods.)
Trunk transfer	Transfers the call using the trunk method but keeps the agent on the line with the customer. (See your Avaya PDS administrator for available transfer methods.)
Undo last change	Restores the last change in the current text field to its previous state.

5 Messages

Overview

Purpose

Messages are the digitized recordings that customers hear when they are on hold, waiting for an agent, during a Virtual Agent job, or when an agent plays a message. Messages serve a number of functions. They can assure callers that their calls have not been disconnected. They can prepare callers for the upcoming transaction, asking them to have credit cards and order numbers ready. They can answer frequently asked questions. They can promote the business or advertise new products and services.

Contents

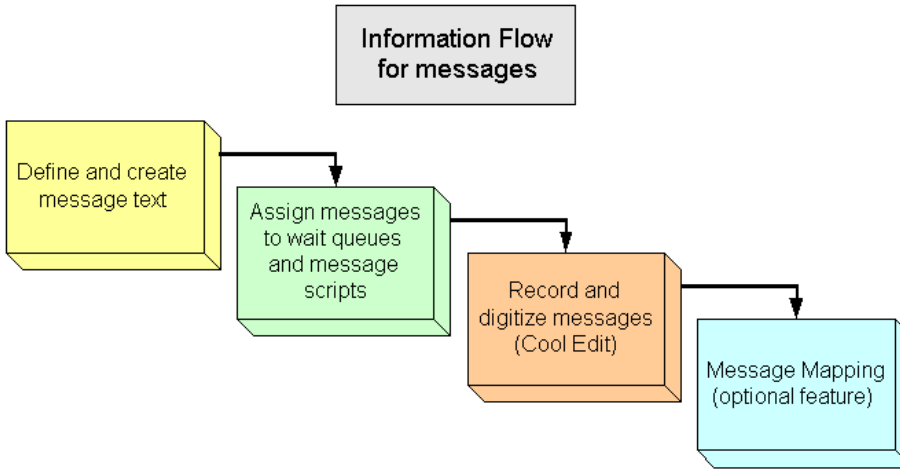
This section contains the following topics:

- Message Mapping overview
- Create a message map
- Message value wildcard characters
- Select a message map

Message overview

Messages

The following illustration describes the steps in creating a message.



There are three components to creating a message:

- Define and create message text
- Assign messages to wait queues and message scripts
- Record and digitize messages
- Message Mapping (optional)

Define and create message text

Define and create message text by assigning the message a file name, writing the text of a message, assigning it to a message type, and identifying the message as a male voice, female voice, or music. Although it is not mandatory to type the full text of the message, most companies find it helpful to have a written record of the text.

Assign messages to wait queues and scripts

Assign messages to wait queues according to how the message is going to be used. For example, is it an outbound or inbound wait queue, and do you have 1 or more messages, as in a script? Use the answers to assign messages to the appropriate wait queues and scripts.

Record and digitize messages

Record your messages and digitize messages to play on the Avaya PDS. Once created and digitized, the messages are ready to use on your next job.

Message Mapping (optional feature)

This optional feature enables you to choose a specific field in each record on the calling list. The information in this field determines which message will be played to the customer.

Use Message Mapping to perform the following functions:

- Select source fields from the calling list. You can use any field that exists on the calling list.
- Define source values the system will compare to the data in the source field on the calling list. You can defined specific source values or a range of values. You can also use wild cards.
- Select the empty field you defined in the calling list to receive the message number. (The Avaya PDS places the message number into this field.)
- Save each message map with a specific file name. Message maps are stored on the dialer. A .mm extension is added to your filename.

For example, you can target records form specific states with unique messages relevant to the state, or you can play one message to an account holder that is 30 days past due, and a different message to an account holder that is 90 days past due. The following items are used with Message Mapping:

- Use message text to save and name messages used in message maps
- Use message assignments to specify the calling list field to use to target records during preprocessing and to specify a default message to play if the message map finds no relevant value in the calling list field that you have chosen.
- Use the calling list feature to select the Avaya PDS and the calling list to use when specifying message maps, select message maps, and save your selections. You can link a message map to more than one calling list.

Message numbers

You can record up to 1970 messages. However, most switches limit the total time for all messages to 35 minutes. The digital switch uses the message number to access the file.

The `voicemsg.cfg` file on the system links each message file with a message number. This allows the Avaya PDS to refer to the messages by number rather than by file name. The message number refers to the file's location on the Large Port Voice Card (LPVC).

File names

Using the **Message Text** menu command, you define the file name, text of the message, message type, and the message gender for all of your messages. Give each message a unique name of up to eight characters. The name cannot contain any special characters. Do not type an extension. When you record the message, Administration Manager adds a `.AU` extension. The file name identifies the sound file located on the system.

The following table lists examples of file names.

Message Name	Description
fwait1	First outbound wait queue message recorded using a female voice
mwait1	First outbound wait queue message recorded using a male voice
fwait2	Second outbound wait queue message (female voice)
mwait2	Second outbound wait queue message (male voice)
infwait1	First inbound wait queue message (female voice)
inmwait1	First inbound wait queue message (male voice)
fpf1	Agent key message (female voice). (pf is a standard designation for agent keys. It comes from the abbreviation for programmable function keys.)
mpf1	Agent key message (male voice)

Plan

When you need a new message, consider the following questions before using Administration Manager:

- What will be the text of the message?

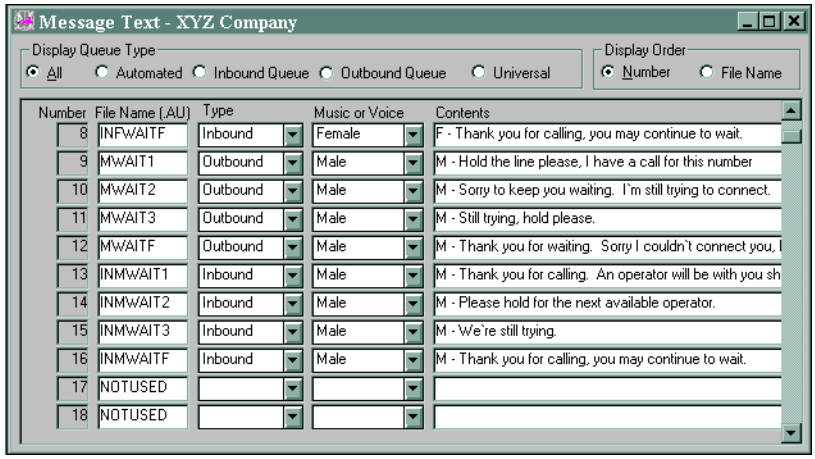
  Many people find it helpful to write out the message. The recorded message and the message text should match.
- What is the purpose of the message and how will it be used?
- Will the message be recorded with a male or female voice or both?

  Whenever possible, have the same person record all messages to be used in a series.
- Will you have to remove a message to make room for this one?

You are limited to 1970 digitized messages on the server.

- Could you use an existing message instead of creating a new one?
- Which queue will use the message?
- What languages do we need for these messages?

Example



Message text types

Message text types

When you create a message, you are required to classify it into one of four types: Automated, Inbound, Outbound, or Universal. When creating your message, you use the **Type** list to make your selection based on the message's intended use.

Automated	Delivered when an agent presses a function key or during a Virtual Agent job
Inbound	Delivered to customers when they are on hold in an inbound wait queue
Outbound	Delivered to customers when they are on hold in an outbound wait queue
Universal	Serves multiple purposes (available for all queue types)

Create a message

Create a message

Use the following procedure to create a message to play to customers.

1. Select **System** > **Message Text**.
   The **Select System** dialog box appears.
2. Select the system and then click **OK**.
3. Select a type in the **Display Queue Type** area.
   Select **All** if you do not want to limit the display.
4. Select the sort order for the display in the **Display Order** area.
5. Place your cursor in the **File Name** box of an unused message number and type a name for the message. Unused message numbers display NOTUSED.
6. Select a message type in the **Type** list.
7. Select male or female in the **Music or Voice** box.
8. Double-click the **Contents** box to display a larger text box and then type the text of your recorded message.
9. Select **File** > **Save**.
10. In the Save dialog box, select **In Process** or **Complete**.

If you complete all your changes and want the new file transferred to the Avaya PDS, select **Complete**. If you are not ready to transfer the file to the Avaya PDS, select **In Process**.

Edit a message

Edit a message

Use the following procedure to edit a message.

1. Select **System** > **Message Text**.
   The **Select System** dialog box appears.
2. Select the system and then click **OK**.
3. Edit the **File Name**, **Type**, **Music or Voice**, and **Contents** boxes.
4. Select **File** > **Save**.
5. In the Save dialog box, select **In Process** or **Complete**.

   If you complete all your changes and want the new file transferred to the Avaya PDS, select **Complete**. If you are not ready to transfer the file to the Avaya PDS, select **In Process**.

Message assignments

Overview

After you create the message text files, use the Message Assignment dialog box to first assign messages to queue types and then to set up scripts. A script is a series of messages that customers hear in the inbound, outbound, or transfer wait queues. You designate the order in which the Avaya PDS plays the messages. You can choose to play music or have silence between messages. A script may also consist of a single message.

Message assignment queue types

As stated earlier in Message overview, Administration Manager requires that you assign messages to one of four message types: Automated, Universal, Inbound, or Outbound.

Similar to choosing message types, the Avaya PDS also requires that you assign message assignments (scripts) to one of five wait queue types:

- Automated
- Virtual
- Transfer
- Inbound
- Outbound

The difference between the two types is that message assignment types are more vast—they provide a label where scripts (which consist of individual messages that each have their own message type) are played for a specific circumstance.

The following table shows how the message types and message assignments relate to each other.

Wait queue type	Description	Allowable message types
Automated	Used for messages that the agents play to customers using an agent function key	Automated Universal
Outbound	Used to assign messages that the system plays to customers in outbound wait queues and to answering machines	Outbound, Automated, Universal

Wait queue type	Description	Allowable message types
Inbound	Used to assign messages that the system plays to customers in inbound wait queues	Inbound, Universal
Transfer	Used to assign messages that the system plays to customers in transfer wait queues	Inbound, Universal
Virtual	Used to assign messages that the system plays to customers during Virtual Agent jobs (jobs that deliver messages without agent intervention)	Automated, Universal

Wait queue list

On the Wait Queue dialog box, there is a **Wait List Action** list, which has four options:

- Deliver Message
- Pause
- Start Looping
- Voice Response

Note that the only wait queue action available for the Automated queue type is Deliver Message.

Action	Description	Queue type
Deliver Message	Plays a recorded message. You select the name of the message file. The file may contain voice or music.	Automated, Outbound, Inbound, Transfer, Virtual
Pause	Specifies how long to wait between messages. You select the amount of delay (silence) in seconds.	Outbound, Inbound, Transfer

Action	Description	Queue type
Start Looping	Instructs the system to repeat the wait queue actions that follow. You must follow this command with a Deliver Message statement. Use Job Editor to set the maximum time a caller can stay in the queue.	Outbound, Inbound, Transfer
Voice Response	Instructs the system to wait for a voice response to verify that the caller or called party is still on the line. If not, the system disconnects the line.	Outbound, Inbound

Outbound wait queue example

The following shows how messages are combined to make a script.

1. Hold the line please. I have a very important call for you from (company name).
2. 5 second pause.
3. Start Looping. *(This loop begins with line four. The system will repeat all lines below the start looping statement for the length of time listed in Campaign Director.)*
4. Sorry to keep you waiting. I'm still trying to connect.
5. 5 second pause.
6. Still trying, hold please.
7. 5 second pause.
8. Still trying to connect. Thank you for waiting.
9. 8 second pause.

Inbound wait queue example

The following shows how messages are combined to make a script.

1. Thank you for calling (company name). A representative will be with you shortly.
2. 5 second pause.
3. Your call is important to us. Please hold for the next available representative.
4. 7 second pause.

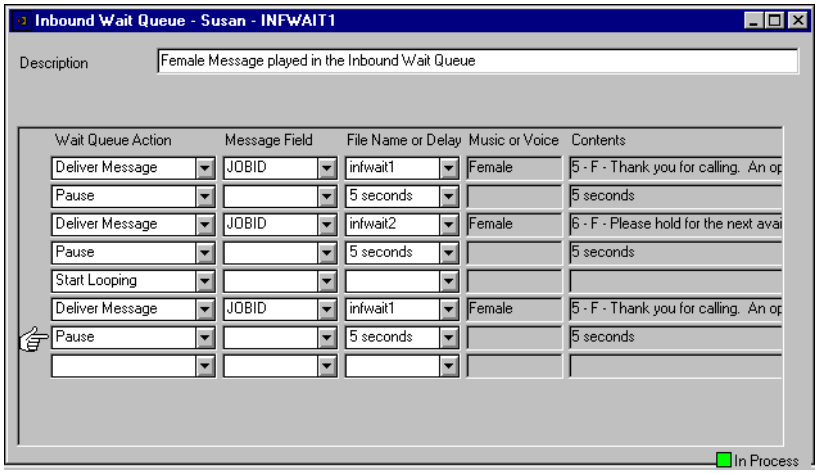
5. Please continue to hold. A representative will be with you momentarily.
6. 7 second pause.
7. Start Looping. *(This loop begins with line eight. The system will repeat the message and music as many times as you set in the Job Editor.)*
8. Thank you for waiting, please continue to hold.
9. Music.

Automated message example

This script consists of a single message that the system plays when an Agent presses a function key.

- Please call your sales representative for information about a special offer.

Example



Create a message assignment

Create a message assignment

Use the following procedure to create a message assignment.

1. Select **System** > **Message Assignments**.
   The system can play only one message for each function key.
2. Select **Automated**, **Inbound**, **Outbound**, **Transfer**, or **Virtual** in the **Display Type** box and then click **New**.
3. Type a description.
4. Select an action in the **Wait Queue Action** list.
   For automated message queues, your only option is Deliver Message.
5. Select the name of the field that will contain the message number after preprocessing. Use the **Message Field** box only if you are using message mapping.
6. Select the message you want the system to play in the **File Name** box. If you are using message mapping, select a default message to play if no matches are found for the source values you specified in the message map.
7. Select **File** > **Save**.
8. In the Save dialog box, select **In Process** or **Complete**.

   If you complete all your changes and want the new file transferred to the system, select **Complete**. If you are not ready to replace the Avaya PDS file, select **In Process**.

Note

If you have not completed all the required fields, Administration Manager will display an error message prompting you to complete the required fields. After all fields are complete, you can save successfully.

Telephony.spt file

Overview

Each time you transfer a Message Assignment to the Avaya PDS, the system adds it to a file named `telephny.spt`. In addition to the lines you create, the Avaya PDS adds lines of code to complete the assignment. The telephny.spt file on the system may not exceed 1500 lines. Unless you keep track of and limit the lines within this file, you may exceed the limit and receive an error.

If you get this error, you must **take immediate action** to correct the problem. If you do not fix the problem, with the next reboot, the Avaya PDS may fail to start jobs, or it may start jobs but not deliver messages beyond line 1500.

After completing the changes, select **Data > Install Data** to export Message Assignments to the system. To reduce the number of lines in the telephny.spt file, do one or more of the following:

- Delete Message Assignments that you no longer use. (You must delete all statuses of a message assignment—Complete, Pending or Live—to remove it from the telephony script file).
- Modify one or more of the Message Assignments that you exported.
- Contact your Avaya PDS vendor for assistance

Delete Message Assignments

Delete Message Assignments

Use the following procedure to delete Message Assignments.

1. Select **System** > **Message Assignments**.
2. Select the system in the **Select System and Display Queue Type** dialog box.
3. Select a **Display Queue Type**.
4. Select the file you want to delete and then click **Delete**
5. Repeat steps 4 and 5 for each status of a message assignment you want to delete.
6. Repeat steps 3 through 6 for each message assignment you want to remove from the telephony.spt file.
7. Select **Data** > **Install Data**.
8. In the **Export** dialog box, select the system.
9. On the install tree, verify that Administration Manager automatically selected Message Data.
10. Click **OK**. Administration Manager begins the data install process. The message data transferred to the system is installed after the next Avaya PDS reboot and empty data install.

Modify one or more Message Assignments

Modify one or more Message Assignments

Use the following procedure to modify one or more Message Assignments.

1. Open a Message Assignment that has a Live status.
2. Select **Edit** in the View or Edit dialog box.
3. Reduce the number of lines in one or more of the files. Consider using a Start Looping statement instead of playing multiple messages.

   Remember, the Avaya PDS adds lines to each Message Assignment. You need to allow for these lines when reducing the Message Assignment.
4. When you complete your changes, select **File** > **Save**.
5. In the Save dialog box, click **Complete**.

Recording messages

Overview

Your recorded voice messages must be digitized for the Avaya PDS to use them. You have several options for creating digitized messages. You can record the messages yourself and send them to a third party to be digitized, you can use a service bureau to record and digitize the messages, or you can use software that records and digitizes your messages. When the message is ready for use, store it in Administration Manager's message subdirectory.

The method you choose depends upon your resources. If you have a large number of recordings or you do not believe that you have anyone with an appropriate voice or language, you may want to use a service bureau. Some companies use service bureaus so they can match regional accents. Another option is to make recordings yourself as a way of testing the content, and then have them professionally recorded when you are happy with the content.

Note

If you use a service bureau to record and digitize the messages you must specify the message format. The service bureau can provide the file through the network, floppy disk, or cassette tape.

Message Mapping overview

Message Mapping overview

The Message Mapping feature is optional. Message maps link wait queue messages to fields you select from the calling list. Use message mapping to customize information customers hear in the outbound wait queue.

For example, you can play different messages based on customer categories on the calling list. You define a message map to link to one of three messages, depending on the value the Avaya PDS finds in the customer ranking source field in the calling list.

Message maps can link to any field in a calling list. For example, you can choose the message customers hear based on their zip code, city, or account type. The value that appears in that field determines the message each customer hears.

You can link several message maps together in a script just as you can other messages. You can also combine messages and message maps together in the same script. You can use message maps with more than one calling list.

A message map uses the calling list in two ways. First, it looks for information in the field you specify (source field). You also specify the variables that the system looks for in this source field, and instruct the system what to look for.

Second, the system looks for an empty field you defined in the calling list (message field). The system inserts the message number that it will play based on the value in the source field. You can also specify a default message (recommended) in case no information in the source field matches the criteria.

You use the Message Mapping feature to define new message maps. Before you define a message map, you must have recorded and saved the messages it will use. Each calling list field you use as a source field for a message map must already exist on the calling list. The empty message field must already exist on the calling list.

Note

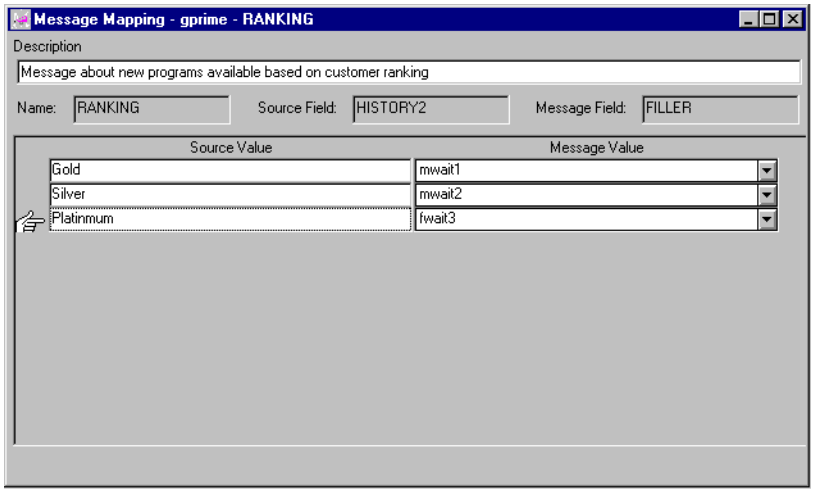
The Message Mapping feature may not be available on your system. If you would like to add this feature, contact your Avaya PDS representative.

Plan

When you need to create a message mapping, consider the following points:

- Which fields from the calling list do you want to use to select different messages?
- Which message do you want each type of customer to hear?
- What will you name the empty field that will receive the message number from the system?
- If you are using several dynamic messages in a row, how will you record the messages to be sure they sound like one smooth message?
- The telephony script file, telephny.spt, is limited to a total of 1500 lines. This 1500 lines must serve all script lines for all calling lists handled by the system.
- Each message is limited to one minute.
- The system can store a total of 35 minutes of recorded messages, or up to 1970 messages.

Example



Create a message map

Create a message map

Use the following procedure to create a message map.

1. Select **Application** > **Message Map**.
2. Select the system and then click **New**.
3. Name the message map. You can use a maximum of eight alphanumeric characters.
4. Select the source field in the calling list (for example, ZIPCODE.) The Avaya PDS compares the data in this field to the source values on the message map to determine which message is played.
5. Select the name of the empty field you created in a calling list for the message number in the **Message Field** box.
6. Click **OK**. You cannot edit the fields after you click **OK**. You can only delete and re-enter the information.
7. Type a description of the message map.
8. Enter the value or range of values that the Avaya PDS will look for in the source field in the **Source Value** box. For example, ZIPCODE = 98000-99999 to play a specific message for customers within Washington state.
9. Select the message to play in the **Message Value** box when the source value or a value within the range is found.

10 Repeat steps 9 and 10 for each set of variables. In the Save dialog box, select **In Process** or **Complete**.

Note

Message Maps have a “last one wins” rule if more than one message number is selected to be placed in the message field. If criteria for the same message field matches more than one source field in your message map, the last message number processed will play. If you are using more than one message map, the last message number processed on the last message map will play.

Message value wildcard characters

Overview

When you specify criteria for a field, you use an expression to define the subset of records you want to use. An expression is a combination of wildcard characters such as greater than (>) or less than (<), and other values.

Wildcard characters

Message Mapping uses the following wildcard characters:.

Wildcard character	Description
=	equal to
<> or ~	not equal to
>	greater than
<	less than
>=	greater than or equal to
<=	less than or equal to
IS EMPTY	match on empty field
IS SPACE	match on space-only field
*	match all
?	match on single character
,	match on one value in a series
-	match on any value in a range

If you want customers with a balance greater than $5000 to hear a message about account insurance, your expression might be >5000 in the ACCTBAL source field. Then specify the name of the message that corresponds to accounts of that size.

Select a message map

Select a message map

Use the following procedure to select a message map.

1. Select **Application** > **Calling List**.
2. Select the system and the calling list in the **Calling List - Select Application** dialog box.
3. Select the **Message Map** tab in the **Calling List - [filename]** dialog box.

   A pull-down menu lists names of all existing message maps. You can add more lines by selecting **Append**.
4. Select the message map(s) to associate with this calling list. You can move your choices up or down, or delete lines.
5. Save your selections. Select **In Process** or **Complete**.

6 Applications

Overview

Purpose In Administration Manager, an application is an association of calling lists and download and upload file definitions.

Contents This section contains the following topics:

Applications overview

Applications overview

Administration Manager defines an application as an association of calling lists and download and upload file definitions. When you create an application in Administration Manager, you specify either an inbound or outbound calling list.

Typically, an outbound calling list begins with information provided by the host, in the form of a data file. The field layout you define on Administration Manager must match the layout of the data file received from the host computer. **Check your work carefully**.

The Avaya PDS processes the data file received from the host computer, checks for records that are duplicated or that contain invalid telephone numbers, and marks those records as ineligible for calling.

Marking the ineligible records and adding the system fields changes the host computer data file into an Avaya PDS calling list. The Avaya PDS uses the calling list to make phone calls, display customer information on agent screens, and save the results of calls.

At the end of each remaining record, the Avaya PDS appends empty data fields. These data fields will contain information about the activities completed during your daily calling operations. For example, the data fields will store the agent's login name, the results of the call, and the duration of each call.

The Avaya PDS identifies each outbound calling list as **list** followed by a number up to 500 (for example, **list1**).

Inbound calling lists

The format of the customer records stored in your inbound list varies depending on the type of business you do and how you interact with your host computer.

If your agents work directly with a host computer, your inbound list may contain only a single custom field. Agents use the information in this field to query the host computer for an account record. This field should uniquely identify each record in the database. Typical fields for this purpose are ACCTNUM and PHONE1.

In a stand alone system where no host is available, the format of the inbound list may be similar to your outbound calling list. However, the fields contain no data, because their function is to accept new information gathered during calling activities.

Since you can use Administration Manager to define more than one application, you must select a calling list name before you begin a task.

When you select the Download, Calling List Format, Inbound List Format, or Upload command from the Application menu, the **Select Application** dialog box appears. There are several types of **Select Application** dialog boxes, but they all serve the same purpose. If the dialog box has a **Display filter** group, you can limit the dialog box display to a particular completion status.

The system identifies each inbound list as **inbnd** followed by a number up to 500 (for example, **inbnd1**).

Application copy

You can copy an application to a new application name on the same Avaya PDS or to another Avaya PDS. When you copy an application, Administration Manager copies the download, calling list or inbound list, upload, and file processing definitions from one application to another. Administration Manager copies each definition in the following preference order: **In Process**, **Complete**, **Pending**, **Live**. All definitions in the new application are assigned an In Process status. For example, if there is an In Process download definition, Administration Manager copies it to the new application. If there is a Complete download definition (but no In Process definition), the Complete definition is copied to the new application and assigned a status of In Process

Delete an application

You can also delete applications. Deleting an application deletes all download, calling list, upload, and file processing information for that application. It also deletes the processed calling or inbound list on the Avaya PDS the next time you use the Install Data feature. The Avaya PDS stores a copy of the deleted list for up to seven days. Depending on the size of the backup list and other data on the system, hard disk space might be limited.

Important

Be careful when deleting an application. You cannot undo this action.

Plan

When you need to create a new application, consider the following questions before using Administration Manager:

- Will this application be used with an inbound or outbound calling list?
- If you have more than one Avaya PDS, which one will use this application?
- What fields may be needed in addition to the downloaded data file fields for your agents to be productive?

Note

When you add new applications or change existing applications using Administration Manager, it does not automatically update your Avaya PDS reports. You can use PC Analysis or Analyst to design similar reports or contact your Avaya PDS vendor to update your system reports.

Create an application

Create an application

Use the following procedure to create an application.

1. Select **Application** > **Application Definition**.
   The New Application dialog box appears.
2. Select the system in the **System** box.
3. Type a unique number in the **List #** box.
4. Type a description (up to 40 alphanumeric characters) of the application in the **List description** box.
5. Select the type of application (outbound or inbound) in the **Type** box.
6. Select **File** > **Save**.
   The new application appears in the **Current Applications** list.

Select an application

Select an application

Use the following procedure to select an application.

1. Select a system from the **System** list.
2. Select the application and then click **OK**.

Copy an application

Copy an application

Use the following procedure to copy an application.

1. Select **Application** > **Application Copy**.
2. Select the system that contains the application you want to copy under **Existing Application Lists**.
3. Select the application name to copy.
4. Select the system to which you want to copy the application under **New Application** list.
5. Type a unique number for the application.
6. Type a description for the application.
7. Select **File** > **Save**.

Delete an application

Delete an application

Use the following procedure to delete an application. **Remember, this action cannot be undone.**

1. Select **Application** > **Application Delete**.
2. Select the system that contains the application you want to delete.
3. Select the application name to delete.
4. Select **Edit** > **Delete Row**.
   Administration Manager displays a message asking you to confirm the deletion.
5. Click **OK**.

7 Download data

Overview

Purpose

The download process transfers data from the host computer to the Avaya™ Predictive Dialing System (PDS) where it is converted to an outbound calling list. Use the download feature to set up the file formats and file transfer details used to transfer files from the host computer to the system. You download information from the host to an Avaya PDS calling list in either ASCII or standard IBM (EBCDIC) file format.

Contents

This section contains the following topics:

- Complete a tape download

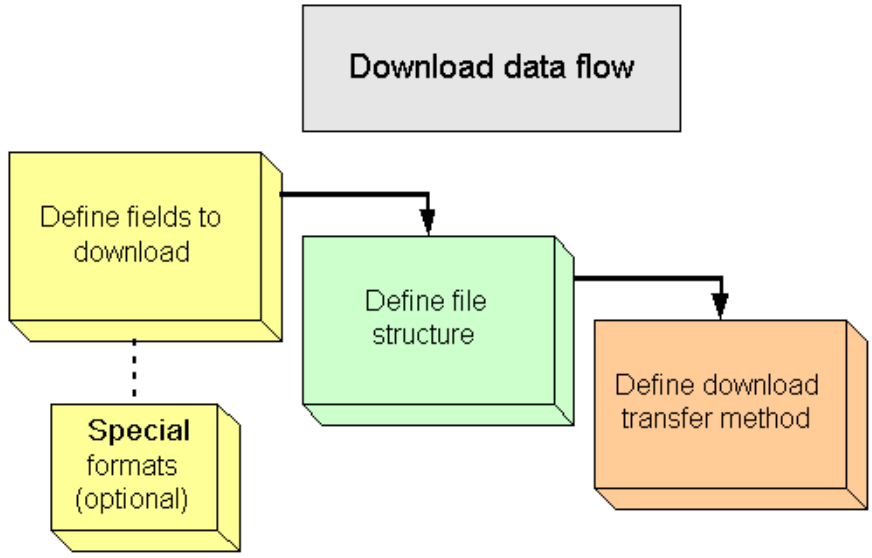
Download overview

Overview

Using the download feature, you provide the Avaya PDS with three sets of information.

- You provide information about the layout of the host data file and the field attributes of each record.
- You describe the format, block size, and file structure used in the host data file.
- You define how the data transfer occurs. You can load host data onto the system using FTP or tape. (If your system is currently set up to use a host gateway, you can select the host gateway transfer method.)

In each download, you must include the host fields the Avaya PDS uses to select records, to display on agent screens, and to include in Avaya PDS reports. Include at least one phone number. Gather the necessary format and file transfer information from your Avaya PDS administrator.



Host Gateway LAN file transfer

If you use a Host Gateway LAN for file transfer, a radio button will already be selected for that option in Administration Manager. **Do not change this to another option!** If you do, you will lose that ability and will have to have it reconfigured.

The Host Gateway LAN file transfer option is obsolete with Avaya PDS 12.0. If you have an earlier version of the Avaya PDS, you can still use it. But remember, do not change file transfer methods in

Adminstration Manager or you will lose the ability to transfer files via Host Gateway LAN.

Edit download field names

The Fields tab is used to specify the information you want to download from the host. For example, the host file may contain information ranging from the customer name and account number to the date of the last purchase and balance due. You may want to download only some of this information to your calling list. Before you edit download field names, you must define an application.

Data Types

When defining download fields, you must choose a data type. Data types are:

- Text
- Date
- Money
- Numeric
- Phone
- Time

If you select Phone, Administration Manager automatically sets the field name to PHONE1, PHONE2, and so on. **If a field contains both alpha and numeric characters, select Text as the data type.** You may also select Text for all numeric data if it is not used in any calculation.

Use Same Start

You can use the same information to populate different fields. For example, PHONE1 contains the 10-digit phone number. The AREACODE field takes the 3-digit area code from the PHONE1 field. Because Same Start is selected, AREACODE and PHONE1 display the same value (21) under Start. The field following the AREACODE field begins at the end of the longer field (PHONE1).

Plan

When you need a new download definition, consider the following questions before using Administration Manager:

- Which fields from the host file do you want to download?
- What is the format of the host file information?
- Is there any special formatting you want to apply to the downloaded data?
- How do you want the data displayed in the calling list?
- What is the file and record structure of the host data?
- What download method do you use (FTP or tape)?

- Which fields will you want on the agents' screens?
- Which fields will you need to select records?
- Which fields will you want for system reports?
- Which fields will you need for record keeping or order processing?

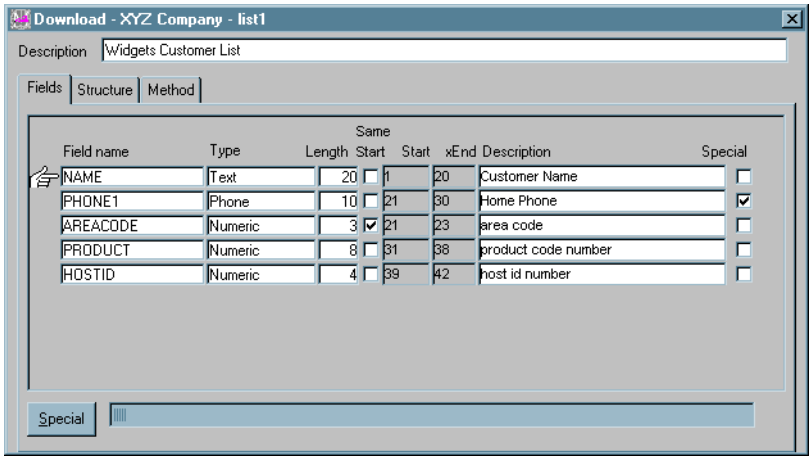
Note

When you add new applications or change existing applications using Administration Manager, it does not automatically update your system reports (such as the Reject and Days on Avaya PDS reports). You can use PC Analysis or Analyst to design similar reports or contact your Avaya PDS vendor to update your system reports.

Example

Use **Application** > **Download** to tell the Avaya PDS which fields the host will download and to define the format for each download list. After filling out the Download dialog box and saving your work, you will have created a download file definition.

The Download dialog box has three tabs: Fields, Structure, and Method.



Edit download field names

Edit download field names

Use the following procedure to edit download field names.

1. Select **Application** > **Download**.
2. Select **Application** dialog box and then select the system.
3. Select the application and then click **OK**.
4. Type the name of the first field (up to 15 alphanumeric characters) in the download In the **Field Name** box. Names appear in uppercase.
5. Select the type of information that appears in this field.
6. In the **Length** box, type the number of characters in the field.
7. Select the **Same Start** check box if this field uses the same data as the previous field.
8. Type a description of the field.
9. Click the **Special** button if you want to apply special formatting to the field.
   For more information, see Special formats.
10. Repeat steps 4 through 9 for each field you want to download.
11. Select **File** > **Save**.

12 In the Save dialog box, select **In Process** or **Complete**.
If you complete all your changes and want the download definition transferred to the system, select **Complete**. If you are not ready to transfer the definition, select **In Process**.

Special formats

Overview

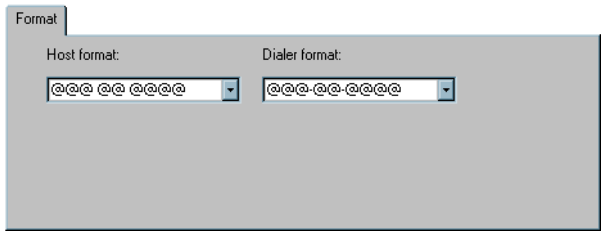
You can apply special formatting to fields downloaded from the host to meet Avaya PDS requirements. Use the special format feature to define the following:

- How you want the system to display the data
- What information you want to force into a selected field
- How to convert specific values of a field to different values
- Fields you want to combine into a single field

Use the Format tab to define how you want host data displayed in the calling list.

For example, you can add dashes to a phone field's format or add a decimal point to a dollar value. The Host format and Avaya PDS format drop-down lists contain commonly used special formats. You can select from these lists or type your own formats, including literal characters.

The following illustration shows an example of the Format tab in the Special Format dialog box.



Special format: merge

Use the Merge tab to identify fields you want to combine into another field. You must define the download fields that you want to combine before you can define the merge field.

Add the merge field on a row below the download fields that you want to merge. It is recommended that you add merge fields below all download fields.

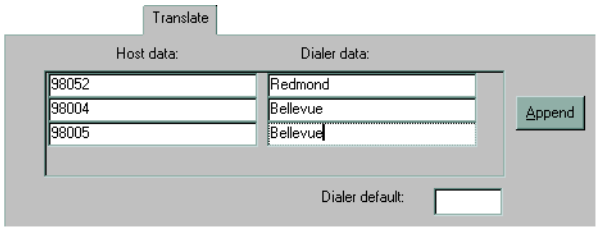
For example, the area code, exchange, and line number have each been defined as separate fields on the Download Fields tab. You define the fourth field (PHONE1) for the complete phone number and use the Special Format - Merge feature to combine the values from the area code, exchange, and line number fields.

Note

The Avaya PDS requires the entire phone number (area code, exchange, and line) in a single field. If you need to break out the area code, exchange, and line in separate fields for other purposes, use the Special Format's **Merge** feature. Administration Manager correctly calculates the system added fields PHONESTAT & ZONEPHONE. This is done by using the special formatting feature **Merge**. The AREA< PREFIX, and SUFFIX are separate fields; the PHONE1 field follows the SUFFIX field. Use Data type **Text** instead of Data type **Phone** for PHONE1. The special formatting check box is selected, and the fields for AREA, PREFIX, and SUFFIX are added for the MERGE field for PHONE1

Special format: translate

Use the **Translate** tab to identify specific field values you want to convert to different values. For example, you can convert ZIP codes to cities.



Special format: Structure

Use the **Structure** tab to provide the Avaya PDS with information about the host file structure and size. The Avaya PDS uses this information to read the host data and process the download file.

If your system is year 2000 compliant and your Administration Manager system supports the Switch Year feature, use the Structure tab to set a switch year value. The system uses this number to convert the year in a date field from two to four digits. If a downloaded two-digit year is greater than or equal to the switch year, the system inserts 19 into the century position of the date. For values less than the switch year, the system inserts 20 into the date. For example, if the switch year value is 30 and the downloaded year value is 95, the system inserts 19 (1995). If the downloaded value is 05, the system inserts 20 (2005). Define a switch year value based on your data and business needs.

Consider how far beyond the year 2000 your data extends.

If you use the Switch Year feature, you must also define special formats for your date fields.

Complete the fields that apply to this download. Required fields are noted in the applicable step.

Create special formats

Create special formats

Use the following procedure to define special field formatting.

1. Select the field you want on the **Download Fields** tab and then click the **Special** button.
   The **Special Format** dialog box appears. Select the **Host field only** option if you do not want to copy this field to the calling list (for example, FILLER1).

2. Select or type the format of the data in the host record in the **Host format** box.
   The items available in the **Host** and **Dialer** format boxes depend on the field's data type.

3. Select or type the format that you want the data displayed on the system in the **Dialer format** box and then click **OK**.

Special field symbols

Special field symbols

Administration Manager uses the following symbols to represent specific types of characters or information.

Data Type	Symbol	Description
Text, Phone	@	Alphanumeric characters and phone numbers
Number	#	Numeric, with leading zeros
Money	$	Numeric, without leading zeros, left justified digits
Date	MM	Month
	DD	Day
	YY	Year
	CC	Century (Use in the host and dialer formats when the host download file includes the century digits.)
	NN	Century (Use in the dialer format to insert the century digits calculated by the Switch Year feature.)
	19	Century (Use in the dialer format to insert 19 before the two digit year.)
	20	Century (Use in the dialer format to insert 20 before the two digit year.)
Time	HH	Hour
	MM	Minutes
	SS	Seconds
All data types	(space)	Place holder (Use in the host format to insert a character in the dialer format, such as a dash or a decimal point.)

If you define a special format that inserts a character into a field, you must insert a space in the host format that corresponds to the new

character in the dialer format. For example, to insert a decimal point into a money field, type the host format with a space where you want to locate the decimal point (###### ##). Type the decimal point in the dialer format ($$$$##.##).

If your system is year 2000 compliant, you need to define how to handle the century digits for date fields. Use one of the following methods:

- If a host download file contains eight-digit date fields that include the century, use the symbol CC to define the century digits in the date format.
- If a host download file does not include the century digits in the date fields and the Switch Year feature is set up on Administration Manager, use the symbol NN to define the century digits in the date field's dialer format.
- If Administration Manager is not set up to use Switch Year, you can define specific century digits that you want the system to insert into a date field. For example, if you insert 19 into a date field's dialer format, the system will insert 19 into that date field in every record of the calling list.

Note

Administration Manager does not require you to insert spaces in the host format to represent inserted century digits in the dialer format.

Special formatting for downloads

The following table lists examples of how to use special formatting for downloads, including sample host and dialer data.

Host Format	Dialer Format	Host Data	Dialer Data
@@@ @@@ @@@@ (phone number)	@@@-@@@-@@@@	2065554259	206-555-4259
#### ##	$$$#.##	059095	$590.95
#### ##	$$##.##	000995	$09.95
MM DD YY	MM/DD/YY	061898	06/18/98
CCYY MM DD	MM/DD/CCYY	19980618	06/18/1998

Host Format	Dialer Format	Host Data	Dialer Data
YY MM DD	MM/DD/ NNYY	980618	06/18/1998 The example is based on a switch year value of 30.
MM DD YY	MM/DD/ NNYY	061805	06/18/2005 The example is based on a switch year value of 30.
YY MM DD	YY/DD/19YY	980618	06/18/1998
MM DD YY	MM/DD/20YY	061805	06/18/2005
HH MM SS	HH.MM.SS	102050	10.20.05
@@@ @@ @@@@ (social security number)	@@@-@@-@@@@	123456789	123-45-6789

Add field filler information

Add field filler information

Use the following procedure to add field filler information.

1. Select the field you want on the Download Fields tab and then click **Special**.
2. Select the **Insert Data** tab in the **Special Format** dialog box.
3. Type the information you want to force into the selected field in **Fill info.**
   The system inserts into the field exactly what you type. For example, if you want to fill a five-character field with asterisks, type five asterisks.
4. Click **OK**.

Add data translations

Add data translations

Use the following procedure to add data translations.

1. Select the field you want and click **Special** on the **Download Fields** tab.
2. Select the **Translate** tab in the **Special Format** dialog box and then click **Append.**
3. Type the data as it appears in the host field in the **Host data** box. Leave the field blank to represent a null field. Press the spacebar to enter a space character.
4. Type the data you want in the downloaded field in the **Dialer data** box. Leave the field blank to represent a null field. Press the spacebar to enter a space character.
5. Repeat steps 3 through 5 for each data pair you want to define.
6. Type the default value you want to use when the host field contains a value that doesn't appear in the Host data list in the **Dialer** default field. This is an optional entry. The calling list uses this value if no match is found between the host field value and values in the Host data list. If you leave this field blank, the calling list field is left empty when no match is found.
7. Click **OK**.

Merge fields

Merge fields Use the following procedure to merge fields.

1. Select the field you want and click **Special** on the Download Fields tab.

2. Select the **Merge** tab in the **Special Format** dialog box.

3. Select the first field you want to merge and click > button in the Available host fields list.

4. Repeat step 3 for each field you want to merge.
   Administration Manager merges the field data in the order listed in the **Merge fields** list.

5. Click **OK**.
   When you define a merged field, no Start and End positions are calculated on the Fields tab.

Create the download file structure

Create the download file structure

Use the following procedure to create the download file structure.

1. Select the **Structure** tab in the **Download** dialog box.

2. Type the size of one host record if necessary, in the **Record Size** box.
   By default, Administration Manager displays the ending position for the last field defined on the Fields tab. This field must contain an entry.

3. Type the size of the buffer in which the records are stored in the **Block Size** box.
   By default, Administration Manager displays the record size. However, the system converts the data more efficiently when you increase the block size. This value must be a multiple of the Record size entry and less than 32,000. If you are unsure what to enter, multiply the record size by 10. This field must contain an entry.

4. Type the number of blocks to read in the **Blocks Read** box.
   Administration Manager displays a default value of 1. The recommended setting is 10. Blocks Read multiplied by Block Size (the number of bytes that the system reads before processing the data) must not exceed 32,000. If Blocks Read is too high, the system converts no records and displays no error statements. This field must contain an entry.
   Administration Manager does not automatically update the Structure tab if you change the record length on the Fields tab. You must type the new Record Size, Block Size, and Blocks Read settings to reflect the new record length.

5. Type the number of bytes in the host file to skip before beginning data conversion and writing in the **Skip Records** box.

6 Type the number of bytes to convert and write in the **Read Bytes** box.

7 Type a two-digit year number in the **Switch Year** box. Complete this field if your system is year 2000 compliant and your Administration Manager system supports the Switch Year feature.

8 Select the value (null or space) to place in every blank position for all fields in each record in the **Terminator** list.

9 Select the data type (ASCII or EBCDIC) of the host file in the **Character Set** list. This field must contain an entry.

10 Select the method to use to handle type case in the **Case Conversion** list.
The default is UPlow (leave case as is). Other options are UPPER (convert all characters to uppercase) and lower (convert all characters to lowercase).

11 Select **Remove carriage return** to remove carriage returns from each record.

12 Select the **Remove line feed** check box to remove line feeds from each record.

13 Type the name of the custom download process for your system (optional) in the Custom Executable box.

14 Select **File** > **Save**.

In the Save dialog box, select **In Process** or **Complete**.
If you complete all your changes and want the download definition transferred to the system, select **Complete**. If you are not ready to transfer the definition, select **In Process**.

Complete an FTP download

Complete an FTP download

Use the following procedure to complete an anonymous FTP download.

1. Select **Application** > **Download**.
2. Select the system in the **Download - Select Application** dialog box.
3. Select the application and click **OK**.
4. Select the **Method** tab, and then select FTP.
5. In the **Server Name** box, type the system name for the host computer.
6. In the **Logon** box, type the logon user name for the host computer.
7. In the **Password** box, type the logon password for the host computer.
   If you complete all your changes and want the download definition transferred to the Avaya PDS, select **Complete**. If you are not ready to transfer the definition, select **In Process**.
8. In the **Host File** box, type the path and file name of the file on the host system.
9. Select **File** > **Save**.
10. In the Save dialog box, select **In Process** or **Complete**.
    If you complete all your changes and want the definition transferred to

the Avaya PDS, select **Complete**. If you are not ready to transfer the definition, select **In Process**.

Complete a tape download

Complete a tape download

If you use 9-track tape to transfer information between the Avaya PDS and the host computer, use the following procedure to complete a tape download.

1. Select **Application** > **Download**.
2. Select the system in the **Download** - **Select Application** dialog box.
3. Select the application and then click **OK**.
4. Select the **Method** tab and then select **Tape**.
5. Select the tape density in the **Density** box.
   /dev/rmt/2hsn for high density tape
   /dev/rmt/2msn for low density tape
6. Select the type of tape header (IBM or none) in the **Label** box.
   If you select IBM, the Avaya PDS skips the header information at the beginning of the file.
7. Select **File** > **Save**.
8. In the Save dialog box, select **In Process** or **Complete**.
   If you complete all your changes and want the definition transferred to the Avaya PDS, select **Complete**. If you are not ready to transfer the definition, select **In Process**.

8 Calling lists

Overview

Purpose

The Avaya™ Predictive Dialing System (PDS) uses calling list information to convert downloaded host data into an Avaya PDS outbound calling list.

Contents

This section contains the following topics:

Calling list definition overview

Calling list definition overview

When you need to create a calling list definition, consider the following questions before using Administration Manager:

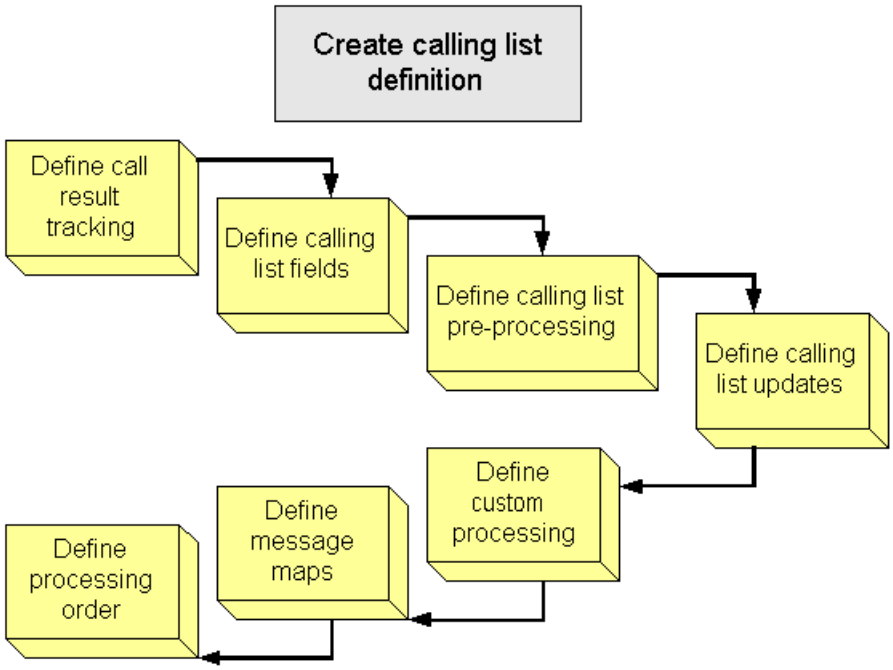
- What fields do you want the system to add for tracking calling activities?
- If you are using message mapping, what fields do you need to add for message maps?
- Which field do you want to use for duplicate checking?
- What call results do you want to track?
- Do you want to index the calling list?
- Do you want to mark records as not callable after they have been on the system for a specified length of time? If so, how long?
- If you download host records on consecutive days, do you want to update the returning records with the previous day's results?
- Are there custom processes you want to run against this calling list?
- In what order do you want your custom processes to run?

Note

When you add new applications or change existing applications using Administration Manager, it does not automatically update your system reports (such as the Reject Record and Days on Avaya PDS reports). You can use PC Analysis or Analyst to design similar reports or contact your Avaya PDS vendor to update your system reports.

Important

When creating a calling list definition, complete the Calling List tabs in order from left to right.



Call results tracking

Use the Features tab to identify the call results you want the Avaya PDS to track for due diligence. Due diligence, also called post-update, is an optional feature that the system uses to track the number of call attempts to a record. For each call attempt, the Avaya PDS tracks the date, time, and call result for the number of phones selected. It is particularly helpful to industries that are required to contact a customer a minimum number of times before taking an action. For example, some institutions cannot refer a past due account to a collection agency until the institution has made four unsuccessful attempts to contact the delinquent account.

Note

To use this feature, Due Diligence must have been selected during Administration Manager system setup. Contact your system installer if fields on the Features tab are disabled.

Calling list fields

Use the Fields tab to display information about all fields in the calling list and to define custom fields, which are placed between the host fields and Avaya PDS-added fields. For example, you may want to add a comment field that agents use to type any call information that doesn’t fit into other fields, or define an empty Message Field for a message map.

You can select the type of calling list fields you want to view.

Select	To display
All	All calling list fields
Download	You can select the type of calling list fields you want to view.
Input	Custom fields only
Dialer	Avaya PDS-added fields only

Note

To display fields defined using the Download feature, select **Refresh Calling List** from the Edit menu.

Calling list field preparation

Use the Prepare tab to specify how a calling list is processed, tracked, and reported. For example, you can define duplicate and reject record checks, ZIP Code conversion to area codes, and calling list record indexing.

Update settings

Use the Update tab to specify the update criteria for this calling list. Use this feature when you download host records on consecutive days and want to update the returning records with the previous list's results.

Customize calling list processing

Use the Custom tab to define custom processing for the calling list. You can add or remove processing programs that have been designed specifically for your system.

Note

Not all systems have this option.

Calling list processing order

Use the Ordering tab to define the order for all processing on this calling list. You can change the order of the custom processing you select.

Warning

You can also change the standard processing order. However, this may interrupt the calling list processing before it is complete or destroy the calling list. You cannot remove time zone processing.

Track call results

Track call results

Use the following procedure to track call results.

1. Select **Application** > **Calling List**.
2. Select the system in the Calling List - Select Application dialog box.
3. Select the application and click **OK**.
   Administration Manager displays the Calling List dialog box with the **Features** tab selected.
4. Select the **Maintain calling activity history** check box.
5. Select **Ignore subsequent attempts** or **Overwrite initial attempts**.
   If you select Ignore subsequent attempts, the system tracks only the number of attempts selected.
   If you select Overwrite initial attempts, the system overwrites the calling activity history on the oldest attempt with the results of the most recent attempt after the selected number of attempts has been reached.
6. Select the number of phone fields (up to 4) in the calling list that you want to track. A minimum of 2 phone fields is required.
7. Select the number of attempts (up to 5) to call a record. A minimum of 2 attempts is required.
8. Select each completion code for which you want to track calling activity history.
9. Select **File** > **Save**.

10 In the Save dialog box, select **In Process** or **Complete**.
If you complete all your changes and want the definition transferred to the system, select **Complete**. If you are not ready to transfer the definition, select **In Process**.

Edit calling list fields

Edit calling list fields

Use the following procedure to edit calling list fields.

1. Select the **Fields** tab in the Calling List dialog box.
2. Select an option under **Display by Calling List Source**.
3. Type a name for the custom field (up to 15 alphanumeric characters) in the **Field Name** box.
4. Select the data type for this field in the **Type** box.
5. Type the number of characters in the field in the **Length** box.
6. Type a brief description n the **Description** box.
7. Select the **Enable Data Transfer** check box if you want to transfer the data in this field during a voice and data transfer.
8. Repeat steps 3 through 7 for each custom field you want to define.
9. Select **File** > **Save**.
10. In the Save dialog box, select **In Process** or **Complete**.
    If you complete all your changes and want the calling list definition transferred to the system, select **Complete**. If you are not ready to transfer the definition, select **In Process**.

Prepare calling list

Prepare calling list

Use the following procedure to prepare a calling list.

1. Select the **Prepare** tab in the Calling List dialog box.

2. Select **Remove duplicate records** in the **Duplicate Entry and Reject Records** box to enable this feature.

3. Select the field to use to identify duplicate records in **Duplicate Field**. Typical choices are the ACCTNUM or PHONE1 field.

4. To exclude records meeting specific criteria. In the **Field** box, select a field name. In the **Value** box, type a field value. If the field contains this value, the record is marked as not callable.

Edit list preparation details

Edit list preparation details

Use the following procedure to edit list preparation details.

1. Select the **Index calling list** check box, and then select a unique key field to index the calling list. This provides faster record access for processes such as Record Edit or Campaign Batch Update. A typical choice is ACCTNUM.

2. Select the Insert area code based on ZIP Code check box, then select the ZIP Code field to perform a ZIP-to-area code conversion. Select this option when your ZIP Code data is more accurate than your area code data. You must have a current ZIP Code to area code database installed on the system.

3. To track the number of days a record has been on the system, select **Calculate consecutive days on system**, and then define the following:
— In the **Sort field** box, select a unique field to use to match records between the new calling list and the previous calling list. A typical field choice is ACCTNUM.
— In the **Maximum Consecutive days** box, select the number of days that a record can remain on the system before it is marked as old.
— In the Days in Work Week box, select the number of days in the call center's work week.
— To mark records identified as old as not callable, select Delete records reaching maximum days. The system places a D (delete) in the record's STATUSFLAG field when it has been on the system for the defined maximum consecutive days.

4. Select **File** > **Save**.

5. In the Save dialog box, select **In Process** or **Complete**.
If you complete all your changes and want the calling list definition transferred to the system, select **Complete**. If you are not ready to transfer the definition, select **In Process**.

Edit update settings

Edit calling list update settings

Use the following procedure to edit update settings.

1. Select the **Update** tab in the Calling List dialog box.
2. Select **Update List** to enable the update feature.
3. Select the key field that identifies a record for update in the **Match on Unique Field** box. A typical choice is ACCTNUM.
4. Select the field(s) you want to update in the **Selectable Fields** box and then press >.
   To select multiple fields, hold down the Ctrl key and click the field names.
5. Select the **Results to Track** check box for each completion code you want to track.
6. Select **File** > **Save**.
7. In the Save dialog box, select **In Process** or **Complete**.
   If you complete all your changes and want the calling list definition transferred to the system, select **Complete**. If you are not ready to transfer the definition, select **In Process**.

Customize calling list processing

Customize calling list processing

Use the following procedure to customize your calling list processing.

1. Select the **Custom** tab in the Calling List dialog box.

2. Select the custom processing you want to add in the Available Calling List Processing list.
   To select multiple processes, press the Ctrl key and click the items you want.

3. Click > to move the selected item(s) to the Selected Calling List Processing list.
   To remove processes from the list, select the item(s) and click <.

4. Select **File** > **Save**.

5. In the Save dialog box, select **In Process** or **Complete**.
   If you complete all your changes and want the calling list definition transferred to the system, select **Complete**. If you are not ready to transfer the definition, select **In Process**.

Link a message map to the calling list

Link a message map to the calling list

Use the following procedure to link message maps to this calling list.

1. Select the **Message Map** tab in the Calling List dialog box.
2. Click **Append** to add more message maps.
3. Select the message map to associate with this calling list. Message maps must appear in the order (top to bottom) they will be used.You can move your choices up or down or delete lines.
4. Save your selections.

Specify calling list processing order

Specify calling list processing order

Use the following procedure to specify calling list processing order.

1. Select the **Ordering** tab in the Calling List dialog box.
2. Select the item you want to move.
3. Select **Edit** > **Move Up** or **Edit** > **Move Down** to move the item up or down in the list.
4. Repeat steps 2 and 3 for each item you want to move.
5. Select **File** > **Save**.
6. In the Save dialog box, select **In Process** or **Complete**.
   If you complete all your changes and want the calling list definition transferred to the system, select **Complete**. If you are not ready to transfer the definition, select **In Process**.

9 Inbound lists

Overview

Purpose You can use Administration Manager to create empty inbound lists for use with Intelligent Call Blending.

Contents This section contains the following topics:

Inbound lists

Overview

Inbound lists are templates that contain fields but no data. You create inbound lists for Intelligent Call Blending® systems. The inbound lists store data about the type of calls the Avaya PDS. Agents complete data fields and the information can be uploaded to the host. When you define an inbound list, you assign a number to it; Administration Manager automatically adds the prefix **inbnd** (for example, inbnd1 or inbnd2). You define one set of data for each inbound list, including a unique identifier for accessing the records on the host and uploading the records to the host. The unique identifier is a group of characters is unique to each record, typically an account number. In addition, you define the fields that appear on agent screens and reports.

Record format

The format of the customer records stored in your inbound list varies depending on the type of business you do and how you interact with your host computer.

If your agents work directly with a host computer, your customer records may contain only a single custom field. Agents use the information in this field to query the host computer for an account record.

In a standalone system, the format of the customer records may be similar to your outbound calling list. However, many of the fields are empty because agents use these fields to collect information during calling.

Note

You must create an inbound application before you can define an inbound list.

Define input fields

After you create an inbound application, you define the inbound list format.

Data types

Use the following data types:

- Text
- Date
- Money
- Numeric
- Phone

- Time

If you select Phone, Administration Manager automatically sets the field name to PHONE1, PHONE2, and so on. **If a field contains both alpha and numeric characters, select Text as the data type.** You may also select Text for all numeric data if it is not used in any calculation.

Plan

When you need to create an inbound list definition, consider the following questions before using Administration Manager:

- Will agents work directly on your host computer (interactive system)?
- If the system is interactive, what is the query field?
- Will you use the Avaya PDS as a standalone system?
- Which fields do you want to retain for account records?
- What completion codes will agents use?
- Which fields does an agent need to efficiently serve the caller?
- What information do you want in reports?

Create an inbound list

Create an inbound list

Use the following procedure to create an inbound list.

1. Select **Application** > **Inbound List Format**.
2. Select the system and application in the **Select Application** dialog box and then click **OK**.
3. Select **Input** in the **Display by Calling List Source** area.
4. Type a field name (no larger than 15 alphanumeric characters) in the **Field Name** box.
5. Select the field type in the **Type** box.
6. Type the maximum number of characters allowed in the **Length** box.
7. Type a brief description of the field in the **Description** box.
8. Select **File** > **Save**.
9. In the Save dialog box, select **In Process** or **Complete**.
   If you complete all your changes and want the download definition transferred to the system, select **Complete**. If you are not ready to transfer the definition, select **In Process**.

10 Upload data

Overview

Purpose

The upload process transfers data stored in inbound and outbound calling lists to your host. Use Administration Manager's upload feature to set up the file formats and file transfer details used to transfer files from the Avaya™ Predictive Dialing System to the host computer.

Contents

This section contains the following topics:

Upload file definition overview

Overview

Using the upload feature, you provide the Avaya PDS with four sets of information.

- You provide information about the layout of the host upload file and the field attributes of each record. Typically, you upload some or all of the fields included in the calling list.
- You describe the format, block size, and file structure in the upload file.
- You define how the data transfer occurs. You can transfer data to the host Avaya PDS using either FTP or tape (if your Avaya PDS is currently set up to use a host gateway, you can select the host gateway transfer method).
- You define which calling list records to upload.

For each calling list that you want to upload, you must include the fields the host system needs for its processing. Gather the necessary format and file transfer information from your system administrator.

Host Gateway LAN file transfer

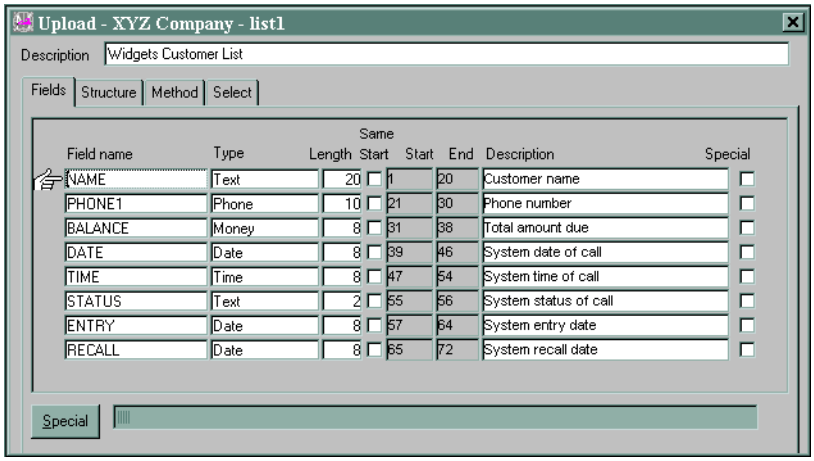
If you use a Host Gateway LAN for file transfer, a radio button will already be selected for that option in Administration Manager. **Do not change this to another option!** If you do, you will lose that ability and will have to have it reconfigured.

The Host Gateway LAN file transfer option is obsolete with Avaya PDS 12.0. If you have an earlier version of the Avaya PDS, you can still use it. But remember, do not change file transfer methods in Adminstration Manager or you will lose the ability to transfer files via Host Gateway LAN.

Upload file definition

Upload on the Application menu tells the Avaya PDS which fields to upload and defines the format for each upload file. The Upload dialog box consists of four tabs:

- Fields
- Structure
- Method
- Select



Note

Before you create an upload definition, you must define an application. You may also want to define the download and calling lists for this application before defining the upload.

Data Types

You must choose a data type:

- Text
- Date
- Money
- Numeric
- Phone
- Time

If you select Phone, Administration Manager automatically sets the field name to PHONE1, PHONE2, and so on. **If a field contains both alpha and numeric characters, select Text as the data type.** You may also select Text for all numeric data if it is not used in any calculation.

Duplicate removal

In order to remove duplicate records during the upload process, you must first understand how the process works.

During upload or download processing, the Avaya PDS can be configured to remove duplicate records. You specify a calling list field that is unique to each record, for example, an account number. If, during processing, there are two records with the same account number, the second record will be marked with an **R** in the calling list STATUSFLAG field. This tells the system not to call the second

record, because it contains the same account number as another record in the calling list.

Fill in the following text boxes if you want to remove duplicate records during the upload process:

- Unique ID
- Extraction ID
- Extraction Value

Unique ID

The Unique ID text box requires an entry that corresponds to a unique field on your calling list. Select a calling list field from the drop down list that is unique to the record, for example, an account number (ACCTNUM). The entry in the Unique ID text box is how the Avaya PDS will identify duplicate records. Once duplicate records are found, an R is placed in the STATUSFLAG field of the duplicate record.

Extraction ID and Extraction Value

The Extraction ID text box and the Extraction Value text box work together to remove duplicates from a calling list once they have been flagged as duplicate records.

Choose the STATUSFLAG field from the drop down of the Extraction ID text box. Remember, if there is an **R** in the STATUSFLAG field, the record was marked as a duplicate record.

The Extraction Value is the value in relation to the field that you chose in the Extraction ID text box. For example, if you want a list of all valid records (no duplicates) then you want a list of all records without an R in the STATUSFLAG field. If the Extraction Value = ~R (not R), records without an R in the STATUSFLAG field are temporarily saved to another location. A new list is created, containing only records without STATUSFLAG R. This new list overwrites the original list, giving you a list without duplicates.

The following is an example of how to fill-in the three text boxes to remove duplicate records from a calling list during upload activities:

- Unique ID = ACCTNUM
- Extraction ID = STATUSFLAG
- Extraction Value = ~R

Note

You cannot add entries to one field without adding entries into the other. This will cause corruption to your calling list. Either fill in all fields or leave all fields blank.

Plan

When you need a new upload definition, consider the following questions before using Administration Manager:

- What is the format of the calling list information?
- What format does the host require to read data?
- Which fields from the calling list do you want to upload?
- Is there any special formatting you want to apply during the upload process?
- What is the file and record structure of the upload file?
- What upload method do you use?
- Which records do you want to upload to the host?

Edit upload fields

Edit upload fields

Use the following procedure to edit upload fields.

1. Select **Application** > **Upload**.
2. Select the system in the **Upload - Select Application** dialog box.
3. Select the application and then click **OK**.
4. Type the field name (up to 15 alphanumeric characters) of the first field you want to upload In the **Field name** box.
   If you want to upload all or most of the fields from the calling list, select **Edit** > **Power Load**. Administration Manager copies all field definitions but not special formatting from the calling list to the Upload Fields tab.
5. Select the type of information that appears in this field in the **Type** box.
6. Type the number of characters in the field In the **Length** box.
   You enter the exact number of characters to upload in the length box. The Avaya PDS formats data based on special formats but only sends the number of characters specified.
7. Select the **Same Start** check box if this field uses the same data as the previous field.
   This option uses data from the previous field to populate the current field. For example, if the previous field contains both the area code and phone number, type 3 in the Length box and select the **Same Start** check box to place the area code in a separate field when it is uploaded.
8. Type a description of the field.

9 Click the **Special** button to define special formatting for this field.

10 Repeat steps 4 through 9 for each field in the upload file.

11 Select **File** > **Save**.

12 In the Save dialog box, select **In Process** or **Complete**.
If you complete all your changes and want the upload definition transferred to the Avaya PDS, select **Complete**. If you are not ready to transfer the definition, select **In Process**.

Create special formats

Create special formats

Use the following procedure to create special formats.

1. Select **Application** > **Upload**.
2. Select the **Upload Fields** tab.
3. Select the field you want and click the **Special** button. The **Special Format** dialog box appears.
4. Select or type the format of the data in the host record in the **Host format** box.
5. Select or type the format that you want the data displayed on the system in the **Dialer format** box and then click **OK**.

Add field filler information

Add field filler information

Use the following procedure to add field filler information.

1. Select the field you want on the **Upload Fields** tab and then click **Special**.
2. Select the **Insert Data** tab in the Special Format dialog box.
3. Type the information you want to force into the selected field in **Fill info.**
   The system inserts into the field exactly what you type. For example, if you want to fill a five-character field with asterisks, type five asterisks.
4. Click **OK**.

Add data translations

Add data translations

Use the following procedure to add data translations.

1. Select the field you want and click **Special** on the **Upload Fields** tab.
2. Select the **Translate** tab in the **Special Format** dialog box and then click **Append.**
3. Type the data as it appears in the host field in the **Host data** box. Leave the field blank to represent a null field. Press the spacebar to enter a space character.
4. Type the data you want in the uploaded field in the **Dialer data** box. Leave the field blank to represent a null field. Press the spacebar to enter a space character.
5. Repeat steps 3 through 5 for each data pair you want to define.
6. Type the default value you want to use when the host field contains a value that doesn't appear in the Host data list in the **Dialer** default field. This is an optional entry. The calling list uses this value if no match is found between the host field value and values in the Host data list. If you leave this field blank, the calling list field is left empty when no match is found.
7. Click **OK**.

Create the upload file structure

Create the upload file structure

Use the following procedure to create the upload file structure.

1. Select the **Structure** tab in the Upload dialog box.

2. Type the size of one host record if necessary, in the **Record Size** box. By default, Administration Manager displays the ending position for the last field defined on the Fields tab. This field must contain an entry.

3. Type the size of the buffer in which the records are stored in the **Block Size** box.

4. Type the number of blocks to read in the **Blocks Read** box. Administration Manager displays a default value of 1. The recommended setting is 10. Blocks Read multiplied by Block Size (the number of bytes that the system reads before processing the data) must not exceed 32,000. If Blocks Read is too high, the system converts no records and displays no error statements. This field must contain an entry.
   Administration Manager does not automatically update the Structure tab if you change the record length on the Fields tab. You must type the new Record Size, Block Size, and Blocks Read settings to reflect the new record length.

5. Type the number of bytes in the host file to skip before beginning data conversion and writing in the **Skip Records** box.

6. Type the number of bytes to convert and write in the **Read Bytes** box.

7 Type a two-digit year number in the **Switch Year** box. Complete this field if your system is year 2000 compliant and your Administration Manager system supports the Switch Year feature.

8 Select the value (null or space) to place in every blank position for all fields in each record in the **Terminator** list.

9 Select the data type (ASCII or EBCDIC) of the host file in the **Character Set** list. This field must contain an entry.

10 Select the method to use to handle type case in the **Case Conversion** list.
The default is UPlow (leave case as is). Other options are UPPER (convert all characters to uppercase) and lower (convert all characters to lowercase).

11 Select **Remove carriage return** to remove carriage returns from each record.

12 Select the **Remove line feed** check box to remove line feeds from each record.

13 Type the name of the custom upload process for your system (optional) in the Custom Executable box.

14 Select **File** > **Save**.

In the Save dialog box, select **In Process** or **Complete**.
If you complete all your changes and want the upload definition transferred to the Avaya PDS, select **Complete**. If you are not ready to transfer the definition, select **In Process**.

Complete an FTP upload

Complete an FTP upload

Use the following procedure to complete an FTP upload.

1. Select **Application** > **Upload**.
2. Select the system in the **Upload - Select Application** dialog box.
3. Select the application and click **OK**.
4. Select the **Method** tab, and then select FTP.
5. In the **Server Name** box, type the system name for the host computer.
6. In the **Logon** box, type the logon user name for the host computer.
7. In the **Password** box, type the logon password for the host computer.
   If you complete all your changes and want the upload definition transferred to the Avaya PDS, select **Complete**. If you are not ready to transfer the definition, select **In Process**.
8. In the **Host File** box, type the path and file name of the file on the host system.
9. Select **File** > **Save**.
10. In the Save dialog box, select **In Process** or **Complete**.
    If you complete all your changes and want the definition transferred to the Avaya PDS, select **Complete**. If you are not ready to transfer the definition, select **In Process**.

Complete a tape upload

Complete a tape upload

If you use 9-track tape to transfer information between the Avaya PDS and the host computer, use the following procedure to complete a tape upload.

1. Select **Application** > **Upload**.
2. Select the system in the **Upload - Select Application** dialog box.
3. Select the application and then click **OK**.
4. Select the **Method** tab and then select **Tape**.
5. Select the tape density in the **Density** box.
   /dev/rmt/2hsn for high density tape
   /dev/rmt/2msn for low density tape
6. Select the type of tape header (IBM or none) in the **Label** box.
   If you select IBM, the Avaya PDS skips the header information at the beginning of the file.
7. Select **File** > **Save**.
8. In the Save dialog box, select **In Process** or **Complete**.
   If you complete all your changes and want the definition transferred to the Avaya PDS, select **Complete**. If you are not ready to transfer the definition, select **In Process**.

Specify the upload selection criteria

Specify the upload selection criteria

Use the following procedure to specify the upload selection criteria.

1. Select the **Select** tab in the **Upload** dialog box.
2. Select the field to use to select records to upload.
3. Type a field value and then click **Append**.
4. Repeat steps 3 and 4 for each field value.
5. Select **File** > **Save**.
6. In the Save dialog box, select **In Process** or **Complete**.
   If you complete all your changes and want the upload definition transferred to the Avaya PDS, select **Complete**. If you are not ready to transfer the definition, select **In Process**.

11 Transfers and schedules

Overview

Purpose

Transfer processing allows you to set up and modify scheduled events that you define, such as uploads, downloads, and job related tasks. You can also view processes that the Avaya™ Predictive Dialing System (PDS) schedules and executes.

Contents

This section contains the following topics:

Transfer and schedules overview

Transfers overview

Use the File Transfer Setup dialog box to define file transfer processing for the downloads and uploads you have defined. Typically, a file transfer routine is made up of one or more data transfers of the same kind. For example, you might define one transfer routine for downloads and another transfer routine for uploads. You must define a file transfer routine before you can schedule it, even if the transfer routine contains only one download or upload.

Schedules overview

You can define scheduled events, such as transferring files, starting jobs, and selecting records. You add and modify your scheduled events in the Dialer Event Schedules dialog box. Administration Manager does not allow you to edit Special Program events. Instead, delete Special Program events that no longer meet your needs and then define one or more new events.

- Schedule downloads to occur Monday, Wednesday, and Friday at 5 AM and end by 8 AM. (Use File Transfer Setup to define the end time.)
- Schedule record selections to run Tuesdays and Thursdays at 9 AM.
- Schedule jobs to start Tuesday and Thursday at 10 AM.
- Schedule a report to run daily at 6 PM.

The Dialer Event Schedules dialog box displays file transfer and dialer processes. You can view all scheduled processes or only the processes you have defined and sort the display by the time the process is scheduled to occur or alphabetically by process. You can also view and print the Dialer Event Schedules report.

For each scheduled process, Administration Manager displays the following information.

Start time	The time of day (in minutes and hours) that the event is scheduled to start. An asterisk (*) in the hour field indicates that the process runs every hour.
Day	The day that the event is schedules to run. An asterisk (*) indicates that the process runs every day or every day of the week displayed in the Weekday field.

Month	The month that the event is scheduled to run. An asterisk (*) indicates that the process runs every month on the days selected in the Day or Weekday fields.
Weekday	The day(s) of the week the process is scheduled to run. Days are numbered 0 through 6 representing Sunday through Saturday. An asterisk (*) indicates that the process runs every day of the month selected in the Day field.
Command	The binary file or script name for the process.
Parameter	Any parameters associated with the process.
End time	For file transfers, the time of day that the Avaya PDS stops attempting the transfer.

Commands and parameters

Overview

For each event that you schedule, you select a command and any required parameters. Parameters provide additional information the Avaya PDS uses to run the command. The parameters available depend on the selected command.

Command	Parameters
File transfer	Select a file transfer routine you created using the File Transfer Setup option on the System menu.
Start job	Select a job name.
Run report	Select a calling list name and report name.
Run selection	Select a calling list name and the record selection name.
Run special program	Select or type the special program name. Include the directory path (/usr/vl/custom) with the program name. You can type additional command information in the same parameter field as the program name.

The following list provides tips for setting up command parameters:

- When typing command parameters, include the directory path for each command, and include all appropriate flags and arguments.
- After Administration Manager synchs the event schedules with the Avaya PDS, the command parameters may appear to be different. The schedule parameters still meet Avaya PDS requirements. No changes are necessary.
- When you change any parameter in a schedule, Administration Manager clears the other parameter fields. Be sure to reselect or retype all necessary parameters.
- Typically, you select Parameter 3 (2>/dev/null 1>/dev/null) to redirect messages produced by the selected command to a null device instead of the Avaya PDS administrator console.

Note

If you schedule record selections and jobs, you should still verify that your download was successfully received.

Create file transfer routines

Create file transfer routines

Use the following procedure to create file transfer routines.

1. Select **System** > **File Transfer Setup**.
2. Select the system from the **Select System** dialog box and then click **New**.
3. Type a name and description for the file transfer routine and then click **OK**.
4. Type the time that the Avaya PDS will stop attempting a transfer in the **End time** box. **This is a required entry.** Use the 24-hour format (for example, 19:30 represents 7:30 PM).
5. Select a process to run (download or upload) in the **Transfer to** box.
6. Select the calling list to use in the **Calling list name** box.
7. Type the number of minutes and seconds to wait between each calling list transfer in the **Delay** box.
8. Select the **Retry** check box if you want to repeat the process if an attempt fails. If you select this option, attempts are repeated until the end time.
9. Select **Edit** > **Append Row** to add another transfer to the routine. (If you select Retry, Administration Manager automatically adds a new row to the transfer routine.)

10 Repeat steps 6 through 10 for each additional transfer.

11 Select **File** > **Save**.

12 From the Save dialog box, select **In Process** or **Complete**.
If you complete all your changes and want the file transfer setup definition transferred to the Avaya PDS, select **Complete**. If you are not ready to transfer the definition, select **In Process**.

View event schedules

View event schedules

Use the following procedure to view event schedules.

1. Select **System** > **Dialer Event Schedules**.
2. Select the system from the **Select System** dialog box and then click **OK**.
3. Select **User** entries or **All** entries.
4. Select **Sort by time** or **Sort by process**.
5. Select **File** > **Close** when you finish.

Schedule a dialer event

Schedule a dialer event

Use the following procedure to schedule a dialer event.

1. Select **System** > **Dialer Event Schedules**.
2. Select the system from the **Select System** dialog box and then click **OK**.
3. Select **User entries**.
4. Select **Edit** > **Append Row**. The **Dialer Event Schedules** dialog box appears.
5. Select the process you want to schedule in the **Command** list.
6. Select or type any parameters associated with this process in the Parameter boxes. For example, if you selected Transfer File in the Command box, select a file transfer routine (defined using the File Transfer Setup feature) in the **Parameters** box.
7. In the **Start Time** boxes, select the hour and minutes when you want the process to start. **Remember to use a 24-hour clock**.
8. In the **Day** box, select the day you want the process to run.
9. In the **Weekday** box, select the day of the week you want the process to run.
10. In the **Month** box, select the month you want the process to run. You can select multiple months.

11 In the **Comments** box, type any additional information about the process and then click **OK**. You can modify existing user-defined event schedules. In the Dialer Event Schedules dialog box, double-click the schedule you want to modify.

Dialer events schedule examples

Dialer events schedule examples

The following table provides examples of dialer event schedules and describes how the Avaya PDS interprets the settings.

Minute	Hour	Day	Month	Weekday	Result
30	*	*	*	*	The command runs every hour of every day at 30 minutes past the hour.
30	00	*	*	*	The command runs every day at 12:30 AM.
30	04	*	*	1	The command runs at 4:30 AM every Monday.
07	00	15, 30	4, 6, 8, 10	*	The command runs at 7:00 AM on the 15th and 30th of April, June, August, and October.
15, 30	11, 17	*	*	1, 3, 5	The command runs at 11:15 AM, 11:30 AM, 5:15 PM, and 5:30 PM every Monday, Wednesday, and Friday.

Minute	Hour	Day	Month	Weekday	Result
00	06	*	*	1, 2, 3, 4, 5	The command runs at 6:00 AM every Monday through Friday. This is a typical schedule for downloads.
00	21	*	*	1, 2, 3, 4, 6	The command runs at 9:00 PM every Monday through Thursday and Saturday. This is a typical schedule for uploads.

12 Reports

Overview

Purpose

Administration Manager provides a set of reports that you can view or print. The reports provide details on the Administration Manager settings for the selected Avaya™ Predictive Dialing System (PDS). Administration Manager also provides two reports that provide details on the data install process.

Contents

This section contains the following topics:

Administration Manager reports

Administration Manager reports

Use the report information to review and verify your Administration Manager settings before you use Install Data to transfer them to the Avaya PDS. The reports also provide a hard copy archive of your settings.

Administration Manager provides the following reports.

Report title	Description
Agent Keys Report	For each agent key, lists the control sequence, key or key sequence, action, call result or screen number, and automated message assignment name.
Calling List Features Report	Lists call tracking definitions, including attempt type, number of phone fields, number of attempts, and completion codes to track.
Calling List Format Report	Lists the settings for each calling list field, including the name, type, source, length, and description.
Calling List Processing Order Report	For each calling list process defined, lists the sequence number, description, and any parameters.
Completion Code Report	For each completion code, lists the number, call result, description, recall setting, and code type.
Configuration Report	Lists information from the System Setup Configuration tab, including the configuration fields and values entered.
Dialer Event Schedules Report	Lists the scheduled time, command name, parameters, and end time for each scheduled event.
Download Format Report	For each download field, lists the name, length, type, start position, end position, and any special formatting that has been defined.

Report title	Description
Download Processing Report	Lists the file structure and transfer method settings for the selected calling list.
Late List Field Report	Lists the calling list name, field names, and descriptions that have been identified for updating.
Late List Value Report	Lists the calling list name, completion codes, and descriptions that have been selected for updating.
Message Text Report	For each message, lists the message number, file name, music or voice (male or female), message text, and message type (inbound, outbound, automated).
Message Assignment Automated Message Report	For each queue, lists the queue name, wait queue action assigned, and message content.
Message Assignment Inbound Wait Queue Report	For each inbound wait queue, lists the queue name, wait queue actions assigned to the queue, and message content.
Message Assignment Outbound Wait Queue Report	For each outbound wait queue, lists the queue name, wait queue actions assigned to the queue, and message content.
Network Report	Lists information from the System Setup Network tab, including the host TCP/IP address, alias, description, and modem server.
System Basic Information Report	Lists information from the System Setup Customer tab, including mailing and shipping addresses, and customer contacts.
System Features Report	Lists information from the System Setup Features tab, including the features and products installed on this system.
System Summary Report	Provides a summary of all System Setup information.

Report title	Description
Upload Format Report	For each upload field, lists the name, length, type, start position, end position, and any special formatting that has been defined.
Upload Processing Report	Lists the file structure and transfer method settings for the selected calling list.

For Administration Manager reports, you can select only one of the following completion statuses.

- **In Process**: The file definition is not complete.
- **Complete**: The file definition is complete.
- **Pending**: Administration Manager has transferred the file definition to the Avaya PDS. The next time the system reboots and synchronizes with Administration Manager, Administration Manager changes the status to Live
- **Live**: The files that have been transferred from Administration Manager to the Avaya PDS.

Reports

Data install reports

Administration Manager provides two reports. The Out of Synch report lists the Avaya PDS configuration files that have been modified since the previous install data process. The Install report contains the results from the Avaya PDS installation process, which occurred during the most recent Avaya PDS reboot. The installation process activates Administration Manager files on the Avaya PDS.

The following sections provide more information about each report including a report legend which describes the files listed in the Out of Synch and Install reports.

Out of Synch report

The Out of Synch report identifies files on the Avaya PDS that are no longer in synch with the files on Administration Manager. When Administration Manager runs the Install Data command, it first verifies that all files on the Avaya PDS are still in synch. If Administration Manager determines that a file is out of synch, it imports the file from the Avaya PDS, displays a warning, and writes the information to the Out of Synch report. The Out of Synch report contains the following information.

Report information	Description
Date	Displays the date, in MM/DD/YY format, that the install data occurred.
Time	Displays the time, in HH:MM:SS format, that the install data occurred.
System ID	Displays the Avaya PDS identification number
File name	Displays the name of the Avaya PDS file that is out of synch. See Report legend for descriptions of the files listed in the Out of Synch report.
Imported	Indicates whether Administration Manager imported the Avaya PDS file and saved it with a Live status.

Install report

The Install report indicates whether or not the Avaya PDS successfully installed the exported Administration Manager files. The installation process takes place when the Avaya PDS reboots.

The Install report contains the following information.

Report information	Description
System ID	Displays the Avaya PDS identification number.
Action/Error and Code	Displays the Administration Manager Install Data batch number that the Avaya PDS processed. For each file in the batch, the report displays an action, such as FILEINSTALL or EXECPROG, or indicates an error on the first line. On the second line, the report displays an Avaya PDS message or error code number for the result of the action.
Message and Command	If the Action value is a batch number, the report displays the date (YY/MM/DD format) and time (HH.MM.SS format) that the Avaya PDS started the installation process. For each file in the batch, the report displays the result of the command that the Avaya PDS attempted to process. On the next line, the report displays the command, which consists of the action, a directory location, and a file name.

Report legend

Report legend

This report legend describes the files listed in Administration Manager's Out of Synch and Install reports. The files are displayed in alphabetical order according to file extension.

The Administration Manager feature that you use to define the file's settings follows each file description. The following information also appears at the end of each report.

Crontab

Lists the processes that are scheduled to run automatically on the dialer. For each process, the **crontab** contains settings for the time (minute and hour), day(s) of the week, month(s), and day(s) of the month. When a time listed in the **crontab** matches the dialer system time, the dialer starts the specified process.

(System > Dialer Event Schedules)

PUlist*.cfg

Contains information the Avaya PDS uses for due diligence (postupdate) processing.

(Application > Calling list
Features tab)

compcode.cfg

Lists all of the call completion codes (system and agent) for the dialer.

(System > Completion Codes)

voicemsg.cfg

Lists the digitized voice messages installed on the dialer.

(System > Message Text)

*.conf

Contains information about the host data file and its format, including the record size and character set.

(Application > Download and Upload
Fields tab including special formats)

***.dict**

Defines the record layout of the host data file. For each field in a record, a dictionary (*.dict) file contains the field start position, field length, data type, host format, dialer format, and other special formatting instructions.

(Application > Download
Fields tab including special formats)

***.dnld**

Contains download file transfer information, such as the selected download transfer method and host login name and password.

(Application > Download
Structure and Method tabs)

***.fdict**

Contains the record format information used to convert host data into a calling list.

For each field in a record, a file dictionary (*.fdict) defines the field name, field length, data type, and description. File dictionaries contain definitions for host fields, customer-added fields, and dialer-added fields.

(Application > Calling List
Fields tab)

script.hlp

Contains information about the telephony.spt file, such as message assignment labels (queue names) and wait queue message names and text. The script.hlp file is part of the Avaya PDS character-based help system.

(System > Message Assignments)

***.ky**

Contains agent key definitions that identify, for example, key combinations and actions such as release line or transfer call.

(System > Agent Keys)

***.prep**

Contains the calling list preparation information, for example, to remove duplicate records, index the calling list, and calculate the number of consecutive days a record has been sent to the dialer.

(Application > Calling List
Prepare, Update, Custom, and Ordering tabs)

***.rd_tape**

Contains file transfer information for downloads, such as the dictionary (.dict) and configuration (.conf) file names and whether to append downloaded data to an existing list.

(Application > Download
Structure and Method tabs)

telephny.spt

Contains call processing information, including message assignments, which tell the dialer how to handle calls. The telephny.spt file must not exceed 1500 lines.

(System > Message Assignments)

agentkey.tbl

Lists the agent keys (*.ky) files set up for the Avaya PDS. Campaign Director also references the agentkey.tbl file.

(System > Agent Keys)

calllist.tbl

Lists the calling lists currently on Administration Manager and the Avaya PDS. Campaign Director also references the calllist.tbl file.

(Application > Application Definition and Calling List)

telephny.tbl

Lists the wait queue labels (message assignment names) currently in the telephny.spt file. Campaign Director also references the telephny.tbl file.

(System > Completion Codes)

code.tsub

List the completion codes and descriptions that the Avaya PDS uses when it generates calling list reports.

(System > Completion Codes)

***.upld**

Contains upload file transfer information, such as the selected upload transfer method and host login name and password.

(Application > Upload
Structure and Method tabs)

***.wt_tape**

Contains file transfer information for uploads, such as the dictionary (.dict) and configuration (.conf) file names, upload selection criteria, and the calling list name.

(Application > Upload
Structure, Method, and Select tabs)

***.xfr**

Contains file transfer routine settings, such as the transfer end time, transfer type (download or upload), calling list name, delay time, and whether to retry an unsuccessful transfer.

(System > File Transfer Setup)

Generate an Administration Manager report

Generate an Administration Manager report

Use the following procedure to select the Administration Manager report.

1. Select **Administration** > **Administration Manager Reports**.
2. Select the system for which you want to generate Administration Manager reports.
3. Select the report destination.
4. Select the completion status you want to include in the reports.
5. From the **Report Master** List, select the report you want to generate, and then click >.

   To select multiple reports, press **Ctrl** key and click the field names. To select all reports, click >>. To remove a report from the Selected Report List, click <. To remove all reports from the list, click <<.
6. Select **Edit** > **Run System Reports**.

   Administration Manager generates the selected reports. If you selected multiple reports for display, Administration Manager displays each report consecutively. You can preview the printed report or print the report.
7. Click **Cancel** to display the next report.

Generate an Out of Synch report

Generate an Out of Synch report

Use the following procedure to generate an Out of Synch report.

1 Select **Administration** > **Out of Synch Report**. Administration Manager automatically displays the report.

Preview an Out of Synch report

Preview an Out of Synch report

Use the following procedure to preview an Out of Synch report.

1. In the Out of Synch Report dialog box, click **Preview**. Use the Zoom and Show Ruler options to change the preview.

Print an Out of Synch report

Print an Out of Synch report

Use the following procedure to print an Out of Synch report.

1. In the Out of Synch Report dialog box, click **Print**.

Glossary

Action
Actions are tasks such as managing calling list functions, running scripts, and installing or removing files.

Active job
A job that the Avaya PDS is currently using to call customers. A job becomes active when the system supervisor starts it. The job stays active as long as it's running.

Agent
A person who talks with customers and updates customer records.

Agent key
The function keys at an agent workstation. The keys are programmed to perform specific tasks. They are also called pf keys.

Agent release code
The completion codes agents assign to a customer record to indicate a call's outcome. Examples include Promise to Pay and Left Message.

Agent screen
The dialog box on an agent's monitor where the Avaya PDS displays customer records and prompts.

Allow retries (Same as Allow Recalls)
A parameter that allows the Avaya PDS to schedule calls to be recalled automatically. Typical completion codes that use this parameter are BUSY and NOANSWER.

American Standard Code for Information Interchange (ASCII)
A binary code for text as well as communications and printer control. By standardizing the values used for these characters, ASCII enables computers to exchange information. Also called a text file, a text-only file, or an ASCII text file.

A document file in the ASCII format contains punctuation but no formatting.

Answer script
A wait queue setting that determines the answer script label to use for inbound calling. This label tells the Avaya PDS which message a customer hears while waiting for an agent or after business hours.

Application
In Administration Manager, an application is an association of calling lists and download and upload file definitions.

Avaya™ Predictive Dialing System (PDS)
The hardware and software that conducts calling activities. Hardware components can include a system cabinet, printers, supervisor and agent workstations, and an administrator console. The system software contains the settings that conduct and track calling activities.

Busy
A system completion code indicating that the call reached a busy signal. Often displayed as BUSY.

Calling activity
The activities that the Avaya PDS and agents perform during a job. The system calling activities include processing the calling lists, running jobs, calling customers, receiving customer calls, monitoring calls between agents and customers, recording call results, and generating reports on agent and job statistics. Agent calling activities include talking to customers and updating customer records.

Calling list
A modified version of the customer records. The Avaya PDS adds fields that allow it to process the customer records and track calling results. The system reformats the records to make them easier to read and display.

Calling result
A parameter that determines which customer records to call based on the results of previous calls.

Calling script
An outbound job parameter that determines the calling script label for wait queue messages. This label tells the Avaya PDS which wait queue message a customer hears while waiting for an agent.

Campaign
A strategy designed to achieve call center goals. A campaign includes one or more jobs. Each job definition accomplishes specific goals.

Analyst
A business information access, analysis, and reporting tool for a client/server environment. Analyst allows you to produce both standard and exception reports on various aspects of call center performance.

Campaign Director
The program group that can include the Monitor, Analyst, and Editor.

Editor
The Campaign Director software that supervisors use to create or edit phone strategies, record selections, and jobs.

Monitor
The Campaign Director software that supervisors use to identify system resource allocations, set alarms, set and observe job goals, and display other aspects of job productivity.

Completion
In Administration Manager, the completion status of a file. Administration Manager automatically selects Complete files for transfer to the Avaya PDS.

Completion code
A code that represents the result of the last call the Avaya PDS made for a record. The system records the result of each call that is not passed to an agent, such as Busy and No Answer. An agent uses function keys on the computer keyboard to record the call result.

CTI
Computer Telephony Interface. A generic term for the interface that allows a telephony switch to perform data communication with a computer.

Customer
A person the Avaya PDS calls during a job or a person who calls the Avaya PDS. A customer typically talks to an agent but may also hear messages.

Data file
A collection of data records that consists of customer information, job statistics, and agent statistics.

Data process
A parameter that identifies the label name for the set of instructions the Avaya PDS uses to process a record before and after handling an outbound or inbound call.

Digitize
To convert an analog file to a digital file. This process is used to convert voice messages to digital files for use on the Avaya PDS.

Download
The process that transfers a data file from the host computer to the Avaya PDS.

Due Diligence
Also called post-update, number of attempts, and call tracking. Due Diligence is an optional feature that the Avaya PDS uses to track the number of call attempts to a record. It is particularly helpful to industries that are required to contact a customer a minimum number of times before taking an action. For example, some institutions cannot refer a past due account to a collection agency until the institution has made four unsuccessful attempts to contact the delinquent account.

Duplicate record
A calling list record identified as a duplicate of another record in the calling list. Duplicate records are typically identified using a unique field, such as the account number or phone number.

File Transfer Protocol (FTP)
A method used to transfer a data file between the Avaya PDS and a host computer.

Function key
Another name for the programmable keys on the keyboard to which you assign common tasks. The Avaya PDS documentation sometimes calls these keys agent keys or **pf** keys (programmable function keys).

Headset
The electronic equivalent of the handle of a standard desktop telephone. A headset contains a microphone and one or two earphone speakers. The Avaya PDS telephone agents and supervisors wear headsets.

Host computer
A computer that stores customer records. A mainframe computer that supplies customer telephone numbers and other data to the Avaya PDS for calling jobs. The Avaya PDS CPU when used in the digital switch menu system.

Inbound list
A template list that agents use to enter customer data during inbound calling. The

Avaya PDS can transfer this information to the host.

In Process
In Administration Manager, the status code that indicates a file is not ready to transfer to the Avaya PDS.

Job
A set of instructions that the Avaya PDS uses to place or receive calls and route them to agents. The system can run multiple jobs, each with unique settings.

Key file
The setting that identifies the function key set that agents use during a job.

Large Port Voice card (LPVC)
A printed-circuit assembly located in slot 3 in the digital switch subrack that plays digitized voice messages during calling jobs.

Live
In Administration Manager, the completion status code used to indicate that a file is in use by the Avaya PDS.

Login or Logon
The process of entering a user name and password. When agents log in, the Avaya PDS prompts them for a phone extension or key code and agent type.

Login name
A unique name or word that, along with a password, identifies a user to the Avaya PDS.

Managed Dialing
An application that offers a call center a non-predictive dialing mode that is considerably faster and more efficient than placing calls manually. Managed agents can preview the customer record before the system places the call. The agent then has the ability to cancel or launch the call.

Message numbers
The number that the Avaya PDS uses to identify a voice message file. The system uses these numbers to deliver the messages. The Avaya PDS refers to messages by number rather than by file name. Message files are stored on the LPVC in the switch, and are loaded into memory when the system needs them. Use only message numbers 1 through 247.

Messages (same as voice messages)
Digitized messages that the Avaya PDS plays to customers and agents.

Message script
A file that tells the system which messages to play, when to play them, and the amount of time to pause between messages. Administration Manager message scripts are called message assignments.

Message type
Administration Manager classifies messages into four types: automated, inbound queue, outbound queue, and universal. Classification is for convenience. You can use any message with any job type. Usually, agent key and virtual agent messages are classified as automated. Music and generic messages are classified as universal.

No Answer
A system release code indicating that a customer did not answer a call within the specified amount of time. Often displayed as NOANSWER.

Outbound (calling) list
A calling list that contains records from the host computer used for outbound calling. There is a record for each customer an agent will talk to during a job.

Outbound job
A job that calls customers and connects customers to agents.

PC Analysis
An Avaya PDS feature that allows supervisors to select information to be transferred to a PC for analysis and report generation.

Pending
In Administration Manager, the status of a file that was transferred to the Avaya PDS. If the transfer was successful, the Avaya PDS will apply the file settings after a reboot occurs and after an "Empty" Install Data has been performed.

Preprocessing
The process of checking a data file for duplicate phone numbers and phone numbers with an incorrect format. It also determines the time zones for each number. In the Avaya PDS, preprocessing takes place after downloading a data file and before the Avaya PDS can place calls.

Promise code
A completion code that indicates that an agent contacted the desired audience and recorded a commitment from the customer. Codes often identified as promise codes include Promise to Pay and Sale.

Prompt
A system message that asks for input or helps a user complete a task.

Queue
A queue is the place where a call waits until an agent is available. The Avaya PDS uses several types of queues including inbound, outbound, virtual agent, and transfer queues.

Record
A collection of one or more fields in a calling list. Most calling lists contain one record for each customer.

Record selection
All outbound calling activity uses a record selection. The record selection is based on time zone settings, completion codes, data value selections, and a phone strategy. The selection criteria determines which customers the system calls.

Reject record
A calling list record marked as not callable based on the field data. For example, you can reject records with a particular completion code.

Release code
See completion code.

Script file (telphny.spt)
In Administration Manager, the file you create using Message Assignments on the System menu. The script file controls the use of recorded messages. When the system plays a message, the script file defines the number of messages to play, the sequence, and the content.

System release code
The completion code that the system assigns to records for calls not passed to an agent. Examples are No Answer or Busy.

Tape drive
The optional half-inch, nine-track, analog magnetic tape drive connected to the Avaya PDS CPU. The Avaya PDS site system administrator uses it to download, upload, and back up customer data. The DAT tape drive in the Avaya PDS CPU that the Avaya PDS site system administrator uses to back up and restore system settings.

Time zone
Used to group regions globally. The Avaya PDS bases time zones on area codes and exchanges. It uses the time zone settings to determine the local calling time for each phone number.

Uncallable phone number
In the Avaya PDS, a phone number that the system cannot call beause the format is incorrect.

Unused completion code
In the Completion Codes dialog box, Administration Manager displays a generic code in the Result column (for example, CODE21 or CODE54). Change the names in the Results column for the codes you use (for example, NOTIFIED or PTP). You can use the Delete Row command to delete codes that you are not using for calling operations. Administration Manager displays NOTUSED in the Results column.

Upload
The process of transferring a data file from the Avaya PDS to the host computer.

User name
A name used by an Avaya PDS user, typically the user's first or last name and usually the same as their login name. User names appear on reports and job monitor screens.

Virtual Agent
An option that enables the Avaya PDS to automatically deliver messages to both live contacts and answering machines, without agent intervention.

Virtual Agent job
An outbound job during which the Avaya PDS manages calling activities without agents. A Virtual Agent job places a call, connects the customer or answering machine to the system, and plays a recorded message.

Voice and data transfer
A feature that allows an outbound or blend agent to transfer an outbound call and its calling list record to an inbound or blend agent on another job.

Wait queue
A holding area where the Avaya PDS places calls when agents are not available.

Wait queue limit
The time that a call remains in the wait queue before the Avaya PDS disconnects it.

Ziptone
A sound that the Avaya PDS transmits to an agent's headset immediately before connecting the agent with a customer. You can define up to four ziptones for inbound and outbound calls. Using different tones makes it easier for agents to quickly determine whether they are handling an inbound or outbound call.