



**Avaya Proactive Contact**  
Release 4.0  
Using Avaya Proactive Contact  
Supervisor

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# Preface

This section contains the following topics:

- [Purpose](#) on page 14
- [Audience](#) on page 14
- [What's New In This release](#) on page 14
- [Related documents](#) on page 16

---

## Purpose

The purpose of this guide is to provide detailed information about Avaya Proactive Contact 4.0 Supervisor.

---

## Audience

This guide is for personnel who configure jobs, select records, and define phone strategies. The Avaya Proactive Contact Supervisor also provides monitoring and reporting of real time and historical operations.

---

## What's New In This release

Avaya Proactive Contact 4.0 is a new major release, featuring substantial advances in core functionality, new deployment options, and updates to the underlying platform technology.

Avaya Proactive Contact 4.0 provides you with three system deployment options tailored to meet your specific call center requirements:

- Avaya Proactive Contact with Application Enablement Services
- Avaya Proactive Contact with Avaya PG230 Proactive Contact Gateway (available with an Avaya-provided server)
- Avaya Proactive Contact system (with the traditional system cabinet)

This release supports simple migrations between the different deployments allowing you to start small and easily upgrade to a larger system.

All configurations use the same robust Avaya Proactive Contact core predictive dialing application and the same client suite called Avaya Proactive Contact Supervisor. The application suite includes Monitor, Editor, Analyst, and a Health Manager application designed

## **Preface**

to help you monitor and administer system functions. Changes were also made to provide a more robust, simplified version of the existing feature set, as well as simplified configuration and installation of the system. Powerful tools such as Hierarchy Manager and Completion Code Manager continue to be supported.

Avaya Proactive Contact 4.0 already includes an updated predictive dialing algorithm with a revolutionary operating mode called Cruise Control, which allows you to achieve even higher operational efficiencies than were previously possible with Avaya PDS version 12.0.

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## Related documents

- [Planning and Prerequisites for Avaya Proactive Contact](#)
- [Installing and Configuring Avaya Proactive Contact](#)
- [Administering Avaya Proactive Contact \(Linux-based Interface\)](#)
- [Using Avaya Proactive Contact Analyst](#)
- [Avaya Proactive Contact Safety and Regulatory Information](#)
- [Avaya Proactive Contact Documentation Library \(CD-ROM\)](#)
- [Avaya WebLM Release 4.5 for Core Services 3.2 Administration Guide](#)



# Chapter 1: Introduction

Avaya Proactive Contact consists of software, hardware, and networked components. The system is comprised of the system cabinet, supervisor workstation, agent workstations, printer, and modem.

Avaya Proactive Contact is available with increased capacities for the Avaya Proactive Contact large cabinet and PG230 systems (Application Enablement Services implementations will remain at the previous capacity levels). Capacities for both concurrent agents and outbound trunks have been significantly increased to almost double the current capacities of 240 agents and 480 trunks. Actual agent and trunk maximum capacities differ based upon trunk configuration parameters.

As a system supervisor, you use the supervisor workstation and the Supervisor applications to set up, monitor, modify, and report on your calling activities. Agents use the agent workstations to handle inbound and outbound phone calls.

This section contains the following topics:

- [Avaya Proactive Contact environment](#) on page 19
- [Avaya Proactive Contact users](#) on page 68
- [Log in to Supervisor](#) on page 71

---

## Avaya Proactive Contact environment

The dialer works with your call center's equipment and operations to perform call center tasks. Your installation can include more than one dialer.

This section contains the following topics:

- [Dialer functions](#) on page 19
- [Multiple dialers](#) on page 20
- [Pods](#) on page 20
- [Calling lists](#) on page 20
- [Using Calling lists](#) on page 23
- [Using Agent Keys](#) on page 40
- [Using Schedule](#) on page 44
- [Security Overview](#) on page 53
- [Licensing](#) on page 59

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### Dialer functions

The following list describes the main functions of the dialer:

- Receives customer records from the call center's host computer
- Selects and sorts customer records based on your call center's business goals
- Allows agents to update customer information on an agent screen or on the host, depending on your configuration
- Passes only specific call types to agents
- Adjusts the calling pace to meet the call center's requirements
- Monitors ACD inbound traffic and predicts when to acquire and release ACD agents for outbound calling on Avaya Proactive Contact with Agent Blending
- Supports outbound, inbound, and blend jobs
- Generates a variety of reports, including job, agent, and system reports
- Uploads record information to the host (optional)

---

## Multiple dialers

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

An Avaya Proactive Contact system that is connected through a middle-tier structure is a pod.

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

- Multiple stand alone dialers
- One or more pods of dialers
- Multiple stand alone dialers and multiple pods of dialers

Multiple stand alone dialers allow you to manage multiple jobs simultaneously, each with its own calling list. If a dialer shuts down, the remaining dialers continue to operate.

---

## Pods

A multiple dialer office environment that uses a pod increases your company's outreach capacity. A pod allows you to manage large-scale outreach programs from one administration and Supervisor interface.

A pod provides additional benefits including the follow features:

- Calling lists
- Jobs
- Phone strategies
- Record selections
- Completion codes
- Logins

From one Supervisor application, you can run one job on multiple dialers and monitor the calling activities on each dialer.

---

## Calling lists

A calling list is a file that contains customer records. Avaya Proactive Contact uses two types of calling lists, one for outbound calling and one for inbound calling on Intelligent Call Blending systems.

## Introduction

The host system creates the download file of customer records for the outbound calling list. The download file contains the records and fields you defined as necessary to your outbound call activities.

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

## Process calling lists

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

- Checks for and flags duplicate records and invalid telephone numbers
- Identifies and marks records that have been on the system more than a specified number of days
- Recalls the name of the last agent to speak to the customer
- Stores the result of the last call attempt as recorded by the agent
- Verifies the following statistics:
  - Name of the last agent to speak with the customer
  - Date and time of the last call attempt
  - Result of the last call attempt as recorded by the agent on the system
  - Number of days the record has been on the system
  - Record status
  - If configured, data listed is the data that is carried forward from the previous calling list

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

- Converts the customer records in a specific calling list to a format or the specified for your host computer
- Converts sample file from fixed length or CSV format to sample calling list binary
- Creates an upload file. The host then updates your customer database with the data in the converted calling list

**Note:**

Use Editor > Calling list application features for TFORM,DFORM to setup download make 2 digit to 3 digit and vice versa for upload.

## Environment

The calling list environment is responsible for the following activities:

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

## Using Calling lists

The Calling List feature helps you to modify an existing calling list, create a new calling list, Import Data, Export Data, Do not Call Groups, and Calling List Reports, as explained in detail in the subsequent sections.

This section consists of the following topics:

- [Modify an existing calling list](#) on page 23
- [Create a new calling list](#) on page 23
- [Data Import](#) on page 24
- [Data Export](#) on page 25
- [Upload To Host](#) on page 26
- [Upload Dictionary](#) on page 29
- [Download From Host](#) on page 32
- [Download Dictionary](#) on page 34
- [Do not Call Groups \(DNC\)](#) on page 37
- [Calling List Reports](#) on page 38

---

### Modify an existing calling list

Use the following procedure to modify an existing calling list:

1. In Editor, select **File > Save As**.  
The Save As dialog box appears.
2. Select the **Version**.
3. Enter a **New Name** for the calling list.
4. Enter a **Description** for the calling list.
5. Click **OK** to modify an existing calling list.

---

### Create a new calling list

Use the following procedure to create a new calling list:

1. In the Editor button bar, select **New**.

2. Click **Next** when the New Calling List Wizard appears. You can define the following information:

- The type of activity that the calling list will support.
- The name of the calling list.
- A brief description for the new calling list.

**Note:**

You can also run the Data Import Wizard from the New Calling List Wizard by selecting the **Launch Import Wizard** check box. For more information on steps of Data Import, refer to the [Data Import](#) on page 24.

3. Follow the steps in the Calling List Wizard. The wizard adds the new calling list to the list of calling lists in the Feature Panel and displays the details of the calling list in the Feature Detail pane.

---

## Data Import

The Data Import Wizard takes a sample host data file, analyzes the file, and creates a download dictionary and a calling list dictionary.

The download dictionary is empty if you do not launch the Data Import option.

You can import data for calling by identifying the record format that you want to use. The data that you wish to import must satisfy the following criteria:

- The sample data file must contain 10-50 records.
- The sample data file must be fixed width or CSV format.

**Note:**

The fixed width format and CSV format allows you to import text and character separated values respectively.

- Verify the analysis of the data import wizard and modify, if required.

## Import a Data File

Use the following procedure to import a data file:

1. Right-click the specific list and select **Download From Host**.
2. In the right-hand pane, right-click anywhere on the blank section of the screen and select **Create New Set**.
3. Click **Next** when the Data Import Wizard appears.
4. Select the **Data Type**.

## Introduction

**Note:**

If you select Fixed width as the data type, you have to specify the **Record Length**. The maximum supported record length is 4096.

5. Select **Browse** to locate your sample file.
6. Verify that the record length has been analyzed correctly.
7. Click **Next**.
8. Click the specific character in the field length section to define the character length of each field.

**Note:**

For Example: If you have clicked the number 10 as the character for a specific field, a vertical line automatically appears as the field length. You can also drag the line to specify a different character length as a field length. To remove the vertical line, click the line again.

9. Click **Next**.
10. Click on each column header to change the length of the field or fields.
11. Click **Finish** to import the sample file.

If you select **Delimited** as the Data Type for import, follow steps 1 to 5, and continue from step 13.

12. Click **Next**.  
The Records and Field Delimiters appear automatically.
13. Click **Next**.
14. Click **Finish** to import the sample file.

---

## Data Export

The Data Export Wizard helps you to prepare for uploading calling list data to the host computer. Specifically, the wizard prompts you to select which records and fields should be exported. Based on your responses, as well as information from the associated download (data import), the wizard creates a new upload definition and completes the Upload to Host, Upload Dictionary, Upload Map, and Select records tabs.

The use of this wizard is to quickly create a data export definition that fulfills the needs of most customers. Thus, it supports straightforward implementations. If you have more complex requirements, the wizard may be used to create the basic definition and then you can refine the definition using the full user interface.

## Export a Data File

To export a data file, you have to define the following fields:

- Define the records you want to export
- Identify the fields of the calling list from which you want to export the data
- Define the fields that will be uploaded to the host

You can export a data file, using any of the following two ways:

Use the following procedure to export a data file:

1. Right-click the specific list and select **Upload To Host**.
2. Click **Yes** to export the data.

The Data Export Wizard appears.

**Note:**

If you click **No** the Upload Dictionary tab will appear as empty. You can open the Data Export Wizard by using the steps 1 and 2 mentioned after step 7.

3. Click **Next**.
4. Select the appropriate **Records, Date, Results, Field,** and **Field Value**.
5. Click **Next**.
6. Select the fields that you want to export by selecting the specific check boxes.
7. Click **Finish**.

If you have selected the **No** option, at step 2 and you want to export the data at a later stage you can do so by following these steps:

1. Click **Upload Dictionary** tab.
2. Right-click and select **Create New Set**.

The Data Export Wizard appears.

Follow steps from 3 to 7 to finish exporting the data.

---

## Upload To Host

The Upload to Host feature displays the configuration data associated with upload data from the dialer to the host. This information includes the transfer method, the transfer schedule, the format of the host data, and directions for handling certain types of file data.

The following table displays the name and description of the rows available in the upload to host tab:

## Introduction

| Name                        | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|-----------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Method                      | This represents the title row for grouping related data.                                                                                                                                                                                                                                                                                                                                                                                                              |
| Type of Transfer            | <p>This represents the method used to transfer data from the dialer to the host. The available values are SFTP transfer initiated by host and SFTP transfer initiated by dialer. If you select the Initiated by dialer, the following four data elements are enabled; otherwise, they are disabled.</p> <p>If you do not want to enter the host name, logon name, password, and host file name, you must change the sftp enable option in master.cfg file to Yes.</p> |
| Host Name                   | This represents the name of the Host computer.                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Logon Name                  | This represents the name that you use to logon to the host computer.                                                                                                                                                                                                                                                                                                                                                                                                  |
| Password                    | This represents the Password that you use to logon to the host computer.                                                                                                                                                                                                                                                                                                                                                                                              |
| Host File Name              | This represents the name of the data file that is present on the host computer.                                                                                                                                                                                                                                                                                                                                                                                       |
| Raw Data File Name          | This represents the File name of the Raw Data file.                                                                                                                                                                                                                                                                                                                                                                                                                   |
| Schedule                    | This represents the title row for grouping related data.                                                                                                                                                                                                                                                                                                                                                                                                              |
| Stop upload time            | This represents the time that marks the end of the period when the upload can be attempted. The time must be displayed according to local regional settings.                                                                                                                                                                                                                                                                                                          |
| Retry if upload fails       | This checkbox indicates whether you should reattempt a failed upload.                                                                                                                                                                                                                                                                                                                                                                                                 |
| Delay between uploads (sec) | This represents the number of seconds to wait between attempts. This time should be displayed according to local regional settings as minutes and seconds.                                                                                                                                                                                                                                                                                                            |
| Format                      | This represents the title row for grouping related data.                                                                                                                                                                                                                                                                                                                                                                                                              |
| Record Size                 | The size in bytes of each host record.                                                                                                                                                                                                                                                                                                                                                                                                                                |

| Name                                 | Description                                                                                                                                                                       |
|--------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Block Size                           | This represents the size in bytes of each block.                                                                                                                                  |
| Blocks Read                          | This represents the number of blocks read at a time.                                                                                                                              |
| Text case                            | The options available for selection of text case are Uppercase, Lowercase, and Title case.                                                                                        |
| Record Format                        | The options available for record format are Fixed Length and Character Separated Values (CSV). If CSV is chosen, the next two rows are enabled; otherwise, the rows are disabled. |
| Record delimiter                     | This represents the character that marks the boundary between one record and the next.                                                                                            |
| Field delimiter                      | This represents the character that marks the boundary between one field and the next.                                                                                             |
| Preparation                          | This represents the title row for grouping related data.                                                                                                                          |
| Add Carriage Returns                 | This checkbox indicates that carriage returns should be added to the end of each record when the new host data is created for upload.                                             |
| Add Line Feeds                       | This checkbox indicates that line feeds should be added to the end of each record when the new host data is created for upload.                                                   |
| Remove duplicate records from upload | This checkbox indicates whether duplicate records should be removed and not included in the upload.                                                                               |
| Unique field                         | This represents a list of calling list fields. You must pick a field that contains unique data, that is, the data is unique to each record.                                       |
| Extraction field                     | The process of identifying duplicate records involves storing each record's status in a calling list field. The dropdown offers a list of calling list fields.                    |
| Extraction Value                     | All records with this value in the Extraction field will be included in the upload.                                                                                               |

## Upload Dictionary

The Upload Dictionary tab displays a list of all the fields in the upload data file.

Following is a brief description of the columns of the Upload Dictionary tab:

- Field - The name of an upload field.

**Note:**

The field name has to be in all caps, for example: ACCTNUM represents the account number.

- Data Type - This field represents the type of data contained in the field. The dropdown lists all the available data types.
- Length - This field represents the length of the data.

**Note:**

The overall length of the record is displayed as a subtotal at the top of the grid and the data is not-editable.

- Same Start - This is a checkbox to indicate that the field has the same starting position as the previous field.
- Start - This is a non-editable field that displays the character position in the file where the field starts. Normally this is calculated as the start position of the previous field and the length of the previous field. If you select the Same Start checkbox, this is calculated as the start position of the previous field.
- End - This is a non-editable field that displays the character position that marks the end of the field. This is calculated by adding the field's length to the field's start.
- Description - This field allows you to enter a user-defined description of the field.

---

## Map

The Map tab is available in the Calling List menu and is used to configure how the host data is transformed into the calling list data on a field-by-field basis.

## Upload Map

The Upload Map tab allows you to configure how calling list data is transformed into upload data on a field-by-field basis. You can create a new transformation and also edit and delete existing transformations.

## Create a new Upload Map

Follow these steps to create a new upload map transformation of calling list data:

1. Select the specific Calling List.
2. Right-click and select **Upload to Host**.
3. In the Map tab, select **New**.

The Upload Map dialog box appears.

The Upload Map dialog allows you to choose the ways of transforming host data using one of the following methods:

1. Transform - The transform tab is a transformation that allows you change one value into another value based on regular expressions. All the records that match a specific regular expression are transformed to a specified value. This transformation allows a specified host value to be translated into a specific calling list value.
2. Fill - The Fill tab is a transformation that allows you to fill a host data field with a specific character.
3. Format - The Format tab is a transformation that allows you to change a host format into another format for the calling list.
4. Translate - The Translate tab is a transformation that allows you to change one value into another value based on regular expressions.

**Note:**

One or more calling list fields can be added to form a new field.

## Edit an Upload Map

Follow these steps to edit an existing upload map transformation of calling list data:

1. Select the specific Calling List.
2. Right-click and select **Upload to Host**.

## Introduction

3. In the Map tab, select **Edit**.

The Download Map dialog box appears.

Following is a brief explanation of each of the transformations:

- **Fill** - You use the Fill tab to apply a fill function to the mapped field. The text you enter in the **Fill With** field will appear in the Download Data column and the transformation type is Fill.

**Format** - You use the Format tab to define the format of the download field. You can select and map the host field with the dialer field.

## Delete an Upload Map

Follow these steps to delete an existing upload map transformation of calling list data:

1. Select the specific Calling List.
2. Right-click and select **Upload to Host**.
3. In the Map tab, select **Delete**.

The specific upload map transformation is deleted.

## Select Records

The Select Record tab allows you to select records based on date, call result, and field to export. You can identify which records to export based on field criteria.

You can set the selection criteria by choosing records with specific values in specific fields. For example, you may choose to upload all records that were called today and have a CODE2, CODE3, or CODE4 in the CODE field.

You can also enter multiple criteria and join them together using logical operators (And, Or)

The Select records screen allows you to select the following:

1. **Date** - The Date field allows you to pick a date. All records with the selected date in the Date field will be selected for export. The options available for selection are:
  - **Records called today** - Use this field to display the records called today.
  - **Records called yesterday** - Use this field to display the records called yesterday.
  - **Records called on this date** - Use this field to display the calendar and select the specific date from the calendar for which you want to see all the records.
2. **Call Results** - Use this field to select one or more call results from the dropdown list.
3. **Field** - Use this field to select specific fields and enter the field values that you want to export.

---

## Download From Host

The Download From Host feature displays the configuration data associated with download data from the host to the dialer. This information includes the transfer method, the transfer schedule, the format of the host data, and directions for handling certain types of file data.

The following table displays the name and description of the rows available in the Download From Host tab:

| Name                    | Description                                                                                                                                                                                                                                                                                              |
|-------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Method                  | This represents the title row for grouping related data.                                                                                                                                                                                                                                                 |
| Type of Transfer        | This represents the method used to transfer data from the host to the dialer. The acceptable values are SFTP transfer initiated by host and SFTP transfer initiated by dialer. If you select the Initiated by dialer option, the following four data elements are enabled; otherwise, they are disabled. |
| Host Name               | This represents the name of the Host computer.                                                                                                                                                                                                                                                           |
| Logon Name              | This represents the name that you use to logon to the host computer.                                                                                                                                                                                                                                     |
| Password                | This represents the Password that you use to logon to the host computer.                                                                                                                                                                                                                                 |
| Host File Name          | This represents the name of the data file that is present on the host computer.                                                                                                                                                                                                                          |
| Raw Data File Name      | This represents the File name of the Raw Data file.                                                                                                                                                                                                                                                      |
| Schedule                | This represents the title row for grouping related data.                                                                                                                                                                                                                                                 |
| Stop download time      | This represents the time that marks the end of the period when the download can be attempted. The time must be displayed according to local regional settings.                                                                                                                                           |
| Retry if download fails | This checkbox indicates whether you should reattempt a failed download.                                                                                                                                                                                                                                  |

## Introduction

| Name                           | Description                                                                                                                                                                       |
|--------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Delay between downloads (sec)  | This represents the number of seconds to wait between attempts. This time should be displayed according to local regional settings as minutes and seconds.                        |
| Format                         | This represents the title row for grouping related data.                                                                                                                          |
| Record Size                    | The size in bytes of each host record.                                                                                                                                            |
| Block Size                     | This represents the size in bytes of each block.                                                                                                                                  |
| Blocks Read                    | This represents the number of blocks read at a time.                                                                                                                              |
| Skip Records                   | This represents the number of records to skip before starting to convert the host data.                                                                                           |
| Records to read                | This represents the total number of records to read from the host.                                                                                                                |
| Do not verify record length    | This checkbox indicates whether the verification process should be run during download.                                                                                           |
| Text case                      | The options available for selection of text case are Uppercase, Lowercase, and Title case.                                                                                        |
| Record Format                  | The options available for record format are Fixed Length and Character Separated Values (CSV). If CSV is chosen, the next two rows are enabled; otherwise, the rows are disabled. |
| Record delimiter               | This represents the character that marks the boundary between one record and the next.                                                                                            |
| Field delimiter                | This represents the character that marks the boundary between one field and the next.                                                                                             |
| Preparation                    | This represents the title row for grouping related data.                                                                                                                          |
| Append records to calling list | This checkbox indicates that the records in this download must be appended to the existing records instead of overwriting the records.                                            |

| Name                                        | Description                                                                                                                                                                                                                                                                    |
|---------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Remove Carriage Returns                     | This checkbox indicates that carriage returns should be removed to the end of each record when the new host data is created for download.                                                                                                                                      |
| Remove Line Feeds                           | This checkbox indicates that line feeds must be removed to the end of each record when the new host data is created for download.                                                                                                                                              |
| Remove duplicate records from upload        | This checkbox indicates whether duplicate records should be removed and not included in the upload.                                                                                                                                                                            |
| Run custom process at beginning of download | This allows you to select your own custom scripts at the beginning of a download. You can have more than one custom script. For example: If you want to copy your raw data file name and you have created a custom backup script, you can enter the script name in this field. |
| Run custom process after download           | This allows you to select your own custom scripts after download. You can have more than one custom script.                                                                                                                                                                    |
| Switch Year                                 | This represents the year. The year that marks when 20 should prefix or added at the beginning to represent a 2-digit year data. Before this year, 19 is prefixed. The default is 70.                                                                                           |

---

## Download Dictionary

This screen displays a list of all fields in the download data file.

Following is a brief description of the columns of the Upload Dictionary tab:

- Field - The name of an download field.

**Note:**

The field name has to be in all caps, for example: SYSNUM.

- Data Type - This field represents the type of data contained in the field. The dropdown lists all the available data types.
- Length - This field represents the length of the data.

## Introduction

### Note:

The overall length of the record is displayed as a subtotal at the top of the grid and the data is not-editable.

- Same Start - Is a checkbox to indicate that the field has the same starting position as the previous field.
- Start - This field displays the character position in the file where the field starts. Normally this is calculated as the start position of the previous field and the length of the previous field. If you select the Same Start checkbox, this is calculated as the start position of the previous field.
- End - This is a non-editable field that displays the character position that marks the end of the field. This is calculated by adding the field's length to the field's start.
- Description - This field allows you to enter a user-defined description of the field.
- Host Only Field - This is the associated Host Field name in the calling list.

---

## Map

The Map tab is used to configure how host data is transformed into calling list data on a field-by-field basis.

## Download Map

The Download Map tab allows you to configure how calling list data is transformed into download data on a field-by-field basis. You can create a new transformation and also edit and delete existing transformations.

## Create a new Download Map

Follow these steps to create a new download map transformation of calling list data:

1. Select the specific Calling List.
2. Right-click and select **Download to Host**.
3. In the Map tab, select **New**.

The Download Map dialog box appears.

The Download Map dialog allows you to choose the ways of transforming host data using one of the following:

1. Merge - The Merge option allows you to Merge one or more host fields to form a new field. You can also specify the order of the fields. You can also use the Move Up and Move Down buttons to move the highlighted items in the Merged list up one row or down one row, respectively.

2. Transform - The Transform option allows you to choose from three different types of available transformations. The available transformations are Fill, Format, and Translate.

Following is a brief explanation of each of the transformations:

- Fill - You use the Fill tab to apply a fill function to the mapped field.
  - Format - You use the Format tab to define the format of the download field and the mapped field.
  - Translate - You use the Translate tab to convert specific strings in the download field to specific strings in the mapped field.
3. RSM - The RSM option represents Record Specific Messaging. This option allows you to specify a new name for the RSM field and associate a source field to the specific default message. You can also define a message by entering the host data and associating the host data to the specific message. You can also add and remove rows in the Define Message section.

## Edit a Download Map

Follow these steps to edit an existing download map transformation of calling list data:

1. Select the specific Calling List.
2. Right-click and select **Download to Host**.
3. In the Map tab, select **Edit**.

The Download Map dialog box appears.

Following is a brief explanation of each of the transformations:

- Fill - You use the Fill tab to apply a fill function to the mapped field. The text you enter in the **Fill With** field will appear in the Download Data column and the transformation type is Fill.
- Format - You use the Format tab to define the format of the download field. You can select and map the appropriate host field with the appropriate dialer field.
- Translate - You use the Translate tab to convert specific strings in the download field to specific strings in the mapped field. Select the Append and Remove buttons to add or remove a row respectively.

For Translate functions, this field displays the data that will be placed in the host data field if the current data matches the criteria in Download Data.

For Format functions, this field displays the format of the data as it will appear in the calling list field. You must be able to enter free form data in this field, but also provide a dropdown list of common formats.

For Merge and Fill functions, this field is empty.

### Delete a Download Map

Follow these steps to delete an existing download map transformation of calling list data:

1. Select the specific Calling List.
2. Right-click and select **Download to Host**.
3. In the Map tab, select **Delete**.

The specific download map transformation is deleted.

---

### Processing

The processing tab displays a list of processes that run on the downloaded data as part of the process of converting the data into a calling list.

The processes are listed in the order in which they are run.

The process, Set timezones by default, is the first process to be run and cannot be moved or deleted.

You can change the order of the process by right-clicking on a process, then selecting either Move Up or Move Down from the popup menu.

---

### Convert Sample

The Convert Sample option allows you to view the contents of the binary file that will be created out of the sample file that you provide.

This is similar to the Fdict dump. To use convert sample, you will require the sample file and the definition of the sample file.

---

### Do not Call Groups (DNC)

Do Not Call Group allows you to mark a specific record as unavailable for calling. Once a request is made to be added to the Do Not Call list, the agent must ensure that the current job as well as the other jobs include these recipients in the call records as part of the do not call list.

You can configure a new or existing application to support Do Not Call by adding the list to a new or an existing Do Not Call group.

The Do Not Call Groups screen displays a list of all the Do Not Call groups defined on the dialer. When you click the Do Not Call Groups item from the Calling List button bar, the application displays a list of Do Not Call Groups in the Feature Pane.

You can view the details by selecting a group in the Feature Pane. The detail appears to the right in the Feature Detail Pane.

**Important:**

To activate the DNC feature, you must select the **Index calling list for quick sorting and searching** and **Index calling list for Do not Call processing** from the Processing tab available on the right-hand pane in Calling List. You must also map the Index calling list for quick sorting and searching items with any of the key fields available below the **Index calling list for quick sorting and searching** field. When you select the key field the same key field is automatically mapped with the **Index calling list for Do not Call processing**.

You can create one or more DNC groups and use this UI to add calling lists to them. No additional configuration is required through the calling list editor.

## Create a new do not call Group

The Do Not Call Groups wizard is designed to help you create a new DNC group. You can create one or more DNC groups and associate the DNC group or groups to calling lists.

Use the following procedure to create a new do not call group:

1. In the Editor button bar, select **File > New**.  
The New Do Not Call Group Wizard appears.
2. Enter a **Name** for the new do not call group.
3. Select a **Version**.
4. Select a **Initial Calling List**.
5. Click **Add**. The wizard adds the new group to the list of groups in the Feature Panel and displays the details of the group in the Feature Detail pane.

---

## Calling List Reports

When you select a report, you can then view the full report in the Feature Detail pane at the right side of the window.

## Status Reports

This report displays a list of all calling lists. It is very similar to the list that normally appears in the Feature pane, but also includes the Type, Status, and Change Date (Date and Time).

**Note:**

The **Change Date** field represents the date and time that the calling list entered this status. For a Pending list, this represents the date and time that the calling list definition was written to the dialer in the directory that holds the files that will be activated on the next restart. For a deleted list, this is the date and time the list was deleted. A Deleted calling list is stored for a period of 30 days in a backup directory. You can only retrieve the list during this period.

You can sort and resize the size settings for each column. The sessions of the size settings that you resize will be stored.

---

## Using Agent Keys

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.

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

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

The Agent Keys feature helps you to modify an existing calling list, create a new Agent Key Set, and select Job features, as explained in detail in the subsequent sections.

This section consists of the following topics:

- [Create a new Agent Key Set](#) on page 40
- [Supported Features](#) on page 41

---

## Create a new Agent Key Set

The Agent Keys screen displays the names of all agent key sets defined on the selected dialer.

You can view the individual key assignments defined in the agent keys set by selecting a key set in the Feature Pane. The key assignments appear to the right in the Feature Detail pane.

Use the following procedure to create a new agent key set:

1. In the Editor button bar, select **New**.  
The New Agent Keys Wizard appears.
2. Click **Next**.
3. Enter a **Name** for the Agent Key set.
4. Enter a brief Description for the Agent Key set.
5. Click **Next**.
6. Select the **Type of Job** that will use this Agent Key set.

**Note:**

If you select the **Any Type of Job** option, continue from step 7 to 10.

7. Click **Next**.

## Introduction

8. Select the check boxes on the Supported Features Page that should be supported in the new agent key set that you are defining. For more information, refer to [Supported Features](#) on page 41.
9. Click **Next**.
10. Click **Finish**.

The Agent Keys screen displays the names of all agent keys sets defined on the selected dialer. When the user clicks the Agent Keys icon in the Button Bar, the application requests a list of the agent key files or sets from the selected dialer and displays them in the Feature Pane.

**Note:**

The Avaya Proactive Contact Agent does not honor all key assignments entered in a key file. If you are using the Avaya Proactive Contact Agent, the only key assignments that will be accepted are those related to release codes and automated messages.

A user can display the individual key assignments defined in the agent key set by selecting a key set in the Feature Pane. The key assignments appear to the right in the Feature Detail pane.

---

## Supported Features

The Supported Features Page in the Agent Keys Set Wizard allows the user to select the job features that you want to support in this agent key set. The job features that allows the agent to perform specific functions are listed as follows:

- **Managed Dialing** - This job feature allows agents to preview account information and cancel calls before they are made. It also allows them to specify the keys needed to support the user to control the pace and outcome of managed dialing. Specifically, when an agent is previewing a record, the agent may choose to cancel the call and move to the next record or the agent may choose to go ahead and dial the record immediately.
- **Sales Verification** - This job feature automatically creates a second calling campaign to confirm sales or commitments obtained in a prior campaign. This also allows you to choose the keys needed to support a sales job in a sales verification scenario. When Sales Verification is used, agents use a specific code to release records that resulted in a successful sale. These records are automatically fed to a second verification job. In this job, each record is called and a supervisor verifies that the person at the other end of the line agrees to a sale.
- **Native Voice and Data Transfer** - This job feature allows you to define the keystrokes for transferring a call to another agent or to a supervisor. One keystroke will immediately transfer the call and allow the agent to receive a new call. The other keystroke allows the agent to stay on the line with the customers until the other agent answers.
- **Do Not Call** - This job feature allows you to choose the keys needed to support the Do Not Call feature. When an agent uses the defined key combination, the record is released and

marked as Do Not Call. This will prevent the dialer from calling the customer at this number for any reason in the future.

---

## Versions

The Version feature allows you to set privileges.

For example: an user with sysadm privileges has the ability to create and edit configuration data in each of the defined versions, such as Active, Pending, and In Progress. Access to configuration data in the various stages is accomplished in one of two ways, depending on the type of configuration data.

**Note:**

Deleted is also a version

For data that is always saved to the same file - completion codes, schedules, telephony scripts, and voice messages - a message appears when you try to edit the data. This message gives you the option of choosing the version that exists in any of the stages.

---

## Using Version Data

If you have sysadm privileges you may want to use data that is Pending or In Progress during the configuration of another type of file. For example, you may want to create a calling list application with upload configuration that depends on a completion code that is Pending. Change this, if you want to create a new telephony script with a voice message that is Pending.

If there are configuration changes in Pending or In Progress, the Configuration Version dialog box appears, the first time you attempt to edit a file. In the above example, the Save As dialog appears as soon as you select New on the Calling List menu.

When you select a version, the configuration data associated with that version is used throughout the editing session. If, for example, you choose to use completion code definitions that are in Pending, the Pending completion codes are loaded into the application and are used in all cases where the user interface offers you a choice of codes.

Once you have chosen a configuration version, the same will remain active until the application is closed or until you choose to change the configuration version by selecting Options - Configuration Version from the main menu.

---

## Saving Version Data

The configuration data can be saved to the dialer and immediately become active; it may be saved to a Pending directory and will not become active until dialer services are restarted; or it may be saved indefinitely to an In Progress directory.

## Introduction

This feature, the ability to save data based on its state of readiness or completeness, is implemented through the UI by prompting the user for the state when the data is saved.

---

## Using Deleted Configuration Files

To work with deleted files, you can recover the files that are placed in special directories and may be available for retrieval by users with sysadm privileges. These files are listed in the Versions dialog and in the feature pane. To work with these files, you must open the file in Deleted, then save the file into another version, either Pending or In Progress.

---

## Using Schedule

The Schedule feature provides the flexibility to automatically schedule activities, create a new dialer activity, and view schedule reports.

Avaya Proactive Contact provides the ability to define and manage schedules.

When you select Activities from the Schedule feature, calendar is displayed that lists all the scheduled activities. When you select the Schedules icon in the Button Bar, the application requests a list of all scheduled activities from the dialer and displays them in the Feature Pane.

You can display further detail for a particular activity by selecting the activity in the Feature Pane. The detailed information appears to the right in the Feature Detail pane.

Individual activities are not saved as changes are made to activities, but the entire schedule is saved at once.

During a single editing session, you can create new activities and change or delete existing activities. You can then save all changes and end the session. The resulting changes will not be immediately available on the dialer, but are stored in a staging area. The data is moved from the staging area into the active cron the next time the dialer is restarted.

This section consists of the following topics:

- [Types of Dialer Activities](#) on page 44
- [Using Recurrence Pattern](#) on page 51
- [Schedule Reports](#) on page 51

---

## Types of Dialer Activities

You use the New Schedule Activity Wizard to schedule the dialer activities such as Backup, Backup MidTier, Backup Calling List for Late List, Campaign Update, Custom Script, File Transfer, MTS Maintenance, Proactive Contact Maintenance, run a Job, Run a Selection, and Restart Proactive Contact. The activity details of the new activity are stored as part of the crontab command entry.

Following is a brief explanation of each type of activity supported by the dialer:

- Backup - The Backup activity type allows you to schedule a backup for the new activity. You can also perform the following functions:
  - You can take a Full Backup or an Incremental Backup. Full and Incremental Backup includes the complete system including OS, PC Configuration files and calling lists, PC only, and PC System configuration files.
  - You can backup the data to a file or to a device. The device available for storing backup data is DDS.

## Introduction

- You can schedule the date and time for the new activity and set a recurrence pattern for None, Daily, Weekly, Monthly, and Yearly. For more information on recurrence pattern, refer to [Using Recurrence Pattern](#) on page 51.

## Schedule a Backup Activity Type

Use the following procedure to create a new Backup Activity Type:

1. In the Schedule button bar, select **New**.  
The New Dialer Activity Wizard appears.
2. Click **Next**.
3. Select **Backup** as the activity type.
4. Enter a brief **Description** for the backup.
5. Select the **Type** of backup.
6. Select the **File** or **Device** for backup.

**Note:**

If you select File, you must specify the name of the file which will store the details of the new activity. The file will be saved in \tmp directory.

**Note:**

If you select Device, the available device for selection is DDS that represents backup on a DVD.

7. Click **Next**.
8. Select the **Start Date** and **Time** on the Recurrence page of the wizard to schedule the new activity.
9. Select the Recurrence pattern.
10. Click **Next**.
11. Click **Finish**.

The new Backup activity that you scheduled appears in the Scheduled list of activities.

## Schedule a Backup MidTier Activity Type

The Backup MidTier activity type allows you to backup or restore the MidTier database using the `Backup_db` script.

You can also schedule the date and time for the new activity and set a recurrence pattern for None, Daily, Weekly, Monthly, and Yearly.

Use the following procedure to create a new Backup MidTier Activity Type:

1. In the Schedule button bar, select **New**.  
The New Dialer Activity Wizard appears.

2. Click **Next**.
3. Select **Backup MidTier** as the activity type.
4. Enter a brief **Description** for the backup.
5. Select the Recurrence pattern.
6. Click **Next**.
7. Click **Finish**.

The new Backup MidTier activity that you scheduled appears in the Scheduled list of activities.

## Schedule a Backup calling list for latelist

Latelist allows data from previous day's calling list to be set to move to the current calling list as records are downloaded from the host on previous days. The Backup calling list for latelist activity type allows you to backup your latelist. To save on idle time during the time of dialer maintenance, it is advisable that you schedule a backup calling list for latelist.

The backup is taken using the database manager script. You can schedule the date and time for the new activity and set a recurrence pattern for None, Daily, Weekly, Monthly, and Yearly.

Use the following procedure to create a new Backup MidTier Activity Type:

1. In the Schedule button bar, select **New**.  
The New Dialer Activity Wizard appears.
2. Click **Next**.
3. Select **Backup calling list for latelist** as the activity type.
4. Enter a brief **Description** for the backup.
5. Select the Recurrence pattern.
6. Click **Next**.
7. Click **Finish**.

The new Backup MidTier activity that you scheduled appears in the Scheduled list of activities.

## Schedule a Campaign Update

The Campaign Update activity type allows you to schedule a campaign update feature for a calling list. To use this feature you must enable the Campaign Update by selecting the Campaign Update option available in the Features tab, under Calling List. In the Update Mode option, you must select the batch campaign update as the update mode.

- Batch campaign update allows you to periodically send updates to a calling list throughout the day to note the records that should no longer be called. The batch campaign update uses the `rec_update` binary to update the calling list records as non-callable.

## Introduction

**Note:**

You should never run the Batch campaign update process for more than fifteen minutes. For large lists, the time interval needs to be even longer.

**Note:**

This feature is only supported for calling lists in active or pending versions.

- Real-time campaign update will allow the results of a call to be transferred to the same record. Real-time campaign update will mark the outbound record as not-callable on the basis of unique ID, completion code, and job parameters. For example: There are times when inbound calls are received from customers whose accounts have crossed the due date. In such a scenario, the real-time update will allow this call result to be transferred to the same record on an outbound list so that the customer does not receive additional calls.



**Important:**

The unique ID field from your outbound calling list must be included in the inbound calling list.

Use the following procedure to schedule a new Campaign Update:

1. In the Schedule button bar, select **New**.  
The New Dialer Activity Wizard appears.
2. Click **Next**.
3. Select **Campaign Update** as the activity type.
4. Enter a brief **Description** for the campaign update.
5. Select the **Calling List**.
6. Select the Recurrence pattern.
7. Click **Next**.
8. Click **Finish**.

The new Campaign Update activity that you scheduled appears in the Scheduled list of activities.

## Schedule a Custom Script

The Custom Script activity type allows you to create a script and define arguments for the script. You can define your own specific scripts that you would like to be scheduled. You must place the scripts in the customs directory.

Use the following procedure to schedule a new Custom Script:

1. In the Schedule button bar, select **New**.  
The New Dialer Activity Wizard appears.
2. Click **Next**.
3. Select **Custom Script** as the activity type.

4. Enter a brief **Description** for the custom script.
5. Select the **Script Name**.
6. Select the Argument checkbox if you have defined arguments.
7. Click **Next**.
8. Select the Recurrence pattern.
9. Click **Next**.
10. Click **Finish**.

The new Custom Script activity that you scheduled appears in the Scheduled list of activities.

## Schedule a File Transfer

The File Transfer activity type allows you to download calling list data from a host system to a dialer and upload the results of calling from a dialer to the host system. You can schedule the date and time for the new activity and set a recurrence pattern for None, Daily, Weekly, Monthly, and Yearly backup.

Use the following procedure to schedule a File Transfer:

1. In the Schedule button bar, select **New**.  
The New Dialer Activity Wizard appears.
2. Click **Next**.
3. Select **File Transfer** as the activity type.
4. Enter a brief **Description** for the backup.
5. Select the **Download** option if you want to download the calling list data to the dialer or select the **Upload** option if you want to upload the results of calling from the dialer to the host system.
6. Select the **Calling List**.
7. Click **Next**.
8. Select the Recurrence pattern.
9. Click **Next**.
10. Click **Finish**.

## Schedule MTS Maintenance

The MTS maintenance activity type allows you to schedule the date, time, and the recurrence pattern for MidTier Maintenance. The MTS Maintenance script performs the following functions:

- Starts MTS

## Introduction

- Clears all the data
- Stop MTS

Use the following procedure to schedule a MTS Maintenance:

1. In the Schedule button bar, select **New**.  
The New Dialer Activity Wizard appears.
2. Click **Next**.
3. Select **MTS Maintenance** as the activity type.
4. Enter a brief **Description** for MTS Maintenance.
5. Click **Next**.
6. Select the Recurrence pattern.
7. Click **Next**.
8. Click **Finish**.

## Schedule Proactive Contact Maintenance

The Proactive Contact maintenance activity type allows you to schedule the date, time, and the recurrence pattern for Proactive Contact Maintenance.

Use the following procedure to schedule a Proactive Contact Maintenance:

1. In the Schedule button bar, select **New**.  
The New Dialer Activity Wizard appears.
2. Click **Next**.
3. Select **Proactive Contact Maintenance** as the activity type.
4. Enter a brief **Description** for Proactive Contact Maintenance.
5. Click **Next**.
6. Select the Recurrence pattern.
7. Click **Next**.
8. Click **Finish**.

## Schedule Run a Selection

The Run a Selection activity type allows you to schedule running a selection by selecting a strategy from the available strategies such as autovunit, autov, all, verify, and virtual. You must also select the calling list that you want to run for scheduling the selection.

You can also schedule the date and time for the new activity and set a recurrence pattern for None, Daily, Weekly, Monthly, and Yearly.

Use the following procedure to schedule a Run a selection:

1. In the Schedule button bar, select **New**.  
The New Dialer Activity Wizard appears.
2. Click **Next**.
3. Select **Run a Selection** as the activity type.
4. Enter a brief **Description** for Running a Selection.
5. Select the type of Strategy.
6. Select a **Calling List**.
7. Click **Next**.
8. Select the Recurrence pattern.
9. Click **Next**.
10. Click **Finish**.

## Schedule Run a Job

The Run a Job activity type allows you to select the job type that you require to be scheduled. The available job types for selection are blend, inbound, managed, outbound, verify, and virtual. You can schedule the date and time for the new activity and set a recurrence pattern for None, Daily, Weekly, Monthly, and Yearly.

Use the following procedure to schedule a Run a Job:

1. In the Schedule button bar, select **New**.  
The New Dialer Activity Wizard appears.
2. Click **Next**.
3. Select **Run a Job** as the activity type.
4. Enter a brief **Description** for Running a Job.
5. Select the type of Job.
6. Click **Next**.
7. Select the Recurrence pattern.
8. Click **Next**.
9. Click **Finish**.

## Schedule Restart Proactive Contact

The Restart Proactive Contact activity type allows you to schedule when you would like to restart Proactive Contact.

## Introduction

You can schedule the date and time to schedule a restart of Proactive Contact and set a recurrence pattern for None, Daily, Weekly, Monthly, and Yearly.

Use the following procedure to schedule a Restart of Proactive Contact:

1. In the Schedule button bar, select **New**.  
The New Dialer Activity Wizard appears.
2. Click **Next**.
3. Select **Restart Proactive Contact** as the activity type.
4. Enter a brief **Description** for Running a Job.
5. Click **Next**.
6. Select the Recurrence pattern.
7. Click **Next**.
8. Click **Finish**.

## Using Recurrence Pattern

Recurrence pattern represents a set of controls that help you to schedule an activity to occur repeatedly at set intervals. You can choose between None, Daily, Weekly, Monthly, and Yearly.

Depending on the type of pattern you choose, one or more additional controls appear.

- If you select the default selection, **None**, no additional controls appear and the Start Time (date) control is enabled.
- If you select **Daily** recurrence, additional controls let you choose between repeating the activity every n number of days, repeating the activity on every weekday, and repeating the activity every weekend day.
- If you select the **Weekly** pattern, you can choose to repeat the activity every week on specific days.
- If you select the **Monthly** pattern, you can choose to repeat the activity on the nth day of every month.
- If you select the **Yearly** pattern, you can choose to repeat the activity on a specific month and day.

---

## Schedule Reports

The Schedule Reports screen displays a list of all the available reports related to Schedules. When you select the Report item in the ButtonBar's Schedules button group, the application displays a list of available reports in the Feature Pane.

You can view the full report by selecting a report in the Feature Pane. The report appears to the right in the Feature Detail Pane.

## Security Overview

All the exposed communications to and from the Avaya Proactive Contact 4.0 systems are secured at the highest security level.

The enhanced security covers three areas:

- All the exposed socket-based communications are changed to SSL
- All the CORBA IIOP-based communications are changed to SSLIOP-based CORBA connections where SSLIOP represents the SSL
- All the Telnet and ftp sessions from supervisor workstations to PC servers are changed to SSH and SFTP.

This section consists of the following topics:

- [Communication Encryption](#) on page 53
- [Identity Authentication](#) on page 54
- [Certificate Generation Signing and Maintenance](#) on page 54
- [List of Secured Services](#) on page 54
- [Secured Telnet and ftp](#) on page 55
- [Encryption Algorithm](#) on page 55
- [Database Security](#) on page 55
- [Client Password Aging](#) on page 56
- [Role-Based Authorization For Administrators](#) on page 56
- [Password Rotation](#) on page 57
- [Secured Agent](#) on page 57
- [Certificates](#) on page 54

---

## Communication Encryption

Avaya Proactive Contact 4.0 adopts a secure protocol called SSL for all its communications. SSL fulfills requirements that make it acceptable for use in the transmission of even the most sensitive of transactions, such as credit card information, medical records, legal documents, and e-commerce applications.

SSL encrypts data before it is sent. the receiver decrypts it after it is delivered. The encryption mechanisms are only known to the sender and the receiver.

---

## Identity Authentication

In addition to operating system, password-based authentication, Avaya Proactive Contact 4.0 also validates incoming client certificates. Servers (Agent/ Enserver /List Server) receives client's certificates during the SSL handshake. Based on the server configuration, it validates the client if the certificate is valid and signed by trusted Certificate Authority (CA).

---

## Certificate Generation Signing and Maintenance

Currently, OpenSSL CA and EJBCA are the types of CAs evaluated. EJBCA is the Avaya Proactive Contact 4.0 certificate management tool. EJBCA is a fully functional CA built in Java and based on J2EE standards.

OpenSSL CA is an open source CA distributed from <http://openssl.org>. It is a minimal CA application. It signs certificate requests in a variety of forms and generate CRLs. It also maintains a text database of issued certificates and their status.

Avaya Proactive Contact 4.0 systems have a set of default certificates for all the services and internal clients. The Avaya Proactive Contact 4.0 SDK provides default certificates for external clients. SDK.

The certificates can be generated in several ways:

- A single certificate is shared by all the services
- A single certificate is shared by all the internal clients. A certificate is generated for each service or internal client. All these options are designated in a configuration file.

Also in the configuration file, it will provide information on whether both servers and clients have certificates, or only servers have certificates.

## Certificates

Following is a list of certificates that are required by the Avaya Proactive Contact Agent:

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

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

---

## List of Secured Services

The list of Secured CORBA Services in Avaya Proactive Contact systems including but not limited to the following services:

## Introduction

- Event Service
- Command and Control Service
- Dialer Command and Control Service
- Logging Service
- Service Monitor
- Real Time Data Service
- System Health Service
- DataPump - HDCC
- StatsPump
- History Data Service - HDSC

The exposed tcp socket based interfaces are as follows:

- List Server
- Agent API

---

## Secured Telnet and ftp

The telnet and ftp operations from Supervisor workstations to Avaya Proactive Contact 4.0 systems will be replaced with SSH and SFTP.

It will use the following tools for doing this activity:

WEONLYDO's FTPDLX

WEONLYDO's TelnetDLX

---

## Encryption Algorithm

For storing all sensitive information on disk, Avaya Proactive Contact 4.0 uses the AES 128 Encryption algorithm available in the library libcrypto from openssl A.00.09.07.

---

## Database Security

The application specific database users are:

- avayadba - application specific schema owner
- statspump - used for statspump process connection to the database and update real-time statistics for monitoring.

- datapump - used for datapump process connection to the database and update historical statistics for reporting.
- dsc - real-time data reporter, used by Real Time Data Server (rtdatasvr process) and Data Services Component (DSC) to report real-time data to the Supervisor. This user is also responsible for hierarchy operations (create/update/read/delete).
- reporter - used by Avaya Proactive Contact 4.0 Supervisor for historical data retrieval.

Avaya Proactive Contact 4.0 enables database security. For Oracle, Oracle Advanced Security is enabled to use TCPS instead of TCP. Oracle manages certificates (client/server/trusted CA) with wallets. Avaya Proactive Contact 4.0 will supply default wallets using certificates signed by the Certificate Authority.

Avaya Proactive Contact 4.0 will also use password management for database users, using a menu which allows the user to change the passwords for all database users, with the exception of avayadba. The avayadba user password will be maintained by Avaya Support.

---

## Client Password Aging

The Avaya Proactive Contact 4.0 server authenticates the clients with a password in addition to the certificates and private keys. The clients mentioned here can be internal clients or external clients from the third party. The passwords can be set to expire if necessary.

Since there are certain clients who are invoked from the background, Avaya Proactive Contact 4.0 will have a programmable password change mechanism so that clients can set the new password without human intervention.

Because Avaya Proactive Contact 4.0 requires certain passwords to age, certain users have been created which are used only internally.

---

## Role-Based Authorization For Administrators

- To meet security requirements, each administrator should only see the view of administration based on his or her assigned role. In Avaya Proactive Contact 4.0, there are three types of administrator roles: **Auditor** This is a new role which needs to be added into the system.  
**Main Menu** includes the role **Auditor**. A separate menu for **Auditor** will be created. The role **Auditor** can create new users, and audit system security like bad logins, job operations like job settings during run-time.
- **Security Administrator** this role will provide for the administration of users and passwords.
- **Backup Administrator** This is an existing role. A separate menu was created based on new backup-restore methodology

---

## Password Rotation

The password rotation feature provides the following benefits:

- All the CORBA services user names are added with the dialerID. For Example: The User name of SM is smntr10 (where 10 is dialerID)s.
- Use the `manage_corba_users` command to add all the users in the `/etc/passwd` directory or to reset the user(s) password.
- To add all the CORBA users, execute the following command:  

```
$ manage_corba_users -D 10 -A
```
- To reset the user password, execute the following command:  

```
$ manage_corba_users -U smntr10
```
- All services use their default password to log into respective servers
- In case of password expiry, the specific Service sets a new password (a combination of 2 char seeds + current timestamp) into the system (`/etc/passwd`). This password is stored in encrypted form (using AES128) format in `/opt/avaya/pds/config/ <username>.pass` file for next time login.
- Services will decrypt respective `.pass` file using AES 128 algorithm when they require the password.



**Tip:**

When you get the error "Getting an error UNKNOWN USER: PAM Authentication failed". The resolution for this means that you need to add users in `/etc/passwd`. So before doing anything, check `/etc/passwd` file and verify that the username is added with the dialerID specified in the `master.cfg` file.



**Tip:**

If you get an error message "Invalid password in the account file", the problem is that this user password got mismatched. In this case, you can run `manage_corba_users` with reset option. Please ensure that the respective `.pass` file in `/opt/avaya/pds/config` directory got deleted when you run `manage_corba_users`.

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

---

## Secured Agent

The Agent application is secured that offers the following benefits:

- Communicates using Secure Socket Layer (SSL).

- Data Transmission is encrypted.
- Certificates are used for client and server authentication.
- Security Settings are saved in PDSAgent.ini file.

## Licensing

The licensing feature provides licensing of various dialer entities using the Avaya standard RFA and Web-based License Manager (WebLM) licensing software. WebLM is a standalone Web-based license manager that runs on both Windows and Linux systems. WebLM is designed to support any Avaya software product that needs licensing capabilities.

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

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

This feature does not replace any of the required configurable limits that are used to limit the capacity of an individual dialer due to hardware limitations or dialer performance.

Licensing is in addition to dialer capacity checks. The licensing feature is not intended to be used for role restriction. The capacities and potential roles of an application will be determined prior to a request for a license.

All the dialer components that use licensing must provide a two day grace period that allows access for 48 hours in the case of the failure of WebLM server.

This feature consists of the following topics:

- [Types of Licenses](#) on page 60
- [License Server Setup](#) on page 60
- [Dialer Configuration](#) on page 60
- [Grace Period](#) on page 61

---

## Types of Licenses

The following table lists the feature and the license key value for the specific feature:

| Feature                                  | License Key                   |
|------------------------------------------|-------------------------------|
| Basic agent for hard dialer              | VALUE_APC_TOTAL_AGENTS        |
| Predictive dialing agent for hard dialer | VALUE_APC_PREDICTIVECTIAGENTS |
| PBX agent for AES dialing                | VALUE_APC_TOTALCTIAGENTS      |
| PBX agent for predictive dialing         | VALUE_APC_PREDICTIVE_AGENTS   |
| Number of telephone lines (porter)       | VALUE_APC_PHONELINES          |
| Supervisor                               | VALUE_APC_SUPERVISORS         |

---

## License Server Setup

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

- Tomcat Installation
- WebLM Server Installation
- License file Installation on WebLM Server
- License file is generated by RFA

---

## Dialer Configuration

The WebLM Server URL must be stored in the master.cfg file on the dialer. You can store the URL using any of the following ways:

- By manually entering the WebLM Server URL in the master.cfg file.
- By Using the License Configurator option available in the Tools menu of the Health Manager application.

**Note:**

The dialer must be restarted every time the WebLM Server URL is changed.

The WebLM Server URL is: <http://135.27.151.44:8080/WebLM/LicenseServer>

## Grace Period

When the dialer is unable to connect to the WebLM Server and refresh the licenses, then the system goes into a grace period.

The dialer can run into the grace period for 30 days. During the grace period, the Supervisor application will receive grace period messages every 30 minutes indicating the time left for the grace period to expire.

When the connection is re-established with the WebLM server, all licenses are acquired again.

After the expiry of the grace period, the system will restart.

---

## Start Enforcer

You can start Enforcer either using the Start All Services option from the Action Menu of the Health Manager application or start the Enforcer manually from the CUI menu using the enforcer \$NS command.

---

## Stop Enforcer

You can stop Enforcer using the Stop All Services option from the Action Menu of the Health Manager application or you can stop the Enforcer manually from the CUI menu using the kill-15 enforcerpid.

---

## Proactive Contact and IR Integration

Avaya Proactive Contact and Avaya IR Integration is a software that integrates the functionality of the Avaya IR and the Dialer. The Integration provides a subset of Avaya Proactive Contact commands for the Avaya IR system, which allows the Avaya IR to act as agents attached to the Dialer.

These commands can be used as external functions in IVR Designer applications to add outbound functionality to the Avaya IR system. This integration allows the Avaya Proactive Contact to make an outbound call and pass that voice and data to the Avaya IR. The Avaya IR then processes that call as it would any other inbound call. The flexibility of the Avaya IR allows the IVR Designer application to provide a high level of complexity to the subsequent caller interaction. When the call is complete, certain information related to the call is passed back to the Avaya Proactive Contact so the record in the calling list is updated.

Avaya Proactive Contact 4.0 (soft dialer) and Interactive response (IR) Integration includes the following benefits:

- Outbound dialing is done on Avaya Communication Manager (CM).
- There is no continuous connection on IR channel. IR channel receives events from CM for incoming call or hangup. In case of hangup, event execution of script stops.
- Use of AES 4.1 to communicate between Avaya Proactive Contact and Avaya Communication Manager (CM).
- IR channel receives incoming call event on channel, on such event it will execute the application/script assigned to it by sim\_agt.

---

## IR/Proactive Contact Interface Processes

The Dialer and the Avaya IR communicate with each other on an administrative level through a socket connection between a process on each machine. On the Avaya IR, dialer\_conn acts as the server, and on the Dialer, ivr\_conn acts as the client. Through this interface, initial connections are set up and administrative commands are processed.

The Dialer and the Avaya IR also communicate with each other on an individual agent level through a socket connection between another process on each machine. On the Avaya IR, sim\_agt acts as the client, and on the Dialer, agent acts as the server. Through this interface, the Dialer commands required by the Virtual Agent script are processed. The sim\_agt process uses the Dialer's Agent API to send and receive commands to and from the Dialer.

There is one other process on the Dialer that serves as the interface between the character-based (CUI) menus on the Dialer and the ivr\_conn process. This process, called ivr\_supr, acts as a client and ivr\_conn acts as the server.

### The dialer\_conn process

The dialer\_conn process is a permanent process on the Avaya IR that is started when the Voice System starts. It listens to a specific port and waits for a socket connection to be established by the ivr\_conn process on a Dialer.

When a connection is established, the dialer\_conn process sends a list of scripts to the Dialer. Then, in response to a command from the Dialer, it starts a sim\_agt process for each channel configured as an agent. The dialer\_conn process, in response to a command from the Dialer, will also stop each sim\_agt process.

---

### The ivr\_conn process

The ivr\_conn process is a permanent process on the Dialer that is started when the Dialer system starts. It listens to a specific port waiting for a socket connection to be established by the command interface process, ivr\_supr. When a connection is established, the ivr\_conn process acts according to the commands given.

If the command is a CONNECT command, a socket connection to the dialer\_conn process on the specified Avaya IR is established. This initiates the download of script names from the Avaya IR, the starting of a job on the Dialer and the logging in of virtual agents from the Avaya IR (sim\_agt processes).

If the command is a DISCONNECT command, the agents are logged off, the job is shut down and the socket connection disconnected.

If the command is a GET\_SCRIPTS command, a request for an updated list of scripts is sent to the dialer\_conn process.

---

### The ivr\_supr process

The ivr\_supr process is invoked from the CUI menus on the Dialer to send commands to the ivr\_conn process. When invoked, the ivr\_supr process establishes a socket connection to a specific port being listened to by the ivr\_conn process. Once established, it sends the specified command, disconnects and then terminates. The possible commands are CONNECT, DISCONNECT and GET\_SCRIPTS (see The ivr\_conn process).

---

## The agent process

The agent process serves as the command interface between the Dialer and any Agent API application such as sim\_agt. The communication of the sim\_agt process is through secure sockets layer. This process is started on the Dialer when the system is started and runs as a permanent process. In its permanent state, the agent process simply listens to a specific port waiting for a socket connection to be established in this case by sim\_agt.

When a connection is established, the agent process creates a copy of itself. This copy becomes the individual agent process associated with the particular copy of sim\_agt that established the connection. The individual agent process handles all interaction between the Dialer and the Virtual Agent script. When the sim\_agt process executes a logout command, the socket connection between the agent process and the sim\_agt process is dropped and the associated individual agent process is terminated.

---

## The sim\_agt process

The sim\_agt process is the Agent API application that serves as the interface between the agent process on the Dialer and the Virtual Agent script on the Avaya IR. It is started and stopped by the dialer\_conn process in response to commands from the Dialer. The communication of the sim\_agt process is through secure sockets layer.

---

## Integration scenarios

There are three scenarios supported by the Avaya Proactive Contact and IR Integration solution. In all three, the dialer first makes a call to a customer on the calling list. After that, one of these three general call flows occurs:

- The call is passed to a Virtual Agent on the Avaya IR and is completely handled there.
- The call is first passed to a live agent on the dialer who then passes it to the Virtual Agent on the Avaya IR. The call is completed on the Avaya IR.
- The call is first passed to a Virtual Agent on the Avaya IR and is then transferred to a live agent on the Dialer. The call is completed on the dialer.

---

## AES Dialer Integration

Following are the advantages of using AES dialer integration:

- Ideal for pursuing customer loyalty enhancement market
- Aimed at the enterprise customers with moderate dialing needs
- Re-use the existing contact center infrastructure
- Co-resident Application Enablement Service
- Avaya CM for inbound/ outbound dialing
- Scheduled calling lists with advanced list segmentation
- Blending for maximum agent productivity

---

## Lightweight Directory Access Protocol

This section contains the following topics:

- [Setting Up LDAP on Primary Dialer](#) on page 65
- [Setting up LDAP on Secondary Dialer](#) on page 66

---

## Setting Up LDAP on Primary Dialer

Follow these steps to setup LDAP on Primary Dialer:

1. On Primary Install all the packages that consists of OS, dialer, midtier, and db.
2. Check for the following entry in the path /etc/hosts file  

```
127.0.0.1      localhost
```
3. Check for the following entry in the path /etc/hosts.allow file  

```
slapd = <ip of primary dialer>
```
4. LDAP should be installed on Primary dialer

**Note:**

The tools modifydbusers, createop and manage\_corba\_users will only run on the primary dialer

5. On all the dialers, change the value of LDAP in master.cfg file to YES
6. On the Primary type `su sroot` and then run the `LdapServerInstall.sh` script to install the LDAP server

7. The `LdapServerInstall.sh` script requires an argument as domain name or company name.
8. Enter the domain name as `-D` or company name as `Avaya`.
9. Type **Yes** to Setup password policy.
10. Type the number of days for Password Expiry duration.
11. Type **Yes** if you want to force change password after the first login  
 After you have answered all the questions, the installation script will install the following:
  - Install openssl
  - Install BarclayDB
  - Install openLdap
  - Add basic user configuration to LDAP database
  - Migrate all the PC4.0 default users (admin,sysadm)
  - Setup the system for auto start of LDAP (add startup scripts and create links, as required)
12. The Same script will add the basic configurations to ldap (no user inputs required)
13. After installation is completed, run `ps -ef` command to verify that slapd is running
14. Run the `authconfig` command on the primary dialer by selecting the following in the Authentication Configuration Screen:
  - From User Information, select Use LDAP.
  - From Configuration select Use MD5 Passwords, Use Shadow Passwords, and Use LDAP Authentication.
15. Click **Next**.
16. Enter LDAP Server information as follows:
  - Server - 135.27.151.87
  - Base DN - `dc=avaya, dc=com`
17. Run `manage_corba_users -D <dialer ID> -A` to add all the system accounts needed for CORBA sub systems
18. Repeat the same steps for all the dialer id's in the POD.

---

## Setting up LDAP on Secondary Dialer

Follow these steps to setup LDAP on Secondary Dialer:

1. Install the secondary dialer.
2. Check the LDAP parameter in `master.cfg`.

## Introduction

3. Check the Primary Dialer entry in the path /etc/hosts file.
4. Install LDAP client.
5. run the auth config command on the Secondary Dialer by selecting the following in the Authentication Configuration Screen:
  - From User Information, select Use LDAP.
  - From Configuration select Use MD5 Passwords, Use Shadow Passwords, and Use LDAP Authentication.
6. Click **Next**.
7. Enter LDAP Server information as follows:
  - Server - 135.27.151.87
  - Base DN - dc=avaya, dc=com

---

## Avaya Proactive Contact users

Your contact center manages the personnel who use Avaya Proactive Contact and the components that each person can use.

This section discusses the following topics:

- [Types of users](#) on page 68
- [Logins and permissions](#) on page 69

---

### Types of users

Contact Center personnel who use Avaya Proactive Contact include the following users:

**Administrators** - Set up and maintain the Avaya Proactive Contact system including the following tasks:

- Set up user accounts.
- Start and stop dialers.
- Define and download calling lists.
- Monitor the health of the system.
- Define audio messages and scripts.

**Supervisors** - Set up and monitor the contact center calling activities including the following tasks:

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

**Agents** - Handle inbound and outbound calling activities. Throughout the day, agents work on outbound and blend jobs. Agents can also receive inbound calls that customers place to the contact center.

# Logins and permissions

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

**Administrator login and password** - Allows you to use the administrative features and the supervisor features in the Linux-based application and in Supervisor. Administrators also use Health Manager to monitor and manage the operation of Avaya Proactive Contact.

**Supervisor login and password** - Allows you to use supervisor features in the Linux-based application and in Supervisor, and Avaya Proactive Contact Agent application.

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

This section contains the following topics:

- [Agent types](#) on page 69
- [Agent logins](#) on page 70

## Agent types

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

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

**Outbound agent** - Outbound agents handle outbound calls only. Outbound agents can join the following types of outbound jobs:

- Cruise Control
- Unit work list
- Sales Verification
- Infinite

**Managed agent** - Managed agents only handle outbound calls during an outbound job set up as a Managed Dialing job.

**Inbound agent** - Inbound agents handle only inbound calls. They can join inbound or blend jobs. The system receives calls directly from customers or through an ACD.

**Blend agent** - Blend agents handle both outbound and inbound calls. They join blend jobs and can handle customer records on outbound and inbound calling screens.

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

**ACD agent** - ACD agents handle outbound calls on the Avaya Proactive Contact and handle inbound calls on the ACD.

## Agent logins

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

| Agent type       | Login | Joins job         | Handles calls                             |
|------------------|-------|-------------------|-------------------------------------------|
| Managed          | m     | outbound          | Outbound calls on Avaya Proactive Contact |
| Outbound         | o     | outbound or blend | Outbound calls on Avaya Proactive Contact |
| Person to Person | p     | outbound          | Outbound calls on Avaya Proactive Contact |

**Agent Blending login** - If your system is configured with Agent Blending, the following table describes the agent logins used.

| Agent type | Login | Joins job | Handles calls                                         |
|------------|-------|-----------|-------------------------------------------------------|
| ACD        | a     | outbound  | Outbound calls on the dialer and inbound calls on ACD |

**Intelligent Call Blending login** - If your system is configured with Intelligent Call Blending, the following table describes the agent login used.

| Agent type | Login | Joins job        | Handles calls                                         |
|------------|-------|------------------|-------------------------------------------------------|
| Inbound    | i     | inbound or blend | Inbound calls on Avaya Proactive Contact              |
| Blend      | b     | blend            | Inbound and outbound calls on Avaya Proactive Contact |

## Log in to Supervisor

Avaya Proactive Contact uses the Supervisor application to interface with the hardware and software that is included with the system.

The system allows you to access Monitor, Editor, or Analyst with one password.

After you log in to one application, you can access the others without entering another user name and password. Use the following procedure to log in to any Supervisor application.

1. Select **Start > All Programs > Avaya > Avaya Proactive Contact 4.0 > Supervisor > Monitor, Editor, or Analyst**.
2. Enter your log in name with at least 3 characters and password, and then click **OK**.



**Tip:**

If you exit all applications, you will need to log in again.

To display the online help, select **Help > Contents**, or press **F1**.

**Note:**

You might see a message that Internet Explorer restricted the help system from showing active content.

To display the help, complete the following procedure:

1. In Internet Explorer, select **Tools > Internet Options > Advanced** tab.
2. Navigate to the section labeled **Security**.
3. Select the **Allow active content to run in files on My Computer** check box.
4. Click **OK**.

## Chapter 2: Understanding Editor settings

Editor allows you to see large amounts of information in a single window. The buttons on the left-hand pane filter the type of information you see.

**Strategies** - Lists the existing phone strategies on the right-hand pane in the window. If you select a phone strategy in the list, the settings appear on the tabs. You can add rows and modify phone strategy settings.

**Selections** - Lists the existing record selections. If you select a record selection, the settings appear on the tabs. To modify the record selection settings, select the fields in the tree structure.

**Selections Reports** - Lists the record selections that were previously run. Selection Reports contains summary information that you do not modify.

**Jobs** - Displays a tree structure on the right-hand pane of the window. The tree structure lists the settings for the selected job. To modify the job settings, select the fields in the tree structure.

In Editor, Avaya Proactive Contact allows you to enable or disable multi-dialer commands and set your **Save** and **Refresh** options.

This section contains the following topics:

- [Enable or disable multi-dialer commands](#) on page 73
- [Save options](#) on page 74
- [Set refresh options](#) on page 75

## Enable or disable multi-dialer commands

Use the following procedure to enable or disable multi-dialer commands:

1. In **Editor**, select **Settings > Options**.
2. In the **Options** dialog box, click the **Multi-dialer** tab.
3. Select **Enable** to enable multi-dialer commands. Select **Disable** to disable multi-dialer commands. For more information, see the following topics:
  - [Options, Multi-dialer tab](#) on page 141
  - [Multiple dialers](#) on page 20
  - [Pods](#) on page 20
4. Select the dialer you want to use.
5. Click **Apply** to save your changes.
6. Click **OK** to save your changes and close the dialog box.

---

## Save options

The Save option allows you to display or not to display a confirmation prompt when you select **File > Save As** to save changes to an existing file.

Use the following procedure to set Save options:

1. In **Editor**, select **Settings > Options**.
2. In the **Options** dialog box, click the **Save** tab.
3. Select **Prompt before overwrite** to receive a prompt before saving. Select **Overwrite without asking** to save without receiving a prompt. For more information, see [Options, Save tab](#) on page 141.
4. Click **Apply** to save your changes.
5. Click **OK** to save your changes and close the dialog box.

## Set refresh options

Use the following procedure to set how often Editor refreshes the data displayed on your screen:

1. In **Editor**, select **Settings > Options**.
2. In the **Options** dialog box, click the **Refresh** tab.
3. Select the interval at which you want Editor to refresh. For more information, see [Options, Refresh tab](#) on page 141.
4. Click **Apply** to save your changes.
5. Click **OK** to save your changes and close the dialog box.

# Chapter 3: Customize Editor

The Avaya Proactive Contact allows you to customize the appearance of your Editor windows to help you navigate within Editor.

This section contains the following topics:

- [Understanding Editor](#) on page 77
- [Navigate among the Tool applications](#) on page 79
- [Move within Contact Management](#) on page 80
- [View icons in the button group](#) on page 81
- [Refresh a view](#) on page 82

## Understanding Editor

This section provides information that will help you use Editor to create and maintain phone strategies, record selections, and jobs.

This section contains the following topics:

- [Editor window description](#) on page 77
- [Editor screen layout and usage](#) on page 77

---

## Editor window description

The **Contact Management** button group in Editor allows you to move among Strategies, Selections, Selection Reports, and Jobs. Each feature has a very similar look and feel.

---

## Editor screen layout and usage

Editor contains two panes with the button group displayed to the left. The left-hand pane contains either summary information or a list of titles or files. The right-hand pane contains a tree with settings that you define and modify.

To display settings in the right-hand pane, select a field in the left-hand pane.

This section contains the following topics:

- [Button group](#) on page 77
- [Sort](#) on page 78
- [Resize columns](#) on page 78
- [Resize panes](#) on page 78

## Button group

The button group expands and contracts to display additional buttons. When you click the button group, buttons appear. You can resize the buttons.

Depending on your login, you see the **Contact Management**, and **Messages and Scripts** buttons.

Use the **Contact Management** group to move between the following features:

- Strategies
- Selections

- Selection Reports
- Jobs

Use the **Messages and Scripts** group to move between the following features:

- Messages
- Scripts

Use the **Calling Lists** group to move between the following features:

- Calling Lists
- Do Not Call Groups
- Reports

Use the **Agent Keys** group to move between the following features:

- Agent Keys
- Reports

Use the **Schedule** group to move between the following features:

- Activities
- Reports

## Sort

You can click most column headings to sort the contents of the column.

When you click a heading, you see a small arrow appear alongside the heading. A small arrow that points up indicates that the data is in ascending order. A small arrow that points down indicates that the data is in descending order.

## Resize columns

You can resize any column in a view by hovering your cursor between the heading titles until a double-arrow appears. Press the left mouse button while you drag the cursor to the left or to the right.

## Resize panes

You can resize the panes by hovering your cursor on the divider line that separates the panes. until a double-arrow appears. Press the left mouse button while you drag the cursor to the left or to the right.

---

## Navigate among the Tool applications

Editor comes with tool applications that you access from the Tools menu. Use the following procedure to start Tool menu applications:

1. Select **Start > All Programs > Avaya Proactive Contact 4.0 > Supervisor > Editor**.
2. To start a tool, select its name from the **Tools** menu.

While you use the tool, Editor remains open in the background so you can navigate back to it when you are finished using the tool.

---

## Move within Contact Management

Use the Strategies, Selections, Selection Reports, and Jobs buttons on the button bar to move within the Contact Management features. Editor prompts you to save your work when changing to another feature. When prompted, you can choose not to save your work, too.

Use the following procedure to select a Contact Management feature:

1. Select **Start > All Programs > Avaya Proactive Contact 4.0 > Supervisor > Editor**.
2. Click the **Contact Management** button group.
3. Click the following buttons:
  - **Strategies** to launch the phone strategy editor
  - **Selections** to launch the record selection editor
  - **Selection Reports** to launch the record selection reports editor
  - **Jobs** to launch the job editor

## View icons in the button group

You can view large or small buttons on the button group. Use the following procedure to switch between large and small icons in the button group:

1. On the button group, click to expand the button group whose icon size you want to change.
2. Right-click, and then select either **Large Icons** or **Small Icons**.

A check mark next to the menu command indicates which view you are currently using.

---

## Refresh a view

To refresh an open view, press the **F5** key.



# Chapter 4: Phone strategy

Avaya Proactive Contact uses phone strategies during jobs to place phone calls to customers more effectively.

A phone strategy is a set of instructions that tells the system when and how to place calls to customers, which customer phone number to dial, and the frequency of calls.

This section contains the following topics:

- [Understanding phone strategy](#) on page 85
- [Using phone strategies](#) on page 89
- [Maintaining phone strategies](#) on page 93

---

## Understanding phone strategy

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

This section contains the following topics:

- [Phone strategy preparation](#) on page 85
- [Phone strategy settings](#) on page 86

---

## Phone strategy preparation

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

- The phone number to call first
- The number of rings to allow before disconnecting the call
- The time to wait before retrying a phone number that was busy, unanswered, or disconnected
- The phone number to dial if the first phone number is not answered
- The number of times to retry a busy phone number
- The number of times to dial a phone number before switching to an alternate phone number
- The types of calls to pass to an agent when the dialer detects an answer

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

Wildcard characters include the following symbols:

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

For more detailed pattern matching rules, see [Chapter 23: Pattern matching rules](#) on page 324.

---

## Phone strategy settings

This section describes the following phone strategy settings:

- [Initial phone](#) on page 86
- [Alternate initial phone](#) on page 87
- [Detection mode](#) on page 87
- [Retries](#) on page 88

### Initial phone

The initial phone is the first phone number that the system uses to place a call for each record.

The system stores the phone numbers in the calling list phone fields, for example PHONE1 and PHONE2. If a record does not match the phone criteria that you set, the system will not place a call.

The system classifies phone numbers by phone type and assigns a number to each type. For example, the home phone might be phone number 1 and the business phone number 2. The dialer phone type numbers are set during your system configuration.

**Example** - If your initial phone pane's fields were as follows: Phone=1, Field=Name=PHONESTAT, and Value=~B?

The system would dial the number in the PHONE1 field for all records whose PHONESTAT field does not contain a "B", or bad number.

The only fields that are required on the Initial Phone tab are Phone, Field, and Value. The remaining three fields (Logic, Field, and Value) are optional and allow you to combine two statements together using a logic operator.

**Phone** - Click this field to select a phone.

**Field** - Click this field to select one of the fields from your download.

**Value** - Use a value or a wildcard character. Values can be numbers, letters, dates, and times. For example, account balances consist of numbers, while customer names consist of letters. For information on using wildcard characters, see [Record selection wildcard characters](#) on page 101.

## Alternate initial phone

The alternate initial phone setting is the phone number that becomes the initial phone at a specified time of day. The alternate initial phone number also specifies the time the system starts dialing the alternate initial phone.

The system starts dialing the alternative initial phone based on the local time in the selected time zone.

**Example** - You can tell the system to switch from dialing business phones, the initial phone, to dialing home phones, the alternate initial phone, at 6 PM.

## Detection mode

The system uses the detection mode to identify how the phone number was answered. The system passes phone calls to agents based on the detection mode you specify.

**Example** - A detection mode can be a live voice, an answering machine, or an operator intercept.

**Number of Rings** - Specify the number of rings to allow before the system records a NOANSWER completion code.

**Pass to Agent** - The detection mode tells the system which calls to pass to agents. When the system places a call, the system detects what type of answer occurs for each call and then decides whether or not to pass that call to an agent.

The following table describes the Detection Mode tab options:

| Option     | Description                       |
|------------|-----------------------------------|
| Voice      | A person's voice was detected     |
| Autovoice  | An answering machine was detected |
| Intercept  | An operator intercepted the call  |
| No circuit | No circuit was available          |
| Disconnect | Disconnected the phone call       |
| Vacant     | Vacant number                     |
| Reorder    | Reorder                           |



**Tip:**

To increase your hit rate, decide which detection modes to use. With each additional criteria you select, your agents can handle more calls rather than the system.

## Retries

The system uses the retries setting to place another phone call for the same record.

The system applies the following criteria based on the result of the initial call:

- How long the system waits before dialing the number again
- How many times the system dials the same phone number
- Which phone number the system dials next

**Example** - You can tell the system to retry the call in 15 minutes when the initial call result is busy and to stop dialing that phone number if there is no answer after three retries.



**Tip:**

It is important to understand the difference between a system retry and a customer recall.

- A system retry is a computer generated phone call attempt. If the system detects a busy signal on the first call attempt, the system dials the phone number based on the retry parameters in the phone strategy.
- Agents set up customer recalls. An agent can set either an Agent Owned Recall or a general recall. For an agent owned recall, the system routes the phone call to the agent who set the phone call. For a general recall, the system dials the phone number and routes the phone call to any available agent.

## Using phone strategies

This section contains procedures that you can use to create, edit, and use phone strategies:

- [Create a phone strategy](#) on page 89
- [Copy a phone strategy](#) on page 91
- [View phone strategy settings](#) on page 91
- [Edit a phone strategy](#) on page 91
- [Delete a phone strategy](#) on page 92

---

## Create a phone strategy

Use the following procedure to create a phone strategy:

1. Select **Start > All Programs > Avaya > Proactive Contact 4.0 > Supervisor > Editor**.
2. If necessary, log in to Supervisor. For more information, see [Log in to Supervisor](#) on page 71.
3. From the drop down list, select the dialer where you want your phone strategy to reside.



**Tip:**

You can save the phone strategy to other dialers or delete the phone strategy from this dialer at a later time.

4. Click **Strategy** on the button group.
5. Select **File > New**.
6. On **Detail** tab, select a calling list.
7. Select **File > Save**.
  - a. In the Save As dialog box, select another dialer if you want to save the phone strategy to a different dialer.
  - b. Enter a file name for your strategy, and then click **OK**.  
Editor displays the phone strategy tabs in the right-hand pane.
8. On the **Initial Phone** tab, complete the following settings:
  - a. Right-click and select **Append Row**.
  - b. Click the **Phone** field and select a phone.
  - c. Click the **Field** field and select a field from the download to use base how the system selects phone numbers to place telephone calls.

- d. (Optional) Complete the **Logic**, **Field**, and **Value** fields to specify your restrictions. For documentation on wild card characters, see [Phone strategy preparation](#) on page 85.

Examples:

- To exclude bad numbers, select PHONESTAT in the **Field** list and Enter ~B? in the **Value** field to specify or not equal to bad numbers.
- To place a call to all records, Enter an asterisk (\*) in the **Value** field.

9. (Optional) On the **Alternate Initial** tab, specify alternate initial phone settings.

- a. Right-click and select **Append Row**.

- b. Click the **Time** field to specify the time that you want to switch from the initial phone to the alternate initial phone.

The system bases the decision to switch phone numbers on the time in the time zone (not the system time).

- c. Select the time zone(s) as appropriate.

- Right-click and select **Select All** to select all time zones.
- Right-click and select **Unselect All** to clear all options.

10. On the **Detection Mode** tab, click the **Number of Rings** field and then use the list to select a number.

Select the check boxes to specify which types of calls to pass to agents.

11. On the **Retries** tab, select the call results that the system will retry. For example, if the system detects a busy signal on the first call attempt, it will retry based on your “Busy signal” values on this pane.

For each result you select, enter a value in the **Retry Interval** (minutes), **Attempts**, and **Next Phone** columns.

12. Select **File > Save**.

If multi-dialer is enabled, you can copy the strategy to additional dialers.

- a. In the Save As dialog box, select another dialer if you want to save the phone strategy to a different dialer.

- b. Enter a file name for your strategy, and then click **OK**.

Avaya Proactive Contact automatically saves the file to the selected dialer.

## Copy a phone strategy

You can copy a phone strategy to another dialer. If the multi-dialer is not enabled, see [Enable or disable multi-dialer commands](#) on page 73 to enable the feature.

Use the following procedure to copy a phone strategy.

1. Click the phone strategy you want to copy.
2. Select **File > Save As**.

If multi-dialer is enabled, you can copy the strategy to additional dialers.

- a. In the Save As dialog box, select another dialer if you want to save the phone strategy to a different dialer.
- b. Enter a file name for your strategy, and then click **OK**.

Avaya Proactive Contact automatically copies the file to the selected dialer.

---

## View phone strategy settings

Use the following procedure to view phone strategy settings:

1. Click the phone strategy you want to open.  
The phone strategy settings appear in the right-hand pane.
  2. To navigate through the phone strategy settings, click a tab.
- 

## Edit a phone strategy

Change phone strategy settings when doing so will help your system dial more efficiently. Changes take affect the next time a job that uses the strategy is started.

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

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

Use the following procedure to edit a phone strategy:

1. Click the phone strategy you want to edit.

2. Click a tab to make the necessary edits in the right-hand pane.  
Refer to the [Create a phone strategy](#) on page 89 for detailed information.
3. Select **File > Save**, and then click **OK**.

---

## Delete a phone strategy

Use the following procedure to delete a phone strategy:

1. Click the phone strategy you want to delete.
2. Select **File > Delete**.
3. When asked if you really want to do this, click **OK**.
4. If the multi-dialer option is enabled, the **Multiple dialer command** dialog box appears.  
If the check boxes are grayed out, select **Settings > Options** to enable the multi-dialer settings.
  - a. Click to clear the check boxes of the dialers from which you do not want to delete the strategy.
  - b. Click **OK**.

---

## Maintaining phone strategies

This section contains the following procedures you can use to maintain phone strategies:

- [List all phone strategies on a selected dialer](#) on page 93
- [Append a phone strategy row](#) on page 93
- [Insert an initial phone in a phone strategy](#) on page 94
- [Delete a row in a phone strategy](#) on page 94
- [Select all rows in a phone strategy](#) on page 94
- [Unselect all rows in a phone strategy](#) on page 95

---

### List all phone strategies on a selected dialer

Use the following procedure to view a list of all phone strategies on a selected dialer:

1. From the drop down list, select the dialer for which you want to list the phone strategies.

If you logged in as a supervisor, the **Contact Management** button displays in the left-hand pane. If you logged in as an administrator, the following buttons display:

- **Contact Management**
- **Messages and Scripts**

2. Click **Contact Management**.
3. Click **Strategies**.

---

### Append a phone strategy row

Appending a row adds a row beneath the bottom row on the **Initial Phone** and **Alternative Initial Phone** tabs.

Use the following procedure to append a row:

1. On the Editor button bar, click **Contact Management**.
2. Click **Strategies**.
3. Click the phone strategy you want to edit.
4. In the right-hand pane, click the following tabs to append an initial or alternate initial phone:
  - **Initial Phone**
  - **Alternate Phone**

5. Select **Edit > Append Row**.

---

## Insert an initial phone in a phone strategy

Inserting a row adds a row directly above the row you select on the **Initial Phones** or **Alternate Initial** tabs.

Use the following procedure to insert a row in your phone strategy:

1. On the Editor button bar, click **Contact Management**.
2. Click **Strategies**.
3. Click the phone strategy you want to edit.
4. In the right-hand pane, click the **Initial Phone** or **Alternate Initial Phone** tabs for the settings you want to edit.
5. Select the row that the new row will appear above.
6. Select **Edit > Insert Row**.

---

## Delete a row in a phone strategy

Use the following procedure to delete a row on the **Initial Phones** or **Alternate Initial** tabs from your phone strategy:

1. On the Editor button bar, click **Contact Management**.
2. Click **Strategies**.
3. Click the phone strategy you want to edit.
4. In the right-hand pane, click the **Initial Phone** or **Alternate Initial Phone** tabs for the settings you want to edit.
5. Select the row you want to delete.
6. Select **Edit > Delete Row**.
7. Select the row to move.
8. Select **Edit > Move Up**.

---

## Select all rows in a phone strategy

Use the following procedure to select all rows that have a check box on the **Alternate Initial**, **Phone**, **Detection**, and **Retires** tabs:

1. On the Editor button bar, click **Contact Management**.

## Phone strategy

2. Click **Strategies**.
3. Click the phone strategy you want to edit.
4. In the right-hand pane, click one of the following tab:
  - **Alternate Initial Phone**
  - **Detection**
  - **Retries**
5. Select **Edit > Select All**.  
Editor selects each check box.

---

## Unselect all rows in a phone strategy

Use the following procedure to clear all rows that have a check box on the **Alternate Initial, Phone, Detection, and Retires** tabs:

1. On the Editor button bar, click **Contact Management**.
2. Click **Strategies**.
3. Click the phone strategy you want to edit.
4. In the right-hand pane, click one of the following tab:
  - **Alternate Initial Phone**
  - **Detection**
  - **Retries**
5. Select **Edit > Unselect All**.  
Editor clears each check box.

# Chapter 5: Record selection

Avaya Proactive Contact uses record selections to determine which records to use to place phone calls during a job.

In Editor, you can create, edit, and view existing record selections or view only the record selections that have been run.

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

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

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

This section contains the following topics:

- [Understanding record selection](#) on page 97
- [Record selection use](#) on page 99
- [Using a record selection](#) on page 104
- [Maintaining a record selection](#) on page 111
- [Record Selection for Multiple Dialers](#) on page 115

---

## Understanding record selection

A record selection contains the set of instructions that tells Avaya Proactive Contact which customer records to select from a calling list.

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

When a record selection starts, Avaya Proactive Contact selects records based on the following criteria:

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

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

This section contains the following topics:

- [Specify time zones](#) on page 97
- [Specify completion codes](#) on page 97
- [Specify goals](#) on page 98

---

## Specify time zones

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

---

## Specify completion codes

You can use a record selection to specify completion codes such as BUSY, NOANSWER, or SIT, special information tones. For example, if you specify the SIT completion code, the record selection looks for phone numbers that are disconnected, redirected, or no longer in service.

---

## Specify goals

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

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

## Record selection use

In Editor, you can create, edit and view existing record selections or view only the record selections that have been run.

This section discusses the following buttons for record selections:

- [Understand the Selections settings](#) on page 99
- [Understand the Selection Reports settings](#) on page 102

---

## Understand the Selections settings

Use **Selections** to do the following tasks:

- Create a new record selection
- Edit an existing record selection
- View all existing record selections

Click **Selections** on the button bar to list the existing record selections. Click a record selection name to divide the window into the following panes:

- The left-hand pane lists the record selections.
- The right-hand side contains tabs that you use to edit settings for the record selection.

This section discusses the following topics:

- [Selections tabs](#) on page 100
- [Record selection wildcard characters](#) on page 101

## Selections tabs

The following table describes the tabs that appear on the right-hand pane of the window.

| Tab name   | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Detail     | Use the <b>Detail</b> tab to specify a calling list, ignore the time zone option, unit work list field, and phone strategy file. To select a value, click the field and use the drop-down list to select.                                                                                                                                                                                                                                                                                                                                                                                |
| Records    | <p>Use the <b>Records</b> tab to define which records the system uses during a job based on logic statements that you create. Click <b>Field</b> and the drop-down list to select a field. Enter a value.</p> <p>If you use the <b>Logic</b> field, you begin to create a multi-line logic statement. Click the <b>Logic</b> field to use the drop-down list to select <b>And</b> or <b>Or</b>.</p> <p>To add a row, select <b>Edit &gt; Append Row</b>.</p> <p>For information on using a wildcard character, see <a href="#">Record selection wildcard characters</a> on page 101.</p> |
| Time Zones | <p>Use the <b>Time Zones</b> tab to select time zones that the system places phone calls.</p> <p>You can right-click and select <b>Select All</b> or <b>Unselect All</b></p>                                                                                                                                                                                                                                                                                                                                                                                                             |
| Results    | <p>Use the <b>Results</b> tab to tell the system which phone numbers to dial based on previous calling results.</p> <p>Select each completion code you want the system to call. You can right-click and select <b>Select All</b> or <b>Unselect All</b>.</p>                                                                                                                                                                                                                                                                                                                             |

## Record selection

| Tab name | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|----------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Recalls  | <p>Use the <b>Recalls</b> tab to determine which agent-set recalls to include in the record selection.</p> <p>To make only the recalls scheduled during the current job, enter criteria to match the Records pane. To prevent any agent-set recalls, enter values that cannot be met (for example, enter a STATE of ZZ).</p> <p>Click <b>Field</b> and use the drop-down list to select a field. Enter a value.</p> <p>If you use the <b>Logic</b> field, you begin to create a multi-line logic statement. Click the <b>Logic</b> field to use the drop-down list to select <b>And</b> or <b>Or</b>.</p> <p>To add a row, select <b>Edit &gt; Append Row</b>.</p> <p>Click the <b>Group</b> field to enter a letter or number. When you group rows, the <b>Logic</b> column becomes a critical linking component because its logic operator determines how the linked elements resolve as one statement.</p> |
| Sort     | <p>Use the <b>Sort</b> tab to determine the order in which the system uses records to place calls to customers.</p> <p>To add a row, select <b>Edit &gt; Append Row</b>.</p> <p>Click <b>Sort Record by</b> to enter your sorting preference.</p> <p>To change the priority, select the row and then select <b>Move Up</b> or <b>Move Down</b>.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |

A record selection contains options that you define. The system selects a record if it meets specific criteria. The record selection with the phone strategy determines to whom the dialer places phone calls and how the dialer places the phone calls.



### Tip:

If you do not know what to enter in a field, click the field to see if there is a list of values to select. A blinking cursor indicates that you can enter a value in the field.

## Record selection wildcard characters

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

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

You can create wildcard expressions on the **Records** and **Recalls** tabs. Each wildcard expression specifies a field name from the records in the calling list, a wildcard character, and a value. A value can be numbers, letters, dates, and times. For example, account balances consist of numbers and customer names consist of letters.

Wildcard characters include the following symbols:

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

For more detailed pattern matching rules, see [Chapter 23: Pattern matching rules](#) on page 324.

Example record selection statements include the following:

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

Consider the following tips when you create your record selection statement:

- You can connect two or more statements using the operators **And** and **Or**.  
Use **And** to narrow the selection to the customer records that meet the criteria in **both** statements.  
Use **Or** to broaden the selection to select the customer records that meet the conditions in **either** statement.
- Click **Append** to add a line to the bottom of the selection area.
- Click **Insert** to insert a line below the cursor.
- Click **Delete** to delete the selected line.

---

## Understand the Selection Reports settings

Click **Selection Reports** on the button bar to list the record selections that were previously run.

Selection Reports contains summary information that you do not modify.

To view a selection report, click a selection. The **Details** tab contains the report details that you can copy and paste into a different application or save and print the report. For more information, see [Save and print a Record Selections report](#) on page 109.

## Record selection

The Selection Reports pane contains the following headings:

| <b>Heading</b>    | <b>Description</b>                                                                                            |
|-------------------|---------------------------------------------------------------------------------------------------------------|
| Selection         | Record selection file name.                                                                                   |
| List              | Calling list associated with this record selection                                                            |
| Status            | Record selection status is In Use if it is used for a currently running job or Available if it is not in use. |
| Records           | Number of customer records associated with this record selection file                                         |
| Records Remaining | Number of remaining records to dial. The s number changes if the job is running.                              |
| Recalls           | Number of recalls or callbacks that the record selection file has flagged.                                    |
| Selection Ran at  | The time and date when the record selection was run.                                                          |

---

## Using a record selection

This section contains the following topics to help you create a record selection:

- [Open and view a record selection](#) on page 104
- [Complete the Detail tab](#) on page 105
- [Complete the Records tab](#) on page 105
- [Complete the Time Zones tab](#) on page 106
- [Complete the Results tab](#) on page 106
- [Complete the Recalls tab \(optional\)](#) on page 106
- [Complete the Sort tab \(optional\)](#) on page 107
- [Create a record selection](#) on page 107
- [Save a record selection](#) on page 108
- [Edit a record selection](#) on page 108
- [Delete a record selection](#) on page 109
- [Verify a record selection](#) on page 109
- [Run a record selection](#) on page 109
- [Save and print a Record Selections report](#) on page 109

---

## Open and view a record selection

Use the following procedure to open and view a record selection.

1. Select **Start > All Programs > Avaya > Supervisor > Editor**.
2. On the button bar, click **Selections**.

The list of selections for the selected dialer appear.

3. To see record selections that have been defined for a different dialer, click the name of the dialer on the button bar, and then click **Selections** for that dialer.
4. Click a record selection title to display the selection settings in the right-most pane.
5. Click a tab to move through the settings.

---

## Complete the Detail tab

Use the following procedure to modify the fields on the **Details** tab.

1. Click the **List** field to use the drop-down list. Select a calling list.
2. Click the **Ignore Time Zone** check box to ignore time zones and to follow the sun. Clear the check box to use time zones.
3. Click the **Strategy** field to use the drop-down list.

Select a phone strategy file that you have already created.

It is beneficial to create a phone strategy, record selection and then job, in that order.

4. Click the **Unit Field** field and select a unit work list.
5. Click the **Selection Type** field and select **Infinite**, **Verify**, or blank.

Blank is an empty, blank option; in this case it indicates that you want neither **Infinite** nor **Verify**.

Select **Infinite** if your job is an infinite job; select **Verify** if your job is a verification job.

---

## Complete the Records tab

Use the **Records** tab to define your record selection statement.

1. Click the **Records** tab.
2. Click the **Field** field to use the drop-down list. Select a field (for example, BALANCE).
3. Double-click the **Value** field to enter a value (for example, >3000).
4. (Optional) If you use the **Logic** field, you begin to create a multi-line logic statement. Click the **Logic** field to use the drop-down list to select **And** or **Or**.
5. Click the **Group** field to enter a letter or number.

For example, if you enter a "1" in the **Group** column for the first row and a "1" in the **Group** column for the second row, then you have just grouped the first two rows into a group named "1." When you group rows, the **Logic** column becomes a critical linking component because its logic operator determines how the linked elements resolve as one statement.

6. To add a row, select **Edit > Append Row**.
7. Repeat steps 2 through 6 for each selection criteria.

---

## Complete the Time Zones tab

Use the following procedure to select which time zones the system will call.

1. Select the time zones you want to call.  
To select all time zones, right-click and select **Select All**.
2. Clear the each time zone you do not want to include.  
To clear all time zones, right-click and select **Unselect All**.

---

## Complete the Results tab

Use the following procedure to complete the **Results** tab.

1. Select the completion code you want the system to call.  
Select **File > Select All** or right-click and select **Select All**.
2. Clear each completion code you do not want to call.  
Select **File > Select All** or right-click and select **Unselect All** to clear all of the completion codes.

**Tip:**

New records that have not been called yet are assigned a “Record not yet called” code. You will almost always select the “Record not yet called” box because you have never attempted to call that customer before.

---

## Complete the Recalls tab (optional)

The **Recalls** tab is optional. Use the **Recalls** tab to filter which agent-set recall records that dialer will use to place calls.

To dial all scheduled agent-set recalls, do not complete this tab.

To make only the recalls scheduled during the current job, enter criteria to match the **Records** tab.

To prevent any agent-set recalls, enter values that cannot be met so that no records can qualify for recall. For example, select the STATE field and enter ZZ (no records will have a STATE value of ZZ, so no records can be selected for recall).

Use the following procedure to complete the **Recalls** tab:

1. If the **Recalls** tab has no visible rows, select **Edit > Append Row** or right-click and select **Append Row**.

## Record selection

2. Click the **Field** field to select a field (for example, BALANCE).
3. Double-click the **Value** field to enter a value (for example, >3000).
4. (Optional) If you use the **Logic** field, you begin to create a multi-line logic statement. Click the **Logic** field to use the drop-down list to select **And** or **Or**.
5. Double-click the **Group** field to enter a letter or number.

For example, if you enter a “1” in the **Group** column for the first row and a “1” in the **Group** column for the second row, then you have just grouped the first two rows into a group named “1.” When you group rows, the **Logic** column becomes a critical linking component because its logic operator determines how the linked elements resolve as one statement.

---

## Complete the Sort tab (optional)

The **Sort** tab is optional.

Use the following procedure to tell the system how to sort the selected records:

1. If the Sort tab has no visible rows, select **Edit > Append Row** or right-click and select **Append Row**.
2. To change the priority, select the **Edit** menu or right-click the row and then select **Move Up** or **Move Down**.
3. Click the **Sorts Records By** field to use the drop-down list and select a field.
4. Click the **Order** field to use the drop-down list and select **Ascending** or **Descending**.



### Tip:

You can set up to 10 sorts.

---

## Create a record selection

Use the following procedure to create a record selection:

1. Select the name of the dialer where you want your record selection to reside. (You can save it to additional dialers or delete it from this dialer later.)
2. On the button bar, click **Selections**.
3. Select **File > New**. The right-hand pane populates.
4. In the right-hand pane, click the **List** field and select a calling list.
5. Click a tab to complete the settings. For more information, see the following topics:
  - [Complete the Detail tab](#) on page 105
  - [Complete the Records tab](#) on page 105

- [Complete the Time Zones tab](#) on page 106
  - [Complete the Results tab](#) on page 106
  - [Complete the Recalls tab \(optional\)](#) on page 106
  - [Complete the Sort tab \(optional\)](#) on page 107
6. When finished, select **File > Save**.
    - a. The record selection is automatically saved to the dialer you selected.

In a multi-dialer environment, select the dialers you want to save the record selection.

If the additional dialers were unavailable, select **Settings > Options** to change your multi-dialer settings. For more information, see [Options, Multi-dialer tab](#) on page 141.
    - b. Enter a file name, and then click **OK**.

---

## Save a record selection

You can save a record selection to another dialer. If the multi-dialer is not enabled, see [Enable or disable multi-dialer commands](#) on page 73 to enable the feature.

1. Use the following procedure to save a record selection:
2. When you finish defining settings for a record selection, select **File > Save**.
3. Select **File > Save**.

If multi-dialer is enabled, you can save the record selection to additional dialers.

  - a. In the Save As dialog box, select another dialer if you want to save the phone strategy to a different dialer.
  - b. Enter a file name for your strategy, and then click **OK**.

Avaya Proactive Contact automatically saves the file to the selected dialer.

---

## Edit a record selection

Use the following procedure to edit a record selection:

1. Click on the record selection you want to edit.
2. Make the necessary edits on the tabs.
3. Select **File > Save** to save the changes.

## Delete a record selection

Use the following procedure to delete a record selection:

1. Select the record selection you want to delete.
2. Select **File > Delete**.
3. When asked if you are sure, click **Yes** if you are sure.

---

## Verify a record selection

Use the following procedure to verify that the settings for a particular record selection are complete and that the record selection will run when started.

Avaya Proactive Contact displays a message if an error occurs.

You should review the tabs before verifying a record selection. You cannot verify a record selection until you have saved your work.

1. Select the record selection you want to verify.
2. Select **File > Verify**, and then click **OK**.

---

## Run a record selection

Use the following procedure to run a record selection:

1. Click the record selection you want to run.
2. Select **File > Run**, and then click **OK**.



**Tip:**

You do not need to run a record selection before you start a job. You can, however, run a record selection to check to determine how many records are selected. When you start a job, the system first verifies the record selection, and then starts the job.

---

## Save and print a Record Selections report

Use the following procedure to save a Record Selections report as an HTML file:

1. Click **Selections Report** in the left-hand pane.

2. Select a selections report in the Record Selections window.  
The report appears in the right-hand pane.
3. Select **File > Save As HTML**.  
The **Save As** dialog opens in your preference directory.
4. Enter a file name and click **OK**.
5. Click **Yes** to display the report.  
Internet Explore displays the report ready for you to print.
6. Select **File > Print** to print the report.

## Maintaining a record selection

This section contains the following topics to help you maintain a record selection:

- [Copy a record selection](#) on page 111
- [List all record selections on a selected dialer](#) on page 111
- [View selection reports](#) on page 112
- [View record selection settings](#) on page 112
- [Append record selection rows](#) on page 112
- [Insert a row in a record selection](#) on page 113
- [Delete a row in a record selection](#) on page 113
- [Move a row up in a record selection](#) on page 114
- [Move a row down in a record selection](#) on page 114
- [Select all rows in a record selection](#) on page 114
- [Unselect all rows in a record selection](#) on page 115

---

## Copy a record selection

Use the following procedure to copy a record selection:

1. Select the record selection you want to copy.
2. Select **File > Save As**.

In a multi-dialer environment, select the dialers you want to save the record selection. If the multi-dialer is not enabled, see [Enable or disable multi-dialer commands](#) on page 73 to enable the feature.

3. Enter a name for the copied record selection, and then click **OK**.

---

## List all record selections on a selected dialer

Use the following procedure to view a list of all record selections on a selected dialer:

1. Select the name of the dialer whose record selections you want to list.
2. Click **Selection Files**. The record selections for the selected dialer appear.

---

## View selection reports

In the button bar, you see both **Selections** and **Selection Reports**. The difference between these two is that **Selections** displays all of the record selections that you have created and **Selection Reports** displays all of the record selections that you have run.

**Selection Reports** provides detailed information about the results of the record selection.

Use the following procedure to view selection reports.

1. On the button bar, select the dialer whose record selection reports you want to view.
2. Click **Selection Reports**.  
The right-hand pane list the selection reports.
3. Click the selection report you want to open. The right-hand pane populates with your selection report.
4. If you want to copy and paste the report to a different application, right-click and select **Select All**. Then, right-click and select **Copy**.

---

## View record selection settings

Use the following procedure to view record selection settings:

1. On the Editor button bar, click **Selections**.
2. Click the record selection you want to open.  
The record selection settings will appear in the right hand pane.
3. Click a tab to navigate through all of the record selection settings.

---

## Append record selection rows

Appending a row adds a row beneath the bottom row.

Use the following procedure to append a row in your record selection:

1. On the Editor button bar, click **Contact Management**.
2. Click **Selections**.
3. Click the record selection you want to edit.
4. In the right-hand pane, click the following tabs to append a row to the record selection settings:
  - **Records**

## Record selection

- **Recalls**
  - **Sort**
5. Select **Edit > Append Row**.

---

## Insert a row in a record selection

Inserting a row adds a row directly above the row you select.

Use the following procedure to insert a row to your record selection:

1. On the Editor button bar, click **Contact Management**.
2. Click **Selections**.
3. Click the record selection you want to edit.
4. Click one of the following tabs:
  - **Records**
  - **Recall**
  - **Sort**
5. Select the row that the new row will appear directly above.
6. Select **Edit > Insert Row**.

---

## Delete a row in a record selection

Use the following procedure to delete a row from your record selection:

1. On the Editor button bar, click **Contact Management**.
2. Click **Selections**.
3. Click the record selection you want to edit.
4. Click one of the following tabs:
  - **Records**
  - **Recall**
  - **Sort**
5. Select the row that the new row will appear directly above.
6. Select **Edit > Insert Row**.
7. Select the row you want to delete.
8. Select **Edit > Delete Row**.

---

## Move a row up in a record selection

You can change the sort order by moving the row up or down on the **Sort** tab.

Use the following procedure to move a row up in you record selection:

1. On the Editor button bar, click **Contact Management**.
2. Click **Selections**.
3. Click the record selection you want to edit.
4. Click the **Sort** tab.
5. Select the row you want to move.
6. Select **Edit > Move Up**.

---

## Move a row down in a record selection

You can change the sort order by moving the row up or down on the **Sort** tab.

Use the following procedure to move a row down in your record selection:

1. On the Editor button bar, click **Contact Management**.
2. Click **Selections**.
3. Click the record selection you want to edit.
4. Click the **Sort** tab.
5. Select the row you want to move.
6. Select **Edit > Move Down**.

---

## Select all rows in a record selection

Use the following procedure to select all rows that have a check box on the **Time Zones** and **Results** tabs:

1. On the Editor button bar, click **Contact Management**.
2. Click **Selections**.
3. Click the record selection you want to edit.
4. Click one of the following tabs:
  - **Time Zones**
  - **Results**

5. Select **Edit > Select All**.

---

## Unselect all rows in a record selection

Use the following procedure to clear all rows that have a check box on the **Time Zones** and **Results** tabs:

1. On the Editor button bar, click **Contact Management**.
2. Click **Selections**.
3. Click the record selection you want to edit.
4. Click one of the following tabs:
  - **Time Zones**
  - **Results**
5. Select **Edit > Unselect All**.

---

## Record Selection for Multiple Dialers

When a record selection is run for multiple dialers, it will execute on the Proactive Contact that contains the list. However for many dialers it is needed for how many actual call selections are run. They run simultaneously, but if there is calling being done on the same records that are being selected, the records selected may not match 100%. Avaya Proactive Contact that holds the list will then "push" the indexes to the remote system via a socket connection of listserver. You will see a "callsel (for remote)" message in the account log on the PDS containing the list (one callsel message for each call selection run for remote systems). The time stamp for the "callsel (for remote)" account log entry will be in local time of the remote system, which can look odd as it will likely be off from the other times of the nearby messages in that account log.

Once the job has been started on the remote system listserver will "fetch" each record to the job, once the call is completed it will "push" the record back to the list.

## Run Record Selections From Command Line

Record Selections can be run from the command line using `md_callsel`:

```
md_callsel redlab06-list1 xyz
```

Record Selections can run locally on remote list with `callsel` by using the `callsel -l redlab03-list1 -s xyz -x command`.

# Chapter 6: Jobs

A job contains all the information that Avaya Proactive Contact needs to place phone calls to customers. A job integrates a calling list, phone strategy, record selection, and other settings to place outbound calls and receive inbound calls.

There can be a maximum of 20 jobs running on your installation, including the agent owned recall and linked jobs.

This section contains the following topics:

- [Understanding jobs](#) on page 117
- [Understanding job settings](#) on page 122
- [Using jobs](#) on page 134
- [Maintaining jobs](#) on page 138
- [Understanding Editor system dialog boxes](#) on page 141

---

## Understanding jobs

A job contains all the information the system needs to place phone call to customers. The type of job you set up determines the type of calling activities that agents handle.

This section contains the following topics to help you create and run jobs:

- [Job types](#) on page 117
- [Outbound jobs](#) on page 118
- [Call pacing](#) on page 119

---

## Job types

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

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

You can start more than one job at one time.

If you have an Agent Blending system, you can use Editor to set up outbound jobs.

If you have an Intelligent Call Blending system, you can use Editor to set up the following types of jobs:

**Outbound jobs** - During outbound jobs, the system uses a calling list, phone strategy, record selection, and other settings to place outbound calls to customers. For more information, see [Understanding job settings](#) on page 122.

**Inbound jobs** - An inbound job is a job on an Intelligent Call Blending system where the system automatically routes inbound calls to agents.

An Agent Blending system does not have inbound jobs. The ACD controls inbound calling activity rather than the system. The agents on the ACD handle the inbound calls.

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

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

---

## Outbound jobs

During outbound jobs, the system automatically dials phone numbers and routes calls to agents. Depending on your system configuration, the system monitors the phone calls to ensure that agents do not receive phone calls that result in the following connections:

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

This section contains the following topics:

- [When a job stops](#) on page 118
- [Types of outbound jobs](#) on page 118

## When a job stops

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

A quota is a maximum number of releases for a particular completion code. When the job reaches the quota for a unit, no more calls are placed.

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

- The job reaches the **Latest Time to Stop** setting.
- You stop the job manually.
- The system placed a call to all initial phones at least once.
- The system placed a call to all recalls at least once.
- The system placed a call to all scheduled recalls, but stops dialing after placing a call to all initial phones at least once.

In Editor, you set and modify a quota that the system applies to the job when the job starts. In Monitor, you set and modify a quota that affects the current job while that job runs.

## Types of outbound jobs

An outbound job uses settings to place calls to customers.

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

- A Unit Work List job divides customer records into work lists or subsets. Agents work with records only in their assigned work lists.
- A Managed Dialing job allows agents to preview or cancel a customer record before the dialer places the call the customer. Depending on your system setup, you can adjust the maximum preview time and allow agents to cancel calls.
- A Sales Verification job verifies a transaction or commitment that the customer made. Use the Sales Verification record selection when starting a Sales Verification job.
- An Infinite job uses a special record selection to add records for calling to an existing calling list while the job is active. Use the Infinite record selection when starting an Infinite job. An infinite job runs until you stop it manually.
- A Virtual Agent job allows the system to run a job without agents. When the system detects a customer or an answering machine, the system plays a recorded message.

In Editor Job Wizard, you define Unit Work List, Managed, Sales Verification, and Virtual jobs on the second screen. The job you select determines the type of additional jobs you can select to create. For example:

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

---

## Call pacing

Avaya Proactive Contact has two methods to pace outbound dialing during an outbound job: Cruise Control and Expert Calling Ratio.

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

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

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

**Note:**

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

This section contains the following topics:

- [Cruise Control](#) on page 120
- [Expert Calling Ratio](#) on page 120

## Cruise Control

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

- The job is subject to government regulations prohibiting abandoned calls, nuisance calls, or silent calls.
- You want to provide a high level of customer service to the contacted parties.
- You want to supervise agents and calling activities rather than manually supervising the predictive dialing process.
- The number of agents on an outbound job is small or may change. The Cruise Control feature requires at least eight outbound agents to be logged into a job to function correctly.
- Agents perform other activities such as handling inbound calls during the job.

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

When you set up an outbound job that uses Cruise Control, you must define the **Desired service level** and the **Time to connect tolerance** settings. The system uses these settings to do the following:

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

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

## Expert Calling Ratio

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

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

Expert Calling Ratio allows you to change the way the system determines when to place the next call while a job is running.

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

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

The Expert Calling Ratio method tells the dialer when to place calls based on one of the following values:

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

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

---

## Understanding job settings

After double-clicking a job or selecting the **New** command, a tree structure appears on the **Job Detail** tab. Use this tree to modify your job settings. Click the fields located in the **Setting** column.

There are several settings that you define for each job. The settings on your system depends on your system configuration.

Job settings appear in the following groups:

- [Basic settings](#) on page 122
- [Call pacing settings](#) on page 123
- [Files settings](#) on page 125
- [Job Type settings](#) on page 127
- [Inbound Processing settings](#) on page 127
- [Labels settings](#) on page 128
- [Managed Dialing settings](#) on page 129
- [Outbound Processing settings](#) on page 130
- [Post Processing settings](#) on page 131
- [Quota Settings](#) on page 131
- [Recall settings](#) on page 131
- [Service Level settings](#) on page 132
- [Wait Queues settings](#) on page 132
- [Interactive Voice Response settings](#) on page 133

---

## Basic settings

Basic settings are for every type of job: outbound, inbound, and blend.

The following settings are listed in the **Basic** group:

- [Job description](#) on page 123
- [Line type\(s\) for use on job](#) on page 123
- [Earliest start time](#) on page 123
- [Latest stop time](#) on page 123
- [Calling party number \(ANI\)](#) on page 123

- [Require unit ID for agent login](#) on page 123
- [Transaction completion code](#) on page 123

**Job description** - Select the field to enter a description of the job. For example, type a description that reflects the goal of the job such as 30-day Accounts.

**Line type(s) for use on job** - Select the group of lines that the system uses for a job.

**Earliest start time** - Select the field to set the time that you want the system to start dialing customer phone numbers and receiving inbound calls. Enter numbers only.

The system is preset with recommended start and stop times for different time zones. If you enter a time that is earlier than the recommended start time, the dialer does not dial phone numbers until the system clock reaches the recommended time.

**Latest stop time** - Select the field to set the time that you want the dialer to stop dialing customer phone numbers and receiving customer inbound calls. Enter numbers only.

**Calling party number (ANI)** - Identifies the party that placed the phone call. Displays the phone number of your contact center on the phone of the party that received the phone call.

**Require unit ID for agent login** - Select the field to require an agent to enter a unit work list when the agent logs in to Avaya Proactive Contact Agent.

**Transaction completion code** - Select the field to enter the call completion code to indicate the need to verify the transaction by the Sales Verification job.

---

## Call pacing settings

Call pacing settings are for outbound and blend jobs.

**Note:**

The same job name on different dialers in a pod can use a different call pacing method. To ensure consistent monitoring and reporting, use the same settings for the same job name on each dialer. For more information, see [Call pacing](#) on page 119.

The following settings are listed in the **Call Pacing** group:

- [Call Pacing method](#) on page 124
- [Initial hit rate](#) on page 124
- [Minimum hit rate](#) on page 125

## Call Pacing method

Select Cruise Control or Expert Calling Ratio from the drop-down list and press the **Enter** key to set the call pacing method.



**Important:**

If you select Cruise Control, you must set the **Desired service level** and **Time to connect tolerance** settings listed in the **Service Level** group. For more information, see [Service Level settings](#) on page 132.

The following table contains the settings for the Expert Calling Ratio method:

| Expert Calling Ratio Setting | Description and recommended setting                                                                                                                                                                                                                                                                                                                                                                                                         |
|------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Calls in the wait queue      | <p>The system achieves a balance between agents waiting for a call and customers placed in the wait queue. This setting affects the customer wait times.</p> <p>Enter a percent value from 1 through 100. The recommended setting is from 4 through 31 to place fewer customers in the wait queue. A low setting can affect the time that agents wait between phone calls.</p>                                                              |
| Agent Work Time              | <p>The system monitors the time agents take to complete calls and update records, and adjusts the calling pace accordingly.</p> <p>A higher number shortens the average agent idle time and increases the number of customers in the wait queue at any given time.</p> <p>Enter a higher number when update times are relatively short.</p> <p>Enter a percent value from 1 through 100. The recommended setting is from 29 through 71.</p> |
| Agent Update Time            | <p>The system monitors the time agents take to update records and adjusts the calling pace accordingly.</p> <p>A higher number shortens the average agent idle time and increases the number of customers in the wait queue at any given time.</p> <p>Enter a higher number when update times are relatively short.</p> <p>Enter a percent value from 1 through 100. The recommended setting is from 32 through 78.</p>                     |

## Initial hit rate

Select the field to enter the initial hit rate. Enter a number.

The initial hit rate determines the average number of calls per agent that the system makes during the first five minutes of the job. The initial hit rate is the number of call completions compared with call attempts.

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

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

| If you want to make  | Set rate to | Description                        |
|----------------------|-------------|------------------------------------|
| Daytime home calls   | 30          | 3 calls per agent for 1 connection |
| Evening home calls   | 50          | 2 calls per agent for 1 connection |
| Weekend home calls   | 50          | 2 calls per agent for 1 connection |
| Daytime office calls | 70          | 1 call per agent for 1 connection  |

## Minimum hit rate

Select the field to set the minimum hit rate for the job. Enter a value from 1 through 100 in increments of 10. A typical setting is 30.

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

Use minimum hit rate to limit the number of lines a job can use. For example, a minimum hit rate of 30 means the system will make no more than three dialing attempts for each agent, or 30%. This prevents the system from allocating more pooled lines to a poorly performing job at the expense of a more successful job.

---

## Files settings

Files settings are for every type of job: outbound, inbound, and blend. The system displays the appropriate settings for the type of job.

The following settings are listed in the **Files** group:

- [Outbound calling list](#) on page 126
- [Inbound calling list](#) on page 126
- [Record selection file name](#) on page 126
- [Outbound screen\(s\)](#) on page 126

- [Inbound screen\(s\)](#) on page 126
- [Agent keys definition file name](#) on page 126
- [Do Not Call group name](#) on page 126
- [Name of next job](#) on page 126
- [Transfer to inbound job name](#) on page 127

**Outbound calling list** - Select a calling list name from the drop-down list. The calling list description, if any, appears to the right of the calling list name.

The job uses the outbound calling list to place calls to customers during outbound and blend jobs. The calling list name includes the host dialer name where the list is stored.

**Inbound calling list** - Select a calling list name from the drop-down list. The calling list description, if any, appears to the right of the calling list name.

The job uses the inbound calling list to identify the calls that customers placed during inbound and blend jobs. The calling list name includes the host dialer name where the list is stored.

**Record selection file name** - Select the name of the record selection from the drop-down list. The record selection defines which records the dialer uses to place phone calls during outbound and blend jobs. The record selection contains the phone strategy for the job.

**Outbound screen(s)** - Select one or more outbound screens from the window. This setting determines the outbound screens that agents see on their workstations and the order in which the screens display. Select outbound screens for outbound and blend jobs.

**Inbound screen(s)** - Select one or more inbound screens from the window. This setting determines the inbound screens that agents see on their workstations and the order in which the screens display. Select inbound screens for inbound and blend jobs.

**Agent keys definition file name** - Select the agent keys file name to use during a job from the drop-down list. An agent keys file is configured during installation. The file lists the sets of functions for keys used during types of jobs.

**Do Not Call group name** - Select the name of the Do Not Call group file from the drop-down list.

The system adds customer information to the file when a customer requests to be added to the Do Not Call List.

**Name of next job** - Select the field to select the next outbound or blend job to start from the drop-down list. The system automatically starts the job when the agent on the current job completes the last call and releases the record. The system displays a message telling the agents that they are changing jobs.

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

| Job type            | Can link to                   |
|---------------------|-------------------------------|
| outbound job        | Any job, except a virtual job |
| Managed Dialing job | Any job, except a virtual job |
| inbound job         | Any job, except a virtual job |
| blend job           | Any job, except a virtual job |
| virtual job         | A virtual job                 |

If you stop a job that is linked to another job, the system automatically starts the next job.

**Transfer to inbound job name** - Select the inbound job name from the drop-down list to identify the job name that agents can use to transfer calls during outbound and blend jobs.

---

## Job Type settings

Job Type settings are for outbound jobs. Select the appropriate check box to identify the type of special job: Sales Verification or Virtual Agent.

**Transaction verification job** - Select the check box to identify that the outbound job is a Sales Verification job.

**Run job without agents** - Select the check box to identify that the outbound job is a Virtual Agent job. The system runs your job without agents. This field does not appear unless you select Virtual in the Editor Job Wizard when you create a new job.

---

## Inbound Processing settings

Inbound Processing settings are for inbound or blend jobs. The system displays the appropriate settings for the type of job.

The following settings are listed in the **Inbound Processing** group:

- [Activate inbound lines at login](#) on page 128
- [Service inbound calls immediately](#) on page 128
- [Move blend agents to inb after call](#) on page 128
- [Max time blend agent idle on inbound](#) on page 128
- [% calls in queue to inbound agents](#) on page 128

- [Maximum time call can spend in wait queue \(seconds\)](#) on page 128

**Activate inbound lines at login** - elect the check box to activate the inbound lines when agents log in to the inbound or blend job.

**Service inbound calls immediately** - Select the check box to handle the inbound calls immediately during the inbound or blend job.

**Move blend agents to inb after call** - Select the check box to have blend agents handle inbound calls after handling the outbound call during the blend job.

**Max time blend agent idle on inbound** - Select the field to enter the maximum number of seconds that the blend agent can be idle between inbound calls during the blend job. When the time exceeds the setting, the system moves the agent to handle outbound calls.

**% calls in queue to inbound agents** - Select the field to enter the upper percentage limit of the calls waiting to be passed to inbound agents during the inbound or blend job.

**Maximum time call can spend in wait queue (seconds)** - Select the field to enter the longest time in seconds that calls can be held in the wait queue during the inbound or blend job.

---

## Labels settings

Files settings are for every type of job: outbound, inbound, and blend. The system displays the appropriate settings for the type of job.



### Important:

The changes you make to a script become available for use the next time you restart the system. You can set up a job with a new script but cannot run the job until you restart the system.

The following settings are listed in the **Labels** group:

- [Script label for call](#) on page 128
- [Script label for answer](#) on page 129
- [Main data processing label](#) on page 129
- [Transfer wait queue label](#) on page 129

**Script label for call** - Select the script label from the drop-down list. The script label is the name of the script used during the outbound job.

The message script is the message or string of messages customers hear. Jobs can use different wait queue messages.

**Script label for answer** - Select the script label from the drop-down list. The script label is the name of the script used during the inbound job.

The message script is the message or string of messages customers hear. Jobs can use different wait queue messages.

**Main data processing label** - Select the correct main data processing label from the drop-down list. The main data process label instructs the system to begin job processing and tells the system what to display on the agent screens.

Select the appropriate data process label for the job. Select **virtual** for a virtual job, **verify** for a sales verification job, and **generic** for an outbound job.

**Transfer wait queue label** - Select the correct transfer wait queue label from the drop-down list. The transfer queue label is the name of the transfer script used during the inbound or blend job.

---

## Managed Dialing settings

During a managed job, an agent can preview a customer record before placing or cancelling the call.

Managed job settings are for outbound jobs.

The following settings are listed in the **Managed Dialing** group:

- [Managed \(preview\) dialing](#) on page 129
- [Allow agents to cancel call](#) on page 129
- [Time limit \(seconds\) for preview](#) on page 130
- [Display empty record at preview](#) on page 130
- [Allow dialing from deleted record](#) on page 130
- [Method for record search type at preview](#) on page 130
- [Key field for LIS record search](#) on page 130

**Managed (preview) dialing** - Select the check box to allow an agent to look at a customer record before the dialer places the phone call.

**Allow agents to cancel call** - When you enable **Managed preview dialing**, you can allow an agent to cancel a Managed Dialing call.

Select the check box to allow an agent to cancel the managed dialing call. Clear the check box to prevent agents from cancelling a managed dialing call.

**Time limit (seconds) for preview** - When you enable Managed preview dialing, you can set up the time limit during which an agent can preview a record before the system dials the number.

Select a number from 1 through 999, or select 0 (zero) to set an unlimited amount of preview time.

**Display empty record at preview** - When you enable **Managed preview dialing**, you can allow an agent to create a new record during preview from an empty record. The agent then uses the record to place the phone call.

Select the check box to display an empty record during preview. Clear check box to prevent displaying an empty record during preview.

**Allow dialing from deleted record** - When you enable **Managed preview dialing**, you can allow an agent to use a record that was identified as not to use. When an agent removes or deletes a record, the record remains on the dialer. The agent can place a phone number from that record.

Select the check box to allow agents to use the record. Clear the check box to prevent dialing a record that was marked not to use.

**Method for record search type at preview** - When you enable **Managed preview dialing**, you can select one of the following options from the drop-down list:

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

**Key field for LIS record search** - Select the field and enter the field name you want to use as the key field for the record search at preview.

---

## Outbound Processing settings

Outbound Processing settings are for outbound and blend jobs.

The following settings are listed in the **Outbound Processing** group:

**Shutdown job when no more calls remain** - Select the check box if you want the system to end jobs when each customer has been called at least once.

Clear the check box if you want the system to end jobs after all calls are completed, including recalls.

**Make alternative phone lowest priority in selecting next record** - Select the field to place calls that are first attempts, retries, and recalls before placing a phone call that uses the alternative phone.

**Order calling of records by time zone** - Select the check box if you want the system to order calls by times zones. The dialer places phone calls “following the sun” from east to west.

With either choice, time zone laws are still applied.

---

## Post Processing settings

The following setting in the **Post Processing** group is for every type of job: outbound, inbound, and blend:

**Automatically start Update mode on customer hang up** - Select the check box to enable the setting. The system starts to record the time an agent takes to complete the after call work when the customer disconnects the phone call.

---

## Quota Settings

The following settings in the **Quota Settings** group are for outbound or blend jobs.

**Quota setting (completion code, quota)** - Select the field in the drop-down list to select a completion code. Select a quota for the completion code. The system stops the job automatically when the number of completion codes reaches the quota.

**Quota settings file name** - Select the field to enter a name for the file that saves the quota settings.

**Save quota setting when the job ends** - Select this option to save the quota setting when the jobs ends. The system continues to use the quota setting the next time the job starts.

---

## Recall settings

The following settings in the **Recall** group are for outbound or blend jobs.

**Recall reschedule interval (minutes)** - If your system uses Agent Owned Recall, this field is visible. Select the field to enter the minimum number of minutes that must elapse before the system tries to pass the agent a recall.

**Recall notification time (minutes)** - If your system uses Agent Owned Recall, this field is visible. Select the field to enter the time in minutes during which the system looks for the agent who set up the recall on the job and is available for a call.

**Number of recall attempts** - If your system uses Agent Owned Recall, this field is visible. Select the field to enter the number of times to look for the agent that set up the recall.

---

## Service Level settings

The following settings in the Service Level group are for outbound, inbound, and blend jobs.



### Important:

If you select Cruise Control in the **Call Pacing** group, you must set the **Desired service level** and **Time to connect tolerance** settings. For more information, see [Call pacing settings](#) on page 123.

Avaya Proactive Contact uses the **Desired Service Level** and **Time to connect tolerance** settings for real-time monitoring and reporting of outbound, inbound, and blend jobs.

For jobs that use Cruise Control, Avaya Proactive Contact uses the **Desired service level** and **Time to connect tolerance** settings to predict when to automatically dial phone numbers and distribute the calls within the tolerable time period.

**Desired service level (percentage)** - The target percentage of serviced calls that you want the system to maintain.

Enter percent value that is from 70 through 99. The default value is 99.

**Time to connect tolerance (seconds)** - The number of seconds that you will allow a phone call to be delayed waiting for an agent before the system designates the call as a nuisance call. Typically you want to allow a minimum time delay before the system sends the phone call to an agent.

Enter a number from 0 (zero) through 9. The default value is 1.

---

## Wait Queues settings

The following settings in the **Wait Queues** group are for outbound, inbound, and blend jobs. The system displays the appropriate settings for the job.

**Total wait delay (seconds)** - Select the field to enter the number of seconds from 0 to 999 that the customer can wait in the wait queue before the system ends the call.

**Inbound wait queue limit (seconds)** - Select the field to enter the number of seconds from 0 to 999 that the customer can wait in the inbound wait queue before the system ends the call.

**Transfer on hold message number** - Select the field to enter the number of the message that users hear during the call-transfer process.

---

## Interactive Voice Response settings

The following settings in the **Interactive Voice Response** group are for outbound, inbound, and blend jobs.

**IVR identifier** - Select the field to enter the IVR identifier.

**Script to run on the IVR** - Select the field to enter the script that customers hear when they answer an IVR phone call.

**IVR agents** - Select the field to allow IVR agents to join the job

**IVR initial script** - Select the field to enter the script agents hear when joining an IVR job.

---

## Using jobs

This section contains the following topics that help you create and use jobs:

- [Create a job](#) on page 134
- [View job settings](#) on page 135
- [Save a job](#) on page 135
- [Save a job as another name or on a different dialer](#) on page 135
- [Start a job on one or more dialers](#) on page 136
- [Start multiple jobs on currently selected dialer](#) on page 136
- [Share a List or a Job](#) on page 136

---

## Create a job

In a pod, the same job name can exist on each dialer.

To ensure consistent monitoring and reporting, use the same settings for the same job name on each dialer. For more information, see [Outbound jobs](#) on page 118.

Use the following procedure to create a job:

1. In the Editor button bar, select a dialer, and then click **Jobs**.
2. Select **File > New**.
3. Click **Next** when the **Editor Job Wizard** appears.
4. Select settings to specify the type of job you want to create, the appropriate outbound or inbound calling list, and the job options you want to use:
  - Sales Verification
  - Unit Work List
  - Virtual
  - Managed
5. When you finish the wizard, the default tree structure for your job type (inbound, outbound, blend, etc.) appears in the right-hand pane.
6. Use the **Setting** and **Value** columns to select and edit values.

---

## View job settings

Use the following procedure to view job settings:

1. Select the job you want to view.

The job settings appear in the right-hand pane.

---

## Save a job

In a pod, the same job name can exist on each dialer.

To ensure consistent monitoring and reporting, use the same settings for the same job name on each dialer. For more information, see [Outbound jobs](#) on page 118.

Use the following procedure to save a job:

1. Select **File > Save** to save the job.

If needed, provide a name.

2. Click **OK**.

---

## Save a job as another name or on a different dialer

Use the following procedure to save a job as another name or on a different dialer:

1. Select the job you want to save.

2. Select **File > Save As**.

If the multi-dialer option is enabled, select additional dialers to which you want to save the job.

If the dialer check boxes are unavailable and you want to enable them, select **Settings > Options**. For more information, see [Enable or disable multi-dialer commands](#) on page 73.

3. Enter a name for your job, and then click **OK**.

The job is saved to the dialer you selected in the button bar and it to any additional dialers you selected.

---

## Start a job on one or more dialers

You are not required to run a record selection before starting a job. Editor automatically executes the record selection if needed, and starts the job. If the job verification passes, you are offered a choice of starting the job or cancelling the action.

Use the following procedure to start a job on one or more dialers:

1. Select the job you want to start.
2. Select **File > Run**.

If the multi-dialer option is enabled, you are asked if you want to run the job on additional dialers. Select additional dialers on which you want to start the job.

3. Click **OK**.

---

## Start multiple jobs on currently selected dialer

Use the following procedure to start multiple jobs on the currently selected dialer:

1. Select the jobs you want to start.
2. Select **File > Run**, and then click **OK**.

---

## Share a List or a Job

There are two basic categories for what functionality List Sharing includes:

- Shared Calling List (commonly referred to as list sharing) and
- Shared Campaigns (commonly referred to as job sharing)

**Shared Calling List** - This feature provides you the ability for any dialer in a pod to use a calling list that physically resides on another dialer CPU's Hard Drive. This allows one Dialer Application Server to house a single calling list which 3 other dialer applications in the pod can access and use for calling in their own jobs.

Job sharing goes one step further and effectively allows all dialer applications in a pod to concurrently run the same job on the same call selection (This allows a much larger number of agents spread across multiple systems to call the same records). In actuality, each dialer will have it's own job, with a unique job number and a unique call selection index, but as long as all systems are calling on the campaign, the indexes will keep updating each other so that each system knows which records have already been called and will pick the next available record.

**Shared Campaigns** - This feature allows you to share a campaign across 2 or more dialer Applications in a POD.

This feature can only be used in the GUI (Graphical User Interface), CUI (Character User Interface) does not support this feature, nor will it be added in the future.

You must have "Multi-Dialer" option enabled in CD software. From the CE menu Settings ' Options ' Multi-Dialer tab. Click enable in "Multi-dialer settings" and then check the box for each system you wish to control in "Multi-dialer.

With Multi-dialer settings enabled, when a Proactive Contact Supervisor saves their Phone Strategy, Record Selection, and Job configurations, they will be prompted to save the changes to the file to one or more systems.

You will need to save any changes to all dialers which will be sharing the job to ensure that job files amongst the systems are the same. If any configurations in the strategy, selection, or jobs are mismatched in any way, the job sharing feature can result in displaying odd behavior.

When using Shared Campaigns the following configuration files must be the same on all Proactive Contact systems:

- locale.cfg
- timezone.cfg
- telephny.\* scripts (telephny.spt, telephny.labels, telephny.alljobs.dat
- postupdate files (if used), there must be PU\* .cfg files that specify the - of each remote list.
- ORDERBYZONES must be set to the same on all jobs, either YES or NO

**Note:**

If a single campaign is different than the others, the jobs will compete for records.

---

## Maintaining jobs

This section contains the following topics that help your maintain jobs:

- [Copy a job](#) on page 138
- [Edit a job](#) on page 138
- [Verify a job on one or more dialers](#) on page 139
- [Verify multiple jobs on the currently selected dialer](#) on page 139
- [Delete a job on one or more dialers](#) on page 139
- [Delete multiple jobs on the currently selected dialer](#) on page 139
- [List all jobs on a selected dialer](#) on page 140

---

### Copy a job

Use the following procedure to copy a job:

1. Select the job you want to copy.
2. Select **File > Save As**.

If the multi-dialer option is enabled, select the dialer where you want to copy a job.

3. Enter a name for the job, and then click **OK**.

---

### Edit a job

Use the following procedure to edit a job:

1. Select **File > Open**.
2. Select the job you want to edit, and then make the necessary edits in the right-hand pane.
3. Select **File > Save** to save the job.

If the multi-dialer option is enabled, select the additional dialers to save the job to.

4. Enter a name for the job, and then click **OK**.

---

## Verify a job on one or more dialers

Use the following procedure to verify a job on one or more dialers:

1. Select the job you want to verify.
2. Select **File > Verify**.
3. If the multi-dialer option is enabled, you are prompted to select whether or not to verify the job on additional dialers. Specify your preferences, and then click **OK**.

The results of the verification, including any settings that are in error, appear in a separate window.

4. Review the results and click **OK**.

---

## Verify multiple jobs on the currently selected dialer

Use the following procedure to verify multiple jobs on the currently selected dialer:

1. Control-click to select all the jobs you want to verify.
2. Select **File > Verify**.

---

## Delete a job on one or more dialers

Use the following procedure to delete a job on one or more dialers:

1. Select the job you want to delete.
2. Select **File > Delete**.

If the multi-dialer option is enabled, you are prompted to specify whether or not to delete the job from additional dialers. Make your selections, and then click **OK**.

3. When prompted, click **Yes** to delete the job.

---

## Delete multiple jobs on the currently selected dialer

Use the following procedure to delete multiple jobs on the currently selected dialer:

1. Control-click to select the jobs you want to delete.
2. Select **File > Delete**.

If the multi-dialer option is enabled, you are prompted to specify whether or not to delete the job from additional dialers. Make your selections, and then click **OK**.

3. When prompted, click **Yes** to delete the jobs.

---

## List all jobs on a selected dialer

Use the following procedure to list all jobs on a selected dialer:

1. Select the dialer name on the button bar.
2. Click **Jobs**. A list of jobs on the selected dialer appears.

---

## Understanding Editor system dialog boxes

This section describes the dialog boxes you use in Editor.

This section contains the following topics:

- [Options dialog box](#) on page 141
- [Screens dialog box](#) on page 142

---

### Options dialog box

The **Options** dialog box contains the following tabs:

- [Options, Multi-dialer tab](#) on page 141
- [Options, Save tab](#) on page 141
- [Options, Refresh tab](#) on page 141

#### Options, Multi-dialer tab

The **Multi-dialer** tab allows you to customize Editor's interaction with your various dialers.

**Multi-dialer settings, Enable or disable multi-dialer commands** - Select **Enable** to enable multi-dialer commands. Select **Disable** to disable multi-dialer commands.

**Multi-dialer commands apply to** - From the list, select the dialer you want to use.

#### Options, Save tab

This **Save** tab allows you to customize how the Save command behaves.

**When saving to an existing filename** - Select **Prompt before overwrite** to receive a prompt before saving. Select **Overwrite without asking** to save without receiving a prompt.

#### Options, Refresh tab

The **Refresh** tab allows you to specify your Refresh rate preferences.

**How often should data be refreshed on the screen** - Select the interval at which you want Editor to refresh.

---

## Screens dialog box

The **Screens** dialog box allows you to select screens to use during a job.

**Available screens** - Lists the agent screens defined for the system.

**Screens (in order)** - Lists the selected screens in the sequence that a job will use them.

**Selection buttons** - Move one or more selected screens between lists.

| Button | Description                                                                                           |
|--------|-------------------------------------------------------------------------------------------------------|
| >      | Moves a selected screen in the <b>Available screens</b> list to the <b>Screens (in order)</b> list.   |
| >>     | Moves all the screens from the <b>Available screens</b> list to the <b>Screens (in order)</b> list.   |
| <      | Moves a selected screen from the <b>Screens (in order)</b> list to the <b>Available screens</b> list. |
| <<     | Moves all the screens from the <b>Screens (in order)</b> list to the <b>Available screens</b> list.   |



**Tip:**

You can also use the up and down arrow keys to change the order in which the screens appear.



# Chapter 7: Messages and scripts

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

Messages provide the following functions:

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

You can create messages and scripts if you have administrative privileges. The Messages and Scripts button bar appears in the left-hand pane of Editor.

This section contains the following topics:

- [Understanding messages](#) on page 145
- [Using messages](#) on page 148
- [Maintaining messages](#) on page 151
- [Understanding scripts](#) on page 153
- [Using scripts](#) on page 156
- [Maintaining scripts](#) on page 159
- [Understanding Messages and Scripts dialog boxes](#) on page 161

## Understanding messages

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

On Avaya Proactive Contact with PG230, your recorded voice messages must be digitized for Avaya Proactive Contact to use them. You choose message files when you set up jobs on the system. Later you can add and remove the messages.

Avaya Proactive Contact provides a wizard to help you add messages to the system and organize them in folders.

Later you can add and remove the messages and folders.

This section contains the following topics:

- [Plan messages](#) on page 145
- [Telephony file](#) on page 146
- [Messages pane](#) on page 148
- [Record messages](#) on page 146
- [Define and create message text](#) on page 146

---

## Plan messages

In Avaya Proactive Contact, you can store up to 1970 digitized messages. Each message can be up to one minute in duration. Avaya Proactive Contact can store up to 35 minutes of recorded messages.

Before you record and digitize messages, it is helpful to compose and print the message text.

Consider the following times before you create a message:

- The purpose and use of the message
- The message text
- The male or female voice that delivers the message
- The current number of messages stored in Avaya Proactive Contact
- The category that best identifies the use for the message
- The languages that deliver the message

---

## Telephony file

The telephony.spt files stores scripts. The telephony.spt file on the dialer can not exceed 1500 lines.

**Important:**

If the number of lines exceed 1500, you receive an error. You cannot save scripts when the number of lines exceed the 1500.

If the number of lines exceed 1500, Avaya Proactive Contact might do one of the following:

- Not start jobs
- Start jobs but not deliver messages beyond line 1500

To reduce the number of lines in the telephony.spt file, do one or more of the following:

- Remove scripts and messages that you no longer use.
- Contact your Avaya Proactive Contact vendor for assistance.

---

## Record messages

Before you use Messages Wizard, you must define, record, and digitize audio messages. You have several options for recording audio messages.

For the Avaya Proactive Contact and Avaya Proactive Contact with PG230 systems, you can do the following to record messages:

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

For the Avaya Proactive Contact with Application Enablement Services, the ACD stores the recorded messages. Refer to the ACD documentation for information on recording voice messages.

When the message is ready for use, save the audio file in a location that is readily accessible to the supervisor workstation. From this workstation, you can assign the digitized audio to a message file in Editor and to a dialer.

---

## Define and create message text

Messages Wizard helps you complete the following tasks in Avaya Proactive Contact:

- Add audio messages to Avaya Proactive Contact with PG230 systems.

## Messages and scripts

- Update existing messages on Avaya Proactive Contact with PG230 systems.
  - Identify details about the message, such as is it a male voice, female voice, or music.
- Although it is not mandatory, most companies have a written record of the message text.

---

## Using messages

Message Wizard is available to help you do the following tasks:

- Add a message.
- Add an updated audio portion of a message to Avaya Proactive Contact.
- Store these messages in folders for easy access.

This section contains the following topics:

- [Messages pane](#) on page 148
- [Start Messages](#) on page 148
- [Create message folders](#) on page 149
- [Add or update messages](#) on page 149
- [Verify a message](#) on page 150

---

## Messages pane

The Messages pane provides a means to add and maintain the messages that customers hear.

Editor displays a tree view that contains folders for script names and descriptions.

- If messages do not display, click the plus symbol to the left of the message name.
- If a plus symbol does not display, there are no messages assigned to the category.



**Important:**

You use the right-click menu in the right-hand pane to change, or remove messages and folders.

---

## Start Messages

You start Messages from Editor if you have administrative privileges.

Use the following procedure to start Messages.

1. Select **Start > All Programs > Avaya > Proactive Contact 4.0 > Supervisor > Editor**.
2. Log in to Editor using your user name and password.
3. Click the **Messages and Scripts** button group.

4. Click **Messages**.

The Messages window appears.

---

## Create message folders

You can create one or more folders to organize messages.

Use the following procedure to create a folder:

1. Click **Messages**.

The Messages pane appears.

2. In the right-hand pane, right-click and select **New > Folder**.

Editor adds a folder in the messages tree and selects the row.

3. Right-click the row and select **Rename Folder**.

The **Rename Folder** dialog box appears.

4. In the **New Name** field, type a name for the folder and click **OK**.

---

## Add or update messages

Messages Wizard helps you add a message or update the audio portion of an existing message to the system.

Use the following procedure to start the Messages Wizard:

1. Click **Messages**.

The Messages pane appears.

2. Select a folder or a message in the **Messages** pane.

3. Select **File > New**.

Editor opens Message Wizard. You can define the following information:

- Location of the audio file
- File name
- Type of message: voice or music, and male or female voice
- Folder to store the message

4. Complete the wizard instructions to add or update audio message files to the system.

Use a maximum of eight characters for the file name and three characters for the file extension. When you name the file in the wizard, use a name that clearly identifies the type

of message. For example, "fwait1" can identify the first female message played in a wait queue. "Inmwait1" can identify the first male message playing in an inbound wait queue.

Editor adds the message to the Messages folder.

5. Select **File > Save**.

---

## Verify a message

Use the following procedure to verify that a message is available on the system:

1. Click **Messages**.

The Messages pane appears.

2. Select a folder or a message in the **Messages** pane.

3. Select **File > Verify**.

Editor opens the **Results** dialog box.

4. Click **OK**.

## Maintaining messages

You can change or remove a message or folder.

This section contains the following topics:

- [Add or update messages](#) on page 149
- [Remove a message](#) on page 151
- [Rename a message folder](#) on page 151
- [Remove a folder](#) on page 152

---

## Remove a message

Before you remove a message, verify that a script does not use the message.

Use the following procedure to remove a message from the Messages pane:

1. Click **Messages**.

The Messages pane appears.

2. Click the plus sign to expand the folder that contains the message.

3. Select a message.

Editor selects the row.

4. Right-click the row and select **Remove**.

The **Delete** dialog box lists the selected message.

5. Verify that the message is the one you want to remove and click **OK**.

Editor removes the message from the folder. Editor deletes the message when you save messages.

---

## Rename a message folder

You can rename a folder to organize messages.

Use the following procedure to rename a folder:

1. Click **Messages**.

The Messages pane appears.

2. Select a message folder.

Editor selects the row.

3. Right-click the row and select **Rename Folder**.

The **Rename Folder** dialog box appears.

4. In the **New Name** field, enter a name for the folder and click **OK**.

---

## Remove a folder

You can remove an empty folder from the Messages pane.

Use the following procedure to remove a folder:

1. Click **Messages**.

The Messages pane appears.

2. Click the plus sign to expand the folder you want to remove.

3. Remove each message from the folder.

For more information, see [Remove a message](#) on page 151.

4. Select a message folder.

Editor selects the row.

5. Right-click the row and select **Remove Folder**.

Editor removes the folder.

---

## Understanding scripts

Scripts define how customers hear messages during the following occasions:

- While waiting in inbound, outbound, or transfer queues
- When customers answer a call placed by a virtual agent
- When an agent presses a function key

You designate the order in which Avaya Proactive Contact plays messages. You can choose to play music or have silence between messages.

This section contains the following topics:

- [Types of scripts](#) on page 153
- [Script actions](#) on page 154
- [Script examples](#) on page 154

---

## Types of scripts

After you add messages to the system, you create scripts. To create a script, you complete the following tasks:

- Assign messages to a category when the script runs.
- Assign actions to messages.

The following table describes the categories of when scripts run:

| Script              | Description                                                                                                                                         |
|---------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------|
| Automated Messages  | Messages that agents play to customers when the agent presses any function key.                                                                     |
| Inbound Wait Queue  | Messages that the system plays to customers while waiting for an agent in inbound wait queues.                                                      |
| Outbound Wait Queue | Messages that the system plays to customers while waiting for an agent in outbound wait queues and or when an answering machines receives the call. |
| Transfer Wait Queue | Messages that the system plays to customers while waiting to be transferred.                                                                        |
| Virtual Wait Queue  | Messages that the system plays to customers during Virtual Agent jobs. A virtual agent job delivers messages without agent intervention.            |

---

## Script actions

Script actions define a script. Depending on the script you select in the Scripts left-hand pane, you can do the following when defining a script:

- Select to play the script when an answering machine or voice answers the phone call.
- Assign actions that play additional messages.

The following actions appear in the right-hand pane.

**Play message** - Plays a recorded message. You select the name of the message file. The file may contain voice or music.

**Pause** - Specifies how long to wait between messages in inbound, outbound or transfer wait queues. You select the amount of silent delay in seconds.

**Start Looping** - Instructs the system to repeat the wait queue actions that follow in inbound, outbound or transfer wait queues. You must follow this command with a Play statement. When you set up a job, you can set the maximum time a caller can stay in the queue.

**Voice Response** - Instructs the system to wait for a voice response in inbound or outbound wait queues. The dialer verifies that the person who placed or received the call is still on the line. If not, the system disconnects the line.

---

## Script examples

This section provides the following examples of how you can create scripts.

- [Outbound wait queue](#) on page 154
- [Inbound wait queue](#) on page 155
- [Automated message](#) on page 155

### Outbound wait queue

The following example shows how you can combine messages in 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 repeats all lines below the start looping statement for the length of time listed in Editor.

## Messages and scripts

4. Sorry to keep you waiting. I am 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

The following example shows how you can combine messages in 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 repeats all lines below the start looping statement for the length of time listed in Jobs.

8. Thank you for waiting, please continue to hold.
9. Music.

## Automated message

The following script consists of a single message that the system plays when an agent presses a function key.

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

---

## Using scripts

Avaya Proactive Contact provides a Message Script wizard to help you create a message script.

This section contains the following topics:

- [Scripts pane](#) on page 156
- [Start Scripts](#) on page 156
- [Add or update scripts](#) on page 157
- [Define a script](#) on page 157

---

## Scripts pane

The Scripts pane provides a means to create and maintain message scripts that play the messages customers hear.

**Left-hand pane** - Editor displays a tree view organizes script names and descriptions into categories of when the system runs the script.

- If scripts do not display, click the plus symbol to the left of the script name.
- If a plus symbol does not display, there are no scripts assigned to the category.

**Right-hand pane** - The right-hand pane appears when you select a script. The **Detail** tab lists the actions for the script. Depending on the when the script runs, you can assign actions that tells Avaya Proactive Contact how to play messages.

**Tip:**

You can use the right-click menu in the right-hand pane to add, change, or remove actions.

---

## Start Scripts

You start Scripts from Editor.

Use the following procedure to start Scripts:

1. Select **Start > All Programs > Avaya > Proactive Contact 4.0 > Supervisor > Editor**.
2. Click the **Messages and Scripts** button group.

## Messages and scripts

3. Click **Scripts**.

The Scripts pane appears.

---

## Add or update scripts

Message Scripts Wizard helps you create and update a message script. Scripts define one or more messages that customers can hear.



**Important:**

The changes you make to a script become available for use the next time you restart the dialer.

You can use the right-click menu in the right-hand pane to add, change, or remove actions.

Use the following procedure to start the Messages Script Wizard:

1. Click **Scripts**.

The Scripts pane appears.

2. Select **File > New**.

Editor opens Message Script Wizard.

3. Complete the wizard instructions to add or update scripts to Avaya Proactive Contact.



**Tip:**

There is a time limit that you can leave a file open for editing. Depending on your system configuration, the default value is 60 minutes. We recommend that you save each new script after you add or update the script.

4. Select **File > Save**.

---

## Define a script

When you define a script, you can assign one or more of the following actions to the script:

- Play a message
- Pause
- Start a loop
- Wait for a response

Use the following procedure to define a script:

1. Click **Scripts**.

The Scripts pane appears.

2. Select a script in the left-hand pane.

Depending on the script you select, you can play the script when an answering machine and voice answers the phone call.

3. Select **If a machine answers...** or **While a person is waiting for an agent.**
4. Right-click the response and select **Add an Action.**



**Tip:**

You can also select a location in the script, then drag and drop an action icon to a location in the script.

Editor displays the Message Script Wizard.

5. Complete the wizard instructions to add an action to the script.

Editor adds the action below the response. Depending on the script you can select additional actions.

6. To add another action to the response, repeat step 5 or right-click and select **Add an Action.**
7. To add actions to the other response, repeat steps 3, 4, and 5.
8. Select **File > Save.**

## Maintaining scripts

You can change or remove a script action and script.



**Tip:**

You can also use the right-click menu in the right-hand pane to add, change, or remove actions.

This section contains the following topics:

- [Change a script action](#) on page 159
- [Remove a script action](#) on page 159
- [Change a script](#) on page 160
- [Remove a script](#) on page 160

---

## Change a script action

Use the following procedure to change an action for a script:

1. Click **Scripts**.  
The Scripts pane appears.
2. Click the action you want to change.
3. Right-click the action and select **Change an Action**.  
Editor displays the Message Script Wizard.
4. Complete the wizard instructions to change an action or message to play.
5. To change another action, repeat steps 2, 3, and 4.
6. Select **File > Save**.

---

## Remove a script action

Use the following procedure to remove an action from a script:

1. Click **Scripts**.  
The Scripts pane appears.
2. Click the action you want to change.

3. Right-click the action and select **Remove an Action**.  
Editor removes the action from the response.
4. To remove actions for another response, repeat steps 2 and 3.
5. Select **File > Save**.

---

## Change a script

You can change the name and description of a script.

Use the following procedure the change a script:

1. Click **Scripts**.  
The Scripts pane appears.
2. Select a script from a category.
3. Right-click and select **Change**.  
Editor opens the Message Script Wizard window.
4. Complete the wizard instructions to change the script.
5. Select **File > Save**.

---

## Remove a script

You can remove a script that you or another person created. You cannot remove a script that is reserved by Avaya Proactive Contact.

Use the following procedure the remove a script:

1. Click **Scripts**.  
The Scripts pane appears.
2. Click the plus sign to expand the category that contains the message.
3. Select a script from a category.  
Editor selects the row.
4. Right-click the row and select **Remove**.  
Editor removes the script from the category.

---

## Understanding Messages and Scripts dialog boxes

This section contains the following topics:

- [Delete dialog box](#) on page 161
- [Rename Folder dialog box](#) on page 161

---

### Delete dialog box

The **Delete** dialog box allows you to remove selected message from Avaya Proactive Contact.

---

### Rename Folder dialog box

The **Rename Folder** dialog box allows you to name or give the folder another name.

# Chapter 8: Monitor settings

Avaya Proactive Contact allows you to monitor real time calling activities.

Monitor allows you to define how to view real time calling activities.

You can define how to monitor calling activities in the following ways:

- Arrange data
- Specify the time range
- Change a job as the job runs
- Customize a view according to completion code
- Customize a view according to an agent's state
- Determine the refresh rate and the preferred saving method

You can modify the Monitor default settings during a job from the Monitor toolbar. You can also save the changes to a custom view for use the next time you use Monitor.

Monitor applies the default settings to the view when you open Monitor. To use the customized settings, select the custom view from the button bar.

The button groups on the left pane filter the type of information you see by the following views:

- View set
- Dialer
- Job
- Supervisor
- Agent
- Custom

The buttons in each view set display detailed information about that view.

This section contains the following topics:

- [Understanding Monitor](#) on page 163
- [Using Monitor settings](#) on page 164

## Understanding Monitor

Monitor allows you to define how to view real time calling activities.

This section contains the following topic:

- [Monitor window description](#) on page 163

---

### Monitor window description

Monitor has a button bar on the left-hand side of the screen and an area on the right-hand side to display various windows or views.

A view is a window that displays when you click a button in the button bar. In each view, you can filter information and customize how you monitor the calling activities, including sorting data and resizing columns.

**Button group** - Expands and contracts to display buttons associated with the group. Click a button to display a view.

**Views** - Display data based on the type of calling activity and specific criteria. You can use the toolbar options in each view to modify and create views. Monitor lists views that you create in the Custom group.

To sort the contents of a view, click a column heading.



**Tip:**

An arrow appears in the column heading to indicate the sort order. An up arrow identifies that the data is in ascending order. A down arrow point identifies that the data is in descending order.

To resize columns in a view:

1. Hover your cursor between the heading titles until a double-arrow appears.
2. Hold down the left mouse button and drag the cursor to resize the columns.

For more information on views, see the following topics:

- To customize individual views using the toolbar, see [Create a custom view](#) on page 172.
- To learn more about the various Monitor views and how to customize each view, see the [Using view controls](#) on page 210.

---

## Using Monitor settings

You can modify the Monitor default settings during a job from the Monitor toolbar. You can also save the changes to a custom view for use the next time you use Monitor.

Monitor applies the default settings when you open Monitor. To use the customized settings, select the custom view from the button bar.

This section contains the following topics:

- [Set the default hierarchy](#) on page 164
- [Set time range](#) on page 165
- [Set multi-dialer views](#) on page 165
- [Set agent states to display](#) on page 166
- [Set the view set](#) on page 166
- [Set save on exit settings](#) on page 167
- [Set alert monitoring](#) on page 167

---

## Set the default hierarchy

The default hierarchy is set in the **Options** dialog box.

The **Scope** tab affects the options you see in a view's toolbar.

**Note:**

You must create a custom or an agent/supervisor hierarchy before you can select a hierarchy from the Scope tab.

For example, on the **Scope** tab, you select a hierarchy from the agent/supervisor list, then, when a view is opened and you select **agent/supervisor hierarchy** from the list that appears when you click the **Hierarchy Manager** toolbar icon, the hierarchy defined on the **Scope** tab is used.

Use the following procedure to set the default hierarchy:

3. In Monitor, select **Settings > Options**.
4. In the **Options** dialog box, select the **Scope** tab. For more information, see [Options, Scope tab](#) on page 235.
5. Under **How should data be arranged**, select a hierarchy from the following drop-down lists:
  - Select a hierarchy from the **Agent/supervisor** list to use as the default view when you select the **Use the agent/supervisor hierarchy** option in any view.

## Monitor settings

**Note:**

If you select **Use custom Hierarchy**, you need to have previously created hierarchies using the Hierarchy Manager tool.

- Select a custom hierarchy from the **Custom Hierarchy** list to use as the default view when you select the **Use custom hierarchy** option in any view.
6. Click **OK** or **Apply**.

---

## Set time range

The time range is set in the **Options** dialog box. The preferences that you specify in the **Options** dialog box's **Scope** tab dynamically affect the **Time Scope** button on all of your views' toolbars.

Use the following procedure to set the time range:

1. In Monitor, select **Settings > Options**.
2. In the **Options** dialog box, select the **Scope** tab. For more information, see [Options dialog box](#) on page 235.
3. Under **What time range should views support**, select **Show data for both active and recent jobs** if you want to see data for both currently running jobs and jobs that have run today but have since shutdown.

---

## Set multi-dialer views

Use the **Multi-Dialer** tab to choose which dialers you can execute commands against.

Use the following procedure to set multi-dialer views:

1. In Monitor, select **Settings > Options**.
2. In the **Options** dialog box, select the **Multi-Dialer** tab. For more information, see [Options, Multi-Dialer Control tab](#) on page 236.
3. To set up how to apply the job changes, complete one of the following steps:
  - a. To apply job changes to all dialers, select **Apply job changes to all selected dialers**.  
OR
  - b. To apply job changes to specific dialers, select the name of each dialer in the **Dialer** list to which you want to apply job changes.
  - c. Click **OK**.

---

## Set agent states to display

Use the **Agent States** tab to choose which agent states to display. For example, the “state” of an agent might include any of the following agent states:

- Talk
- Update a record
- Idle
- ACD
- Logging off
- Off job
- Offline
- Not Available

Use the following procedure to display agent states:

1. In Monitor, select **Settings > Options**.
2. In the **Options** dialog box, select the **Agent States** tab. For more information, see [Options, Agent States tab](#) on page 236.
3. Select which states to display, and then click **OK**.

---

## Set the view set

Use the **Appearance** tab to set the view set and refresh rate.

Use the following procedure to set the view and refresh rate:

1. In Monitor, select **Settings > Options**.
2. In the **Options** dialog box, select the **Appearance** tab. For more information, see [Options, Appearance tab](#) on page 236.
3. Enter the view set to use, or select **Browse** to locate your view set.
4. Click the up or down arrow to set the refresh interval, in seconds, for your views.
5. Click **OK**.

## Set save on exit settings

Use the **Feedback** tab to choose how to save changes to views and view sets when the application closes.

1. In Monitor, select **Settings > Options**.
2. In the **Options** dialog box, select the **Feedback** tab.
3. Below each choice, select when to save changes, and then click **OK**.

---

## Set alert monitoring

Use the **Alerts** tab to start alert monitoring automatically and to disable email alert notifications.

Use the following procedure to set alert monitoring:

1. In Monitor, select **Settings > Options**.
2. In the **Options** dialog box, select the **Alerts** tab.
3. Select each of the following check boxes that you want to apply to alerts:
  - **Start alert monitoring automatically**
  - **Disable e-mail notifications**

# Chapter 9: Customize Monitor

Avaya Proactive Contact allows you to navigate among the tool applications and customize the Monitor views.

This section contains the following topics:

- [Navigate among the Tool menu applications](#) on page 169
- [Using a Monitor view](#) on page 170
- [Customizing Monitor views](#) on page 172
- [Managing custom views](#) on page 175

---

## Navigate among the Tool menu applications

Monitor comes with tool applications that you access from the **Tools** menu.

Use the following procedure to start Tools menu applications:

1. Select **Start > All Programs > Avaya > Proactive Contact 4.0> Supervisor > Monitor**.
2. To start a tool, select the tool option from the **Tools** menu.

While you use the tool, Monitor remains open in the background so that you can navigate back to Monitor when you are finished using the tool.

---

## Using a Monitor view

Monitor comes with tool applications that you access from the **Tools** menu.

This section contains the following topics to help you open a view:

- [View icons in the button bar](#) on page 170
- [Open a standard view](#) on page 170
- [Open a view or view set from another location](#) on page 171
- [Open a view about a specific agent](#) on page 171

---

### View icons in the button bar

You can view large or small buttons on the button bar.

Use the following procedure to switch between large and small icons in the button bar:

1. On the button bar, click a group name to expand the button bar whose icon size you want to change.
2. Right-click, and then select either **Large Icons** or **Small Icons**.

A check mark next to the menu command indicates which view you are currently using.

---

### Open a standard view

Use the following procedure to open a standard view in Monitor:

1. On the Monitor button bar, click one of the following group of views:
  - **View Set**
  - **Dialer**
  - **Job**
  - **Supervisor**
  - **Agent**
  - **Custom**
2. Click the view you want to open.

The view opens as a new window in the right-hand pane.

## Open a view or view set from another location

Use the following procedure to open a view or view set from another location:

1. In Monitor, select **File > Open**.
2. Locate and select the view or view set you want to open, or type the file name in the **File name** field, and then click **Open**.

The view or view set opens as a new window in the right-hand pane.

---

## Open a view about a specific agent

You can display the following views to list information about a specific agent:

- Agent Detail
- Agent Completion Codes
- Agent History

Use the following procedure to open a view about a specific agent:

1. Display a view that lists agents, for example Dialer Agents or Job Agents.
2. Select an agent in the view.
3. Select **Tools**, and then a view.

---

## Customizing Monitor views

In Monitor, you can customize and save a view. You can also save multiple views as a view set. The Monitor wizard helps you customize how you monitor calling activities for the contact center and specific jobs.

This section contains the following topics to help you customize a view:

- [Create a custom view](#) on page 172
- [Save current view](#) on page 172
- [Save as a view set](#) on page 173
- [Save view set with a new name](#) on page 173

---

### Create a custom view

Use the following procedure to create a custom view:

1. In Monitor, select **File > New**.  
The **New View Wizard** opens.
2. Follow the steps in the View Wizard to create your custom view.

---

### Save current view

Use the following procedure to save a current view:

1. On the Monitor button bar, click one of the following group of views:
  - **View Set**
  - **Dialer**
  - **Job**
  - **Supervisor**
  - **Agent**
  - **Custom**
2. Click the button for the view you want to open.
3. Alter the view using the view's toolbar.
4. When you have the view set up the way you want, select **File > Save**.  
The next time you select the view, your saved preferences appear.

## Save as a view set

In Monitor, you can open one or more views and save the views as set for use later from the View Set button bar.

Use the following procedure to save a view set:

1. On the Monitor button bar, click one of the following group of views:
  - **View Set**
  - **Dialer**
  - **Job**
  - **Supervisor**
  - **Agent**
  - **Custom**
2. Select the button for the view you want to open.

The view opens as a new window in the right-hand pane
3. Repeat steps 1 and 2 until you have all necessary views open.
4. Select **File > Save All As**.
5. Browse to the location where you want to save the view set, enter a name, and then click **OK**.
6. In the Add a Custom View dialog, enter the name for the view set, and then click **OK**.

A button for the view set appears in the View Set group.

---

## Save view set with a new name

Use the following procedure to save a view set with a new name:

1. On the Monitor button bar, click one of the following views:
  - **View Set**
  - **Dialer**
  - **Job**
  - **Supervisor**
  - **Agent**
  - **Custom**
2. Click the button for the view set you want to open. The view set opens.

3. Select **File > Save All As**.
4. Enter the name you want to give your view set, and then click **OK**. The view set's new name appears in the View Set button bar.

## Managing custom views

This section contains the following topics to help you manage custom views:

- [Delete a view set](#) on page 175
- [Add a view to the Custom button group](#) on page 175
- [Refresh a view](#) on page 175

---

### Delete a view set

Use the following procedure to delete a view set:

1. On the Monitor button bar, click **View Set**.
2. Right-click the view set you want to delete, and then select **Remove View Set**.

---

### Add a view to the Custom button group

To create a button, you must have a view open in the main pane.

Use the following procedure to add a view to the Custom button group:

1. Open a view that you would like to have as a button.
2. Select **File > Save As**.
3. Enter a name and then click **OK**.

The view automatically appears in the Custom button group.

---

### Refresh a view

To refresh an open view, press the **F5** key.

# Chapter 10: Use Monitor views

Monitor uses the button bar in the left-hand side of the window as the primary navigation point for opening views. Monitor displays views in window on right-hand side of your screen.

You can do the following tasks from the Monitor button bar:

- Open and save favorite views
- Display views according to completion codes
- Display views according to agent and supervisor relationships
- Configure alerts so that you can receive notifications from the Avaya Proactive Contact.

This section contains the following topics

- [Understanding view windows](#) on page 177
- [Using views](#) on page 180

---

## Understanding view windows

A view displays information about dialers, jobs, agents, and completion codes in a separate window.

In Monitor, you can create views, save the view when you exit Monitor, and then restore the views. This allows you to use the same views without recreating specific views.

Use the button bar to access and organize the available views. Use the View toolbar to modify how the view displays data.

This section contains the following topics:

- [Types of views](#) on page 177
- [View toolbar](#) on page 178

---

## Types of views

Use the Monitor button bar to display the following types group of views:

**View Set** - Displays the set of views that you create and save.

**Dialer** - Lists views that display calling activity data about dialers.

- **Dialer Status** - Displays the job, agent, and line resources used on a dialer. For view details, see [Dialer Status view](#) on page 180.
- **Dialer Agents** - Displays the agents logged in to one or more dialers. For view details, see [Dialer Agents view](#) on page 182.
- **Dialer Lines** - Displays line assignments and activity levels for each job. For view details, see [Dialer Lines view](#) on page 183.
- **Dialer History** - Displays dialer activity over time. For view details, see [Dialer History view](#) on page 184.

**Job** - Lists views that display calling activity data about jobs:

- **Job Status** - Displays the job, agent, and line resources used on a dialer grouped and totaled by the job. For view details, see [Job Status view](#) on page 185.
- **Job Agents** - Displays the agents who are joined to jobs. For view details, see [Job Agents view](#) on page 186.
- **Job Detail** - Displays detailed information about the performance of a job, including connect, RPC, and closure rates. For view details, see [Job Detail view](#) on page 188.

- **Job Call Handling** - Displays how much time each agent spends talking to customers, updating records, and waiting for the next call. For view details, see [Job Call Handling view](#) on page 190.
- **Job Completion Codes** - Displays completion codes used during the job. For view details, see [Job Completion Codes view](#) on page 191.
- **Job Wait Queues** - Displays information about calls directed to the wait queue during a job, including the number of calls currently in queue, the number abandoned, and the average wait time for each call. For view details, see [Job Wait Queues view](#) on page 192.
- **Job History** - Displays dialer activity over time grouped by job. For view details, see [Job History view](#) on page 194.
- **Job Performance** - Compares agent performance on a selected completion code. For view details, see [Completion Code Detail by Agent view](#) on page 196
- **Job Quality** - Displays information about the quality of service that dialers achieve during a job. For view details, see [Job Quality view](#) on page 197.

**Supervisor** - Displays information about Supervisor Agents. For view details, see [Supervisor Agents view](#) on page 199.

Displays the agents active on one or more dialers grouped by job.

**Agent** - Displays information about. Agent data for a job and allows you to find an agent. For view details, see [Find Agent view](#) on page 200.

**Custom** - Displays the customized views that you create.

You can display a view about a specific agent from any view that lists agents from the **Tools** menu. For more information see, [Open a view about a specific agent](#) on page 171.

---

## View toolbar

You can use the view toolbar to display the information in the following formats:

**Table view** - Displays the data without icons. **Table View** is enabled if the view has two presentation modes.

**Graphic View** - Displays the data with icons. **Graphic View** is enabled if the view has two presentation modes.

**Filter Data** - Allows you to filter the data in the view according to one selected criteria.

**Performance Code** - In the Job Performance View only, you can select which completion code to use when monitoring job performance.

## Use Monitor views

**Hide/Show Columns** - Allows you to select which of the available data fields appear.

**Find Item** - Allows you to search for a text string within a view. For example, search for a specific agent or job.

**Hierarchy Manager** - Allows you to choose the type of data that appear in the view:

- No hierarchy
- The default supervisor/agent hierarchy, if one was defined using **Settings > Options**
- Custom Hierarchy, if one was defined using **Settings > Options**

For more information, see [Options dialog box](#) on page 235.

You can define the default supervisor/agent hierarchy and the custom hierarchy.

| <b>Hierarchy</b>                       | <b>Scope selector 1</b>                | <b>Scope selector 2</b>                   | <b>Scope selector 3</b>                                |
|----------------------------------------|----------------------------------------|-------------------------------------------|--------------------------------------------------------|
| No hierarchy                           | Dialer (default)                       | Job (default)                             | Empty                                                  |
| Default agent/<br>supervisor hierarchy | Dialer (default)                       | Job (default)                             | Supervisor (bottom level of<br>the selected hierarchy) |
| Custom                                 | Top level of the<br>selected hierarchy | Middle level of the<br>selected hierarchy | Bottom level of the<br>selected hierarchy              |

**Time Scope** - Allows you to choose to monitor running jobs or all jobs in the view.

**Refresh** - Refreshes the data in the open views.

---

## Using views

Monitor provides a variety of views that allow you to monitor calling activities for the following components and users:

- Dialers
- Jobs
- Supervisors
- Agents

This section contains the following topics:

- [Dialer Status view](#) on page 180
- [Dialer Agents view](#) on page 182
- [Dialer Lines view](#) on page 183
- [Dialer History view](#) on page 184
- [Job Status view](#) on page 185
- [Job Detail view](#) on page 188
- [Job Agents view](#) on page 186
- [Job Call Handling view](#) on page 190
- [Job Completion Codes view](#) on page 191
- [Job Wait Queues view](#) on page 192
- [Job History view](#) on page 194
- [Completion Code Detail by Agent view](#) on page 196
- [Job Quality view](#) on page 197
- [Supervisor Agents view](#) on page 199
- [Find Agent view](#) on page 200
- [Agent Detail view](#) on page 201
- [Agent Completion Codes view](#) on page 203
- [Agent History view](#) on page 204

---

## Dialer Status view

The Dialer Status view displays the job, agent, and line resources used on a dialer. The view shows the following data:

## Use Monitor views

- Agents and lines assigned to all dialers in the selected scope
- Jobs assigned to all dialers and the state of completion of each job

The following table describes the Dialer Status views:

| Dialer Status      | Description                                                                                                                                                                                                                       |
|--------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Dialer ID          | A unique identification number, automatically assigned to a dialer, and is used to identify dialer data in the database.                                                                                                          |
| Dialer             | The name of a dialer in the current scope.                                                                                                                                                                                        |
| Job ID             | A unique identification number, automatically assigned to a job (by name), used to identify job data in the database.                                                                                                             |
| Job                | The name of each job running in the current scope.                                                                                                                                                                                |
| Job Instance       | A unique identification number, automatically assigned to a single instance of a job, used to identify data associated with that job instance in the database. Each time a job runs, the system assigns it a new job instance ID. |
| Job Type           | The type of job: outbound, inbound, or blend.                                                                                                                                                                                     |
| Status             | The current status of the job. The status types include stopped, running, error, or shutting down.                                                                                                                                |
| Start Date         | The date the job instance started.                                                                                                                                                                                                |
| Start Time         | The time the job instance started.                                                                                                                                                                                                |
| Stop Date          | The date the job instance stopped or blank if the job is still running.                                                                                                                                                           |
| Stop Time          | The time the job instance stopped or blank if the job is still running.                                                                                                                                                           |
| Estimated End Time | The time that Monitor estimates the job will end. For an inbound job, the Estimated Job End field is empty.                                                                                                                       |
| Inbound Agents     | The total number of inbound agents logged in to each job.                                                                                                                                                                         |
| Outbound Agents    | The total number of outbound agents logged in to each job.                                                                                                                                                                        |
| Blend Agents       | The total number of blend agents logged in to each job.                                                                                                                                                                           |
| Managed Agents     | The total number of managed agents logged in to each job.                                                                                                                                                                         |
| PTP Agents         | The total number of person-to-person agents logged in to each job.                                                                                                                                                                |
| ACD Agents         | The total number of ACD Agents logged in to each job.                                                                                                                                                                             |
| Total Agents       | The total number of agents logged in to each job.                                                                                                                                                                                 |

| Dialer Status | Description                                                                                   |
|---------------|-----------------------------------------------------------------------------------------------|
| Total Lines   | The total number of lines in use by the job.                                                  |
| % Complete    | The percentage of records called based upon the total number of records selected for calling. |

---

## Dialer Agents view

The Dialer Agents view displays the agents active on one or more dialers.

To choose which agent states to include in the Dialer Agent view:

1. In Monitor, select **Settings > Options**.
2. Select the **Agent States** tab. For more information, see [Options, Agent States tab](#) on page 236.
3. Select the agent states you want to view.

You can further limit the agent states in a single view by using the **Filter** option.

The graphic mode displays a subset of the data in the table mode. The graphic mode displays data for each agent: agent name, the agent's status, the time the agent is in that status.

The following table describes the Dialer Agents view:

| Dialer Agents | Description                                                                             |
|---------------|-----------------------------------------------------------------------------------------|
| Total         | The total number of agents within the selected scope.                                   |
| Talk          | The total number of agents with status "Talk" in the selected scope.                    |
| Update        | The total number of agents with status "Update" in the selected scope.                  |
| Idle          | The total number of agents with status "Idle" in the selected scope.                    |
| ACD           | The total number of ACD agents in the selected scope.                                   |
| Acquired      | The total number of acquired ACD agents in the selected scope.                          |
| Not available | The total number of agents with the status "Not available" in the selected scope.       |
| Off Job       | The total number of agents that are not on the job in the selected scope.               |
| Offline       | The total number of offline agents in the selected scope.                               |
| Logging Off   | The total number of agents that have requested to log off but are still handling calls. |

## Use Monitor views

| Dialer Agents | Description                                                                                                                                                                                                                   |
|---------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Dialer        | The name of the dialer on which the job instance is running.                                                                                                                                                                  |
| Job           | The name of a currently running job. Available data includes the names of all jobs running in the current scope.                                                                                                              |
| Job Instance  | A unique identification number automatically assigned to a single instance of a job, used to identify data associated with that job instance in the database. Each time a job runs, the system assigns a new job instance ID. |
| Agent         | The identification number of the agent logged in to the selected dialer.                                                                                                                                                      |
| Status        | The current status of the Agent. Status types include Talk, Update, Idle, ACD, Offline, Off job, Not available, and Logging off.                                                                                              |
| On Status     | The duration of the current status of the agent in hh:mm:ss format.                                                                                                                                                           |
| Agent Type    | The type of calling activity that the agent logged in to handle. Acceptable values include Outbound, Inbound, and Blend.                                                                                                      |
| On Job        | The elapsed time that the agent has been working on a job.                                                                                                                                                                    |
| Headset       | The headset ID or ACD extension assigned to the agent. The system uses this data to perform audio monitoring of an agent.                                                                                                     |

---

## Dialer Lines view

The Dialer Lines view displays line assignments and activity levels for each job.

The following table describes the Dialer Lines view:

| Dialer Lines | Description                                                                                                                                                                                                                   |
|--------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Dialer       | The name of the dialer on which the job instance is running.                                                                                                                                                                  |
| Job          | The name of each job running on the dialer.                                                                                                                                                                                   |
| Job ID       | A unique identification number, automatically assigned to a job (by name), used to identify job data in the database.                                                                                                         |
| Job Number   | The unique number, assigned by the dialer to this instance of the job.                                                                                                                                                        |
| Job Instance | A unique identification number, automatically assigned to a single instance of a job, to help identify data associated with that job instance in the database. Each time a job runs the system assigns a new job instance ID. |

| Dialer Lines        | Description                                                                                       |
|---------------------|---------------------------------------------------------------------------------------------------|
| Lines In Use        | The number of lines currently in use by the job.                                                  |
| System Lines in Use | The number of lines in use by the job as a percentage of the total number of lines on the system. |

---

## Dialer History view

The Dialer History view shows dialer activity over time. The view lists all instances of a job that have run on a dialer, regardless of the current status of the job.

For example, if Job1 runs from 8:00 until 10:30, then restarts at 11:15, both job instances appear in the view separately. The default value for the time selector is active data + recent data.

The following table describes the Dialer History view:

| Dialer History | Description                                                                                                                                                                                                                    |
|----------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Dialer ID      | A unique identification number, automatically assigned to a dialer, used to identify data related to that dialer in the database.                                                                                              |
| Dialer         | The name of the dialer in the current scope.                                                                                                                                                                                   |
| Job            | The name of a job that has run during the current time scope.                                                                                                                                                                  |
| Job ID         | A unique identification number, automatically assigned to a job by name, used to identify job data in the database.                                                                                                            |
| Job Instance   | A unique identification number, automatically assigned to a single instance of a job, used to identify data associated with that job instance in the database. Each time a job runs, the system assigns a new job instance ID. |
| Job Number     | The unique number, assigned by the dialer to this instance of the job.                                                                                                                                                         |
| Job Type       | The type of job: outbound, inbound, or blend.                                                                                                                                                                                  |
| Status         | The current status of the job. The status types include stopped, running, error, or shutting down.                                                                                                                             |
| Start Date     | The date the job started.                                                                                                                                                                                                      |
| Start Time     | The time the job started.                                                                                                                                                                                                      |
| Stop Date      | The date the job stopped.                                                                                                                                                                                                      |
| Stop Time      | The time the job stopped.                                                                                                                                                                                                      |

## Use Monitor views

| Dialer History     | Description                                                                                                                                 |
|--------------------|---------------------------------------------------------------------------------------------------------------------------------------------|
| Estimated End Date | The date that Monitor estimates the job will end. For an inbound job, this field is empty                                                   |
| Estimated Job End  | The time that Monitor estimates the job will end. For an inbound job, this field is empty.                                                  |
| Connects           | The total number of connects, both inbound and outbound, for each job instance. A subtotal appears for each job and each dialer.            |
| RPCs               | The total number of calls released as right-party contacts (RPCs) for each job instance. A subtotal appears for each job and each dialer.   |
| Closures           | The total number of calls released as closures for each job instance. A subtotal appears for each job and each dialer.                      |
| Abandons           | The total number of calls released as abandoned for each job instance. A subtotal appears for each job and each dialer.                     |
| Elapsed Time       | The total time since the job instance started.                                                                                              |
| Agent Hours        | The total number of hours agents have joined to a job instance over the course of the job. A subtotal appears for each job and each dialer. |
| Total Records      | The total number of records selected for the job. For inbound jobs, this field is always zero.                                              |
| Dialed             | The total number of records used to call during the course of the job. A subtotal appears for each job and each dialer.                     |

---

## Job Status view

The Job Status view displays the same data as the Dialer Status view, but is grouped and totaled by job.

The following table displays the Job Status view:

| Job Status | Description                                                                                                                       |
|------------|-----------------------------------------------------------------------------------------------------------------------------------|
| DialerID   | A unique identification number, automatically assigned to a dialer, used to identify data related to that dialer in the database. |
| Dialer     | The name of a dialer in the current scope.                                                                                        |
| Job ID     | A unique identification number, automatically assigned to a job by name, used to identify job data in the database.               |
| Job        | The job name appears in the window title bar.                                                                                     |

| <b>Job Status</b>  | <b>Description</b>                                                                                                                                                                                                             |
|--------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Job Instance       | A unique identification number, automatically assigned to a single instance of a job, used to identify data associated with that job instance in the database. Each time a job runs, the system assigns a new job instance ID. |
| Job Type           | The type of job: outbound, inbound, or blend.                                                                                                                                                                                  |
| Status             | The current status of the job. The status types include stopped, running, error, or shutting down.                                                                                                                             |
| Start Date         | The date the job started running.                                                                                                                                                                                              |
| Start Time         | The time the job started running.                                                                                                                                                                                              |
| Stop Date          | The date the job stopped running.                                                                                                                                                                                              |
| Stop Time          | The time the job stopped running.                                                                                                                                                                                              |
| Estimated End Date | The date that Monitor estimates the job will end. For an inbound job, this field is empty.                                                                                                                                     |
| Estimated End Time | The time that Monitor estimates the job will end. For an inbound job, this field is empty.                                                                                                                                     |
| Inbound Agents     | The total number of inbound agents logged in to each job.                                                                                                                                                                      |
| Outbound Agents    | The total number of outbound agents logged in to each job.                                                                                                                                                                     |
| Blend Agents       | The total number of blend agents logged in to each job.                                                                                                                                                                        |
| Managed Agents     | The total number of managed agents logged in to each job.                                                                                                                                                                      |
| PTP Agents         | The total number of PTP agents logged in to each job.                                                                                                                                                                          |
| ACD Agents         | The total number of ACD agents logged in to each job.                                                                                                                                                                          |
| Total Agents       | The total number of agents within the selected scope.                                                                                                                                                                          |
| Total Lines        | The number of lines currently in use by each job.                                                                                                                                                                              |
| % Complete         | The percentage of records called based upon the total number of records selected for calling.                                                                                                                                  |

---

## Job Agents view

The Job Agents view displays the same data as the Dialer Agents view, but groups the data by job.

If you select All from the first scope selector and Job2 from the second scope selector, the view displays a summary of data for all jobs called Job2 on all dialers.

## Use Monitor views

To choose which agent states to include in the Dialer Agent view:

1. In Monitor, select **Settings > Options**.
2. Select the **Agent States** tab. For more information, see [Options, Agent States tab](#) on page 236.
3. Select the agent states you want to view.

You can further limit the agent states in a single view by using the **Filter** option.

The graphic mode displays a subset of the data in the table mode. The graphic mode displays data for each agent: agent name, the agent's status, and the time the agent is in that status.

The following table describes the Job Agents view:

| <b>Job Agents</b> | <b>Description</b>                                                                                                                                                                                                            |
|-------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Total             | The total number of agents within the selected scope.                                                                                                                                                                         |
| Talk              | The total number of agents with status "Talk" in the selected scope.                                                                                                                                                          |
| Update            | The total number of agents with status "Update" in the selected scope.                                                                                                                                                        |
| Idle              | The total number of agents with status "Idle" in the selected scope.                                                                                                                                                          |
| ACD               | The total number of ACD agents in the selected scope.                                                                                                                                                                         |
| Acquired          | The total number of acquired ACD agents in the selected scope.                                                                                                                                                                |
| Offline           | The total number of offline agents in the selected scope.                                                                                                                                                                     |
| Logging Off       | The total number of agents that have requested a log off, but are still handling calls.                                                                                                                                       |
| Dialer            | The name of the dialer.                                                                                                                                                                                                       |
| Job               | The name of a currently running job. Available data includes the names of all jobs in the current scope.                                                                                                                      |
| Job Instance      | A unique identification number, automatically assigned to a single instance of a job, used to identify data associated with that job instance in the database. Each time a job run, the system assigns a new job instance ID. |
| Agent ID          | The identification number of the agent logged in to the selected dialer.                                                                                                                                                      |
| Agent             | The name of an agent logged in to the selected dialer.                                                                                                                                                                        |
| Status            | The current status of the Agent. Status types include Talk, Update, Idle, ACD, Offline, Off job, Not available, and Logging off.                                                                                              |
| On Status         | The duration of the current status of the agent in hh:mm:ss format.                                                                                                                                                           |
| Agent Type        | The type of calling activity that the agent logged in to handle. Acceptable values include Outbound, Inbound, and Blend.                                                                                                      |

| Job Agents | Description                                                                                                               |
|------------|---------------------------------------------------------------------------------------------------------------------------|
| On Job     | The elapsed time that the agent has actually been working on a job.                                                       |
| Headset    | The headset ID or ACD extension assigned to the agent. The system uses this data to perform audio monitoring of an agent. |

---

## Job Detail view

The Job Detail view displays detailed information about the performance of a job, including connect, RPC, and closure rates. It also displays static operational information about the job, as well as the current setting of various runtime parameters.

Because the Job Detail view is the lowest-level view of a job, data is not summed over time or dialers. Instead, it is information about a single instance of a job. For historical or summary information about a job, see [Job History view](#) on page 194.

The following table describes the Job Detail view:

| Job Detail   | Description                                                                                                                                                                                                                                                              |
|--------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Dialer       | The name of the dialer on which the job instance is running.                                                                                                                                                                                                             |
| Job Name     | The job name appears in the window title bar.                                                                                                                                                                                                                            |
| Job Type     | The type of the outbound job.                                                                                                                                                                                                                                            |
| Selection    | The name of the file that defines which records will be available for calling. If the job is inbound, this field is blank.                                                                                                                                               |
| Strategy     | The name of the file that defines which records will be available for calling. If the job is inbound, this field is blank.                                                                                                                                               |
| Job Number   | The unique number assigned to this instance of the job by the dialer.                                                                                                                                                                                                    |
| Job Instance | A unique identification number, automatically assigned to a single instance of a job, used to help identify data associated with that job instance in the database. Each time a job runs, the system assigns a new job instance ID.                                      |
| Current      | The current status of the job. The status types include stopped, running, error, or shutting down.                                                                                                                                                                       |
| % Complete   | The percentage complete for the job. This value is calculated by dividing the total records called by total records selected for calling. An outbound job will never appear as 100% complete unless all records are called. Inbound jobs always appear as 100% complete. |
| Start Date   | The time the job stopped running.                                                                                                                                                                                                                                        |
| Start Time   | The time the job started running.                                                                                                                                                                                                                                        |

## Use Monitor views

| Job Detail               | Description                                                                                                                                                                                                                             |
|--------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Estimated End Date       | The date that Monitor estimates the job will end. For an inbound job, this field is empty.                                                                                                                                              |
| Estimated End Time       | The time that Monitor estimates the job will end. For an inbound job, this field is empty.                                                                                                                                              |
| Time Left                | The estimated time remaining to complete calling for the job. For an inbound job, this field is empty.                                                                                                                                  |
| Pacing                   | The call pacing defined for the job.                                                                                                                                                                                                    |
| Cruise Control           | Displays the current values for the <b>Desired service level</b> and <b>Time to connect tolerance</b> settings.<br>If the job uses the Expert Calling Ratio method, this field is blank.<br>If the job is inbound, this field is blank. |
| Running Hit Rate         | The overall hit rate (percentage of call completions measured against call attempts) for the job calculated from job start to the present.                                                                                              |
| Current Hit Rate         | The hit rate for the job over the last five to ten minutes. The dialer uses this figure to make adjustments in the Expert Calling Ratio.                                                                                                |
| Expert Calling Ratio     | The Expert Calling Ratio defined for the job.<br>If the job uses the Cruise Control method, this field is blank.<br>If the job is inbound, this field is blank.                                                                         |
| Total Connects           | The total number of inbound and outbound connects for the job.                                                                                                                                                                          |
| Inbound Connects         | The total number of inbound calls connected.                                                                                                                                                                                            |
| Inbound Connects per Hr  | The average number of inbound connects per hour. The value is calculated by dividing the total number of inbound connects by the total Online Time (Online Time is the elapsed time since the job instance began).                      |
| Outbound Connects        | The total number of outbound calls connected.                                                                                                                                                                                           |
| Outbound Connects per Hr | The average number of outbound connects per hour. The value is calculated by dividing the total number of outbound connects by the total Online Time.                                                                                   |
| Abandons per hour        | The total number of calls released as abandoned per hour for each job instance.                                                                                                                                                         |
| Dials                    | The total number of records called during the course of the job.                                                                                                                                                                        |
| Total Records            | The total number of records selected for calling. For inbound jobs, this field is always zero.                                                                                                                                          |
| Total Calls              | The total number of calls made or handled for the job, including both inbound and outbound calls.                                                                                                                                       |

| <b>Job Detail</b>         | <b>Description</b>                                                                                                                                       |
|---------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|
| Records Left              | The number of eligible records not yet called for the job. For inbound jobs, this field is always zero.                                                  |
| Total RPCs                | The total number of RPCs currently recorded.                                                                                                             |
| RPCs per Connect          | The number of RPCs as a percentage of the total number of connects. This value is calculated by dividing the total RPC connects by total agent connects. |
| Total Abandons            | The total number of calls released as abandoned.                                                                                                         |
| Abandons per connect      | The percentage of connects that resulted in calls released as abandoned.                                                                                 |
| Connects per Call         | The percentage of calls that resulted in a connect.                                                                                                      |
| RPCs Per Connect          | The percentage of connects that resulted in an RPC.                                                                                                      |
| Closures Per Connect      | The percentage of connects that resulted in a closure.                                                                                                   |
| Closures Per RPC          | The percentage of RPCs that resulted in a closure.                                                                                                       |
| Inbound Wait Queue Total  | The total number of inbound calls currently in the wait queue.                                                                                           |
| Outbound Wait Queue Total | The total number of outbound calls currently in the wait queue                                                                                           |

---

## Job Call Handling view

The Job Call Handling view displays how much time each agent spends talking to customers, updating records, and waiting for the next call.

For example, select All on the dialer scope selector and Job1 on the second scope selector to display the agents joined to Job1.

The graphic mode displays a subset of the data in the table mode. The graphic mode displays data for each type of agent. The table mode displays data for each agent.

The following table describes the Job Call Handling view:

| <b>Job Call Handling</b> | <b>Description</b>                                                     |
|--------------------------|------------------------------------------------------------------------|
| Agent Name               | The name of the agent joined to a specific job.                        |
| Agent ID                 | A unique identification number assigned to each agent by the database. |

| <b>Job Call Handling</b> | <b>Description</b>                                                                                                                           |
|--------------------------|----------------------------------------------------------------------------------------------------------------------------------------------|
| Agent Type               | The type of calling activity the agent logged in to handle. Acceptable values include Outbound, Inbound, Blend.                              |
| Connects Per Hour        | The total number of connects per hour in the selected scope.                                                                                 |
| Average Talk             | The average time agents of a specific agent type spend talking on each call.                                                                 |
| Average Idle             | The average time agents of a specific agent type spend waiting between calls.                                                                |
| Average Update           | The average time agents of a specific agent type spend updating records.                                                                     |
| Average Preview          | The average time a managed agent spends previewing records. (For managed agents only.)                                                       |
| Duty Cycle               | The ratio of the average time spent talking and updating to the total time from the beginning of one call to the beginning of the next call. |

---

## Job Completion Codes view

The Job Completion Codes view displays completion codes used during the job. Monitor displays only codes that are defined as RPC, Closure, Abandon, or have a value greater than 0.

Additional information includes the following data:

- Total number of calls, connects, and RPCs
- The per hour number of calls, connects, and RPCs
- The number of RPCs per connect

The following table describes the Job Completion Codes view:

| <b>Job Completion Codes</b> | <b>Description</b>                                                                                                                                                 |
|-----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Calls                       | The total number of calls for the job.                                                                                                                             |
| Connects                    | The total number of calls, both inbound and outbound, for each job instance. A subtotal appears for each job and each dialer.                                      |
| RPC                         | The number of records released with this code as a percentage of the total number of right party connects (RPCs). This number applies to codes marked as RPC only. |
| Closures                    | The number of records released with this code.                                                                                                                     |
| Abandons                    | The number of records released with this code.                                                                                                                     |

| <b>Job Completion Codes</b> | <b>Description</b>                                                                                                                              |
|-----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------|
| Code                        | The unique identification number associated with each completion code.                                                                          |
| RPC                         | A square indicates that you have defined the code as an RPC in the Completion Code Manager                                                      |
| Closure                     | A square indicates that you have defined the code as a closure in the Completion Code Manager.                                                  |
| Abandon                     | A square indicates that you have defined the code as an abandon in the Completion Code Manager.                                                 |
| Name                        | The user-defined name or description assigned to each code. This description is defined by the user in the Completion Code Manager.             |
| Total                       | The total calls made by the dialer in the selected scope.                                                                                       |
| Avg/Hr                      | The average number of calls released with a completion code during an hour.                                                                     |
| RPC %                       | For each code designated as an RPC, the percentage of connects recorded for each completion code based on the total number of RPCs for the job. |
| Closure %                   | The percentage of closures recorded for each completion code based on the total number of closures for the job.                                 |
| Abandon %                   | The percentage of abandons recorded for each completion code based on the total number of abandons for the job.                                 |
| % of Calls                  | The number of calls recorded for each code as a percentage of the total number of calls for the job.                                            |

**Tip:**

You define which codes are abandons using Completion Code Manager. By default, codes 45 and 47 are inbound abandons and 46 and 48 are outbound abandons.

Monitor always uses the definitions that were in effect when the dialer started. If you change any of the completion code descriptions in Completion Code Manager, you see the changes in the

---

## Job Wait Queues view

The Job Wait Queues view displays information about calls directed to the wait queue during a job. The information includes the number of calls currently in queue, the number abandoned, and the average wait time for each call.

## Use Monitor views

A historical graph displays the total calls added to the queue at 15-minute intervals for the job instance selected in the upper part of the view.



### Tip:

You define which codes are abandons using Completion Code Manager. By default, codes 45 and 47 are inbound abandons and 46 and 48 are outbound abandons.

The following table describes the Job Wait Queues view:

| <b>Job Wait Queues</b> | <b>Description</b>                                                                                                                             |
|------------------------|------------------------------------------------------------------------------------------------------------------------------------------------|
| Job                    | The name of each job running in the current scope.                                                                                             |
| Job ID                 | A unique identification number, automatically assigned to a job (by name), used to identify job data in the database.                          |
| Dialer                 | The name of the dialer on which the job instance is running.                                                                                   |
| Dialer ID              | A unique identification number, automatically assigned to a dialer, and is used to identify dialer data in the database.                       |
| Inbound In Queue       | The total number of inbound calls currently in the wait queue.                                                                                 |
| Outbound In Queue      | The total number of outbound calls currently held in the wait queue.                                                                           |
| Total In Queue         | The total number of calls currently in the wait queue. The total is also broken down by call type, either inbound or outbound.                 |
| Inbound Queue Total    | The total number of inbound calls that have spent time in the wait queue since the job began.                                                  |
| Outbound Queue Total   | The total number of outbound calls that have spent time in the wait queue since the job began.                                                 |
| Queue Total            | The total number of calls, both inbound and outbound, that have spent time in the wait queue.                                                  |
| Avg Inbound Wait Time  | The average number of minutes and seconds that an inbound call spends in the wait queue in the mm:ss format.                                   |
| Avg Outbound Wait Time | The average number of minutes and seconds that an outbound call spends in the wait queue in the mm:ss format.                                  |
| Avg Wait Time          | The average time calls (inbound, outbound) spent in the wait queue. The total figure is a weighted average of inbound and outbound wait times. |
| Inbound Connects       | The total number of inbound calls connected to an agent.                                                                                       |
| Outbound Connects      | The total number of outbound calls connected to an agent.                                                                                      |
| Total Connects         | The total number of calls, both inbound and outbound, connected to an agent.                                                                   |

| <b>Job Wait Queues</b>                  | <b>Description</b>                                                                                                                                                              |
|-----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Inbound Calls Answered                  | The total number of inbound calls answered by the dialer. (This number includes all inbound calls connected to an agent plus all inbound calls abandoned in the wait queue.)    |
| Outbound Calls Answered                 | The total number of outbound calls answered by a customer. (This number includes all outbound calls connected to an agent plus all outbound calls abandoned in the wait queue.) |
| Outbound Calls Placed                   | The total number of outbound calls dialed, regardless of the final outcome of the call (i.e., abandoned or connected).                                                          |
| Inbound Abandoned                       | The total number of inbound calls abandoned by the customer or by the system.                                                                                                   |
| Outbound Abandoned                      | The total number of outbound calls abandoned by the customer or by the system.                                                                                                  |
| Total Abandoned                         | The total number of calls marked with a completion code that has been defined as an "abandon."                                                                                  |
| % Abandoned Per Inbound Connect         | The total number of abandoned calls divided by the total number of inbound connects and multiplied by 100.                                                                      |
| % Abandoned Per Outbound Connect        | The total number of abandoned calls divided by the total number of outbound calls and multiplied by 100.                                                                        |
| % Abandoned Per Total Connects          | The total number of abandoned calls divided by the total number of connects and multiplied by 100.                                                                              |
| % Abandoned Per Inbound Calls Answered  | The total number of abandoned calls divided by the sum of the total inbound connects and the total number of inbound calls abandoned.                                           |
| % Abandoned Per Outbound Calls Answered | The total number of abandoned calls divided by the sum of the total number of outbound connects and the total number of outbound calls abandoned.                               |
| % Abandoned Per Total Calls Answered    | The total number of abandoned calls divided by the sum of the total number of connects and the total number of system abandons (codes 45-48).                                   |
| % Abandoned Per Outbound Calls Placed   | The total number of abandoned calls divided by the total number of outbound calls placed.                                                                                       |

---

## Job History view

The Job History view displays the same information as the Dialer History view grouped by job, rather than dialer.

## Use Monitor views

The following table displays the Job History view:

| <b>Job History</b> | <b>Description</b>                                                                                                                                                                                                                  |
|--------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Dialer ID          | A unique identification number, automatically assigned to a dialer, used to identify data related to that dialer in the database.                                                                                                   |
| Dialer             | The name of the dialer in the current scope.                                                                                                                                                                                        |
| Job                | The name of a job that has run during the current time scope.                                                                                                                                                                       |
| Job ID             | A unique identification number, automatically assigned to a job (by name), used to identify job data in the database.                                                                                                               |
| Job Number         | The unique number assigned to this instance of the job by the dialer.                                                                                                                                                               |
| Job Instance       | A unique identification number, automatically assigned to a single instance of a job, used to help identify data associated with that job instance in the database. Each time a job runs, the system assigns a new job instance ID. |
| Job Type           | The type of the outbound job.                                                                                                                                                                                                       |
| Status             | The current status of the job. The status types include stopped, running, error, or shutting down.                                                                                                                                  |
| Start Date         | The date the job started.                                                                                                                                                                                                           |
| Start Time         | The time the job started.                                                                                                                                                                                                           |
| Stop Date          | The date the job stopped.                                                                                                                                                                                                           |
| Stop Time          | The time the job stopped.                                                                                                                                                                                                           |
| Estimated End Date | The date that Monitor estimates the job will end. For an inbound job, this field is empty.<br>The estimate is perfected as more calls are made. May not be too accurate during the first minutes of calling.                        |
| Estimated End Time | The time that Monitor estimates the job will end. For an inbound job, this field is empty.<br>The estimate is perfected as more calls are made. May not be too accurate during the first minutes of calling.                        |
| Connects           | The total number of connects (both inbound and outbound) for each job instance. A subtotal appears for each job and each dialer.                                                                                                    |
| RPCs               | The total number of calls released as right-party contacts (RPCs) for each job instance. A subtotal appears for each job and each dialer.                                                                                           |
| Closures           | The total number of calls released as closures for each job instance. A subtotal appears for each job and each dialer.                                                                                                              |
| Abandons           | The total number of calls released as abandoned for each job instance. A subtotal appears for each job and each dialer.                                                                                                             |

| Job History   | Description                                                                                                                                    |
|---------------|------------------------------------------------------------------------------------------------------------------------------------------------|
| Agent Hours   | The total number of hours agents have logged in to a job instance over the course of the job. A subtotal appears for each job and each dialer. |
| Total Records | The total number of records selected for calling. For inbound jobs, this field is always zero.                                                 |
| Dials         | The total number of records called during the course of the job. A subtotal appears for each job and each dialer.                              |

---

## Completion Code Detail by Agent view

The Completion Code Detail by Agent view compares agent performance on a selected completion code. The code the system uses for comparison appears at the top of the view.

To display the view:

1. Display the Job Completion Codes view.
2. Select a dialer from the dialer scope selector.
3. Select a job from the job scope selector.
4. Select an agent completion code in the view.
5. Right-click and select Completion Code Detail by Agent.

Monitor displays the Completion Code Detail view.

For example, if you select Code 20, Monitor displays the Completion Code Detail by Agent view that lists Code 20 for each agent on that job.

The view also includes Total Releases, Average Per Hour, and the names of the highest and lowest performers.

You can change the comparison code by clicking **Performance Code**. A red line drawn through the bar charts indicates the current average value for the code.

The following table describes the Completion Code Detail by Agent view:

| Completion Code Detail by Detail | Description                                                            |
|----------------------------------|------------------------------------------------------------------------|
| Completion Code                  | The completion code used to compare agent performance.                 |
| Average Per Hour                 | The average number of calls released with this code by a single agent. |
| Average Total                    | The average number of calls released with this code by a single agent. |

## Use Monitor views

| <b>Completion Code Detail by Detail</b> | <b>Description</b>                                                                         |
|-----------------------------------------|--------------------------------------------------------------------------------------------|
| Highest Performer                       | The name of the agent with the best performance.                                           |
| Lowest Performer                        | The name of the agent with the lowest performance.                                         |
| Agent                                   | The name of the agent. This list of agents includes all of the agents assigned to the job. |
| Agent ID                                | A unique identification number assigned to each agent by the database.                     |
| Total                                   | The total number of calls released with this code by an agent.                             |
| Per Hour                                | The average number of calls released with this code in an hour by this agent.              |

---

## Job Quality view

The Job Quality view displays calling activity information for a job.

The view describes the quality of service that dialers achieve during a job. The information includes data for call pacing, nuisance calls, and information about phone calls that were in the wait queue or were abandoned.

The following table describes the Job Quality view:

| <b>Job Quality</b> | <b>Description</b>                                                                                                                                                                                                                  |
|--------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| DialerID           | A unique identification number, automatically assigned to a dialer, and is used to identify dialer data in the database.                                                                                                            |
| Dialer             | The name of the dialer on which the job instance is running.                                                                                                                                                                        |
| JobID              | A unique identification number, automatically assigned to a job (by name), used to identify job data in the database.                                                                                                               |
| Job                | The name of each job running in the current scope.                                                                                                                                                                                  |
| Job Instance       | A unique identification number, automatically assigned to a single instance of a job, used to help identify data associated with that job instance in the database. Each time a job runs, the system assigns a new job instance ID. |
| Job Type           | The type of job: outbound, Managed, Cruise Control, inbound, or blend.                                                                                                                                                              |
| Status             | The current status of the job. The status types include stopped, running, error, or shutting down.                                                                                                                                  |

| <b>Job Quality</b>    | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|-----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Start Date            | The date the job instance started.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| Start Time            | The time the job instance started.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| Stop Date             | The date the job instance stopped or blank if the job is still running.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Stop Time             | The time the job instance stopped or blank if the job is still running.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Calls Placed          | The total number of outbound calls dialed, regardless of the final outcome of the call (i.e., abandoned or connected).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Calls Offered         | The total number of calls detected by the dialer for a given job. Sometimes referred to as the number of "hellos."                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| Connects              | The total number of Calls Offered that are connected to agents, both inbound and outbound, for each job instance.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Connects Per Hour     | The total number of connects per hour in the selected scope.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| Serviced Calls        | Calls offered, or "hellos," that the dialer connected to an agent within the <b>Time to connect tolerance</b> duration. Serviced Calls are the Calls Offered minus the cumulative number of nuisance calls.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Desired Service Level | The target percentage of Serviced Calls that you want the system to maintain. The Desired Service Level is set for the job.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Actual Service Level  | <p>The cumulative realized service level for the job. The ratio of the cumulative number of Serviced Calls divided by the cumulative number of Calls Offered.</p> <ul style="list-style-type: none"> <li>● In an Agent Blending system, the service level is the combined service level of outbound jobs.</li> <li>● In an Intelligent Call Blending system, the service level is the service level for outbound, inbound, and blend jobs. The sum reflects the service level for Cruise Control and non Cruise Control jobs.</li> </ul> <p><b>Important:</b><br/>If Cruise Control is important for regulatory control, create a report that reports statistics for only Cruise Control jobs.</p> |
| Connect Tolerance     | The number of seconds that you will allow a phone call to be delayed waiting for an agent before the dialer designates the call as a nuisance call.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| Nuisance Count        | The total number of Calls Offered that were not distributed to agents within the Connect Tolerance.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| Total Nuisance Rate   | The rate of nuisance calls as a percentage of total Calls Offered. The Nuisance Count divided by the Calls Offered.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| Calls Queued          | The total number of calls that have spent time in the wait queue since the job began.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |

| Job Quality    | Description                                                                                                                                      |
|----------------|--------------------------------------------------------------------------------------------------------------------------------------------------|
| Avg Queue Time | The average length of time calls that have spent time in the wait queue since the job began.                                                     |
| Abandon Rate   | The rate of abandon calls as a percentage of total calls offered. The number of abandoned calls divided by the Calls Offered, multiplied by 100. |
| Elapsed Time   | The total time since the job instance started.                                                                                                   |

---

## Supervisor Agents view

The Supervisor Agents view displays the same data as the Dialer Agents view.

This view is only available if you have completed the following setups:

- Defined a agent/supervisor hierarchy
- Selected **Settings > Options** and select that hierarchy as the default agent/supervisor hierarchy

To choose which agent states to include in the Supervisor Agents view:

1. In Monitor, select **Settings > Options**.
2. Select the **Agent States** tab. For more information, see [Options, Agent States tab](#) on page 236.
3. Select the agent states you want to view.

You can further limit the agent states in a single view by using the **Filter** option.

The graphic mode displays a subset of the data in the table mode. The graphic mode displays data for each agent: agent name, the agent’s status, the time the agent is in that status.

The following table describes the Supervisor Agents view:

| Supervisor Agents | Description                                                            |
|-------------------|------------------------------------------------------------------------|
| Total             | The total number of agents within the selected scope.                  |
| Talk              | The total number of agents with status “Talk” in the selected scope.   |
| Update            | The total number of agents with status “Update” in the selected scope. |
| Idle              | The total number of agents with status “Idle” in the selected scope.   |
| ACD               | The total number of ACD agents in the selected scope.                  |
| Unavailable       | The total number of unavailable agents in the selected scope.          |

| <b>Supervisor Agents</b> | <b>Description</b>                                                                                                                                                                                                             |
|--------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Acquired                 | The total number of acquired ACD agents in the selected scope.                                                                                                                                                                 |
| Offline                  | The total number of offline agents in the selected scope.                                                                                                                                                                      |
| Logging Off              | The total number of agents that have requested log off, but are still handling calls.                                                                                                                                          |
| Supervisor               | The name of the supervisor in the agent/supervisor hierarchy.                                                                                                                                                                  |
| Dialer                   | The name of the dialer.                                                                                                                                                                                                        |
| Job                      | The name of a currently running job. Available data includes the names of all jobs running in the current scope.                                                                                                               |
| Job Instance             | A unique identification number, automatically assigned to a single instance of a job, used to identify data associated with that job instance in the database. Each time a job runs, the system assigns a new job instance ID. |
| Agent                    | The name of an agent logged in to the selected dialer.                                                                                                                                                                         |
| Agent ID                 | The identification number of the agent logged in to the selected dialer.                                                                                                                                                       |
| Status                   | The current status of the Agent. Status types include Talk, Update, Idle, ACD, Offline, Off job, Not available, and Logging off.                                                                                               |
| On Status                | The duration of the current status of the agent in hh:mm:ss format.                                                                                                                                                            |
| Agent Type               | The type of calling activity the agent is logged in to handle. Acceptable values include Outbound, Inbound, and Blend.                                                                                                         |
| On Job                   | The amount of time the agent has been on the job in hh:mm:ss format.                                                                                                                                                           |
| Headset                  | The headset ID or ACD extension assigned to the agent. The system uses this data to perform audio monitoring of an agent.                                                                                                      |

---

## Find Agent view

The Find Agent view helps you locate one or more agents by name, dialer, supervisor, or job. The results appear in a grid at the bottom of the dialog box.

You can select one or more agents from the result list and perform any of the actions on the Find Agent toolbar.

## Use Monitor views

The following table displays the Find Agent view:

| Find Agent | Description                                                                                                                                                            |
|------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Agent      | The name of the agent to search for, or a wildcard character (*).                                                                                                      |
| Status     | The current status of the Agent. Status types include Talk, Update, Idle, ACD, Offline, Off job, Not available, and Logging off.                                       |
| Dialer     | The name of one or more dialers on which to search. Also available as a column.                                                                                        |
| Job        | The name of one or more jobs to limit the search.                                                                                                                      |
| Supervisor | The name of the supervisor in the supervisor hierarchy.<br>The supervisor's name is not be available unless the you applied an agent/supervisor hierarchy to the view. |
| Headset    | The headset ID or ACD extension assigned to the agent. The system uses this data to perform audio monitoring of an agent.                                              |

---

## Agent Detail view

The Agent Detail view displays detailed information about the current activity and performance of an agent.

You can display this view for a specific agent from the **Tools** menu within any view that lists agents. For more information, see [Open a view about a specific agent](#) on page 171.

This view is only available if you have selected **Settings > Options** and select that hierarchy as the default agent/supervisor hierarchy. For more information, see [Options dialog box](#) on page 235.

The following table describes the Agent Detail view:

| Agent Detail | Description                                                                                                                      |
|--------------|----------------------------------------------------------------------------------------------------------------------------------|
| Name         | The name of the agent appears in the title bar.                                                                                  |
| Dialer       | The name of the dialer on which the agent is working.                                                                            |
| Supervisor   | The name of one or more supervisors to limit the search. This is only valid if you define an agent/supervisor hierarchy.         |
| Job          | The name of the job on which the agent is working.                                                                               |
| Status       | The current status of the Agent. Status types include Talk, Update, Idle, ACD, Offline, Off job, Not available, and Logging off. |
| On Status    | The time that the agent is on the current status.                                                                                |

| Agent Detail                            | Description                                                                                                                                                                                                                                                                                                                                                                                                                     |
|-----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Agent Type                              | The type of calling activity the agent is logged in to handle. Acceptable values include Outbound, Inbound, and Blend.                                                                                                                                                                                                                                                                                                          |
| Current Type                            | The type of calling activity in which the agent is currently engaged. This data is significant for agents that log in as blend, but are normally engaged in either Inbound or Outbound activity. Their agent type is Blend, but their current type varies between Outbound and Inbound. Similarly, for agents that have logged in as ACD, both agent type and current type change to Outbound once the agent has been acquired. |
| Total Connects - This Agent             | The total number of calls, both inbound and outbound, connected to this agent                                                                                                                                                                                                                                                                                                                                                   |
| Total Talk - This Agent                 | The total time spent talking on the job.                                                                                                                                                                                                                                                                                                                                                                                        |
| Total Update - This Agent               | The total time spent updating records.                                                                                                                                                                                                                                                                                                                                                                                          |
| Total Idle - This Agent                 | The total time spent waiting for a call.                                                                                                                                                                                                                                                                                                                                                                                        |
| Duty Cycle - This Agent                 | The average ratio between time spent talking and updating a record and the time from the beginning of one call to the beginning of the next call.                                                                                                                                                                                                                                                                               |
| Average Connects - This Agent           | The average number of calls, both inbound and outbound, connected to an agent                                                                                                                                                                                                                                                                                                                                                   |
| Average Talk - This Agent Average       | The average time spent talking on each call. The data appears as a number and as a section of the pie chart.                                                                                                                                                                                                                                                                                                                    |
| Average Update - This Agent Average     | The average time spent updating records by this agent.                                                                                                                                                                                                                                                                                                                                                                          |
| Average Idle - This Agent Average       | The average time the agent spent waiting between calls. The data appears as a number and as a section of the pie chart.                                                                                                                                                                                                                                                                                                         |
| Average Duty Cycle - This Agent Average | The average ratio between time spent talking and updating a record and the time from the beginning of one call to the beginning of the next call.                                                                                                                                                                                                                                                                               |
| Average Connects - Average of This Type | The average number of calls, both inbound and outbound, connected to this agent type. The data appears as a number and as a section of the pie chart                                                                                                                                                                                                                                                                            |
| Average Talk - Average of This Type     | The average time spent talking on each call by agents of the same type. The data appears as a number and as a section of the pie chart.                                                                                                                                                                                                                                                                                         |

## Use Monitor views

| Agent Detail                              | Description                                                                                                                                                              |
|-------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Average Update - Average of This Type     | The average time spent updating records by agents of the same type.                                                                                                      |
| Average Idle - Average of This Type       | The average time spent waiting between calls by agents of the same type. The data appears as a number and as a section of the pie chart.                                 |
| Average Duty Cycle - Average of This Type | The average ratio between time spent talking and updating a record and the time from the beginning of one call to the beginning of the next call for agents of this type |

---

## Agent Completion Codes view

The Agent Completion Codes view displays the calling results in terms of completion codes.

Additional information includes the following data:

- Total number of calls, connects, and RPCs
- The per hour number of calls, connects, and RPCs
- The number of RPCs per connect

You can display this view for a specific agent from the **Tools** menu within any view that lists agents. For more information see, [Open a view about a specific agent](#) on page 171.

The following table displays the Agent Completion Codes view:

| Agent Completion Codes | Description                                                                 |
|------------------------|-----------------------------------------------------------------------------|
| Connects               | The total number of connects for this agent.                                |
| RPCs                   | The total number of RPCs for this agent.                                    |
| Closures               | The total number of closures for this agent.                                |
| Code                   | The unique identification number associated with each completion code.      |
| RPC                    | A square indicates the code is an RPC.                                      |
| Closure                | A square indicates the code is a closure.                                   |
| Name                   | The user-defined name or description assigned to each code.                 |
| Total                  | The total number of calls released with each completion code.               |
| Avg/Hr                 | The average number of calls released with a completion code during an hour. |

| Agent Completion Codes | Description                                                                                                                                                                                                                             |
|------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Type Avg/Hr            | The average number of calls released by a specific type of agent with a completion code during an hour.                                                                                                                                 |
| % of RPCs              | For each code designated as an RPC, the percentage of connects recorded for each completion code based on the total number of RPCs for the job. For more information, see <a href="#">Job Completion Codes view</a> on page 191.        |
| % of Closures          | For each code designated as a closure, the percentage of connects recorded for each completion code based on the total number of closures for the job. For more information, see <a href="#">Job Completion Codes view</a> on page 191. |
| % of Calls             | The number of calls recorded for each code as a percentage of the total number of calls for the job. For more information, see <a href="#">Job Completion Codes view</a> on page 191.                                                   |

---

## Agent History view

The Agent History view displays detailed information about the past activity and performance of an agent.

You can display this view for a specific agent from the **Tools** menu within any view that lists agents. For more information, see [Open a view about a specific agent](#) on page 171.

The following table displays the Agent History views:

| Agent History | Description                                                                                                                                                    |
|---------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Agent         | The name of the agent logged in to the selected dialer.                                                                                                        |
| Agent ID      | The identification number of the agent logged in to the selected dialer.                                                                                       |
| Dialer        | The name of the dialer in the current scope.                                                                                                                   |
| Dialer ID     | A unique identification number, automatically assigned to a dialer, used to identify data related to that dialer in the database.                              |
| Current Job   | The name the job that is running during the current time scope.                                                                                                |
| Status        | The current status of the Agent. Status types include Talk, Update, Idle, ACD, Offline, Off job, Not available, and Logging off.                               |
| All Jobs      | The jobs that have run.                                                                                                                                        |
| Job ID        | A unique identification number, automatically assigned to a job. Used to identify job data in the database. The job ID does not change each time the job runs. |

## Use Monitor views

| <b>Agent History</b> | <b>Description</b>                                                                                                                                                                  |
|----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| First Login Date     | The date the agent first logged in to a job in the yyyy/mm/dd format.                                                                                                               |
| First Login Time     | The time the agent first logged in to a job in the hh:mm:ss format.                                                                                                                 |
| Last Logout Date     | The date the agent last logged out of a job in the yyyy/mm/dd format.                                                                                                               |
| Last Logout Time     | The time the agent last logged out of a job in the hh:mm:ss format.                                                                                                                 |
| Agent Hours          | The total number of hours agents have logged in to a job instance over the course of the job.                                                                                       |
| Job Number           | The number that the system assigned to the job. This is the same number that appears on the JobMon menu in the Linux-based menu system.                                             |
| Job Instance         | A unique identification number, automatically assigned to a job each time the job runs. Used to identify job data in the database. The job instance changes each time the job runs. |

# Chapter 11: Monitor view controls

A view is the name of the window that appears in the right-hand pane. Monitor displays the view after you click a button on the button bar. This section describes how to use views in Monitor.

This section contains the following topics:

- [Understanding view controls](#) on page 207
- [Using view controls](#) on page 210
- [Maintaining Monitor views](#) on page 213

## Understanding view controls

A view is the name given to the window that appears in the right-hand pane.

In Monitor, you can select a view to monitor calling activities and use the toolbar controls to filter the data that displays.

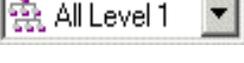
This section discusses the following topics:

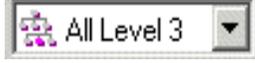
- [View control toolbar](#) on page 207
- [Understand scope selectors examples](#) on page 208

## View control toolbar

Every view opens with a set of tools on a toolbar. Use a toolbar button to help you manipulate the data in a view.

The available toolbar buttons vary depending on the view. For example, the time selector option does not appear if you cannot set a time range for data in a view.

| View tool              | Button                                                                              | Description                                                                                                                                   |
|------------------------|-------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|
| Table View             |  | If the view has graphical and table modes, this button displays the data without icons. The Table View is available for all views.            |
| Graphical View         |  | If the view has graphical and table modes, this button displays the data by showing icons. The Graphical View is not available for all views. |
| Filter Data            |  | Displays the <b>Filter Data</b> dialog box that allows you to filter the data in the view according to the selected criteria.                 |
| Performance Code       |  | Displays a dialog box that allows you to select a completion code that is used to measure agent performance.                                  |
| Hide/Show Columns      |  | Displays the <b>Columns</b> dialog box that allows you to select which of the available data fields will be displayed.                        |
| Find                   |  | Allows you to search for an item in a view.                                                                                                   |
| Level 1 Scope Selector |  | A drop-down list that allows you to limit the amount of in the display. The default is a list of dialers.                                     |

| View tool              | Button                                                                            | Description                                                                                                                                                                                      |
|------------------------|-----------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Level 2 Scope Selector |  | The choices in this list depend on the choice made in the Level1 Scope Selector. Allows you to limit the amount of data in the display. The default is a list of jobs.                           |
| Level 3 Scope Selector |  | The choices offered in this list depend on the choices made in the Level1 and Level2 Scope Selectors. Allows you to limit the amount of data in the display. The default is <b>All Level 3</b> . |
| Hierarchy Manager      |  | A pull-down list that allows you to select the types of data that will appear in the Scope Selectors.                                                                                            |
| Time Scope             |  | Allows you to display only running jobs or all jobs in the view.                                                                                                                                 |
| Refresh view           |  | Allows you to refresh a view.                                                                                                                                                                    |

## Understand scope selectors examples

The three drop-down lists in the view toolbar are scope selectors.

A scope selector allows you to change the range of data displayed in a view. Use the scope selectors with the Hierarchy Manager toolbar button. The option you select using the Hierarchy Manager toolbar button dynamically changes the available options in the Monitor scope selectors.

The default Monitor scope selectors are dialer and job. You can select one or all items from each selector.

A list of supervisors appears in the third scope selector if you completed the following:

- Defined an agent/supervisor hierarchy using the Hierarchy Manager tool
- Designated that hierarchy as the default hierarchy in Monitor

To use Hierarchy Manager, select **Tools > Hierarchy Manager**.

To set the default hierarchy in Monitor, select **Settings > Options > Scope**. For more information, see [Options, Scope tab](#) on page 235.

**Example One** - To display a view with data for all dialers, all jobs, and all supervisors, set the first hierarchy selector to All Level 1, the second selector to All Level 2, and the third selector to All Level 3.

If you change the dialer selector to DialerA, Monitor removes the data for all other dialers from the view.

## Monitor view controls

**Example Two** - To display data for all jobs named 30Day regardless of the dialer on which the jobs reside, set the first selector to All Level 1 and the second selector to 30Day.

---

## Using view controls

This section discusses the following topics to help you use the Monitor view controls:

- [Filter data in a view](#) on page 210
- [Select a performance code](#) on page 210
- [Set scope selectors](#) on page 211
- [Select a time range](#) on page 212
- [Select a hierarchy](#) on page 212

---

### Filter data in a view

Use the following procedure to filter data in a view:

1. With a view open, click **Filter Data**. The **Filter Data** dialog box appears. For more information, see [Filter Data dialog box](#) on page 237.
2. Select a column from the list. The options in this list are the column headings for the selected view.
3. From the **Operator** list, select an operator.
4. In the **Value** box, type a value.
5. Click **OK**.

---

### Select a performance code

The performance code option is available only from the Job Performance view.

Use the following procedure to select a performance code:

1. From the Job Performance view, click **Performance Code**.

The **Performance Completion Code** dialog box lists a set of completion codes with a description. For each code, the system displays the completion code category that was assigned to the code when the job started. For more information, see [Performance Completion Code dialog box](#) on page 248.

2. Select a code.
3. Click **OK**.

Monitor uses the selected code to measure agent performance.

---

## Set scope selectors

Set the scope using the three drop-down lists that are available from any view toolbar.

The Hierarchy Manager settings and the default hierarchy selections on the Monitor **Scope** tab which hierarchy options you can select for the view.

The default Monitor scope selectors are dialer and job. You can select one or all items from each selector.

Use the following procedure to set scope selectors:

1. With a view open, click the **Hierarchy Manager** icon on the view toolbar.
2. Select either **No hierarchy**, **Agent/supervisor hierarchy**, or **Custom hierarchy**.

The options coordinate with the Agent/supervisor hierarchy and Custom hierarchy lists on the **Scope** tab.

Additionally, the option that you select in the Hierarchy Manager list affects the three scope selectors in the drop-down lists in your view.

For example, if you select MySuperAgentHierarchy on the **Scope** tab's Agent/supervisor hierarchy list and then select Agent/supervisor hierarchy from the Hierarchy Manager list, your scope selectors will populate with data from MySuperAgentHierarchy.



**Tip:**

The hierarchy selected on the **Scope** tab becomes the default hierarchy that populates your views.

3. From the first scope selector, select an item. By default, a list of dialer names appear.  
If you selected **Use custom hierarchy**, the top-level items of the selected hierarchy appear in this list.  
The item you select in the first scope selector typically reduces the options available in the second scope selector. You can select **All Level 1**, which does not narrow your view's scope.
4. From the second scope selector, select an item. By default, a list of job names appear.  
If you selected **Use custom hierarchy**, the middle-level items of the selected hierarchy appear in this list.  
The item you select typically narrows the options available in the third scope selector. You can select **All Level 2**, which does not narrow your view's scope.
5. From the third scope selector, select an item. By default, the third scope selector contains no options except **All Level 3**.  
If you selected either **Use default hierarchy** or **Use custom hierarchy**, the bottom-level items of the selected hierarchy appear in this list. The **All Level 3** value does not narrow your view's scope.

---

## Select a time range

You can expand the default time to view data on only the jobs that are running or for all jobs.

For example, you can change the time range to display a view showing right party contacts for all instances of Job1 that have run during a single day.

Time selection is limited to views and data fields where summing makes sense. For example, non-numerical data is not summed. Similarly, data whose value is transient, such as the minimum hit rate, is not summed.

Use the following procedure to select a time range:

1. With a view open, click the **Time Scope** icon.
2. From the list, select or clear **Show Running Jobs Only**.

When you select **Show Running Jobs Only** your view will only display data for currently running jobs. When you clear **Show Running Jobs Only** your view will display data for currently running jobs.

---

## Select a hierarchy

After you create a hierarchy in Hierarchy Manager and use the **Scope** tab in Monitor to select the hierarchy, you can apply the hierarchy to any view.

1. With a view open, click the **Hierarchy Manager** icon.  
A list appears.
2. From the list, select **No Hierarchy**, **Agent/supervisor hierarchy**, or **Custom hierarchy**.

The **No Hierarchy** option sets the scope selectors back to their default settings. The first scope selector lists dialers, the second scope selector lists jobs, and the third scope selector contains no items except All Level 3.

**Agent/supervisor hierarchy** and **Custom hierarchy** coordinate with the Agent/supervisor hierarchy and Custom hierarchy lists seen on the Scope tab.

The option that you select in the Hierarchy Manager list affects the three scope selectors in your view.

For example, if you select MySuperAgentHierarchy in the **Scope** tab Agent/supervisor hierarchy list and then select Agent/supervisor hierarchy from the Hierarchy Manager list, your scope selectors will populate with data from MySuperAgentHierarchy.

The options you select in the scope selectors can change the scope of the data displayed in your views.

## Maintaining Monitor views

This section contains the following topics to help you maintain the Monitor views:

- [Hide or show columns](#) on page 213
- [Select Table View or Graphical View](#) on page 213
- [Save a view as HTML](#) on page 213

---

### Hide or show columns

You can customize your view to display only the columns you want.

Use the following procedure to hide or show columns.

1. With a view open, click the **Hide/Show columns** button.
2. To select or clear a column's check box, do one or more of the following tasks:
  - Click **Select All** to show each column in your current view.
  - Select a check box to show a column in your current view.
  - Clear a column's check box to hide a column in your current view.
  - Click **Hide All** to each column in your current view.
3. Click **OK**.

---

### Select Table View or Graphical View

Table view is the default view.

Use the following procedure to display views in table or graphical format:

1. With a view open, click the **Graphic View** button to switch to a view that uses icons.
2. With a view open, click the **Table View** button to switch to a view that does not display icons of the data in your view.

---

### Save a view as HTML

Use the following procedure to save your view as a HTML file:

1. In Monitor, select the view to save as a HTML file.

2. Select **File > Save as HTML**.

Monitor opens a new window with the HTML output.

3. Select **File > Save As**, browse to a location, and select **Save**.

## Monitor view controls

# Chapter 12: Job control functions

Avaya Proactive Contact allows you to adjust job settings while a job is running. You make these adjustments through the Monitor **Tools** menu. The adjusted settings revert to the default settings when the job ends.

This section contains the following topics:

- [Understanding job control functions](#) on page 217
- [Using job control functions](#) on page 218
- [Maintaining job control functions](#) on page 221

## Understanding job control functions

Avaya Proactive Contact allows you to adjust job settings while a job is running. You make these adjustments through the Monitor **Tools** menu. The adjusted settings expire when the job ends.

**Note:**

When a job uses the Cruise Control feature, you cannot change the call pacing settings.

Job controls are available from any view that displays a list of jobs, such as the **Job Status** view or the **Job Wait Queue** view.

---

## Using job control functions

Job controls are available from any view that displays a list of jobs, such as the **Job Status** view or the **Job Wait Queue** view.

**Note:**

When a job uses the Cruise Control feature, you cannot change the call pacing settings.

This section contains the following topics:

- [Stop a job](#) on page 218
- [Link to job](#) on page 219
- [Set the minimum hit rate](#) on page 219
- [Set the Expert Calling Ratio](#) on page 220

---

## Stop a job

Use the following procedure to stop a job:

1. In Monitor, open a view that lists jobs, and then select the job you want to stop.
2. Select **Tools > Stop Job**.

The **Stop Job** dialog box appears. For more information, see [Stop Job dialog box](#) on page 239.

3. Select one of the following two options:

|                                                     |                                                                                                                                                                                                                              |
|-----------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Stop job gracefully as agents complete calls</b> | Allows you to stop a job after the agents complete their current calls. This option allows the agents to end their current calls and release the records. This is the typical method.                                        |
| <b>Stop job immediately</b>                         | Allows you to stop a job immediately. Avaya Proactive Contact disconnects all phone conversations and closes the records immediately. As a result, agents cannot finish speaking with a customer or update customer records. |

4. Click **OK**.  
A dialog box appears asking you **Are you sure?**
5. Click **Yes** to stop the job.
6. If the job is linked to another job, a dialog box appears asking you whether you want to remove the job link.
7. Click **Yes** to remove the job link.

### Link to job

Use the **Job Link** option to identify a job to start automatically when the current job completes. When you link a job, the system transfers agents to the next job as the agents complete their last calls and release the records. The system displays a message telling the agents that they are changing jobs. For rules regarding linking jobs, see [Basic settings](#) on page 122.

Use the following procedure to link to job:

1. Open a Monitor view that lists jobs.
2. Select a job, and then select **Tools > Job Link**. For more information, see [Link to Job dialog box](#) on page 240.
3. Select a job, and then click **OK**.

**Note:**

It was assumed that the job linking feature would work for campaign share the same way that it does on a single system that is where a series of selections can be run for the linked jobs prior to the first job starting. After that the follow on jobs would start automatically as the previous job in the link ran out of records and shutdown. During this process the agents are also automatically move from one job to the next. This is not the case in a shared campaign. The jobs have to be monitored and the next linked job and selection have to be run manually near the end of the current job.

---

### Set the minimum hit rate

The minimum hit rate prevents Avaya Proactive Contact from allocating more pooled lines to a poorly performing job at the expense of a more successful job.

The minimum hit rate designates the lowest perceived probability of a call attempt that results in a request for an agent. The value of this parameter can reduce the number of call attempts that Avaya Proactive Contact initiates. For example, a job using a minimum hit rate of 30% means the system makes no more than three dialing attempts for each agent that.

Use the following procedure to set the minimum hit rate:

1. Open a Monitor view that lists jobs.
2. Select a job, and then select **Tools > Minimum Hit Rate**. For more information, see [Minimum Hit Rate dialog box](#) on page 240.
3. Use the slider or type a value from **0** to **100** in increments of 10, and then click **OK**.

---

## Set the Expert Calling Ratio

Avaya Proactive Contact provides two methods for predicting when to make the next phone call: Cruise Control and Expert Calling Ratio. If the job uses Expert Calling Ratio, you can change the Expert Calling Mode in Monitor. You cannot change the Cruise Control settings.

Expert Calling Ratio changes the way Avaya Proactive Contact predicts when to make the next call. You can select any of the following three ratios:

- Callers in the wait queue
- Agent Work Time
- Agent Update Time

**Tip:**

If you are currently experiencing a high abandonment rate, you may want to lower the percentage; if your agents are experiencing large amounts of idle time you may want to increase the percentage. This rule is true using any of the three ratios.

Use the following procedure to set the Expert Calling Ratio:

1. Open a Monitor view that lists jobs.
2. Select a job, and then select **Tools > Expert Calling Ratio**. For more information, see [Expert Calling Ratio dialog box](#) on page 240.
3. Click the **Expert Calling Mode** field and select either **Callers in the wait queue**, **Agent update time**, or **Agent work time**.
4. Select the **Value** field to enter a value from **0** through **100** in increments of 10, and then click **OK**.

**Tip:**

Wait at least 15 minutes before changing your Expert Calling Ratio again because your changes will not be noticeable to you for at least that long.

## Maintaining job control functions

This section contains the following topics:

- [Adjust Inbound settings](#) on page 221
- [Reassign lines](#) on page 221
- [Set a managed dialing job](#) on page 222
- [Select and sort time zones](#) on page 222
- [Set up a unit work list](#) on page 223
- [Set and modify a quota](#) on page 223
- [Set the detection mode](#) on page 224
- [Set the alternate initial phone](#) on page 224
- [Set recalls](#) on page 225
- [Find a text string](#) on page 225

---

### Adjust Inbound settings

Use the following procedure to adjust your inbound settings:

1. Open a Monitor view that lists jobs.
2. Select an inbound or blend job, and then select **Tools > Inbound Settings**. For more information, see [Inbound Settings dialog box](#) on page 241.
3. Select the **Value** field to enter settings, and then click **OK**.

---

### Reassign lines

When you reassign lines, you alleviate congestion on certain Avaya Proactive Contact lines so that your jobs run more quickly.

Use the following procedure to reassign lines:

1. Open a Monitor view that lists jobs.
2. Select a job, and then select **Tools > Lines**. For more information, see [Lines dialog box](#) on page 245.
3. A check indicates that the line group is in use.
4. To use line groups, complete one of the following actions:

- Select the appropriate check box.
  - Click the **Activate All** button to select all of the line groups.
  - Click the **Deactivate All** button to clear all of the line groups.
5. Click **OK**

---

## Set a managed dialing job

Managed dialing jobs allow agents to preview a customer's record prior to beginning their conversation with the customer. For more information on Managed Dialing settings, see [Managed Dialing settings](#) on page 129.

Use the following procedure to set the managed dialing job:

1. Open a Monitor view that lists jobs.
2. Select a Managed Dialing job from the list, and then select **Tools > Managed Dialing**. For more information, see [Managed Dialing dialog box](#) on page 241.
3. To modify agents' preview time, enter a different value in the **Time Limit** box.
4. Select **Allow agent to cancel calls** to immediately allow agents to cancel calls.
5. Click **OK**.

---

## Select and sort time zones

Use the following procedure to select time zones and sort calls by time zones:

1. Open a Monitor view that lists jobs.
2. Select a job, and then select **Tools > Time Zones**. For more information, see [Time Zones dialog box](#) on page 242.
3. Select the **Call records in order by time zone** check box to sort calls by times zones.
4. To place calls to a time zone, complete one of the following actions:
  - Select the time zone fields where you want to place calls.
  - Clear the time zone fields where you do not want to place calls.
  - Click **Activate All** to select all time zones.
  - Click **Deactivate All** to clear all time zones.
5. Click **OK**.

## Set up a unit work list

A unit work list creates a sub-list in a job so that certain agents can be assigned to a unit work list and, therefore, receive only certain calls.

You can enable a unit work list for the job before you start the job. During the job, you can enable or disable units. When the job completes the unit work list, the system stops the job.

For example: A job calls potential customers to set up appointments with sales people. You can enable the unit work list named sales group for the job. As the dialer places phone calls, agents make appointments for sales people in the sales group. When the sales people's schedules are full, the dialer stops placing calls for appointments.

Use the following procedure to set up a unit work list:

1. Open a Monitor view that lists jobs.
2. Select a job, and then select **Tools > Unit Work Lists**. For more information, see [Unit Work Lists dialog box](#) on page 242.
3. To change a work list ID, complete one of the following actions:
  - Select the Unit ID names that you want to use.
  - Clear the Unit ID names that you do not want to use.
  - Click **Activate All** to select all Unit ID names.
  - Click **Deactivate All** to clear Unit ID names.
4. Click **OK**.

---

## Set and modify a quota

Avaya Proactive Contact uses quotas to complete a specified number of outbound calls based on a selected outcome.

A quota is a maximum number of releases for a particular completion code. When the system reaches the quota for a completion code, the dialer stops placing phone calls and the system stops the job.

In Editor, you set and modify a quota that the system applies when the job starts.

In Monitor, you set and modify a quota that affects the current job while the job runs.

To understand how Avaya Proactive Contact uses quotas, it helps to understand when a job stops. For more information on when a job stops, see [When a job stops](#) on page 118.

Use the following procedure to change the quota value during calling activities:

1. Start Monitor.

2. Select a job, and then select **Tools > Quotas**. The **Quota** dialog box appears. For more information, see [Quota dialog box](#) on page 243.
3. Select the **Unit ID** field and type a **Unit ID**.
4. Select the **Completion Code** field to select a completion code.
5. Select the **Quota** field to enter a number greater than 0.
6. Click **OK**.

---

## Set the detection mode

Use the **Detection Mode** option to determine the types of calls Avaya Proactive Contact passes to agents. For more information on detection modes, see [Phone strategy settings](#) on page 86.

Use the following procedure to set the detection mode:

1. Open a Monitor view that lists jobs.
2. Select a job, and then select **Tools > Detection Modes**. For more information, see [Detection Modes dialog box](#) on page 244.
3. Click the **Phone** field to select a phone.
4. Select the **Rings** field to enter a different number of rings
5. Select the **Pass to Agents** field to select the type of connections to pass to an agent.
6. To add a phone, click **Add Phone** and repeat steps 3 and 4 to edit the fields.
7. To remove a phone, select the phone you want to delete, click **Remove Phone**, and then click **OK**.

---

## Set the alternate initial phone

The alternate initial phone replaces the initial phone as the first phone number to call at a particular time of day. The system begins to call the alternate initial phone number at the time you specify in the alternate initial phone settings. For more information, see [Phone strategy settings](#) on page 86.

Use the following procedure to set the alternate initial phone:

1. Open a Monitor view that lists jobs.
2. Select a job, and then select **Tools > Alternate Initial**. For more information, see [Alternate Initial Phones dialog box](#) on page 244.
3. Click the **Phone** field to select a phone.
4. Click the **Local Time** field to edit the time. To toggle between AM and PM, select it, and then use your up and down arrows.

## Job control functions

5. Click the **Time Zones** field, and then click the button to display the list of time zones. Select the time zones you want to call.
6. Click **Add Phone** to append a row, and then configure the new alternate initial phone's settings. To remove a phone, select the phone you want to remove, and then click **Remove Phone**.
7. Click **OK**.

---

## Set recalls

Use the recalls setting to determine how long Avaya Proactive Contact waits before recalling a number, how many times it recalls the same phone number, and which phone it calls next.

Use the following procedure to set recalls:

1. Open a Monitor view that lists jobs.
2. Select a job, and then select **Tools > Recalls**. For more information, see [Recalls dialog box](#) on page 245.
3. Select the various fields in the **Recalls** dialog box to edit the recalls currently configured.  
The **Result** column indicates the calling result of the call. The **Retry Interval** values are displayed in minutes.
4. To change a recall, select the appropriate row, then complete one of the following actions:
  - Click **Add Recall** to insert a row where you can edit a new recall.
  - Click **Remove Recall** to delete a recall.
5. Click **OK**.

---

## Find a text string

Use the following procedure to search for a text string in a view:

1. Open a Monitor view that lists jobs.
2. Select a job, and then select **Tools > Find**. For more information, see [Find dialog box](#) on page 237.
3. Enter the text string of the item you want to find in the current view.
4. To refine your search, select one or both of the following check boxes:
  - **Match case**
  - **Find whole words only**
5. Click **Find Next** to continue the search.

6. Click **OK** to end the search.

## **Job control functions**

# Chapter 13: Agent control functions

During calling activities, you can use Monitor to find one or more agents and take an action for that agent.

This section contains the following topics:

- [Understanding agent control functions](#) on page 229
- [Using agent control functions](#) on page 231

---

## Understanding agent control functions

During calling activities, you can use Monitor to find one or more agents and take the following actions to manage agents:

- Transfer one or more agents to another job
- Send a message to one or more agents
- Monitor an agent line
- Remove an agent from a job

Before performing any of these tasks, you must first find an agent.

This section contains the following topics to help you find agents:

- [Hierarchies](#) on page 229
- [Using wildcard characters](#) on page 229

---

## Hierarchies

You can find agents in several ways. If you know the exact agent login, you can search for a single agent.

Use the following hierarchy groups to search for a single agent or a group of agents.

**Job** - Search all agents in a job.

**Supervisor** - Search all agents reporting to a supervisor.

**Dialer** - Search all agents on a dialer.



**Tip:**

An agent must be set up within the supervisor hierarchy in order for the agent to be found using this function. Set up hierarchies using Hierarchy Manager.

---

## Using wildcard characters

In addition to finding a single agent, you can use wildcard characters to search for multiple agents.

The following table lists the common wildcard characters that you can use to find more than one agent:

| <b>Wildcard character</b> | <b>Description</b>                                                                                                                                                                 |
|---------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| *                         | Search for all agents. Use also for multiple agents with identical characters. For example, <i>*smith</i> will find all agents with anything containing the letters <i>smith</i> . |
| ?                         | Search for a single character within an agent login.                                                                                                                               |

## Using agent control functions

After you find one or more agents, you can use the Monitor agent control functions to take the following actions to manage agents:

- Transfer one or more agents to another job
- Send a message to one or more agents
- Monitor an agent line
- Remove an agent from a job

This section contains the following topics to help you manage agents during a job:

- [Find an agent](#) on page 231
- [Transfer an agent to another job](#) on page 231
- [Send message to an agent](#) on page 232
- [Monitor agent line](#) on page 232
- [Remove an agent from a job](#) on page 232
- [Show an agent view](#) on page 233

---

## Find an agent

Use the following procedure to find an agent:

1. On the Monitor button bar, click **Agent**, and then click **Find Agent**.  
The **Find Agent** view appears. For more information, see [Find Agent dialog box](#) on page 247.
2. Type the name of an agent or use wildcard characters to select multiple agents.
3. Use the Dialer, Job, and Supervisor drop-down lists to select a hierarchy to filter the information.
4. Click **Find**.

Agent names appear in the lower section of the **Find Agent** view.

---

## Transfer an agent to another job

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

1. On the Monitor button bar, click **Agent**, and then click **Find Agent**.

2. Select one or more agents in the **Find Agent** dialog box. For more information, see [Find Agent dialog box](#) on page 247.
3. Right-click and select **Transfer Agent**.  
A list of currently running jobs appears.
4. Select the job to transfer the agent to, and then click **OK**.

**Tip:**

You may not see the agent transfer immediately. Factors such as agent talk time and update time may affect how quickly the agent transfers.

---

## Send message to an agent

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

1. On the Monitor button bar, click **Agent**, and then click **Find Agent**.
2. Select one or more agents in the **Find Agent** dialog box. For more information, see [Find Agent dialog box](#) on page 247.
3. Right-click and select **Send Message**.  
The **Send Message** dialog box appears.
4. Type the message to send to an agent, and then click **OK**.

---

## Monitor agent line

Use the following procedure to monitor an agent line on an Avaya Proactive Contact with G230 system:

1. On the Monitor button bar, click **Agent**, and then click **Find Agent**.
2. Select the agent in the **Find Agent** dialog box. For more information, see [Find Agent dialog box](#) on page 247.
3. Right-click and select **Monitor Agent**.  
A dialog box appears.
4. Enter headset ID number, and then click **OK**.

---

## Remove an agent from a job

You can remove an agent from a job in emergencies when the agent cannot use a normal disconnect method.

## Agent control functions

**Remove Agent** immediately removes the agent from the job and logs the agent out of the Avaya Proactive Contact.

Use the following procedure to immediately disconnect an agent from a call:

1. On the Monitor button bar, click **Agent**, and then click **Find Agent**.
2. Select one or more agents in the **Find Agent** dialog box. For more information, see [Find Agent dialog box](#) on page 247.
3. Right-click and select **Remove Agent**.  
A dialog box appears.
4. Click **OK**.

---

## Show an agent view

After you find an agent, you can display an agent view for a selected agent.

Use the following procedure to display an agent view for a selected agent:

1. On the Monitor button bar, click **Agent**, and then click **Find Agent**.
2. Select an agents in the **Find Agent** dialog box. For more information, see [Find Agent dialog box](#) on page 247.
3. Right-click and select one of the following views: **Agent Detail**, **Agent Completion Codes**, or **Agent History**.
4. Click **OK**.  
The selected view for the selected agent appears.

# Chapter 14: Understanding Monitor dialog boxes

This section contains the following topics that describe the dialog boxes that you use in Monitor:

- [View control dialog boxes](#) on page 235
- [Job control dialog boxes](#) on page 239
- [Agent control dialog boxes](#) on page 247

## View control dialog boxes

This section contains the following topics:

- [Options dialog box](#) on page 235
  - [Customize Status Bar dialog box](#) on page 237
  - [Find dialog box](#) on page 237
  - [Filter Data dialog box](#) on page 237
- 

## Options dialog box

In Monitor, the **Options** dialog box is available from the **Settings** menu.

This section contains the following topics:

- [Options, Scope tab](#) on page 235
- [Options, Multi-Dialer Control tab](#) on page 236
- [Options, Completion Codes tab](#) on page 236
- [Options, Agent States tab](#) on page 236
- [Options, Appearance tab](#) on page 236
- [Options, Feedback tab](#) on page 236

## Options, Scope tab

The **Scope** tab allows you to set your preferences for data display and time range.

**How should data be arranged** - Select a hierarchy following drop down lists:

| Option                                     | Description                                                                                                                                                                                                                                                    |
|--------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Use the default agent/supervisor hierarchy | Sets the default hierarchy when you select <b>Agent/supervisor hierarchy</b> in any view.<br>Data is arranged according to dialers, jobs, and supervisors and the agents assigned to supervisors according to the selected default agent/supervisor hierarchy. |
| Use a custom hierarchy                     | Sets the default hierarchy when you select <b>Custom hierarchy</b> in any view.<br>Data is arranged based on the three levels defined in a hierarchy that has been set up in the Hierarchy Manager tool.                                                       |

### What time range should views support?

Gives you the option to select **Show data for all jobs run since the last dialer restart, if applicable.**

## Options, Multi-Dialer Control tab

The **Multi-Dialer Control** tab allows you to choose which of the available dialers you want included in your view.

**Apply job changes to all selected dialers** - Lets you choose to select all dialers to appear in Monitor views.

**Dialers** - Lists individual dialers that you can select to include in Monitor views.

## Options, Completion Codes tab

The **Completion Codes** tab allows you to choose which completion codes to view.

**Show these call completion codes** - Lets you select **All codes** or **Active codes only.**

## Options, Agent States tab

This tab allows you to choose which agents states to display.

**Display agents with these states** - Lets you select which states to display in Monitor views.

## Options, Appearance tab

The **Appearance** tab allows you to use a particular view as the appearance for future views and also allows you to set the refresh rate for all views.

**Use this view set** - Lets you select a default view set to use in Monitor.

**Default refresh rate** - Lets you define the number of seconds to wait between each data refresh.

## Options, Feedback tab

You can choose how changes to views and view sets are saved when the application closes: always save, prompt to save changes, or do not save.

**When a view closes** - Lists save options to apply when a view closes.

## Understanding Monitor dialog boxes

**When the application closes** - Lists save options to apply when Monitor closes.

**When a command is initiated** - Lists save options to apply when a command is initiated.

---

## Customize Status Bar dialog box

Use the **Customize Status Bar** dialog box to choose what information you want to see in the Monitor status bar.

**Available status panels** - Lists the different options that you can have Monitor display in the status bar.

---

## Find dialog box

Use the **Find** dialog box to search for an item in a view. For example, in a view that lists more agents than you can view on the screen, you can quickly locate a specific agent.

**Find what** - Type what you want to search for.

**Match case** - Select **Match case** if you want Monitor to search for items that exactly match the case (upper or lower) that you type. For example, if you type Chris and select **Match case**, Monitor does not include chris in the find results.

**Find whole words only** - Select **Find whole words only** to force Monitor to conduct a literal search based on what you type. For example, if you type chris and select **Find whole words only**, Monitor includes only chris as a valid search result. Christy, christine, and christopher, for example, would not be valid search results.

---

## Filter Data dialog box

The **Filter Data** dialog box lets you filter the amount of data you see in a view based on a data field contained in the view. For example, in the Dialer History view, you can filter data based on the Status column. The filter statement, "Status Is Finished," causes Monitor to display job data for completed job instances only. Currently running instances of the jobs are not included in the view.

**Column** - Lists the column headings of the selected view.

**Operator** - Lists available operators (Is, Is Not, Is Less Than, and Is Greater Than).

**Value** - Lists available values based on the selected column.

## Job control dialog boxes

This section contains the following topics:

- [Stop Job dialog box](#) on page 239
- [Link to Job dialog box](#) on page 240
- [Minimum Hit Rate dialog box](#) on page 240
- [Expert Calling Ratio dialog box](#) on page 240
- [Inbound Settings dialog box](#) on page 241
- [Managed Dialing dialog box](#) on page 241
- [Time Zones dialog box](#) on page 242
- [Unit Work Lists dialog box](#) on page 242
- [Quota dialog box](#) on page 243
- [Alternate Initial Phones dialog box](#) on page 244
- [Detection Modes dialog box](#) on page 244
- [Recalls dialog box](#) on page 245
- [Lines dialog box](#) on page 245

---

### Stop Job dialog box

The **Stop Job** dialog box lets you stop a job.

**Shut down gracefully as agents complete calls** - Allows you to stop a job after the agents complete their current calls. This option allows the agents to end their current calls and release the records.

**Stop job immediately** - Allows you to stop a job immediately. The system disconnects all phone conversations and closes the records immediately. As a result, agents cannot finish speaking with a customer or update customer records.

**Apply changes to all dialers under multi-dialer control** - Available only when multi-dialer control is enabled. Allows you to stop a job with the same name on more than one dialer.

---

## Link to Job dialog box

The **Link to Job** dialog box allows you to connect jobs so that a new job automatically begins when one job ends.

When you link a job, the system transfers each agent to the next job after the agent completes the last call and releases the record. The system displays a message telling the agents that they are changing jobs.

**Current link** - Identifies the job currently scheduled to start when the current job ends.

**New link** - Lists the jobs to which the current job can link.

**Apply changes to all dialers under multi-dialer control** - Available only when multi-dialer control is enabled. Allows you to change the job link for the same job on multiple dialers.

---

## Minimum Hit Rate dialog box

Minimum hit rate prevents the dialer from allocating more lines to a poorly performing job at the expense of a more successful job. For example, a minimum hit rate of 30% means the dialer will make no more than three dialing attempts for each agent.

**Minimum hit rate** - The minimum hit rate determines the maximum number of calls the dialer will make as it attempts to make an agent connection. Enter a value from 0 through 100 in increments of 10, or use the slider bar to set a minimum hit rate value. A typical setting is 30.

**Apply changes to all dialers under multi-dialer control** - Available only when multi-dialer control is enabled. Allows you to change the minimum hit rate for the same job on multiple dialers.

---

## Expert Calling Ratio dialog box

The Expert Calling Ratio affects the wait queue and the calling pace. The dialer achieves a balance between agents waiting for a call and customers placed in the wait queue.

**Expert Calling Mode** - Identifies the current mode (Calls in the wait queue, Agent Work Time, or Agent Update Time) with which the dialer calculates the Expert Calling ratio. Select a different option in this field to change the mode.

**Value** - Displays the current Expert Calling ratio value. Type a percent value from 1 through 100 to change the Expert Calling ratio.

## Understanding Monitor dialog boxes

**Apply changes to all dialers under multi-dialer control** - Available only when multi-dialer control is enabled. Allows you to change the Expert Calling ratio for the same job on multiple dialers.

---

## Inbound Settings dialog box

Inbound settings control the way the dialer transfers blend agents between inbound and outbound calling activities.

**Reassign agents to inbound** - Determines the maximum time a call can be in the wait queue before the system transfers a blend agent to take inbound calls. Decrease agent wait time if you want to emphasize call center productivity. The **Percentage of clients waiting exceeds** setting overrides the **Client wait exceeds** setting.

For **Client wait exceeds**, type a maximum amount of time, in seconds from 0 to 999, that a call can be in the wait queue before the system transfers a blend agent to take inbound calls.

For **Percentage of clients waiting exceeds**, type a number from 100 to 200 to represent the maximum percentage of calls to be in the wait queue. The dialer compares the number of wait queue calls to the number of inbound and blend agents. For example, two blend agents and three inbound agents are on a job. If the **Percentage of clients waiting exceeds** value is 100, five calls (100% of combined inbound and blend agents) must be in the wait queue before the system moves a blend agent to take inbound calls.

**Reassign agents to outbound** - Allows you to set a maximum time, in seconds, that a blend agent taking inbound calls can be idle before the system transfers an agent to take outbound calls. The recommended setting is 20.

**Apply changes to all dialers under multi-dialer control** - Available only when multi-dialer control is enabled. Allows you to change the inbound settings for the same job on multiple dialers.

---

## Managed Dialing dialog box

The **Managed Dialing** dialog box allows you to change managed job preferences.

**Preview length** - Sets the time that an agent can preview a record before the dialer dials the number. Enter a value (in seconds) from 1 through 999 in the **Time limit** field. Select **No limit** to set an unlimited amount of preview time.

**Allow agents to cancel call** - Lets you choose whether agents can cancel a Managed Dialing call.

**Apply changes to all dialers under multi-dialer control** - Available only when multi-dialer control is enabled. Allows you to change the Managed Dialing settings for the same job on multiple dialers.

---

## Time Zones dialog box

Select the time zones you want to call.

**Call records in order by time zone** - Lets you choose to have the dialer attempt to call all records in one time zone before moving to the next time zone. If you clear this option, the system attempts calls across all selected and available time zones.

**Time Zone** - Lists all time zones. Selected time zones are preceded by a check mark.

**Start Time** - Recommended start time for each time zone.

**Stop Time** - Recommended stop time for each time zone.

**Records** - The total number of records selected for calling in each time zone.

**Available** - The current number of records that are eligible to call at the current time for each time zone.

**Recalls** - The current number of records set for recall in each time zone.

**Active totals** - Displays totals for the Records, Available, and Recalls columns.

**Apply changes to all dialers under multi-dialer control** - Available only when multi-dialer control is enabled. Allows you to change the time zone settings for the same job on multiple dialers.

**Activate All** - Selects all time zones.

**Deactivate All** - Clears all time zones.

---

## Unit Work Lists dialog box

If you want a job to have a sub-area so that certain agents can log into a special area and work with certain customers, you can set up a Unit Work List for a job.

**Unit ID** - Lists all available Unit IDs. Selected units are preceded by a check mark. An Allid Unit ID indicates that the job is not set up for Unit Work Lists.

## Understanding Monitor dialog boxes

**Records** - The total number of records selected for each Unit ID.

**Available** - The current number of records that are eligible to call for each Unit ID.

**Recalls** - The current number of records set for recall for each Unit ID.

**Active totals** - Displays totals for the Records, Available, and Recalls columns.

**Apply changes to all dialers under multi-dialer control** - Available only when multi-dialer control is enabled. Allows you to change the Unit Work List settings for the same job on multiple dialers.

**Note:**

Unit Work Lists must only be used with outbound jobs, and blend jobs would be supported. However, there is a manual workaround that will allow you to use Unit Work Lists and achieve almost the same results. Follow the instructions below to configure Unit Work Lists to work with blend jobs.

When you set unit work lists to run on a blend job in the Job Run Verification Screen on Avaya Proactive Contact, you will get the following error messages:

```
2006/09/27!10.58.44!S28407!caller!caller.c!690!PID(28464)!Job blend startup (Pid=28464, Index=157, Number=105)
```

```
2006/09/27!10.58.45!LISTOPS!caller!!0!PID(28464)!Inbound with unshared account ownership is not permitted
```

```
2006/09/27!10.58.45!E28416!caller!caller.c!3374!PID(28464)!Caller - FATAL_ERROR: VL_ERR_JBLST_BAD
```

```
2006/09/27!10.58.55!E28408!nuisance!nuisance.c!260!PID(10700)!105 - Failed to get job number
```

```
2006/09/27!10.58.55!S28413!caller!caller.c!3586!PID(28464)!Job blend finished, setup error
```

The system has to be set to allocate all agents to the units, the parameter in the job file is "LOGONUNIT:Require unit ID for agent login" needs to be set to NO . This rule is enforced in the code due to the fact that the system cannot easily identify which agent to shift to inbound due to the small pool of agents assigned to each unit; this would result in nuisance calls.

An alternative would be to use agent blending, allowing agents to logon to campaigns by units. This solution works, but is not as efficient as a outbound only campaign without agent blending.

---

## Quota dialog box

A quota is a maximum number of releases defined for a particular completion code. When the quota for a unit is reached, no more records are dialed.

**Unit ID** - Lists all Unit IDs. For non-Unit Work List jobs, Allid is the only Unit ID.

**Completion Code** - Identifies the selected completion code to track.

**Quota** - Displays the quota limit for the selected completion code. Enter a number greater than 0.

**Apply changes to all dialers under multi-dialer control** - Available only when multi-dialer control is enabled. Allows you to change the quota settings for the same job on multiple dialers.

---

## Alternate Initial Phones dialog box

The alternate initial phone replaces the initial phone as the first phone number to call at a particular time of day.

**Phone** - Select the phone to use as the alternate initial phone.

**Local Time** - Displays the time that the system starts calling the alternate initial phone based on the local time in the selected time zone. Enter the time of day to switch to the alternate phone.

**Time Zones** - Lists the selected time zones for the selected alternate phone.

**Add Phone** - Adds a row for a new alternate initial phone.

**Remove Phone** - Removes the selected alternate initial phone.

**Apply changes to all dialers under multi-dialer control** - Available only when multi-dialer control is enabled. Allows you to change the alternate initial phone settings for the same job on multiple dialers.

---

## Detection Modes dialog box

Detection Mode refers to the types of calls you want the system to pass to agents.

**Phone** - Identifies the phone field to which the system applies the detection modes settings.

**Rings** - Displays the number of rings to allow before the system records a NOANSWER completion code.

**Pass to Agent** - Lists the call detection modes that you can choose to pass to agents. For example, you might select Human Voice and Answering Machine as the types of calls that agents should handle.

## Understanding Monitor dialog boxes

**Apply changes to all dialers under multi-dialer control** - Available only when multi-dialer control is enabled. Allows you to change the detection modes settings for the same job on multiple dialers.

**Add Phone** - Adds a new row to define detection modes settings for another phone.

**Remove Phone** - Removes the selected phone and detection modes settings.

---

## Recalls dialog box

Recall settings tell the system how to handle system-set recalls.

**Call This Phone** - Lists phones for which recall settings are currently active.

**Result** - Defines the call result for which the system attempts recalls.

**Retry Interval** - Defines the number of minutes between recall attempts.

**Attempts** - Defines the maximum number of call attempts that the system places for each result.

**Next Phone** - Defines the next phone that the system calls when it has completed the defined number of attempts.

**Apply changes to all dialers under multi-dialer control** - Available only when multi-dialer control is enabled. Allows you to change the recall settings for the same job on multiple dialers.

**Add Recall** - Adds a new row to set up new recall parameters.

**Remove Recall** - Removes a selected row from the **Recalls** dialog box.

---

## Lines dialog box

Reassign lines when you feel that certain jobs could use a more lines and when certain jobs do not need as many lines.

**Line Group Name** - Lists the line groups set up for the system. Active line groups are preceded by a check mark.

**Type** - Identifies the type of lines, such as outbound or inbound, in each line group.

**Apply changes to all dialers under multi-dialer control** - Available only when multi-dialer control is enabled. Allows you to change the line assignments for the same job on multiple dialers.

**Activate All** - Selects all line groups for the job.

**Deactivate All** - Clears all line groups from the job.

## Agent control dialog boxes

This section contains the following topics:

- [Find Agent dialog box](#) on page 247
- [Transfer Agent dialog box](#) on page 248
- [Send Message dialog box](#) on page 248
- [Monitor Agent dialog box](#) on page 248
- [Performance Completion Code dialog box](#) on page 248

---

### Find Agent dialog box

The **Find Agent** dialog box lets you search for one or more agents. You can then do the following:

- Send selected agents a message
- Remove them from a job
- Transfer them to another job
- Monitor them

**Name** - Enter the name of an agent or use wildcard characters to select multiple agents.

**Dialer, Supervisor, Job** - Use hierarchies to filter information based on dialer, job, or supervisor (if supervisor hierarchy is set up).

**Send a message to agents** - Sending instant messages lets you communicate directly with agents. Agents see your messages through their Proactive Contact Agent screen. Agents can receive these instant messages even when they are on a call with a customer.

After finding an agent, click the **Send Message** button.

**Remove agent** - Lets you end an agent's session on a job. Use this option only for emergencies when the agent cannot use a normal disconnect. The agent is immediately removed from the job and logged out of the Avaya Proactive Contact.

After finding an agent, click the **Remove Agent** button.

**Transfer agent** - Lets you place an agent on a different calling job.

After finding an agent, click the **Transfer Agent** button.

**Monitor agent** - Lets you listen in on an agent's conversation with a customer.

After finding an agent, click the **Monitor Agent** button.

**Show an agent view** - Lets you choose to display the Agent Detail view, Agent Completion Codes view, or Agent History view for the selected agent(s).

After finding an agent, click the **Agent Detail** button.

---

## Transfer Agent dialog box

Select a job to which the dialer will transfer the agent.

**Available Jobs** - Lists the jobs to which you can transfer an agent.

---

## Send Message dialog box

Lets you type the message you want to send to agents.

**Message text** - Type a message that you want to send to the selected agents.

---

## Monitor Agent dialog box

The **Monitor Agent** dialog box settings allow you to listen to the selected agent's conversation with a customer.

**Headset ID** - Lets you specify your headset ID to allow you to listen to an agent's conversation.

After finding an agent, click the **Monitor Agent** button.

---

## Performance Completion Code dialog box

Use the **Performance Completion Code** dialog box to select a completion code to use to measure agent performance.

**Code** - Lists the number associated with the call completion code.

**RPC** - Identifies whether this completion code was designated as an RPC in Completion Code Manager at the start of the job.

**Closure** - Identifies whether this completion code was designated as a Closure in Completion Code Manager at the start of the job.

## Understanding Monitor dialog boxes

**Description** - Displays the current completion code description from Completion Code Manager.

# Chapter 15: Alerts

Avaya Proactive Contact uses alerts to signal to supervisors the end of a job, a goal is met, and other events.

This section contains the following topics:

- [Understanding alerts](#) on page 251
- [Using alerts](#) on page 255
- [Maintaining alerts](#) on page 257
- [Understanding Alert dialog boxes](#) on page 258

# Understanding alerts

An alert provides a notification when job or agent performance, system or job status, or line usage varies beyond predetermined levels. This capability allows you to identify and correct potential problems before they escalate.

An alert can be the following notifications:

- An audio cue
- A visual cue
- A log file
- An email
- A pager signal

This section contains the following topics:

- [Alerts uses](#) on page 251
- [Alert examples](#) on page 252
- [Alert settings](#) on page 253

---

## Alerts uses

You can define up to 10 alerts that notifies you when the following varies beyond predetermined levels:

- Job or agent performance
- System or job status
- Line usage varies

You can set the following types of alerts to identify and correct potential problems before they escalate:

- Audio cues
- Visual cues
- Log files
- Emails
- Pager signal

For example, you might want to know when an agent handles a call for longer than five minutes or when the hit rate on a job is less than 30%.

You can also set an alert to tell you when the system needs attention, for example, a job is approaching completion.

To access alerts, start Monitor and select **Settings > Alerts**.

**Tip:**

Monitor must be open in order for you to receive a notification of an alert. After you receive an alert notification, you must enable the alert again.

To enable an alert, open the Alert Viewer and select **Enabled**.

---

## Alert examples

Avaya Proactive Contact can alert you for many reasons. The following is a sample list:

**Average Idle Time** - The average time that all agents or a specific agent are idle, not talking or updating.

**Average Talk Time** - The average time that all agents or a specific agent spend talking.

**Average Update Time** - The average update time that all agents or a specific agent spend updating a customer record.

**Current Talk Time** - The talk time for all agents or a specific agent. Current Talk Time is shown as talking in real-time rather than an average over multiple calls.

**Current Update Time** - The update time for all agents or a specific agent. Current Update Time is shown as updating in real-time rather than an average over multiple calls.

**Total Idle Time** - The total idle time for all agents or a specific agent, as idle time added over the course of a single job.

**Total Talk Time** - The total talk time for all agents or a specific agent, as talk time added over the course of a single job.

**Total Update Time** - The total update time for all agents or a specific agent, as update time added over the course of a single job.

**Line Utilization** - The percentage of lines in use. For example, you might want to know when 95% of your lines are used so that you can free some line. Otherwise, when 100% of the lines are used, the dialer automatically places customers in a wait queue when they dial in.

**Current Hit Rate** - The ratio or percentage of call connects to call attempts.

## Alerts

For example: A 25% hit rate means that out of 100 attempts, 25 connects were made. Or, it takes 4 calls to connect to one customer. A minimum hit rate keeps a job with a low hit rate from using all the lines when it shares a line pool with other jobs.

**Time on Dialer** - The time of day or night that the dialer sends an alert notification.

**Agent Completion Code Total** - The accumulated total of completion codes that agents have entered.

**Agent Completion Code Average** - The average number of completion codes that agents have entered.

**Job Completion Code Average** - The completion code average per hour. The Job Completion Code Average is useful if you would like an overall sense of job performance.

**Job Completion Code Total** - The total of all job completion codes, as accumulated over the entire life of a job. The Job Completion Code Total is useful if you want to stop a job or reassign agents to another job when the goal for a job has been met.

**Agents Assigned** - The number of agents currently on a job.

**Job End** - The job has ended.

**Records Left** - The number of records still left in the job that need to be dialed.

**Records Left as Percent of Total** - The percent of records in the entire job still left to be dialed.

**Time Remaining** - The estimated time left on a job.

Avaya Proactive Contact also automatically alerts you when the data in Monitor did not update within the previous 12 minutes.

---

## Alert settings

The following table shows possible combinations of alert settings:

| Condition              | Dialer | Job | Agent | Relation | Value  | Modifier         |
|------------------------|--------|-----|-------|----------|--------|------------------|
| Agent Comp Code Totals | Yes    | Yes | Yes   | >,<      |        | Total            |
| Agent Comp code Avg    | Yes    | Yes | Yes   | >,<      |        | Average Per Hour |
| Agents Assigned        | Yes    | Yes | No    | >,<      |        |                  |
| Average Idle Time      | Yes    | Yes | Yes   | >,<      | 0-1440 | minutes          |

| Condition            | Dialer | Job | Agent | Relation | Value      | Modifier |
|----------------------|--------|-----|-------|----------|------------|----------|
| Average Talk Time    | Yes    | Yes | Yes   | >,<      | 0-1440     | minutes  |
| Average Update Time  | Yes    | Yes | Yes   | >,<      | 0-1440     | minutes  |
| Current Hit Rate     | Yes    | Yes | No    | >,<      | 1-100      | %        |
| Current Talk Time    | Yes    | Yes | Yes   | >,<      | 0-1440     |          |
| Current Update Time  | Yes    | Yes | Yes   | >,<      | 0-1440     |          |
| Job Comp Code Avg    | Yes    | Yes | No    | >,<      |            |          |
| Job Comp Code Total  | Yes    | Yes | No    | >,<      |            |          |
| Job End              | Yes    | Yes | No    |          |            |          |
| Line Utilization     | Yes    | Yes | No    | >,<      | 1-100      | %        |
| Records Left         | Yes    | Yes | No    | >,<      |            |          |
| Records Left Percent | Yes    | Yes | No    | >,<      | 1-100      | %        |
| Time on Dialer       | Yes    | No  | No    | >,<      | 1:00-12:59 | AMPM     |
| Time Remaining       | Yes    | Yes | No    | >,<      | 0-1440     | minutes  |
| Total Idle Time      | Yes    | Yes | Yes   | >,<      | 0-1440     | minutes  |
| Total Talk Time      | Yes    | Yes | Yes   | >,<      | 0-1440     | minutes  |
| Total Update Time    | Yes    | Yes | Yes   | >,<      | 0-1440     | minutes  |

The dialer, job, and agent columns indicate whether a data item is relevant to a particular alert condition. For example, you can set a Job End alert for any job on any dialer, and you can set a Total Talk Time alert on any agent on any job on any dialer.

---

## Using alerts

In Monitor, you can create, change or remove an alert.

This section contains the following topics:

- [Create an alert](#) on page 255
- [Edit an alert](#) on page 256
- [Remove an alert](#) on page 256

---

## Create an alert

You create alerts in Alerts Viewer, which is available in Monitor.

Use the following procedure to create an alert:

1. Select **Start > Programs > Avaya > Proactive Contact 4.0 > Supervisor > Monitor**.
2. Select **Settings > Alerts**. For more information, see [Alert Viewer dialog box](#) on page 258.

If an email configuration wizard appears, either complete it or cancel out of it.

3. In the **Alerts Viewer** dialog box, click **Add**.

The **Alert Editor** dialog box appears.

4. On the **Alert Definition** tab, select the condition you want to monitor and complete the conditional statement.
5. On the **Scope** tab, narrow your alert condition.



**Tip:**

You can skip this tab if you do not want to narrow your alert criteria.

6. On the **Notifications** tab, select the following options to specify how Avaya Proactive Contact notifies you:

- Display an alert to open a pop-up alert dialog on your screen
- Sound an alert to hear an audible sound
- Send e-mail to receive an email with an alert notification.

If **Send e-mail** is unavailable, configure your default email client on your PC.

If **Send e-mail** is available and you want to receive an email alert notification, type your email address in the **To...** box.

7. Click **OK**.

The alert name and summary information appear in the **Alerts Viewer** dialog box.

---

## Edit an alert

Use the following procedure to edit an alert:

1. Use the following procedure to edit an alert:

2. In Monitor, select **Settings > Alerts**.

The **Alert Viewer** dialog box appears.

3. Select the alert you want to edit, and then click **Edit**.

The **Alert Editor** dialog box appears.

4. Use the **Alert Definition**, **Scope**, and **Notifications** tabs to modify the alert.

For more information, see [Alert Editor, Alert Definition tab](#) on page 259, [Alert Editor, Scope tab](#) on page 259, and [Alert Editor, Notifications tab](#) on page 260.

5. Click **OK**.

---

## Remove an alert

Use the following procedure to remove an alert:

1. In Monitor, select **Settings > Alerts**.

The **Alert Viewer** dialog box appears. For more information, see [Alert Viewer dialog box](#) on page 258.

2. Select the alert you want to delete, and then click **Remove**.

3. Click **Close**.

---

## Maintaining alerts

In Monitor, you can view and modify alerts to inform you about your calling activities.

This section contains the following topics:

- [Enable and disable alerts](#) on page 257
- [Check the status of each alert](#) on page 257

---

### Enable and disable alerts

In Alert Viewer, you have the option to disable alerts, which tells Avaya Proactive Contact not to notify you about an alert.

For example: You usually monitor agent Doe everyday because he is a new hire. If agent Doe calls in sick for a day, clear the check box next to the agent Doe alert to disable the alert. When agent Doe returns to work, select the agent Doe alert to reactivate it.

The **Enabled** check box tells you whether or not Avaya Proactive Contact is actively checking the alert's condition. A check mark indicates that Avaya Proactive Contact is monitoring the condition.

Job Ended, Current Talk Time, and Current Update Time automatically reactivate after their condition is met, but all other alerts require that you re-enable them in Alerts Viewer.

Use the following procedure to enable and disable alerts:

1. In Monitor, select **Settings > Alerts**.
2. Select or clear the **Enabled** field.
  - Select the **Enabled** field to activate monitoring of the alert condition.
  - Clear **Enabled** to deactivate the alert.

---

### Check the status of each alert

In Alert Viewer, you can check the status of your alerts.

- If an alert condition has not been met, its status is **On**.
- If an alert condition has been met, its status is **Off**.

Use the following procedure to check the status of each alert:

1. In Monitor, select **Settings > Alerts**.
2. Notice whether the **Status** column has an **On** or **Off** status.

---

## Understanding Alert dialog boxes

This section contains the following topics:

- [Alert Viewer dialog box](#) on page 258
- [Alert Editor, Alert Definition tab](#) on page 259
- [Alert Editor, Scope tab](#) on page 259
- [Alert Editor, Notifications tab](#) on page 260

---

### Alert Viewer dialog box

You can define up to 10 alerts to provide audio cues, visual cues, log files, e-mails, or pager signals when job or agent performance, system or job status, or line usage varies beyond predetermined levels. This information lets you identify and correct potential problems before they escalate.

The **Alert Viewer** dialog box contains summary information about existing alerts. If you want to edit an alert's settings, click Edit. If you want to add an alert, click Add.

You can receive alerts only when Monitor is running at the time the alert's condition is met.

**Enabled** - Indicates if an alert is enabled. If you do not want the system to monitor an alert's condition, clear the check box located in the Enabled field.

Alerts using the Job Ended, Current Talk Time, and Current Update Time conditions automatically re-enable themselves after their condition is met, but all other alerts require that you manually re-enable them.

**Status** - Displays the current status for each alert. If an alert's condition has been met, its status is Off.

**Condition** - Displays the condition, such as Average Talk Time or Line Utilization, defined for each alert. Click Edit to set or change a condition (Alert Editor, Alert Definition tab).

**Value** - Displays the value associated with the condition for each alert. Click Edit to set or change a condition (Alert Editor, Alert Definition tab).

**Scope** - Displays the scope settings for each alert. You can narrow the target of an alert by selecting a specific dialer, job, or agent. Narrowing the scope for an alert is optional.

**Add** - Lets you define a new alert.

**Edit** - Opens the **Alert Editor** dialog box in which you set up and change alert settings.

## Alerts

**Remove** - Removes the selected alert from the list of alerts.

---

### Alert Editor, Alert Definition tab

The **Alert Definition** tab is used to create your alert condition statement. Use the Condition list to select the condition you wish to monitor (for example, Current Talk Time). Use the **Completion Code**, **Operator**, and **Value** fields to complete your alert's conditional statement (for example, =15 minutes). The **Completion Code** list is available based on the Condition selection.

**Condition** - Lists the available conditions that you can set an alert to monitor.

**Completion Code** - Lists completion codes from which you select if your alert condition calls for monitoring a specific completion code.

**Operator** - Lists available logic operators. A logic operator, such as > (greater than), < (less than), or = (equal to), is used to build your conditional statement.

**Value** - Identifies the value for the conditional statement. Enter the value that you want the system to test for when evaluating the conditional statement. For example, in this conditional statement: "Current Talk Time > 5 minutes", the value is 5.

---

### Alert Editor, Scope tab

The **Scope** tab allows you to narrow the breadth of what the dialer monitors. For example, if you only want your alert to track a specific agent, use the Scope tab to tell the dialer which agent to monitor.

**Dialer** - Lists the dialers against which you can set an alert. Select Any Dialer (the Avaya Proactive Contact monitors all dialers) or a specific dialer from the list.

**Job** - Lists the jobs against which you can set an alert. Select Any Job (the Avaya Proactive Contact monitors all jobs) or a specific job from the list.

**Agent** - Lists the agents against whom you can set an alert. Select All Agents (the Avaya Proactive Contact monitors all agents) or a specific agent from the list.

---

## Alert Editor, Notifications tab

The **Notifications** tab allows you to specify how you want the dialer to alert you. The dialer can alert you only when Monitor running at the time the alert condition is met.

**Display alert** - Displays a pop-up dialog box on your computer screen to notify you.

**Sound alert** - Plays an audible sound from your computer to notify you.

**Send e-mail** - Sends you an e-mail message. If this option is unavailable, open Microsoft Outlook and set it as your default e-mail client. If **Send e-mail** is available and you want to receive an e-mail notification, type your email address in the **To...** box.

## Alerts

# Chapter 16: Analyst navigation and personalization

Avaya Proactive Contact allows you to customize the display of Analyst windows and navigate among the various tool applications that you can launch from Analyst.

This section contains the following topics to help you use Analyst:

- [Window arrangement overview](#) on page 263
- [Navigate among the Tool menu applications](#) on page 264
- [Use large icons or small icons in the button bar](#) on page 265

## Window arrangement overview

The Analyst window displays report configurations and summary information of the options that were selected in the Reports Wizard.

This section contains the following topics:

- [Analyst window layout and usage](#) on page 263
- [Button bar](#) on page 263
- [Sort](#) on page 263
- [Resize columns](#) on page 263

**Analyst window layout and usage** - By default, your Analyst window is divided into a button bar on the left and a main pane on the right. Nothing will display in the main pane until you click a selection in the button bar. The Analyst button bar contains report categories; by clicking the buttons under the button group headings, you can quickly move among the various reports.

**Button bar** - The button bar works like an accordion: it expands and contracts. In other words, whenever you click the heading of a button group, you expand the group so that its buttons are visible. You are able to resize the button bar.

**Sort** - You can click most column headings to sort the contents of the column. When you click a heading, you see a small arrow appear alongside the heading; if the small arrow is pointing up, you are sorting the column in ascending order. If the small arrow is pointing down, then you are sorting in descending order.

**Resize columns** - You can resize any column in the main pane by hovering your cursor between the heading titles until a double-arrow appears. Hold down your left mouse button while you drag your cursor to resize the columns.

---

## Navigate among the Tool menu applications

Analyst comes with tool applications that you access from the Tools menu. Use the following procedure to start Tools menu applications:

1. Select **Start > All Programs > Avaya Proactive Contact 4.0 > Supervisor > Analyst**.
2. To start a tool, select its name from the **Tools** menu. While you use the tool, Analyst remains open in the background so that you can navigate back to it when you are finished using the tool.

## Use large icons or small icons in the button bar

You can view large or small buttons on the button bar. Use the following procedure to switch between large and small icons in the button bar:

1. On the button bar, click to expand the button group whose icon size you want to change.
2. Right-click, and then select either **Large Icons** or **Small Icons**. A check mark next to the menu option indicates which view you are currently using.

# Chapter 17: Avaya Proactive Contact Analyst

Avaya Proactive Contact Analyst generates call management reports with job, agent, and system details that are based on Avaya Proactive Contact activity.

This section contains the following topics:

- [Understanding Analyst](#) on page 267
- [Using Analyst](#) on page 269

## Understanding Analyst

Analyst provides reports containing statistical information that you can use to evaluate your jobs. For example, reports can show:

- How agents spend their time.
- Which completion codes are most frequently used.
- The amount of time a particular job ran.
- The hierarchy of managers and agents.

In Analyst, reports are grouped into seven categories:

- Agent
- Job
- Time of Day
- Administrative
- Agent Monthly
- Job Monthly
- Time of Day Monthly

For each category, Analyst provides several reports. For example, the Agent category includes reports about agent activity, performance summary, and completion code summary. For each report, Analyst provides several variations or configurations. The different configurations sort, group, and filter data differently.

In Analyst, report categories appear on the button bar in the left pane. For each category, the reports are listed. When you select a report, the report configurations appear in the right pane.

The right pane displays five columns:

- Title
- Group 1
- Group 2
- Group 3
- Criteria

The last four columns display the options that were selected for the report configuration. There are many configurations for each report. You might compare the configurations to find one that most accurately meets your needs.

You might experiment with the New and Change features. You can use these features to create customized report configurations. After you create and save a configuration, the saved configuration appears with the existing configurations for that report.

You can use the Schedule feature to instruct Analyst to automatically generate reports from a specific configuration at a specific time. When you set up a report schedule, you specify the exact time that Avaya Proactive Contact sends the report to your printer.

## Using Analyst

This section describes the tasks you can perform using Avaya Proactive Contact Analyst.

This section contains the following topics:

- [Create a new report configuration](#) on page 269
- [Delete a report configuration](#) on page 270
- [Change a report configuration](#) on page 270
- [Preview a report](#) on page 271
- [Print a report](#) on page 271
- [Export report data](#) on page 272
- [Schedule a report](#) on page 273

---

## Create a new report configuration

When you create a new report configuration, you specify:

- Grouping: the indentation and the hierarchical layout of the report data.
- Time frame: the desired time period of the report.
- Filtering: the specific information to include in your report.
- Title: the report identifier in the list of report configurations.
- Completion codes: completion code information included in Completion Code Summary reports. This option is available only for Completion Code Summary reports in these categories:
  - Agent
  - Job
  - Time of Day
  - Agent Monthly
  - Job Monthly
  - Time of Day Monthly

To create a new report configuration:

1. Select a report category on the button bar.
2. Select a report.

### 3. Select **Reports > New**.

The system displays the Analyst Report Wizard. The Report Wizard guides you through the configuration process.

**Tip:**

You can only have one Report Wizard running at a time.

### 4. Read the Welcome screen.

### 5. Complete the wizard, noting the following:

- In the Data Group page, if you select a hierarchy branch as a grouping criteria, you must select the hierarchy name on the Additional Report Criteria page.
- In the Additional Report Criteria pages, if you leave these settings blank the report data is not filtered.
- Select up to 14 completion codes for Completion Code Summary reports.

The system displays your report configuration as the last item in the list of report configurations.

---

## Delete a report configuration

Use the following procedure to delete an Analyst report configuration:

1. Select a report category on the button bar.
2. Select a report.
3. Select a report configuration.
4. Select **Reports > Delete**.
5. Click **Yes** to delete the report configuration, or click **No** to close the dialog box without deleting the report configuration.

---

## Change a report configuration

If there is an existing report configuration that you need to modify, use the **Change** command to alter the configuration.

1. Select a report category on the button bar.
2. Select a report.
3. Select a report configuration.

4. Select **Reports > Change**.

The system displays the Analyst Report Wizard, pre-populated with the existing report criteria.

5. Follow the instructions in the Report Wizard to change the report criteria.

---

## Preview a report

To preview a report:

1. Select a report category on the button bar.
2. Select a report in the report category.
3. Select a report configuration.
4. Select **Reports > Preview**.

Analyst displays the report in a new window. From this window you can:

- Print the report
- Set the printer properties
- Refresh the report data
- Export the report data
- Toggle the group tree outline

For more information about printing, see [Print a report](#) on page 271.

For more information about exporting data, see [Export report data](#) on page 272.

---

## Print a report

You have two options for printing an Analyst report: from the menu or from the preview window.

### From the menu

Use this procedure to print an report from the menu:

1. Select a report category on the button bar.
2. Select a report in the category.
3. Select a report configuration.
4. Select **Reports > Print**.
5. Select the number of copies you want to print.

6. Click **OK**.

The system prints the report to your default printer.

**Tip:**

Before printing a report, ensure that the printer properties, like portrait or landscape orientation, are set correctly.

## From the preview window

Use this procedure to print a report from the preview window:

1. Click the **Printer Setup** icon.

The system displays the Print Setup dialog for your default printer.

2. Click **Properties...**
3. Verify the settings for your printer.
4. Click **OK**.
5. Click **OK** again.
6. Click the **Print** icon.
7. Select the page range, number of copies, and collation option.
8. Click **OK**.

The system prints the file to your default printer.

---

## Export report data

Export report data to use or view in a different application:

1. Select a report category on the button bar.
2. Select a report in the category.
3. Select a report configuration.
4. Select **Reports > Preview**.  
Analyst displays the report in a new window.
5. Click **Export** In the report window.
6. From the **Format** list, select a format.
7. From the **Destination** list, select a destination.

8. Click **OK**.

Depending on the format and destination chosen, the system displays a series of dialog boxes containing options for exporting the report data.

9. In each dialog box, verify the correct information is selected.
10. Click **OK** to move to the next dialog box, until the data is exported.

---

## Schedule a report

Use the following procedure to schedule a time to print a report automatically:

1. Select a report category on the button bar.
2. Select a report in the category.
3. Select a report configuration.
4. Select **Reports > Scheduler**.
5. In the **Scheduler** dialog box, select the frequency option that corresponds with how often you want to print the report.

**Note:**

If you select Weekly or Monthly, the report prints on Monday only. Use Task Scheduler, available from the Windows Control Panel, to select a different day of the week. The settings you specify in Task Scheduler override the Analyst schedule settings.

6. Select a start time.
7. Click **OK**.



**Tip:**

After you have scheduled a report, you can look in the Windows Task Scheduler to view your scheduled reports: **Start > Settings > Control Panel > Scheduled Tasks**.





# Chapter 18: PC Analysis Telnet

PC Analysis Telnet is a tool that allows you to access the Linux-based PC Analysis menus.

PC Analysis is a reporting and troubleshooting tool included with the Avaya Proactive Contact. You can also use PC Analysis to define and generate extract output files to a network location. You can use the extract files in third party reporting, spreadsheet, and word processing packages.

This section contains the following topics:

- [Understanding PC Analysis Telnet](#) on page 277
- [Using PC Analysis Telnet](#) on page 279

## Understanding PC Analysis Telnet

The PC Analysis Telnet tool allows you to access the Linux-based PC Analysis menus. You can also use PC Analysis Telnet to move PC Analysis extract output files from the Avaya Proactive Contact to a network location.

PC Analysis Telnet is available from the Analyst **Tools** menu only.

**Note:**

If access to Supervisor is not available, you need to use a third-party telnet tool to access Avaya Proactive Contact menu system and PC Analysis.

This section contains the following topics:

- [PC Analysis](#) on page 277
- [PC Analysis Telnet features](#) on page 277

---

## PC Analysis

Use PC Analysis to create reports, charts, and spreadsheets of Avaya Proactive Contact data in third-party spreadsheet, word processing, and reporting applications.

In PC Analysis, you define extract files, generate extract output files, and transfer the extract output files to third-party applications. You can extract files the following formats: \*.cfg, \*.prn, and \*.txt.

---

## PC Analysis Telnet features

Use the PC Analysis Telnet tool to navigate to the Linux-based menus and PC Analysis screens.

The PC Analysis Telnet features appear on the toolbar, **File** menu, and **Tools** menu.

PC Analysis Telnet contains the following features:

| Feature           | Icon                                                                                | Description                                                                                                                                                                                                                                                                |
|-------------------|-------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Connect           |    | Use <b>Connect</b> to select the dialer for which you want to generate or transfer extract data files. This feature is not available while you are connected to a system.<br>You must disconnect from a dialer before you can connect to a different dialer.               |
| Disconnect        |    | Use <b>Disconnect</b> to end the telnet session for the current dialer. If you exit the menu system, PC Analysis Telnet automatically disconnects your session.<br>After you disconnect, you can connect to a different dialer or exit the PC Analysis Telnet application. |
| Exit out of entry |    | Use <b>Exit out of entry</b> to move back one screen in the Linux-based screens. <b>Exit out of entry</b> provides the same functionality as <b>Ctrl-x</b> .                                                                                                               |
| Done with entry   |    | Use <b>Done with entry</b> to move to the next Linux-based screen. <b>Done with entry</b> provides the same functionality as the <b>Done</b> key, <b>F1</b> .                                                                                                              |
| Select            |    | Use <b>Select</b> from the PC Analysis Extraction Configuration Edit screen. <b>Select</b> moves your cursor to the Select column.<br>Press <b>Enter</b> after typing the <b>Select</b> value.                                                                             |
| Criteria          |  | Use <b>Criteria</b> from the PC Analysis Extraction Configuration Edit screen. <b>Criteria</b> moves your cursor to the Criteria column.<br>Press <b>Enter</b> after typing the <b>Criteria</b> statement.                                                                 |
| Run extract       |  | Use <b>Run extract</b> from the PC Analysis Extraction Configuration Edit screen to generate a PC Analysis extract output file. The file is based on the configuration of the open extract file.                                                                           |
| Get file          |  | Use <b>Get file</b> to transfer one or more PC Analysis extract output files from the dialer to a network location.                                                                                                                                                        |

## Using PC Analysis Telnet

The PC Analysis Telnet tool allows you to access the Linux-based PC Analysis menus.

PC Analysis Telnet is available from the Analyst **Tools** menu only.

**Note:**

If access to Supervisor is not available, you need to use a third-party telnet tool to access Avaya Proactive Contact menu system and PC Analysis.

For information on how to use the Linux-based PC Analysis menus, see *Administering Avaya Proactive Contact (Linux-based Interface)*.

This section contains the following topics for the PC Analysis Telnet tool:

- [Start PC Analysis Telnet](#) on page 279
- [Transfer PC Analysis extract output files](#) on page 280
- [FTP Client dialog box](#) on page 280

---

## Start PC Analysis Telnet

The PC Analysis Telnet tool allows you to access the Linux-based PC Analysis menus.

Use the following procedure to start PC Analysis Telnet.

1. Select **Start > All Programs > Avaya > Proactive Contact 4.0 > Supervisor > Analyst**.
2. Select **Tools > PC Analysis Telnet**.

The PC Analysis Telnet window appears.

3. Select **File > Connect**.

The **Connect to Proactive Contact** dialog box appears.

4. From the **Name** list, select the name of the dialer to which you want to connect, and then click **OK**.

The dialer **login:** prompt appears in the Telnet window.

5. Use your system or PC Analysis login to access the PC Analysis menus.
6. Enter your key code and press **Enter**.

---

## Transfer PC Analysis extract output files

Use the following procedure to transfer generated PC Analysis extract output files from Avaya Proactive Contact to a network location or to a personal computer.

1. Start **PC Analysis Telnet**.
2. Connect to a dialer.
3. Select **Tools > Get File(s)**.

The **FTP Client** dialog box appears. The name of the system to which you are connected appears in the dialog box title.

4. Select one or more extract output files to transfer, and then click **Get file**.

The **Save As** dialog box appears.

5. Browse to the location where you want to transfer the selected extract output file, and then click **Save**.

The system saves the file to the selected location. If you selected more than one extract output file to transfer, the **Save As** dialog box appears for the next file.

6. Repeat step 5 for each extract output file you selected to transfer.

After you click save for the last output file, the **FTP Client** dialog box appears. For more information, see [FTP Client dialog box](#) on page 280.

7. Click **Cancel** to close the **FTP Client** dialog box.

---

## FTP Client dialog box

The **FTP Client** dialog box allows you to transfer PC Analysis extract files from Avaya Proactive Contact to a network location, such as a personal computer.

**File Name** - Lists the PC Analysis extract files that currently exist on the selected dialer. Extract files typically have a .prn extension (for example, list1.prn).

**Size** - Lists the file size of each extract file.

**Date** - Identifies the date that the extract file was generated.

**Get File** - Click Get File to transfer one or more selected extract files. The **Save As** dialog box appears, which lets you choose where you want to save the file.



# Chapter 19: Completion Code Manager

Completion Codes is a tool that helps you create, categorize, and maintain completion codes. The changes you make are available the next time the dialers restart.

A completion code identifies the result of a phone call. Either the system or an agent assigns a completion code to each phone call. The system uses completion codes to select records for placing calls, to monitor calling activities, and to select records for reports.

This section contains the following topics:

- [Understanding completion codes](#) on page 283
- [Using Completion Codes](#) on page 287
- [Maintaining completion codes](#) on page 290

## Understanding completion codes

This section discusses the following topics to help you use completion codes:

- [Completion codes](#) on page 283
- [Completion code attributes](#) on page 284
- [Completion code categories](#) on page 285
- [Multi-dialer environment](#) on page 285

---

## Completion codes

A completion code identifies the result of a phone call. Either the system or an agent assigns a completion code to each phone call.

The system assigns a completion code when the dialer does not pass the phone call to an agent. The only successful call attempts that the system identifies are during Virtual jobs.

An agent assigns a completion code based on the result of a phone call that the dialer passed to the agent.

Examples of completion codes that the system can assign include the following codes:

- BUSY when the dialer detects a busy signal
- SIT when the dialer detects a Standard Information Tone that identifies a disconnected number or busy circuits
- NOANSWER when a party does not answer the phone call within the specified time number of rings



**Tip:**

You can change the number of times the system attempts to call the customer on the **Retries** tab in Strategies.

Examples of completion codes that agents can assign include the following codes:

- RECALL to tell the dialer to place the phone call at a later time
- PROMISE when the customer agrees to make a payment
- AUTOVOICE when the job is set up to pass agents phone calls that connect to an answering machine

## Completion code attributes

Avaya Proactive Contact assigns a number to each completion code and specifies whether the system or agents assign the completion code. A dialer has 200 completion codes.

A completion code has the following attributes:

**Keyword** - Identifies the short name for the completion code.

**Code** - Identifies the assigned number for the completion code. The code numbers range from 0 through 199.

**Description** - Provides a brief description of the completion code.

**Type** - Identifies whether the system or an agent assigns the completion code.

**Report Header** - Identifies the title for the completion code column in the Completion Code Summary report.

You can create the description and report header for the completion codes that agents assign.

You can change the description and report header for the completion codes that agents and the system assign.

You cannot, however, change the code keyword, number, and type for completion codes that agents and the system assign.

The following table provides several examples of completion codes:

| Keyword   | Code | Description                                                                                          | Type   | Report Header          |
|-----------|------|------------------------------------------------------------------------------------------------------|--------|------------------------|
| RESERVED1 | 001  | Reserved for system.                                                                                 |        |                        |
| NOTINZONE | 005  | The local time for the customer phone is outside the legal hours to place calls.                     | System | Not within legal hours |
| MOFLASH_B | 006  | Native voice and data transfer: Agent transfers call to inbound agent without remaining on the line. | Agent  | Blind transfer         |
| TRANSFER  | 018  | Transfer release.                                                                                    | Agent  | Transferred            |
| CODE32    | 032  | Schedule appointment, then call                                                                      | Agent  | SchdCall               |
| DTMF_V    | 044  | Internal system code.                                                                                | System | Voice DTMF             |
| VIRTVOICE | 091  | Virtual voice message to Voice                                                                       | Agent  | Virtual Voice          |

### Completion code categories

During a job, agents assign a completion code to a phone call to indicate the result of a call. In Completion Code Manager, you can organize completion codes into four categories for monitoring and reporting purposes.



**Tip:**

You can associate a completion code with more than one category.

For example, an agent placed a call to confirm an order and left a message on the answering machine. The job is set up to pass phone calls that are answered by an answering machine to agents. The agent assigned the answering machine completion code to the customer record. The answering machine completion code can belong to both the Right Party Contacts and Closures categories.

**Right Party Contacts (RPCs)** - Indicates that the agent talked with the correct party.

**Closures** - Indicates that the agent talked with a party and completed the purpose of the phone call. A closure can represent a variety of outcomes, including the following examples:

- Balance paid in full
- Bankruptcy
- Deceased
- Sale verified and completed

**Abandons** - Indicates that a phone call was abandoned and that the dialer disconnected the phone call. An abandon can be result of several events, including the following examples:

- A customer who placed a call to the call center hung up while in the inbound wait queue.
- A customer hung up while in the outbound wait queue.
- A phone call that was held in wait queue for the maximum time allowed.

**Recalls** - Indicates that the phone call did not connect to a customer and that another phone call attempt can be made. The dialer places another phone call to the customer based on the settings you define on the [Retries](#) tab in Strategies.

---

### Multi-dialer environment

In Completion Code Manager, you can create and change the completion code description and report header text for completion codes that agents assign. You can also assign completion codes to categories.

If your system uses multiple dialers, the completion codes that you create and change in Completion Code Manager belong to the primary dialer. When you save the codes in Completion Code Manager, Avaya Proactive Contact saves the changes to each dialer in the pod. This ensures a consistent set of codes for reporting and monitoring.

## Using Completion Codes

You can use Completion Codes to create and manage completion codes. You can do the following tasks:

- View the system and agent assigned completion codes.
- Create and maintain completion codes that agents can assign.
- Assign completion codes to categories for monitor and reporting activities.

The changes you make are available the next time the dialers restart.

The following topics discuss Completion Code Manager and the procedures you can use to categorize completion codes:

- [Completion Code window](#) on page 287
- [Start Completion Code Manager](#) on page 288
- [Create a completion code](#) on page 288
- [Assign a completion code to a category](#) on page 288

---

## Completion Code window

The Completion Code window provides a means to create, categorize, and maintain completion codes for monitor and reporting activities.

**Right-hand pane** - The right-hand pane contains a complete list of completion codes for the dialer. For each code, Completion Code lists the keyword, code number, description, whether the system or agent assigns the completion code, and the report column text.



**Tip:**

You can use the right-click menu in the right-hand pane to select menu options that are available on the **Edit** and **View** menus.

The Right-hand pane also displays the following categories:

- **RPCs (Right Party Contacts)** - Is used to specify that the person contacted was the appropriate person to talk with.
- **Closures** - Is used to indicate that some form of closure was reached with the contacted party.
- **Abandon** - Is used to indicate the system abandoned the call after connecting with a person at the called number.
- **Recall** - Is used to indicate whether or not this completion code can be used to specify that a record can be recalled.

---

## Start Completion Code Manager

Completion Code Manager is available from the **View** menu.

**Note:**

The changes you make in Completion Codes are available the next time the dialers restart.

Use the following procedure to start Completion Codes:

1. Select **Start > All Programs > Avaya > Proactive Contact 4.0 > Supervisor > Editor**.
2. Select **Completion Codes**.

The Version dialog appears. Select the version that you want to Edit. The default is the Active version. For more information, see [Versions](#) on page 42. A list of all the active completion codes appears. For more information, see [Completion Code window](#) on page 287.

---

## Create a completion code

You can assign the code to the Right Party Contact and Closure categories, and include the code in the Completion Codes Summary report.

Later, you can assign the completion code to the Abandon and Recall categories. You can also change the description and report header text directly on the right-hand pane.

Use the following procedure to create a completion code.

1. Right-click and Select **New** OR click the **New** icon.  
The Completion Code Wizard window opens.
2. Complete the wizard by defining the new code, setting attributes for the code, and verifying the new code entities.

For more information, see the following topics:

- [Change a completion code](#) on page 290.
- [Assign a completion code to a category](#) on page 288.

---

## Assign a completion code to a category

You can assign a completion code to the following categories:

- RPC (Right Party Contact)
- Closure
- Abandon

## Completion Code Manager

- Recall

Use the following procedure to assign a completion code to a category from the list of completion codes in the right-hand pane:

1. Select one or more completion codes.
2. Select the specific option from the available category.
3. Click **Save**.

Completion Code Manager dialog box appears.

4. Click **Yes** to save a copy in a different version OR click **No** to Cancel.

Avaya Proactive Contact saves the completion codes on each dialer in a pod.

---

## Maintaining completion codes

This section discusses the procedures you can use to maintain completion codes:

- [Assign or reassign a completion code to a category](#) on page 290
- [Change a completion code](#) on page 290
- [Filter the completion codes to view](#) on page 291
- [Save the completion code information to a file](#) on page 291

---

### Assign or reassign a completion code to a category

Use the following procedure to remove a completion code from the following categories:

- Right Party Contact
  - Closure
  - Abandon
  - Recall
1. From the list of completion codes in the right-hand pane, select the completion code that you want to remove from the category.
  2. Right-click and select **Remove**.  
The Delete confirmation dialog box appears.
  3. Click **OK** to remove the completion code from the list of completion codes.

---

### Change a completion code

Use the following procedure to change a completion code description and report header text:

1. From the list of completion codes in the right-hand pane of the window, select the completion code that you want to change.
2. Right-click and select **Change Description** or **Change Report Header**.
3. Type the new description or report header text, and then press **Enter**.

**Tip:**

The report column width is limited to 23 characters in length. You can adjust the text until the report meets your requirements

Completion Code displays the new information.

## Filter the completion codes to view

You can display system completion codes, agent completion codes, or all completion codes. Use the following procedure to display the type of completion codes that you want to view:

1. Select **View**.
2. Select the type of completion code you want to view.  
Completion Code displays the type of codes you selected.

---

## Save the completion code information to a file

Use the following procedure to save the completion code attributes and category information to an HTML file:

1. Select **Code > Save as HTML**.
2. In the **Save As** dialog box, browse to the location where you want to save the Completion Code Configuration file.  
You can change the name of the file.
3. Click **Save**.

# Chapter 20: Hierarchy Manager

Hierarchy Manager is a tool that helps you group and organize data.

Hierarchy Manager allows you to create agent, job, or dialer hierarchies to reflect your company's or business' organization. For example, you can create relationships between the Avaya Proactive Contact agents and the management structure of your company.

In Monitor, you can also use hierarchies to adjust the scope of data to view.

In Analyst, you can use hierarchies to group data in reports.

This section contains the following topics:

- [Understanding Hierarchy Manager](#) on page 293
- [Using Hierarchy Manager](#) on page 295
- [Maintaining Hierarchy Manager](#) on page 298

# Understanding Hierarchy Manager

A hierarchy contains one or more branches. Each branch contains three hierarchy levels: top, middle, and bottom.

Each branch can contain more than one middle level. Each middle level can contain one or more bottom levels. You can assign one or more data items to the bottom level

For example: A job hierarchy contains two branches. Each branch follows this structure:

- Top level is Portfolio, such as Loans or Savings.
- Middle level is Account Type, such as Car, Mortgage or Certificate Deposits.
- Bottom level is Term, the length of the loan or savings account such as 60 months, 30 years. The data items in the bottom level data items are job names.

After you add a job or an agent to Avaya Proactive Contact, the job or agent is available for use in Hierarchy Manager. Agents, jobs, and dialers are available in Hierarchy Manager until data in the database expires. This allows for historical reporting.

For example: When you remove an agent login from Avaya Proactive Contact, the database still contains data for that agent. As a result, the agent name appears in the Hierarchy Manager list of available agents.

Hierarchy Manager supports three hierarchy types:

- [Agent hierarchies](#) on page 293
- [Job hierarchies](#) on page 294
- [Dialer hierarchies](#) on page 294

---

## Agent hierarchies

An agent hierarchy creates statistical relationships for individual agent activity and performance data that Avaya Proactive Contact collects during calling activities. Activity and performance data examples include Talk Time, Idle Time, and Connects per Hour.

Agent hierarchies are most effective when monitoring agent views in Monitor and when grouping data in Analyst agent reports.

For example, an agent hierarchy can represent the management structure of a company. Top, middle, and bottom levels represent directors, managers, and supervisors, respectively. Agents are assigned to each supervisor. Monitor can use this hierarchy to group agent activity and performance data by supervisor.

---

## Job hierarchies

A job hierarchy creates statistical relationships for individual job activity data that Avaya Proactive Contact collects during calling activities. Examples of job activity data include Calls Placed, Connects per Hour, and Time in Wait Queue.

Job hierarchies are most effective in Monitor to monitor job views in Monitor and in Analyst to group data in Analyst job reports.

In a multi-dialer environment, job hierarchies apply to all jobs across all dialers unless you create the following environment:

- Create all jobs unique across all dialers
- Create a dialer-job relationship outside of Hierarchy Manager.

For example, when you create a job, include a reference to the dialer in the job name such as job1\_dialer1.

---

## Dialer hierarchies

A dialer hierarchy creates relationships for individual dialer activity data that Avaya Proactive Contact collects during calling activities. Dialer activity includes all available job and agent activity and performance data.

Dialer hierarchies are effective to group data by department and dialer.

For example: In a four-dialer pod environment, the collections and marketing departments use the following dialers:

- Collections uses dialer1 and dialer2
- Marketing department uses dialer3 and dialer4

A hierarchy branch could contain a level for department with individual dialers assigned to the level.

## Using Hierarchy Manager

Hierarchy Manager is available from the **Tools** menu in Analyst or Monitor.

This section contains the following topics:

- [Start Hierarchy Manager](#) on page 295
- [Create a hierarchy](#) on page 295
- [Open a hierarchy to view or change](#) on page 296
- [Add a level to a hierarchy](#) on page 296

---

## Start Hierarchy Manager

Use the following procedure to start Hierarchy Manager:

1. Select **Start > Programs > Avaya Proactive Contact 4.0 > Supervisor > Monitor** or **Analyst**.
2. Select **Tools > Hierarchy Manager**.

The Hierarchy Manager window appears.

---

## Create a hierarchy

You can create an agent, job, or dialer hierarchy based on the hierarchy type you select. When you create a new hierarchy, you add top, middle, and bottom hierarchy levels and assign data items to the bottom hierarchy.

**Note:**

If you name two like levels the same under one parent level, Hierarchy Manager combines the two like levels into one level.

For example: A hierarchy middle level contains two bottom levels named Supervisor. Hierarchy Manager combines all data items assigned to both Supervisor levels and removes the duplicate level.

Use the following procedure to create a hierarchy:

1. On the button bar, click **Agent Hierarchies**, **Job Hierarchies**, or **Dialer Hierarchies** depending on the type of hierarchy you want to create.
2. Select **File > New**.

Hierarchy Manager displays a new hierarchy including a default structure. The **Available** list contains agent, job, or dialer names depending on which hierarchy type you selected.

3. Add hierarchy levels.
  - a. Right-click the level above where you want to add a level.
  - b. Click **Add Level**.

Hierarchy Manager inserts a level named New Level.

4. Rename the new level.

Right-click **New Level**, select **Rename**, enter a new name up to 20 characters, and then press **Enter**.

5. Repeat steps 3 and 4 for each level you want to add to the hierarchy.

6. Add data items.

Drag and drop an item from the **Available** list onto the bottom level of the branch to which you want to add it.

After an item is added to the hierarchy, Hierarchy Manager moves the data item from the **Available** list to the **Allocated** list.

7. Select **File > Save** to save the hierarchy settings.

Hierarchy Manager does not save branches that do not contain data items. Empty branches will no longer appear in the hierarchy after you close and restart Hierarchy Manager.

8. In the **Save As** dialog box, name for the hierarchy.

Enter a name up to 64 characters, and then click **OK**.

Hierarchy Manager saves the hierarchy settings.

---

## Open a hierarchy to view or change

Use the following procedure to open a hierarchy that you want to view or change:

1. On the button bar, click **Agent Hierarchies**, **Job Hierarchies**, or **Dialer Hierarchies** depending on the type of hierarchy you want to open.

A list of hierarchies appears in the button bar for the selected hierarchy type.

2. Select a hierarchy. The selected hierarchy appears.

---

## Add a level to a hierarchy

To build your organizational structure in Hierarchy Manager, you add levels to a hierarchy. Each branch in a hierarchy contains three levels: top, middle, and bottom.

When you add a level, Hierarchy Manager adds a level below the selected level. For example: If you add a level to a top level item, Hierarchy Manager adds a middle level item. To add a top level item, add a level to the hierarchy name.

## Hierarchy Manager

Use the following procedure to add a level to a hierarchy:

1. Open the hierarchy that you want to change.
2. Right-click the level above where you want to add a level, and then click **Add Level**.  
Hierarchy Manager inserts a level named New Level.
3. Right-click **New Level**, and then select **Rename**.
4. Enter a new name up to 20 characters, and then press **Enter**.

---

## Add a data item to a hierarchy

Hierarchy Manager lets you add data items to only the bottom-most levels of the hierarchy.

Use the following procedure to add data items to a hierarchy.

1. Open the hierarchy to which you want to add data items.
2. Select one or more items in the **Available** list, and then drag the items to the appropriate level.

After an item is added to the hierarchy, Hierarchy Manager moves the data item from the **Available** list to the **Allocated** list.



**Tip:**

To select two or more adjacent items in the **Available** list, click the first item, and then hold down **Shift** and click the last item. To select two or more nonadjacent items, click the first item, and then hold down **Ctrl** and click additional items.

---

## Maintaining Hierarchy Manager

As your organization changes, you might need to rearrange elements in a hierarchy, rename levels or remove levels in a hierarchy to reflect your organizational changes. This section provides the following topics:

- [Move a level or item within a hierarchy](#) on page 298
- [Rename a hierarchy level](#) on page 298
- [Remove a level from a hierarchy](#) on page 299
- [Remove a data item from a hierarchy](#) on page 299
- [Rename a hierarchy](#) on page 300
- [Delete a hierarchy](#) on page 300

---

### Move a level or item within a hierarchy

As your organization changes, you might need to rearrange elements in a hierarchy to reflect the changes.

You can move data items from one bottom level to another. For example: In an agent hierarchy, you can move an agent from one supervisor to another.

You can also move a level within a hierarchy. Items and levels that you move must maintain their same level in the hierarchy. For example: A bottom level cannot be moved to a middle level position.

Use the following procedure to move a level or a data item within a hierarchy:

1. Open the hierarchy that you want to change.
2. Select the level or data item that you want to move, and then drag it to the hierarchy level above where you want the level or item to be listed.
3. Repeat step 2 for each level or item that you want to move.

---

### Rename a hierarchy level

Hierarchy Manager lets you rename levels in a hierarchy to reflect organizational changes.

**Note:**

If you name two like levels the same under one parent level, Hierarchy Manager combines the two like levels into one level.

## Hierarchy Manager

For example: A hierarchy middle level contains two bottom levels named Supervisor. Hierarchy Manager combines all data items assigned to both Supervisor levels and removes the duplicate level.

Use the following procedure to rename a hierarchy level:

1. Open the hierarchy in which you want to rename a level.
2. Right-click the hierarchy level name that you want to change, and then select **Rename**.
3. Type a new name for the level (up to 20 characters), and then press **Enter**.

---

## Remove a level from a hierarchy

As your organization changes, you can use Hierarchy Manager to reflect those changes in your hierarchies.

You can remove a level from your hierarchy to better represent your organization.

To remove a top or middle hierarchy level that contains a bottom level with data items, you must first delete the bottom level (and data items).

Use the following procedure to remove a level from a hierarchy:

1. Open the hierarchy from which you want to remove a level.
2. Right-click the level that you want to remove, and then select **Delete**. If the level you select to remove contains data items, Hierarchy Manager asks you if you want to delete the selected level and all the agents associated with that level.
3. Click **Yes** to delete the level. Hierarchy Manager removes the level and moves the data items from the **Allocated** list to the **Available** list.

---

## Remove a data item from a hierarchy

Remove a data item from a hierarchy when the item no longer meets your organizational needs. You can remove individual data items as described in the following procedure. You can also remove all the data items assigned to a bottom level by removing the bottom level.

1. Open the hierarchy from which you want to remove one or more data items.
2. Right-click a data item that you want to remove, and then select **Delete**. Hierarchy Manager removes the data item from the hierarchy, and moves the data item from the **Allocated** list to the **Available** list.
3. Repeat step 2 for each data item you want to remove.

---

## Rename a hierarchy

Use the following procedure to rename a hierarchy:

1. Open the hierarchy that you want to change.
2. Select **File > Save As**.
3. In the **Save As** dialog box, enter a unique name for the hierarchy.

A hierarchy name can contain up to 64 characters and can include the following special characters: parentheses ( ), comma (,), hyphen (-), dollar sign (\$), and the pound sign (#).

4. Click **OK**.

Hierarchy Manager saves the hierarchy settings with the new name.

---

## Delete a hierarchy

As your organization changes, you might decide to no longer use a particular hierarchy. You can delete a hierarchy from Hierarchy Manager.

1. Open the hierarchy that you want to change.
2. Select **Hierarchy > Delete**. Hierarchy Manager asks you to confirm the delete action.
3. Click **Yes** to delete the hierarchy. Hierarchy Manager removes the selected hierarchy.



# Chapter 21: System Telnet

System Telnet is a tool that allows you access to the Avaya Proactive Contact Linux-based menus.

This section contains the following topics:

- [Understanding System Telnet](#) on page 303
- [Using System Telnet](#) on page 305

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## Understanding System Telnet

System Telnet tool allows you to access the Linux-based Supervisor and Administrative menus.

This section contains the following topics:

- [System Telnet](#) on page 303
- [System Telnet features](#) on page 303

---

## System Telnet

Use the Linux-based Supervisor and Administrative menus to do the following:

- Manage user accounts
- Check calling list status
- Manage agent job lists
- Access some Monitor and Editor features

System Telnet is available from the **Tools** menu in Analyst, Editor, or Monitor.

**Note:**

If access to Supervisor is not available, you will need to use a third-party telnet tool to access Avaya Proactive Contact menu system and PC Analysis.

To access the PC Analysis menus, use the PC Analysis Telnet tool in Analyst.

---

## System Telnet features

Use the System Telnet window to navigate to the Linux-based menus.

The System Telnet features appear on the System Telnet toolbar, **File** menu and **Tools** menu.

System Telnet contains the following features:

| Feature           | Icon                                                                              | Description                                                                                                                                                                                                                                                                          |
|-------------------|-----------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Connect           |  | <p>Use the <b>Connect</b> tool to select the dialer for which you want to access Linux-based features. This function is not available while you are connected to a dialer.</p> <p>You must disconnect from a dialer before you can connect to a different dialer.</p>                |
| Disconnect        |  | <p>Use the <b>Disconnect</b> tool to end the telnet session for the current dialer. If you exit the menu system, System Telnet automatically disconnects your session.</p> <p>After you disconnect, you can connect to a different dialer or exit the System Telnet application.</p> |
| Exit out of entry |  | <p>Use the <b>Exit out of entry</b> tool to move back one screen in the Linux-based screens. <b>Exit out of entry</b> provides the same functionality as <b>Ctrl-x</b>.</p>                                                                                                          |
| Done with entry   |  | <p>Use <b>Done with entry</b> to move to the next Linux-based screen. <b>Done with entry</b> provides the same functionality as the <b>Done</b> key, <b>F1</b>.</p>                                                                                                                  |

## Using System Telnet

Use the following procedure to access the Avaya Proactive Contact Linux-based menus:

1. Select **Start > All Programs > Avaya > Proactive Contact > Supervisor > Analyst, Editor, or Monitor.**

2. Select **Tools > System Telnet.**

A System Telnet window appears.

3. Select **File > Connect.**

The **Connect to Proactive Contact** dialog box appears.

4. From the **Name** list, select the name of the dialer to which you want to connect, then click **OK.**

The dialer **login:** prompt appears in the Telnet window.

5. Type one of the following login and password combinations:

- System login and password to access the system menus
- Administrator login and password to access the administrative menus

The Linux-based menu system associated with your user name appears in the Telnet window.

# Chapter 22: Agent Blending

Agent Blending is a tool that integrates outbound calling activities on your Avaya Proactive Contact system with inbound calling activities on your ACD.

This section contains the following topics:

- [Understanding Agent Blending](#) on page 307
- [Using Agent Blending](#) on page 318
- [Maintaining Agent Blending](#) on page 321

## Understanding Agent Blending

Agent Blending integrates outbound calling activities on your Avaya Proactive Contact system with inbound calling activities on your ACD.

The Agent Blending tool allows you to manage the ACD domains and domain groups. A domain is an ACD call queue. Every domain is a member of a domain group.

This section contains the following topics:

- [Agent Blending overview](#) on page 307
- [Predictive Agent Blending](#) on page 308
- [Proactive Agent Blending](#) on page 308
- [Supported ACDs and switch terminology](#) on page 309
- [Domains](#) on page 313
- [Domain Groups](#) on page 314

---

### Agent Blending overview

Agent Blending integrates outbound calling activities on your Avaya Proactive Contact with inbound calling activities on your ACD. Avaya Proactive Contact provides two types of Agent Blending: Predictive Agent Blending and Proactive Agent Blending.

Both types of Agent Blending systems use a pool of ACD blend agents for outbound calling. The ACD agents log in to the dialer and the ACD. Agent Blending monitors the activity on the ACD to determine when to move agents between inbound and outbound calling activities.

The dialer acquires the pooled agents for outbound calling when the inbound calling activity decreases. The dialer releases the pooled agents to inbound calling when the inbound calling activity increases. The movement between inbound and outbound calling keeps the ACD blend agents busy and the ACD service level within your prescribed limits.

Use Predictive Agent Blending if your priority is servicing your inbound customers and your inbound volume is fairly high.

Use Predictive Agent Blending if your call center has the following amount of work:

- Moderate to heavy inbound traffic
- More than 25 agents in an inbound pool

---

## Predictive Agent Blending

Use Predictive Agent Blending if your priority is servicing your inbound customers and your inbound volume is fairly high.

Predictive Agent Blending focuses on the inbound mission. Predictive Agent Blending uses events from the ACD to forecast call volume and determine when to move ACD agents between inbound and outbound calling. The dialer predicts when too many agents receive inbound calls. The dialer then acquires agents from the ACD to handle outbound calls until the inbound volume increases.

The system acquires agents for outbound calls when either the settings for the **Average Speed to Answer** or **Service Level** domain groups are above the desired value.

To configure Predictive Agent Blending, set up an Average Speed to Answer or a Service Level domain group that contains one or more acquire domains and at least one inbound domain.

**Average Speed to Answer (ASA)** - This domain group type uses the target ASA field (MAAS) to calculate when to acquire and release agents.

- The dialer acquires agents for outbound calls when the average speed to answer for all inbound domains in the group is less than or equal to the targeted value.
- The dialer releases agents when the value rises above the target.

**Service Level (SL)** - This domain group type uses the **Service Criterion** (SC, seconds), **Desired Service Level** (DSL, %), and **Abatement Service Level** (ASL, %) fields for calculating when to acquire and release agents.

- The dialer acquires agents for outbound calls when the percentage of inbound calls answered within the Service Criterion is greater than or equal to the Desired Service Level percentage.
- The dialer no longer acquires agents when the actual service level reaches the Abatement Service Level value.
- The dialer releases agents to inbound when the service level falls below the desired value.

The actual service level is calculated using all inbound domains in the group.

---

## Proactive Agent Blending

Use Proactive Agent Blending if your focus is on outbound calling, but you need to service a low volume of inbound customers.

Proactive Agent Blending focuses on outbound calls and releases agents to inbound only when an inbound call enters a monitored queue on the ACD.

## Agent Blending

When an ACD agent logs in, the system immediately acquires the agent for outbound calling. When an inbound call arrives in the ACD queue, the dialer releases the agent to handle the call. If inbound calls continue to arrive, the dialer continues to release agents. When the queue is empty, the dialer acquires agents for outbound calls.

**Note:**

For each OB\_ONLY domain group, you configure the number of queued calls before agents release to inbound.

---

## Supported ACDs and switch terminology

Each ACD switch has unique settings and terminology. For each supported ACD, the dialer uses domains and domain groups to control Agent Blending.

This section defines the switch terminology for the following ACDs:

- [Aspect CallCenter](#) on page 309
- [Avaya Communication Manager](#) on page 310
- [Rockwell Spectrum](#) on page 310
- [Northern Telecom Meridian](#) on page 312
- [PINNACLE](#) on page 312
- [Siemens ROLM 9751, Release 900](#) on page 312

**Note:**

The *Planning and Prerequisites for Avaya Proactive Contact 4.0* contains a full description of the requirements for each supported switch.

## Aspect CallCenter

**Agent group** - A set of agents handling similar types of calls. Agents log in to an agent group when they log on to the Aspect CallCenter. Agent groups may be part of an agent super group.

Agent groups correspond to Agent Blending domains. Agent Blending monitors events for domains configured on the system as inbound or acquire.

**Agent Super Group** - A collection of two or more agent groups. Aspect CallCenter simultaneously selects all agent groups in the agent super group. It delivers a call to the agent in the super group who has been available the longest. Agents do not log on to agent super groups.

If you set up the super group as a domain on Avaya Proactive Contact, Agent Blending monitors the activity in the super group

**Call Control Tables (CCTs)** - Part of the Aspect CallCenter database. CCTs control call routing, queuing, and messaging for agent groups and agent super groups. You can view, set

up, edit, or delete CCTs from Aspect CallCenter management workstation. There can be multiple CCTs for each agent group and agent super group.

**Data System Interlink Table** - Part of the Aspect CallCenter database. The table controls communication between the Aspect CallCenter and the dialer. You can view the Data System Interlink Table and set application parameters using the Aspect CallCenter management workstation. However, only an Aspect representative can set system-level parameters.

## Avaya Communication Manager

**Expert Agent Selection (EAS)** - An optional Avaya Communication Manager feature. Expert Agent Selection allows skill types to be assigned to a call type or Vector Directory Number (VDN).

**Hunt group** - An agent queue on an ACD configured without EAS. The ACD hunts for the next available agent in each hunt group. It uses the hunt method defined on the ACD.

**Skill** - Skill types provide a method for call center managers to match the needs of a caller to the talents of the agents. A skill designates a work category such as sales or collections. Skills enable the ACD to route types of calls to queues. Administrators can assign up to four skills or sets of skills to each agent login ID.

**Skill hunt group** - Replaces ACD splits when the ACD is configured with EAS. The ACD can be queued to up to three different skill hunt groups at one time.

**Split** - An ACD split is a hunt group that is designed for a high volume of similar calls. Members of a split are called agents. At any one time, an agent can be logged in to a maximum of three splits.

**Vector** - Vector settings determine how the switch handles incoming calls based on the number dialed. When the Avaya Communication Manager is configured with EAS, the vector directs the incoming call to a split, a hunt group, or a skill hunt group.

**Vector Directory Number** - The extension number that accesses a vector. Agent Blending uses the Vector Directory Number for the domain address and domain extension.

## Rockwell Spectrum

**Agent Group** - A collection of one or more agents, based on equivalent skills or a specific call center need. In Spectrum, agents may have a primary and a secondary group assignment. However, the dialer requires that agents belong to only one group.

In addition to the agent's skill level, you must assign agents to groups as inbound or acquire. Inbound agents take only inbound calls. Acquire agents take inbound and outbound calls, or they can be outbound-only.

## Agent Blending

**Application** - The system treats applications as domains. In Spectrum, incoming calls are routed to applications. An application is a type or category of call that you want handled in a similar way. Applications can include:

- Company functions, for example, Customer Service, Accounts Payable
- Special skill groups, for example, bilingual or technical troubleshooters
- Types of products, for example, Savings, Checking Accounts, Mortgages. For each application, the Spectrum tracks performance data such as average speed to answer, number of calls offered, and average handling time.

You associate each application with an Application Telescript. The telescript contains a set of instructions for handling calls. For Agent Blending, the transcript queues agent groups, places calls in wait queues, and allows the dialer to track the call while it is on the Spectrum.

**Application Directory Number (DN)** - You assign an Application Directory Number in Applications Parameters when you create the Spectrum application. When dialed, this number calls the application. The Application Directory Number is used as the domain extension in Agent Blending.

**Application Number (also called the Application ID)** - You assign an Application Number in Applications Parameters when you create the Spectrum application. The Application Number is used as the domain address in Agent Blending.

**Class of Service** - A collection of attributes associated with agents and devices within the Spectrum. One of the class of service attributes is the Host Transaction feature. Host Transaction controls whether or not the Spectrum generates call progress messages on the Transaction Link for the associated agent or device. Agent Blending requires that you enable the Host Transaction feature.

**Host** - The host for the Spectrum is Avaya Proactive Contact.

**Provisioning** - A set of actions that add, alter, or delete system parameters. In the Avaya Proactive Contact documentation, “configuring” has the same meaning as “provisioning” in Spectrum documentation.

**Telescript** - A user-programmable sequence of steps associated with various call routing points within the Spectrum. During inbound call routing, error processing, and call queuing, the Spectrum invokes Routing, Intercept, and Application Telescripts. Feature Telescripts operate as subroutines for the other telescript types.

Configuring an Application Telescript to route to the desired agent groups is key to making Agent Blending work with Spectrum.

**Transaction Link** - The Spectrum name for the Application Enablement Services link. Transaction Link is a communications channel between the Spectrum and the dialer. It is operated over an X.25 or TCP/IP transport facility.

**Trunk Group** - A collection of trunk ports that have common processing characteristics, such as ANI and DNIS. One of the characteristics is the Host Transaction Link feature. It controls whether Spectrum generates call progress messages for calls associated with the trunk group members.

You must enable this feature to allow the dialer to monitor calls on Spectrum.

### Northern Telecom Meridian

**ACD-DN (directory number)** - The ACD address for a call queue. The ACD-DN is the Agent Blending domain address.

**ACD Agent Position ID** - The number that identifies an agent's telephone extension. Agent Blending agents log in to Avaya Proactive Contact as ACD agents using their ACD Agent Position ID as the ACD extension. During calling operations, managers can assign agents to Agent Blending domains by assigning agent positions to call queues, or agents can log in to call queues that are Agent Blending domains.

**Multiple queue assignment** - A Meridian option that allows agents to log in to multiple call queues.

The domains and domain groups you define and how your agents log into call queues depends on whether your Meridian uses multiple queue assignment.

### PINNACLE

**Call queue** - A destination for call routing, defined by an ACD address. A call queue can be an Agent Blending domain.

**Queue ID** - The ACD address associated with a call queue. Queue IDs are Agent Blending domain addresses.

**Queue pilot number** - The ACD extension associated with an ACD address. Queue pilot numbers are Agent Blending domain extensions.

**Serving Team** - A group of agent identifiers for agents who will work on the same task. PINNACLE can route calls to the serving team for a call queue. Agent Blending inbound agents belong to an inbound serving team. Agent Blending outbound and blend agents belong to an acquire serving team.

### Siemens ROLM 9751, Release 900

**ACD group or agent group** - A group of agent extensions that receives calls from the same pilot number. Each ACD group has telephones and members.

## Agent Blending

**Call-progress event** - Any change in a call's state in ROLM 9005. CallBridge passes call-progress event messages from ROLM 9005 to CallPath. Call-progress event messages provide the information Agent Blending needs to acquire and release agents.

**Class of service** - A code indicating the features, extensions, and trunk access available to an ACD address. Agent Blending uses agent groups with the CallPath class of service.

**Directory Number (DN)** - An ACD address or extension associated with an ACD-defined group or with a device such as a telephone or a Voice Response Unit (VRU) port. An ACD-defined group can be an agent group or a hunt group.

**Dummy hunt group** - A hunt group with no members defined on ROLM 9005. It unconditionally forwards calls to an agent group. Agent Blending requires dummy hunt groups to collect call-progress event messages. It uses the dummy hunt group's pilot number as the auxiliary domain's extension number.

**Pilot number** - A directory number associated with a group of extension numbers that comprise one ACD group. Agent Blending uses pilot numbers as the domain address. Agent Blending uses the dummy hunt group's pilot number as the domain extension.

---

## Domains

The dialer requires domains and domain groups for each type of switch. Domains are the ACD call queues that are defined on the ACD and on the dialer.

Each domain is a member of a domain group. Agent Blending collects calling events for each domain and totals them by domain group for statistic calculation. The dialer uses the statistics to determine when to move ACD agents between inbound and outbound calling. The dialer does not do the following activities:

- Total statistics across domain groups
- Monitor activity in call queues that are not part of a domain group

This section contains the following topics:

- [Types of domains](#) on page 313
- [Agent assignments to domains](#) on page 314

## Types of domains

The types of domains that you configure depend upon the ACD. The two main domain types are inbound and acquire. All Agent Blending systems must have an acquire domain.

Agent Blending uses inbound domains to determine agent availability by monitoring and analyzing the traffic. The dialer uses acquire domains to acquire agents for outbound calling.

In addition to inbound and acquire domains, the dialer recognizes two additional domains. Some ACDs use auxiliary domains to monitor all calling activity in a domain group. Meridian switches without multiple queues assignment (MQA) use transient domains to temporarily hold agents who are moving between inbound and outbound.

### Agent assignments to domains

After your system is installed, assign your agents to domains based on a skill set. For example, you might divide agents into three sets:

- Agents who handle only credit card customers
- Agents who handle consumer loan customers
- Agents with skills to handle both credit card customers and consumer loan customers

---

### Domain groups

Define each domain group with one of the following four configurations:

- Outbound without inbound domain, which uses the OB\_ONLY control method.
- Predictive-Average Speed to Answer, which uses the ASA control method.
- Predictive-Service Level, which uses the SL control method.
- Outbound with inbound domain, which uses the Proactive Blend OB\_ONLY control method.

This section contains the following topics:

- [Outbound Agent Blend](#) on page 314
- [Domain Groups](#) on page 314

### Outbound Agent Blend

Outbound Agent Blending acquires ACD agents to handle outbound calls as soon as they log in to the system and the ACD.

Since there is no inbound domain in the OB\_ONLY domain group, agents who are assigned to an Outbound domain will not be released to handle inbound calls.

### Domain Groups

During site preparation, you identify which domains you want grouped. A domain group contains one or more domains. A domain can belong to only one domain group. There are three domain group Control Methods: **Outbound Only**, **Average Speed to Answer**, and **Service**

## Agent Blending

**Level.** The Agent Blending Administrator window changes dynamically depending on which one of the three Control Methods you choose.

**Outbound Only** - The dialer acquires outbound-only agents to handle outbound calls as soon as they log in to Avaya Proactive Contact and the ACD. Outbound Agent Blending allows you to take advantage of the least-cost routing available on your ACD and to use the detailed reports available on the ACD.

To configure an Outbound Agent Blending job, set up an outbound domain that contains at least one acquire domain. Do not set up an inbound domain. Select Outbound as the domain group type. Assign at least one acquire domain to the group. Do not set up an inbound domain.

If you select Outbound Only, you must enter a Minimum Queued for Release value to set how quickly the system releases agent to inbound calling. Type a value from 0 through 999. The default value is 0.

**Average Speed to Answer** - If you select **Average Speed to Answer**, your dialog box changes dynamically, and you need to set values for the required fields.

The Average Speed to Answer fields are described in the following table.

| Parameter                              | Definition                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|----------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Time Interval (required)               | The interval that the dialer uses to calculate the Average Speed to Answer. The interval influences how responsive the dialer is to fluctuations in answer delays. The interval begins each time that you start the dialer or restart Agent Blending.<br>Select a value greater than 0.25, in increments of .25. The interval is in hours, so .25 is 1/4 of an hour or 15 minutes. The default is .50 or 30 minutes. The setting represents an average calculated over the Average Speed to Answer interval.                                                                                                                |
| Average Speed to Answer (required)     | The average time within which agents should answer calls.<br>Enter a value from 1 through 999. The default value is 60.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| Agent Utilization Threshold (required) | The percentage of agents available to take calls. Agent Utilization Threshold determines how quickly the system moves agents between inbound and outbound calls. The goal is to prevent agents from being acquired or released too frequently.<br>Agents are available if they are not taking calls or updating records. Agent Blending tracks calling statistics and uses this information to predict future availability.<br>To calculate the threshold, the dialer divides the projected inbound call volume by the projected number of available agents.<br>Enter a value from 1 through 999. The default value is 200. |

| Parameter                             | Definition                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|---------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Minimum Agents on Outbound (required) | The minimum number of ACD blend agents, in this domain, dedicated to handling outbound calls. This setting overrides Desired Level. For example, no matter how low the Average Speed to Answer, there will always be this number of agents unavailable to handle inbound calls. Use this setting when it is more important to meet outbound goals than to service inbound calls.<br>Enter a value from 0 through 999. The default value is 0. |
| Initial Traffic Rate (optional)       | The estimated number of calls each second. The dialer uses this rate for the first 30 calls. It ensures that there are enough agents to handle the first 30 calls.<br>Enter a value from 0 through 999.                                                                                                                                                                                                                                       |
| Talk Time (optional)                  | The estimated minimum seconds agents spend connected on each inbound call. The system adds Talk time and After Call Work Time to determine agent availability. Agent availability is sometimes called service capacity.<br>Enter a value from 0 through 999.                                                                                                                                                                                  |
| After Call Work Time (optional)       | The estimated minimum seconds agents spend, after a call, updating records and processing information.<br>Enter a value from 0 through 999.                                                                                                                                                                                                                                                                                                   |

**Service Level** - If you select **Service Level**, your dialog box changes dynamically, and you need to set values for the required fields. The Service Level fields are described in the following table.

| Parameter                          | Definition                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Desired Service Level (required)   | The percentage of calls agents should answer within the Service Criteria. Enter a value from 0 through 100 (value must be less than Abatement Service Level). The default value is 80.                                                                                                                                                                                                                                                                                                                                   |
| Abatement Service Level (required) | The maximum percentage of inbound calls agents should answer within the Service Level interval. Select a setting from 40 percent to 100 percent. When the service level goes above the abatement service level, the system acquires ACD blend agents for outbound calling. When the service level drops below the abatement service level, the system releases ACD blend agents for inbound calling.<br>Enter a value from 0 through 100. The value must be greater than Desired Service Level. The default value is 95. |
| Service Criterion (required)       | The maximum time within which an agent should answer a call. As the system runs, it measures the seconds an inbound call is in the ACD queue.<br>Enter a value from 0 through 999. The default value is 60.                                                                                                                                                                                                                                                                                                              |
| Time Interval (required)           | See <a href="#">Time Interval (required)</a> on page 315.                                                                                                                                                                                                                                                                                                                                                                                                                                                                |

## Agent Blending

| Parameter                              | Definition                                                              |
|----------------------------------------|-------------------------------------------------------------------------|
| Agent Utilization Threshold (required) | See <a href="#">Agent Utilization Threshold (required)</a> on page 315. |
| Minimum Agents on Outbound (required)  | See <a href="#">Minimum Agents on Outbound (required)</a> on page 316.  |
| Initial Traffic Rate (optional)        | See <a href="#">Initial Traffic Rate (optional)</a> on page 316.        |
| Talk Time (optional)                   | See <a href="#">Talk Time (optional)</a> on page 316.                   |
| After Call Work Time (optional)        | See <a href="#">After Call Work Time (optional)</a> on page 316.        |

---

## Using Agent Blending

Agent Blending is available from the **Tools** menu in Editor or Monitor.

This section contains the following topics to help you set up Agent Blending:

- [Start the Agent Blending tool](#) on page 318
- [Create a domain group](#) on page 318
- [Create a domain](#) on page 319
- [Edit domain group settings](#) on page 319
- [Edit domain settings](#) on page 320
- [Delete a domain group](#) on page 320
- [Delete a domain](#) on page 320

---

### Start the Agent Blending tool

Start the Agent Blending tool from either Monitor or Editor.

1. Select **Start > All Programs > Avaya > Proactive Active Contact > Supervisor > Monitor or Editor**.
2. Select **Tools > Agent Blending Administrator**.

The Agent Blending Administrator window appears.

---

### Create a domain group

You can edit domain group settings while your blend engine is running.

1. In the Agent Blending Administrator window, select **File > Create Domain Group**.
2. In the New Domain Group box, type a descriptive name for the domain group, such as MIDWEST, and then click **OK**.

The name must be 10 or fewer characters. You have now created the domain group name and must now complete the domain group settings.

3. Set values for the domain group fields: **Control Method** (Outbound Only, Service Level, or Average Speed to Answer) and the options that change dynamically based on your Control Method selection.

For help with filling in your fields, see [Outbound Only](#) on page 315, [Average Speed to Answer](#) on page 315, and [Service Level](#) on page 316.

### Create a domain

You must stop your blend engine in order to create a domain. For more information, see [Stop the blend engine](#) on page 321.

1. The **Create Domain** option is not available until you select the name of a domain group. The domain will be added to the domain group that you select.
2. In the Agent Blending Administrator window, click the domain group to which you want the new domain to belong, and then, select **File > Create Domain**.
3. In the **New Domain** dialog box, type the address of the domain.  
Typical values for this box are 5-digit addresses, such as 20601, and must match your PBX ID exactly to communicate with the PBX.

4. Click **OK**.

You have created the domains name and must now define in the domain settings.

5. Define the domain settings: **Domain Type** (Inbound, Transient Acquire, Team Acquire, and Overflow), Phone Number, Gateway ID, Application ID, and PBX ID.

For help with filling in your fields, see the following topics:

- [Supported ACDs and switch terminology](#) on page 309
- [Domains](#) on page 313
- [Domain groups](#) on page 314

---

### Edit domain group settings

You must stop your blend engine in order to edit domain group settings. For more information, see [Stop the blend engine](#) on page 321.

1. In the Agent Blending Administrator window, select the domain group you want to edit.
2. Click the **Control Method** field to select Outbound Only, Service Level, or Average Speed to Answer.

The domain group fields change dynamically depending on which Control Method option you select.

3. Set values for the options.

For help with filling in your fields, see [Outbound Only](#) on page 315, [Average Speed to Answer](#) on page 315, and [Service Level](#) on page 316.

To determine whether the field has a drop-down list or an editable value for you to use, click the field.

4. Save your work.

---

## Edit domain settings

You must stop your blend engine in order to edit domain settings. For more information, see [Stop the blend engine](#) on page 321.

1. In the Agent Blending Administrator window, select the domain you want to edit.
2. Click the **Domain Type** field. Select Inbound, Transient Acquire, Team Acquire, or Overflow.
3. For descriptions of these options, see [Domain groups](#) on page 314.
4. Type values for the **Phone Number**, **Gateway ID**, **Application ID**, and **PBX ID** fields.  
For descriptions of these options, see [Domain groups](#) on page 314.

---

## Delete a domain group

You must stop your blend engine in order to delete a domain group. For more information, see [Stop the blend engine](#) on page 321.

1. In the Agent Blending Administrator window, select the domain group you want to delete.
2. Select **File > Delete Domain Group**, and then save your work.

---

## Delete a domain

You must stop your blend engine in order to delete a domain. For more information, see [Stop the blend engine](#) on page 321.

1. In the Agent Blending Administrator window, select the domain you want to delete.
2. Select **File > Delete Domain**, and then save your work.

---

## Maintaining Agent Blending

Agent Blending is available from the **Tools** menu in Editor or Monitor.

This section contains the following topics to help you maintain Agent Blending:

- [Move a domain to a different group](#) on page 321
- [Stop the blend engine](#) on page 321
- [Start the blend engine](#) on page 322
- [Resynch the blend engine](#) on page 322
- [Resynch the blend engine](#) on page 322
- [View ACD statistics](#) on page 323
- [View alerts](#) on page 323
- [View transactions](#) on page 323

---

### Move a domain to a different group

You must stop your blend engine in order to move a domain to a different domain group. For more information, see [Stop the blend engine](#) on page 321.

Moving a domain is possible by deleting the domain and then adding it to a different domain. Remember to write down its existing settings so that you can recreate them when you add the domain to the new domain group.

1. In the Agent Blending Administrator window, select the domain you want to move (write down its settings first, if necessary), and then, select **File > Delete Domain**.
2. Select the domain group to which you want to add the new domain, and then select **File > Create Domain**.
3. In the **New Domain** dialog box, type the domain address, such as 20601, and then click **OK**.
4. Complete the domain settings.

---

### Stop the blend engine

The **Stop** button shuts down all but two of the Blend processes on a dialer; cbamain and cbauser remain up. This state is also called configure-only mode. It is required for editing or deleting domains. You stop the blend engine by clicking **Stop** in the **Agent Blending**

**Administrator** dialog box. (You must have a dialer selected in the tree view for the **Stop** button to be visible. The dialers are located at the top-most level in the tree view.)

1. Open Monitor or Editor and select **Tools > Agent Blending**.

The Agent Blending Administrator window appears.

2. In the tree view, select a dialer.
3. Select **Blend Engine > Stop**.

---

## Start the blend engine

The **Start** button starts the Blend processes that were killed with the **Stop** command on a dialer.

You start the blend engine by clicking **Start** in the **Agent Blending Administrator** dialog box. (You must have a dialer selected in the tree view for the **Start** button to be visible. The dialers are located at the top-most level in the tree view.)

1. Open Monitor or Editor and select **Tools > Agent Blending**. The Agent Blending Administrator window appears.
2. In the tree view, select a dialer.
3. Select **Blend Engine > Start**.

---

## Reset the blend engine

The **Reset** button stops and restarts the Blend processes on a dialer. If Blend is not running, the **Reset** button starts the processes on a dialer.

1. Open Monitor or Editor and select **Tools > Agent Blending**.

The Agent Blending Administrator window appears.

2. In the tree view, select a dialer.
3. Select **Blend Engine > Reset**.

---

## Resynch the blend engine

The **Resynch** button updates the dialer with the current ACD agent queue assignments. Use Resynch after a supervisor uses the ACD to reassign agents to different inbound queues.

1. Open Monitor or Editor and select **Tools > Agent Blending**.

The Agent Blending Administrator window appears.

2. In the tree view, select a dialer.

3. Select **Blend Engine > Resynch**.

---

## View ACD statistics

Use the following procedure to view ACD statistics.

1. In the Agent Blending Administrator window, select **Statistics** under the domain group for which you want to view statistics.

---

## View alerts

You are able to view alerts by clicking **Alerts** in the tree view.

1. In the Agent Blending Administrator window, select **Alerts** under the domain group for which you want to view alerts.

---

## View transactions

Use the following procedure to view transactions.

1. In the Agent Blending Administrator window, select **Transactions** under the domain group for which you want to view transactions.

# Chapter 23: Pattern matching rules

Avaya Proactive Contact supports pattern matching syntax including wildcard characters. In Editor, you use basic pattern matching syntaxes when creating and editing phone strategies and record selections. You can also use more complex pattern matching syntaxes.

Avaya Proactive Contact also supports the following pattern matching syntaxes:

- Integer
- Floating point
- Date
- Time
- String
- Shell-style
- Extended regular expression-style

This section contains the following topics:

- [Understanding default pattern syntax](#) on page 325
- [Using supported syntaxes](#) on page 327

## Understanding default pattern syntax

Field types are supported in dialer calling lists.

This section contains the following topics:

- [Expected pattern syntax for field types](#) on page 325
- [Explicit pattern syntaxes](#) on page 325

## Expected pattern syntax for field types

The following table shows which pattern syntax is expected for each field type by default:

| Field type symbol | Field type description | Default pattern syntax                                    |
|-------------------|------------------------|-----------------------------------------------------------|
| \$                | Currency Amount        | Floating point Numerical comparison syntax                |
| N                 | Number                 | Numerical comparison syntax                               |
| D                 | Date                   | Date conversion + Time conversion                         |
| T                 | Time                   | Time conversion + Numerical comparison syntax,            |
| C                 | Character              | String comparison syntax, then Shell-style pattern syntax |

If the pattern fails to compile with the default syntax, other syntax types are tried in turn, until one succeeds or fails.

If all compile attempts fail, only the error message for the first failure is reported.

## Explicit pattern syntaxes

You can explicitly designate a pattern syntax by beginning your pattern with the field type symbol of the comparison followed by a '@' character.

The following table lists the explicit syntax for data types:

| @ Type | Data description | Syntax                                     |
|--------|------------------|--------------------------------------------|
| \$@    | Currency amount  | Floating point numerical comparison syntax |
| F@     | Floating point   | Floating point numerical comparison syntax |

| <b>@ Type</b> | <b>Data description</b> | <b>Syntax</b>                                             |
|---------------|-------------------------|-----------------------------------------------------------|
| N@            | Integer                 | Numerical comparison syntax                               |
| D@            | Date                    | Date conversion + numerical comparison syntax             |
| T@            | Time                    | Time comparison syntax + numerical comparison syntax      |
| C@            | Character               | String comparison syntax, then Shell-style pattern syntax |
| S@            | String                  | String comparison syntax                                  |
| P@            | Any                     | Shell-style pattern syntax                                |
| E@            | Any                     | Extended regular expression syntax                        |

For example, if you are working with a number field but want to use shell-style pattern matching syntax instead of numerical comparison syntax, you could begin the pattern with P@.

This is known as explicit pattern syntax specification. For example P@12\* would match against any numerical value beginning with 12.

---

## Using supported syntaxes

Integer numerical values can be given in any integer notation, such as optional spaces, followed by an optional + or -, followed by one or more digits.

This section contains the syntaxes used by the Avaya Proactive Contact system:

- [List separators](#) on page 327
- [Numerical comparisons \(type N, \\$, F\)](#) on page 327
- [Date Comparisons \(Type D\)](#) on page 328
- [Time Comparisons \(Type T\)](#) on page 329
- [String Comparisons \(Type S\)](#) on page 329
- [Shell-style Pattern syntax \(Type P\)](#) on page 330
- [Extended Regular Expression syntax \(Type E\)](#) on page 332

---

## List separators

The following syntaxes are supported:

|   |                                 |
|---|---------------------------------|
| ! | List separator ('or' operator)  |
| , | List separator ('or' operator)  |
| & | List separator ('and' operator) |

To use any of these symbols explicitly in a pattern, and not as list separators, you must precede them with a backslash. For example: \!.

---

## Numerical comparisons (type N, \$, F)

A numerical comparison pattern must contain at least one numerical value and one legal numerical comparison operator. It may contain one or more list separators (, ! &).

|    |                                   |
|----|-----------------------------------|
| == | Match if equal to                 |
| <> | Match if not equal to             |
| >  | Match if greater than             |
| <  | Match if less than                |
| >= | Match if greater than or equal to |

|    |                                 |
|----|---------------------------------|
| <= | Match if less than or equal to  |
| -  | Match if within inclusive range |

Floating point numerical values can be given in any legal floating point notation, such as the following syntax:

**<optional spaces> <optional + or -> <one or more digits>.<one or more digits>.**

| Example Numerical Comparisons |                                          |
|-------------------------------|------------------------------------------|
| > 123                         | Match if greater than 123                |
| >=123.45                      | Match if greater than or equal to 123.45 |
| <-123.                        | Match if less than -123                  |
| <=+12.34                      | Match if less than or equal to 12.34     |
| = 123.0                       | Match if equal to 123                    |
| ==123                         | Match if equal to 123                    |
| 123-456.78                    | Match if in range of 123 to 456.78       |
| -200--100                     | Match if in range of -200 to -100        |
| =123,456                      | Match if 123 or 456                      |
| =123!>456                     | Match if 123 or greater than 456         |
| >123&<>456                    | Match if greater than 123 and not 456    |

---

## Date Comparisons (Type D)

Date comparisons are handled by first converting each date in the pattern to an 8-digit integer with the digit order CCYYMMDD, then compiling the resulting pattern using integer numerical comparison syntax. The same conversion is done to the target date during the comparison operation.

To use this comparison syntax, the dates must follow the format in the DATEFORM parameter of master.cfg. Otherwise, dates could be compared as simple strings using a shell-, ERE-, or string-style pattern notation.

A relative date feature is supported for date comparisons.

## Pattern matching rules

Instead of an explicit date, you can use any of the notations "\$TODAY", "\$TODAY + n", or "\$TODAY - n", where n is an integer. These will be converted into today's date +/- n days.

| Example Date Comparisons |                                                           |
|--------------------------|-----------------------------------------------------------|
| 2004/12/31               | Match if date is 2004/12/31                               |
| =2004/12/31              | Match if date is 2004/12/31                               |
| >2004/12/31              | Match if date is greater than 2004/12/31                  |
| >=2005/01/01             | Match if date is greater than or equal to 2005/01/01      |
| <\$TODAY                 | Match if date is less than today                          |
| <\$TODAY-30              | Match if date is less than 30 days ago                    |
| 2004/02/15-\$TODAY       | Match if date is within range of 2004/02/15 and today     |
| \$TODAY,\$TODAY+1        | Match if date is today or tomorrow                        |
| \$TODAY-2004/03/15       | Match if date is within range of today and 2004/03/15     |
| \$TODAY-1-2004/03/15     | Match if date is within range of yesterday and 2004/03/15 |
| \$TODAY!>\$TODAY+30      | Match if date is today or greater than 30 days from today |
| >\$TODAY&<\$TODAY+30     | Match if date is between tomorrow and 29 days out         |

---

## Time Comparisons (Type T)

Time comparisons are handled by first converting each time in the pattern to a 6-digit integer with the digit order HHMMSS, then compiling the resulting pattern using integer numerical comparison syntax. The same conversion is done to the target date during the comparison operation.

---

## String Comparisons (Type S)

A string comparison pattern should begin with a legal numerical comparison operator.

If the string comparison does not, the pattern compiles as if it does not contain any special characters.

|         |                       |
|---------|-----------------------|
| =       | Match if equal to     |
| ==      | Match if equal to     |
| <> or ~ | Match if not equal to |

|    |                                   |
|----|-----------------------------------|
| >  | Match if greater than             |
| <  | Match if less than                |
| >= | Match if greater than or equal to |
| <= | Match if less than or equal to    |

**Note:**

The range operator '-' is not supported for string comparisons.

To compare a range of strings use the '&' list separator. For example ">ABC&<ADZ".

---

## Shell-style Pattern syntax (Type P)

The pattern must not look like a legal numerical comparison.

To match any regular character, use that character in the pattern.

## Pattern matching rules

To match any special character (~ ? + \* , ! & | [ ] { } ( ) - ^ \$) precede the character with a backslash.

| <b>Character Class Shorthand Notation</b> |                                                   |
|-------------------------------------------|---------------------------------------------------|
| *                                         | Match anything (wildcard)                         |
| ?                                         | Match any single character                        |
| \a                                        | Match any single alphabetic character             |
| \c                                        | Match any single control character                |
| \d                                        | Match any single digit                            |
| \l                                        | Match any single lowercase character              |
| \p                                        | Match any single punctuation character            |
| \s                                        | Match any single space (space, tab, nl) character |
| \u                                        | Match any single uppercase character              |
| \w                                        | Match any single word (alphanumeric) character    |
| \A                                        | Match any single character not matched by \a      |
| \C                                        | Match any single character not matched by \c      |
| \D                                        | Match any single character not matched by \d      |
| \L                                        | Match any single character not matched by \l      |
| \P                                        | Match any single character not matched by \p      |
| \S                                        | Match any single character not matched by \s      |
| \U                                        | Match any single character not matched by \u      |
| \W                                        | Match any single character not matched by \w      |

| <b>Modifiers</b> |                                                                                   |
|------------------|-----------------------------------------------------------------------------------|
| ~                | Match everything except what pattern matches (must be first character in pattern) |
| [ ]              | Match any single character or character range in set                              |
| [^]              | Match any single character or character range not in set                          |
| -                | Character range (sets only)                                                       |
| { }              | Subset (subsets can be nested)                                                    |
|                  | List separator ('or' operator)                                                    |

Patterns without wildcards are considered complete, and will not match on substrings. The following are example patterns.

|                  |                                                                                                                                                   |
|------------------|---------------------------------------------------------------------------------------------------------------------------------------------------|
|                  | Match if string is empty                                                                                                                          |
| ~?*              | Match if string is empty                                                                                                                          |
| ABC              | Match if string is ABC                                                                                                                            |
| ~DEF             | Match if string is not DEF                                                                                                                        |
| FOO*             | Match if string starts with FOO                                                                                                                   |
| *BAR             | Match if string ends with BAR                                                                                                                     |
| SPL?T            | Match if string is SPL?T where ? can be any character                                                                                             |
| [AD-F]           | Match if string is the single character A or D - F                                                                                                |
| A[^AD-F]*        | Match if string starts with an A, whose second character is not the character A or D - F, and ends with anything                                  |
| ABC DEF          | Match if string is ABC or DEF                                                                                                                     |
| BAZ!FUB*         | Match if string is BAZ or starts with FUB                                                                                                         |
| ~{205,425}       | Match if string is not 206 or 425                                                                                                                 |
| {DOG CAT}        | Match if string is DOG or CAT (subset is unnecessary here)                                                                                        |
| CA{NA,LI,RG}*    | Match if string begins with CA; has NA, LI, or RG as its 3rd and 4th characters; and ends in anything. (Would match CANADA, CALIFORNIA, CARGO...) |
| \d\d\d\d\d\d\d\d | Match if string looks like a SSN                                                                                                                  |

## Extended Regular Expression syntax (Type E)

The expression must begin with the symbol 'E@', which is stripped prior to compiling the pattern with regcomp ().

For more information on ERE syntax, refer to the section entitled "Extended Regular Expressions" in the man page "regex".

In addition to the standard ERE syntax described by the above mentioned man page, the following extensions are supported:

- Negation ('~')
- Character class shorthand notation (\a, \c, \d, etc...)

The pattern must not look like a legal numerical comparison (above).

To match any regular character, use that character in the pattern.

## Pattern matching rules

To match any special character (~ ? + \* , ! & | [ ] { } ( ) - ^ \$) precede it with a backslash.

| <b>Character Class Shorthand Notation</b> |                                                               |
|-------------------------------------------|---------------------------------------------------------------|
| .                                         | Match any single character                                    |
| \a                                        | Match any single alphabetic character                         |
| \c                                        | Match any single control character                            |
| \d                                        | Match any single digit                                        |
| \l                                        | Match any single lowercase character                          |
| \p                                        | Match any single punctuation character                        |
| \s                                        | Match any single space (space, tab, nl) character             |
| \u                                        | Match any single uppercase character                          |
| \w                                        | Match any single word (alphanumeric) character                |
| \A                                        | Match any single character not matched by \a                  |
| \C                                        | Match any single character not matched by \c                  |
| \D                                        | Match any single character not matched by \d                  |
| \L                                        | Match any single character not matched by \l                  |
| \P                                        | Match any single character not matched by \p                  |
| \S                                        | Match any single character not matched by \s                  |
| \U                                        | Match any single character not matched by \u                  |
| \W                                        | Match any single character not matched by \w                  |
| \n                                        | Where n is a number, match previously matched subset number n |

| <b>Modifiers</b> |                                                                                                    |
|------------------|----------------------------------------------------------------------------------------------------|
| ~                | Match everything except what pattern matches (must be first character in pattern after '@'),       |
| ^                | Anchor pattern to beginning. For example, the pattern must match from the beginning of the string. |
| \$               | Anchor pattern to end. For example, the pattern must match from the end of the string.             |
| *                | Match preceding character 0 or more times,                                                         |
| +                | Match preceding character 1 or more times,                                                         |

| <b>Modifiers</b> |                                                                                                  |
|------------------|--------------------------------------------------------------------------------------------------|
| ?                | Match preceding character 0 or 1 time,                                                           |
| { }              | Match preceding character n or n, m times where n is a number and n,m is a number range.         |
| [ ]              | Match any single character or character range in se,                                             |
| [^]              | Match any single character or character range not in set,                                        |
| -                | Character range for sets only.                                                                   |
| ( )              | Subset and nested subsets. Subsets are numbered by the order of occurrence of the '(' character. |
|                  | List separator 'or'.                                                                             |

Patterns without anchors are considered incomplete or fragments. Each pattern will match on substrings. For example, 'E@RES' matches on 'FRESNO'.

| <b>Example Patterns</b> |                                                                                                                  |
|-------------------------|------------------------------------------------------------------------------------------------------------------|
| E@^\$                   | Match if string is empty                                                                                         |
| E@^ABC\$                | Match if string is ABC                                                                                           |
| E@~^ABC\$               | Match if string is not ABC                                                                                       |
| E@^ABC                  | Match if string begins with ABC                                                                                  |
| E@^ABC\$                | Match if string ends with ABC                                                                                    |
| E@ABC                   | Match if string contains ABC                                                                                     |
| E@A.*Z                  | Match if string contains any sequence where A precedes Z                                                         |
| E@FOO?BAR               | Match if string contains FOBAR or FOOBAR                                                                         |
| E@FO+BAR                | Match if string contains FOBAR or FOOBAR or FOOOBAR or...                                                        |
| E@^SPL.T\$              | Match if string is SPL?T where? can be any character                                                             |
| E@[AD-F]\$              | Match if string is the single character A or D - F                                                               |
| E@^A[^AD-F]             | Match if string starts with an A, whose second character is not the character A or D - F, and ends with anything |
| E@ABC DEF               | Match if string contains ABC or DEF                                                                              |

## Pattern matching rules

| Example Patterns         |                                                                                                                                                                         |
|--------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| E@^CA(NA LI RG)          | Match if string begins with CA; has NA, LI, or RG as its 3rd and 4th characters; and ends in anything. For example, this pattern would match CANADA, CALIFORNIA, CARGO. |
| E@^\d{3}\-\d{2}\-\d{4}\$ | Match if string looks like a SSN.                                                                                                                                       |

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