Using PDS





Jobs





Using the Avaya PDS 12.0 **March 2002**

NEX 1

Welcome

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If you are enrolled in this class, you should already have taken and received a passing grade in AvayaTM Predictive Dialing System Foundations 12.0 class. If you have not taken this class, please consult with your instructor.

Module contents

Agenda

Course Materials

Using the Web Site













Using the Avaya PDS 12.0 March 2002

Welcome

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Agenda

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Agenda March 2002

This section describes the agenda for this four day class.

Day 1	Introduction to the course
	Review of foundations course
	Campaign Life Cycle
	Lunch
	PDS basics
Day 2	Review activity
	Phone strategy
	Record selections
	Lunch
	More record selections
	Jobs
	Tools - Completion Code Manager
Day 3	Review Activity
	Campaign Editor project
	Manage Jobs
	Manage agents
	Lunch
	Tools - Hierarchy Manager & Agent Blending
	Campaign Analyst
	PC Analyst
Day 4	Review
	More PC Analysis
	System Reports
	Lunch
	Sustaining Activities
	CUI Campaigns
	Review
	Qualification test & follow up

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Course materials March 2002

Every student should have the following materials:

Student Workbook	Contains an outline of the class lessons, study aids, diagrams, and exercises.
Classroom Web Site	Contains supporting materials for the Student Workbook, together with links to relevant topics in the documentation as well as other resources.
CD-ROM	Contains the online course content, instructor presentations, online Avaya PDS User's Guide, and Online Help.

Both the student workbook and classroom web site present the course modules and lessons. These are two different tools that are meant to be used together. Use the workbook to make your own notes about each lesson. Use the classroom web site (CD-ROM) to read about the lesson and to test your knowledge with self-correcting quizzes. Most students will find exercises and group activities easier to follow in the workbook during class. After class you can quickly look up exercise tasks to refresh your skills.

Take some time now and look at the workbook and the online course so that you can quickly and easily find the same lessons in each.

Qualification tests are located on the training web server. Instructions for accessing the qualification test for this class are located in the Qualifications section.

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Using the web site in class March 2002

When you first open the classroom website, the first feature you see is the navigation panel.



Use the following links to take	you to the rele	vant material in
onine Avaya PDS User's Guide		
onine Avaya PDS User's Gude Phone Strategy	Overview	Procedure
Online Avaya PDS User's Guide Phone Strategy Phone Strategy Preparation	Overview	Procedure

This menu allows you to navigate to any class content.

Click \diamondsuit to display subtopics. Click 1 to collapse the topic tree.

Select the topic link to display that topic in the right frame of the web browser.

Some topics, such as the **User's Guide**, **Glossary** or **Search** open new browser windows. These windows are smaller so that you can, for example, look up a glossary term while using the Campaign Monitor application.

The Canpaign Life Cycle icon is linked to the diagram of the Campaign Life Cycle. The instructor refers to this often throughout the class.

If you are using this web site from the CD-ROM, the first time you open the User's Guide or Online Help, you are prompted to confirm that a java control is installed on your computer. Just say "Yes."

On reference pages, the icon is used to indicate a resource. In some cases, a resource is unavailable and no link icon is displayed. Overviews are displayed in larger browser windows than Procedures. Most overview topcis come from the User's Guide, while most procedures come from the online help.

Clicking these reference links opens up windows that are sized according to content. Most procedures, from the online help resource, appear in a smaller window so that you can both read the procedure and



Using Web Site

use the Campaign Director application to which the procedure refers.

Phone strategy - pag	Create a phone	strategy	1
	 Create a phone str 	ategy	- 1
Phone strateg	Vse the following proced phone strategy:	ure to create a	
Overview	1. On the Cempsign click the Phone St	Editor button b	ar.
When preparing to creat	te a new phone strategy, you must	t first	
When preparing to creat decide which parameter define how the system ;	te a new phone strategy, you must s will be used within the phone str places those calls. Use the following links to take online Avaya PDS User's Guide	t first ategy, to pou to the rele	vant material
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Overviews and other material from the Avaya PDS User Guide are displayed in a larger window so that the additional features, such as navigation buttons, can be displayed without reducing the readability of the text.

Your instructor will tell you when you need to use an online resource from the classroom web site. Some students prefer to follow along with the instructor on the web, while others prefer to follow in the student workbook.

Because of the limitations of the screen projectors used in the classroom, it is often possible to see additional detail in your own monitor, as compared with the projected image. Also, since most of the images were optimized for on-screen use, and may reproduce poorly in the student workbook.

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Foundations March 2002

Module contents

Architecture

<u>Software</u>

Terminology review

Objectives

At the end of this module you will:

- Recall the Avaya PDS architecture and software as described in the Foundation Concepts for the AvayaTM Predictive Dialing System
- Describe the Campaign Life Cycle and understand the purpose of each component
- Identify which Campaign Director software application is used in each of the Campaign Life Cycle phases

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Architecture March 2002



Module contents

Topic <u>Network architecture</u> <u>Tier architecture</u>



Additional resources

Use the following links to take you to the relevant material in the online Avaya PDS User's Guide.

Architecture	Overview	Procedure
Avaya PDS Overview		
Avaya PDS System Components	•	
Multiple-dialer operations	•	

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Software March 2002

There are three main applications in the Avaya[™] Predictive Dialing System (PDS) Campaign Director application suite:

Application	Task	Campaign Life Cycle
Campaign Editor	Defines calling campaigns; who, how and when will you call clients	Implementation
Campaign Monitor	Monitors and manages active jobs, agents, and Avaya PDS dialers	Operation
Campaign Analyst	Reports recent and historical data about the effectiveness of your calling campaigns	Evaluation

In addition, there are several helper applications, called tools, that can be accessed from any of the main Campaign Director applications:

Application	Task	Campaign Life Cycle
Hierarchy Manager	Manages Hierarchies	Preparation and Sustaining
Completion Code Manager	Edits Completion Code Parameters	Implementation and Sustaining
Agent Blending	Configure Blend options	Implementation and Sustaining
System Telnet	Access the dialer system menus	Preparation, Evaluation and Sustaining
PC Analysis Telnet	Access the PC Analysis application	Evaluation



Additional resources

You can find additional information about the software, and related discussions, at the following links.

Software	Overview	Procedure
Campaign Editor	•	

Software

Campaign Monitor	•	
Campaign Analyst	•	
Hierarchy Manager	•	
Completion Code Manager	•	
Blend Manager	•	
System Telnet	•	
PC Analysis	•	

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Terminology review March 2002

In the Foundation Concepts class, you were introduced to the basic building blocks you need to learn the skills you will use as a system supervisor. Review the following important terminology and ask your instructor to clarify and terms that are unclear to you.

Glossary of new terms for the Avaya PDS version 12

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Architecture quiz March 2002





http://pds.au.avaya.com/esp/mos12/Redtrain/UsingPDS/Found/130.html [4/5/2002 3:24:24 PM]

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Avaya PDS overview

Overview

The Avaya PDS works with your call center's equipment and operations to perform call center tasks. The following list describes the main functions of the Avaya PDS:

- 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 (Avaya PDS with Agent Blending)
- Supports outbound, inbound, and blend jobs
- Generates a variety of reports, including job, agent, and system reports for three time variables
- Uploads record information to the host (optional)

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System components

Overview

Depending on the configuration and Avaya PDS purchased, the hardware features may be different. The purpose of this section is to provide a general understanding of the names and functions of the various Avaya PDS components.

Hardware components

The basic Avaya PDS includes the following hardware components:

- System cabinet
- Digital switch
- Digital switch subrack
- Digital switch buses
- ENBC I/O Transition Module
- Avaya PDS CPU
- Maintenance modem
- Administrator console
- Agent workstation (customer provided)
- Supervisor workstation (customer provided)
- Printers

System cabinet

The system cabinet contains the Avaya PDS software and hardware that allows the system to call customers and connect agents to those customers. The system cabinet components also store system, job, and agent statistics.

Components inside the system cabinet include:

- Digital switch to provide telephone switching services
- Avaya PDS CPU to run the system software
- DDS drive for backing up and restoring the Avaya PDS database and files
- Modem and access server for remote technical support of the system (systems installed in the United States and Canada include a maintenance modem and modem cable. All other installations outside the United States and Canada include only a modem cable. You, your VAR, or your

http://pds.au.avaya.com/esp/mos12/Redtrain/Docs/Userguide/vol1/01_AvayaPDSOV_BA4.html (1 of 8) [4/5/2002 3:24:25 PM]

System components

partner provides the modem.)

• Uninterruptible Power Supply (UPS) to control power to the cabinet components

Components that connect to the system cabinet include:

- Administrator console for access to the Avaya PDS CPU
- Public Switched Telephone Network (PSTN) for placing and receiving calls
- Local Area Network (LAN) for connecting to agent and supervisor workstations
- Agent and supervisor headsets or telephones

Cabinet specifications for Avaya PDSs may be different.

The following illustration shows a typical system cabinet layout in the Avaya PDS environment.





Digital switch

The digital switch places calls, performs call progress analysis, answers calls, connects calls to agents or hold queues, plays messages, and communicates with the system controller (Avaya PDS CPU). The digital switch is comprised of two subsystems: the digital switch subrack and the ENBC/IO Transition Module. The digital switch uses an Ethernet connection to communicate with the system controller.

Digital switch subrack

The digital switch subrack, also called the digital switch card file, contains cards that provide the following functions:

• Provides a central processor for the digital switch

http://pds.au.avaya.com/esp/mos12/Redtrain/Docs/Userguide/vol1/01_AvayaPDSOV_BA4.html (3 of 8) [4/5/2002 3:24:25 PM]

System components

- Monitors alarm conditions and provides controls for resetting the digital switch
- Provides interfaces for voice cables and various types of telephone trunks
- Places, receives, and processes telephone calls
- Plays digitized voice messages
- Switches calls to workstation headsets

All systems have one ENBC and one EDTG card. The number of LPVC2s depends on your system. The other cards vary from site to site, depending on the number and type of trunks connected to the system.

The following table provides an overview of the functions of the most common cards.

Card type	General function	Description		
ENBC	Control circuit card	This card controls the operation of the digital switch under the direction of the		
(Enhanced Network Bus Controller)		Avaya PDS CPU.		
EDTG	Service circuit cord	Generates DTMF (Dual Tone Multi-frequency) or MF (Multi-frequency) tones for		
(Enhanced Digital Tone Generator)	Service circuit card	placing calls and testing audio paths.		
LPVC2	Service einewit cond	Plays and maanda digitized value massages and giptones		
Large Port Voice Card	Service circuit card	Plays and records digitized voice messages and ziptones.		
DDC	Comvine simewit cond	Concretes additional DTME tange sharpeds and provides additional parts/conceptu		
Digital Dialer Card	Service circuit card	Generates additional DTMF tone channels and provides additional ports/capacity		
ECPA	Service einewit cond	Detects and analyzes call progress tones, voices, and automated voice and message		
Enhanced Call Progress Analyzer	Service circuit card	systems.		
EDRC	Service einewit cond	Detects and reports DTME digits on inhound calls which provide ANI/DNIS		
Enhanced DTMF Receiver Card	Service circuit card	Detects and reports DTWI [*] digits on moound cans which provide ANI/DIVIS.		
ECC	Service einewit cond	Dravidas transfer and conference conshilities		
Enhanced Conference Card	Service circuit card	Provides transfer and conference capabilities.		
UTC-2	Dont interface card	Dravidas an interface to englag ground start or englag loop start telephone trunks		
Universal Trunk Card	Port interface card	Provides an interface to analog ground start or analog loop start telephone trunks.		
QT1	Dont interface cord	Drowides interfaces to four digital T1 talenhans trunks (non ISDN)		
Quad T1 card	Port Interface card	Provides interfaces to four digital 11 telephone trunks (non-iSDN).		

QE1 Quad E1 card	Port interface card	Provides interfaces to four digital E1 telephone trunks (non-ISDN).	
T1-PRI/N		Provides interfaces to one T1-based Primary Rate Interface (ISDN) telephone	
T1 Primary Rate Interface card	Port interface card	trunk.	
E1-PRI	Port interface card	Provides interfaces to one E1-based Primary Rate Interface (ISDN) telephone	
E1 Primary Rate Interface card		trunk.	
QT1-PRI	Port interface card	Provides interfaces to four T1-based Primary Rate Interface (ISDN) telephone	
Quad T1 Primary Rate Interface card		trunks.	
QE1-PRI	Port interface card	Provides interfaces to four E1-based Primary Rate Interface (ISDN) telephone	
Quad E1 Primary Rate Interface card		trunks.	
OLIC2	Port interface card	Provides an interface to analog voice cables for 24 direct-connect headsets	
Operator Line Interface Card		Trovides an interface to analog voice cables for 24 direct-connect neadsets.	

Digital switch buses

The digital switch buses are integrated in the digital switch subrack and controller. The buses control signals and other information within the digital switch.

Digital switch bus name	Description
Ethernet	Carries communication network traffic between the Avaya PDS CPU and the digital switch.
SCSI	Connects the ENB I/O Transition Module to the digital switch subrack. When the call center starts a calling job, the ENBC uses the SCSI bus to download digitized voice messages to the LPVC.
Communication	Carries control signals and data between the ENBC and the cards in the digital switch subrack.
	When the digital switch is reset, the ENBC uses the communication bus to download application software to cards in the digital switch subrack.
РСМ	Carries telephone audio information within the digital switch. The digital switch uses the PCM bus to link the ports on the port interface cards and service circuit cards in the digital switch subrack.

ENBC I/O Transition Module

The ENBC (Enhance Network Bus Controller) I/O Transition Module provides the following connections to the digital switch:

- Ethernet
- serial RS-232 communication
- SCSI
- external clock for testing

The ENBC I/O Transition Module has the following components:

- hard disk drive
- diskette drive
- serial RS-232 ports
- Ethernet connections
- SCSI connection
- ENBC connection

The hard drive contains the operating system, application software, and configuration information used by the digital switch.

Avaya PDS CPU

The Avaya PDS CPU is a Hewlett-Packard computer running the HP-UX operating system. It controls all Avaya PDS operations and provides the interface that supervisors and agents use on their workstations. It contains the Avaya PDS software that calls customers, connects agents and customers, and stores system, job, and agent statistics.

The Avaya PDS CPU contains a DDS tape drive that provides data storage and is used for backing up system software.

AC power

A UPS controls power to the assemblies in the system cabinet.

Fan

The system cabinet has one fan assembly -- the digital switch subrack fan.

Maintenance modem

The Avaya PDS uses a high-speed modem to enable remote access to the system for diagnostic and maintenance purposes. The modem connects an analog telephone line to the access server to provide access to the major subsystems.

Systems installed in the United States and Canada include a maintenance modem and modem cable.

All other installations outside the United States and Canada include only a modem cable. You, your VAR, or your partner provides the modem.

Administrator console

The administrator console provides access to the Avaya PDS CPU and digital switch. It connects directly to the access server inside the system cabinet. This console consists of a monitor and keyboard. The system administrator uses it to perform basic system operations, such as backing up system files, shutting down the system, and setting the system's time and date. Do not use the administrator console to run jobs, select records, or similar tasks.

Systems installed in the United States and United Kingdom include the administrator console. For installations outside the United States and United Kingdom, you, your VAR, or your partner provides the console or purchases one through Avaya.

Agent workstation (customer provided)

Each agent workstation consists of a computer and voice connection. During calling jobs, agents use the workstation to talk to customers and update customer records.

An agent workstation can be a personal computer (PC) or a dumb terminal. See the Avaya PDS Installation Planner for specific requirements.

Personal computers

PCs can be network-connected or serial-connected (direct-connected). The Avaya PDS provides the best service using network connected PCs. Network connected PCs use a Windows or Windows NT operating system. The Avaya PDS supports connections to either an Ethernet or Token Ring type of network. The Avaya PDS uses TCP/IP to move data between itself and the agent workstations. These systems can use graphical user interfaces designed by an application developer using the Avaya PDS Agent API.

Serial-connected computers require a terminal emulation package and terminal servers for connection to the Avaya PDS CPU.

Dumb terminals

Dumb terminals are usually serial-connected to the Avaya PDS through terminal servers. Dumb terminals use the character-based menu system.

Supervisor workstation (customer provided)

Supervisor workstations are usually network-attached PCs. They may also be serial-attached dumb terminals or serial-attached PCs. Supervisor workstations require a headset or telephone. System supervisors use these workstations to set up and manage system settings, set up jobs, and monitor calling activity. See the Avaya PDS Installation Planner for specific requirements.

Comparison

The supervisor workstation is identical to the agent workstation except it is usually a PC running Campaign Director. If it is a dumb terminal, the workstation uses a character-based menu system.

Printers

The printer is used to print status messages, error messages, diagnostic information, and reports on call center operations. You are responsible for the purchase, installation, and maintenance of the printer.

System components

The printer is connected to your call center's LAN, which makes it available to other application software. The printer connects to the Avaya PDS CPU by an Ethernet LAN connection.



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Avaya PDS User Guide

Overview

Purpose

The AvayaTM Predictive Dialing System (PDS) has the capability to be configured into a pod. A pod is a group of up to four dialers connected by a middle-tier structure.

Contents

This section contains the following topics:

- <u>Shared features</u>
- Primary and secondary dialers
- Pod impacts



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Campaign Editor

Overview

Campaign Editor is used for a variety of tasks. Following is a sample list of tasks performed using Campaign Editor:

- Create and modify a phone strategy, record selection, or job
- Open a phone strategy, record selection, or job on local dialer or another dialer (if multi-dialer option is enabled)
- Save a phone strategy, record selection, or job to another dialer
- Display a record selection report

Campaign Editor application

Campaign Editor allows you to see large amounts of information in a single window.

- When the Jobs button is selected, (left-hand side of your screen), you see a list of existing jobs. If you select one of the jobs in the list, you see a tree structure on the right-hand side of the window. The tree structure displays all of your settings for that particular job. To modify the job settings, double-click the fields in the tree structure.
- When the Strategies button is selected, you see a list of existing phone strategies. If you select a phone strategy in the list, you see a wizard on the right-hand side of the window. The wizard screens contain all of your settings for the selected phone strategy. To modify phone strategy settings, use the Next and Back buttons located at the bottom of each wizard screen to navigate. On the wizard screens, append rows and double-click fields to modify phone strategy settings.
- When the Selections button is selected, you see a list of existing record selections. If you select a record selection, you see a wizard on the right-hand side of the widow. The wizard screens contain all of your settings for the selected record selection. To modify record selection settings, use the Next and Back buttons located at the bottom of each wizard screen to navigate. On the wizard screens, append rows and double-click fields to modify record selection settings.



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Campaign Monitor

Overview

Campaign Monitor is used for a variety of tasks. In this version, the previous Campaign Manager functions are incorporated into Campaign Monitor.

Following is a sample list of tasks performed using Campaign Monitor:

- Monitor agents on one or multiple dialers (if multi-dialer option is enabled)
- Customize your view settings
- View detailed agent, supervisor, job, or dialer information and save customized views to use at a later time
- Sort data based on information that is relevant to your call center

User Interface

See the "Campaign Monitor personalization and navigation" section for information on Campaign Monitor.



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Campaign Analyst

Overview

Campaign Analyst is a reporting tool for the Avaya PDS. Campaign Analyst can filter data according to agent, supervisor, job, or dialer, depending on your call center goals.

See "Campaign Analyst" for more information.



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Avaya PDS User Guide

Overview

Purpose

The AvayaTM Predictive Dialing System (PDS) uses Completion Code Manager to categorize completion codes as Right Party Contacts (RPCs), Abandons, and Closures.

Contents

This section contains the following topics:

- Completion code categories
- Start Completion Code Manager
- <u>Set a completion code as RPC</u>
- Set a completion code as a Closure
- Set a completion code as an Abandon
- <u>Remove a completion code</u>
- Change a completion code description
- <u>View Completion Code Manager for another dialer</u>

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Avaya PDS User Guide

Overview

Purpose

The Agent Blending tool allows you to manage domains (ACD call queues) and domain groups (every domain is a member of a domain group). Start the Agent Blending tool from the Campaign Monitor or Campaign Editor Tools menu.

Contents

This section contains the following topics:

- Agent Blending
- <u>Supported ACDs</u>
- Switch terminology
- <u>Domains</u>
- Domain Groups
- Start the Agent Blending tool
- Create a domain group
- Create a domain
- Edit domain group settings
- Edit domain settings
- Delete a domain group
- Delete a domain
- Move a domain to a different group
- Stop the blend engine
- Start the blend engine
- <u>Reset the blend engine</u>
- Resynch the blend engine
- <u>View ACD statistics</u>
- <u>View alerts</u>
- <u>View transactions</u>



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Avaya PDS User Guide

Overview

Purpose

The System Telnet tool provides access to the AvayaTM Predictive Dialing System (PDS) character-based user interface.

Contents

This section contains the following topics:

- System Telnet
- <u>Toolbar icons</u>
- Start System Telnet



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PC Analysis

Overview

PC Analysis allows you to use data from the Avaya PDS to prepare reports, charts, mail merge letters, and spreadsheets using PC software.

Using PC Analysis, you can extract five statistics files:

- job history
- agent history
- calling information
- calling transactions
- calling lists

The extract is in a comma delimited file without headings. In order to use the information, you need to import it into a PC program such as Excel, Lotus, a word processing merge file, or database. You can then create the reports, charts, letters and spreadsheets from the PC program.

When you run PC Analysis, you may see a significant reduction in system performance. For this reason, we suggest that you run the extract when there are no active jobs. Understanding the information in the Avaya PDS files helps you create extracts that contain the data you need.



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Software quiz March 2002



Which portion of the Campaign Life Cycle is	Which of these is not installed with Campaign
Campaign Editor used for most?	Director?
Implementation	Campaign Analyst
Operations	PC Analysis
Preparation	Hierarchy Manager
Evaluation	PC Analysis Telnet
Wheih application is used to send messages to agents?	How much disk space does PC Analysis require to install on the Campaign Director workstation?
Campaign Editor	250 MB
O Agent Blending	100 MB
PC Analysis	O 153.5 MB
Campaign Monitor	0 MB

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Preparation March 2002

Module contents

Topic <u>GUI vs. CUI</u> <u>System menus</u> <u>Related tasks</u> <u>Avaya PDS Agent</u>

Objectives

At the end of this module you will be able to:

- Access the System Telnet tool through Campaign Director software
- Create, edit, and delete users via the Supervisor menu system
- Understand the various options available in the Calling List and Users menu

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Overview

Purpose

The AvayaTM Predictive Dialing System (PDS) consists of software, hardware, and networked components. The system is comprised of the system cabinet, supervisor workstation, agent workstations, printer, and modem. As a system supervisor, you use the supervisor workstation and the Campaign Director applications to set up, monitor, modify, and report on your calling activities.

This guide focuses on how you can use the Campaign Director applications (Campaign Monitor, Campaign Editor, and Campaign Analyst) to make your call center more effective.

Contents

This section contains the following topics:

- Avaya PDS overview
- System components
- Campaign Director
- Campaign Editor
- Campaign Monitor
- Campaign Analyst



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Avaya Inc.



Avaya[™] Predictive Dialing System User's Guide Volume 1

這種推动

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Avaya Predictive Dialing System User's Guide Volume 1

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Notice

Every effort was made to ensure that the information in this book was complete and accurate at the time of printing. However, information is subject to change.

Mandatory Customer Information

Preventing Toll Fraud

Toll Fraud is the unauthorized use of your telecommunications system by an unauthorized party (for example, a person who is not a corporate employee, agent, subcontractor, or working on your company's behalf). Be aware that there is a risk of toll fraud associated with your system and that, if toll fraud occurs, it can result in substantial additional charges for your telecommunications services.

Avaya Fraud Intervention

If you *suspect that you are being victimized* by toll fraud and you need technical assistance or support, call the Technical Service Center's Toll Fraud Intervention Hotline at 1-800-643-2353.

Providing Telecommunications Security

Telecommunications security of voice, data, and/or video communications is the prevention of any type of intrusion to, that is, either unauthorized or malicious access to or use of, your company's telecommunications equipment by some party.

Your company's "telecommunications equipment" includes both this Avaya product and any other voice/ data/video equipment that could be accessed via this Avaya product (that is, "networked equipment").

An "outside party" is anyone who is not a corporate employee, agent, subcontractor, or working on your company's behalf. Whereas, a "malicious party" is Anyone, including someone who may be otherwise authorized, who accesses your telecommunications equipment with either malicious or mischievous intent.

Such intrusions may be either to/through synchronous (time multiplexed and/or circuit-based) or asynchronous (character-, message-, or packet-based) equipment or interfaces for reasons of:

- · Utilization (of capabilities special to the accessed equipment)
- · Theft (such as, of intellectual property, financial assets, or toll-facility access)
- Eavesdropping (privacy invasions to humans)
- · Mischief (troubling, but apparently innocuous, tampering)
- Harm (such as harmful tampering, data loss or alteration, regardless of motive or intent)

Be aware that there may be a risk of unauthorized or malicious intrusions associated with your system and/ or its networked equipment. Also realize that, if such an intrusion should occur, it could result in a variety of losses to your company, including but not limited to, human/data privacy, intellectual property, material assets, financial resources, labor costs, and/or legal costs.

Your Responsibility for Your Company's Telecommunications Security

The final responsibility for securing both this system and its networked equipment rests with you - an Avaya customer's system administrator, your telecommunications peers, and your managers. Base the fulfillment of your responsibility on acquired knowledge and resources from a variety of sources including but not limited to:

- Installation documents
- · System administration documents
- Security documents
- Hardware-/software-based security tools
- Shared information between you and your peers
- · Telecommunications security experts

To prevent intrusions to your telecommunications equipment, you and your peers should carefully program and configure your:

• Avaya provided telecommunications system and their interfaces

 Avaya provided software applications, as well as their underlying hardware/software platforms and interfaces

· Any other equipment networked to your Avaya products

Federal Communications Commission Statement

Part 15: Class A Statement. This equipment has been tested and found to comply with the limits for a Class A digital device, pursuant to Part 15 of the FCC Rules. These limits are designed to provide reasonable protection against harmful interference when the equipment is operated in a commercial environment. This equipment generates, uses, and can radiate radio-frequency energy and, if not installed and used in

accordance with the instructions, may cause harmful interference to radio communications. Operation of this equipment in a residential area is likely to cause harmful interference, in which case the user will be required to correct the interference at his own expense.

Part 68: Network Registration Number. This equipment is registered with the FCC in accordance with Part 68 of the FCC Rules. It is identified by FCC registration number AV1USA-28011-MA-T. Refer to "Federal Communications Commission Statement" in "About This Book" for more information regarding Part 68.

Canadian Department of Communications (DOC) Interference Information

This digital apparatus does not exceed the Class A limits for radio noise emissions set out in the radio interference regulations of the Canadian Department of Communications.

Le Présent Appareil Nomérique n'émet pas de bruits radioélectriques dépassant les limites applicables aux appareils numériques de la class A préscrites dans le reglement sur le brouillage radioélectrique édicté par le ministére des Communications du Canada.

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

• Electromagnetic Compatibility (89/336/EEC)

Telecommunications Terminal Equipment (TTE) i-CTR3 BRI and i-CTR4 PRI

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

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C O N T E N T S X

About this information product

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Purpose	The purpose of this manual is to provide detailed information about the operation of the Avaya TM Predictive Dialing System (PDS).
Reason for reissue	The following list describes changes to the Avaya PDS User's Guide since the last release.
	• This guide has been formatted for easier use.
	• This guide has been branded to match our product name changes.
	• This guide contains two volumes - one for the graphical, Campaign Director interface, and the other for the Character- Based User Interface, which uses menus to navigate through the system (these two interfaces cannot be used simultaneously).
	• This guide is arranged by task rather than by application. This allows the information to flow according to user task rather than individual tasks performed within certain applications.
Intended-Audience	The audience for this manual includes any user of the Avaya PDS. This includes, but is not limited to, system supervisors, integration consultants, application consultants, and customer support engineers.

Part I: Avaya Predictive Dialing System introduction

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1 Avaya Predictive Dialing System

Overview

Purpose	The Avaya TM Predictive Dialing System (PDS) consists of software, hardware, and networked components. The system is comprised of the system cabinet, supervisor workstation, agent workstations, printer, and modem. As a system supervisor, you use the supervisor workstation and the Campaign Director applications to set up, monitor, modify, and report on your calling activities.
	This guide focuses on how you can use the Campaign Director applications (Campaign Monitor, Campaign Editor, and Campaign Analyst) to make your call center more effective.
Contents	 This section contains the following topics: Avaya PDS overview System components Campaign Director Campaign Editor Campaign Monitor Campaign Analyst

Avaya PDS overview

Overview	The Avaya PDS works with your call center's equipment and operations to perform call center tasks. The following list describes the main functions of the Avaya PDS:
	• 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 (Avaya PDS with Agent Blending)
	• Supports outbound, inbound, and blend jobs
	• Generates a variety of reports, including job, agent, and system reports for three time variables

• Uploads record information to the host (optional)

System components

Overview	Depending on the configuration and Avaya PDS purchased, the hardware features may be different. The purpose of this section is to provide a general understanding of the names and functions of the various Avaya PDS components.
Hardware components	The basic Avaya PDS includes the following hardware components:
	• System cabinet
	• Digital switch
	Digital switch subrack
	Digital switch buses
	ENBC I/O Transition Module
	Avaya PDS CPU
	Maintenance modem
	Administrator console
	Agent workstation (customer provided)
	• Supervisor workstation (customer provided)
	• Printers
System cabinet	The system cabinet contains the Avaya PDS software and hardware that allows the system to call customers and connect agents to those customers. The system cabinet components also store system, job, and agent statistics.
	Components inside the system cabinet include:
	• Digital switch to provide telephone switching services
	• Avaya PDS CPU to run the system software
	• DDS drive for backing up and restoring the Avaya PDS database and files
	• Modem and access server for remote technical support of the system (systems installed in the United States and Canada include a maintenance modem and modem cable. All other installations outside the United States and Canada include only a modem cable. You, your VAR, or your partner provides the modem.)
	• Uninterruptible Power Supply (UPS) to control power to the cabinet components

.....

Components that connect to the system cabinet include:

- Administrator console for access to the Avaya PDS CPU
- Public Switched Telephone Network (PSTN) for placing and receiving calls
- Local Area Network (LAN) for connecting to agent and supervisor workstations
- Agent and supervisor headsets or telephones

Cabinet specifications for Avaya PDSs may be different.

The following illustration shows a typical system cabinet layout in the Avaya PDS environment.



Digital switch The digital switch places calls, performs call progress analysis, answers calls, connects calls to agents or hold queues, plays messages, and communicates with the system controller (Avaya PDS CPU). The digital switch is comprised of two subsystems: the digital switch

subrack and the ENBC/IO Transition Module. The digital switch uses an Ethernet connection to communicate with the system controller.

Digital switch subrack The digital switch subrack, also called the digital switch card file, contains cards that provide the following functions:

- Provides a central processor for the digital switch
- Monitors alarm conditions and provides controls for resetting the digital switch
- Provides interfaces for voice cables and various types of telephone trunks
- Places, receives, and processes telephone calls
- Plays digitized voice messages
- Switches calls to workstation headsets

All systems have one ENBC and one EDTG card. The number of LPVC2s depends on your system. The other cards vary from site to site, depending on the number and type of trunks connected to the system.

The following table provides an overview of the functions of the most common cards.

Card type	General function	Description
ENBC (Enhanced Network Bus Controller)	Control circuit card	This card controls the operation of the digital switch under the direction of the Avaya PDS CPU.
EDTG (Enhanced Digital Tone Generator)	Service circuit card	Generates DTMF (Dual Tone Multi- frequency) or MF (Multi-frequency) tones for placing calls and testing audio paths.
LPVC2 Large Port Voice Card	Service circuit card	Plays and records digitized voice messages and ziptones.

Card type	General function	Description
DDC Digital Dialer Card	Service circuit card	Generates additional DTMF tone channels and provides additional ports/capacity.
ECPA Enhanced Call Progress Analyzer	Service circuit card	Detects and analyzes call progress tones, voices, and automated voice and message systems.
EDRC Enhanced DTMF Receiver Card	Service circuit card	Detects and reports DTMF digits on inbound calls which provide ANI/DNIS.
ECC Enhanced Conference Card	Service circuit card	Provides transfer and conference capabilities.
UTC-2 Universal Trunk Card	Port interface card	Provides an interface to analog ground start or analog loop start telephone trunks.
QT1 Quad T1 card	Port interface card	Provides interfaces to four digital T1 telephone trunks (non- ISDN).
QE1 Quad E1 card	Port interface card	Provides interfaces to four digital E1 telephone trunks (non- ISDN).
T1-PRI/N T1 Primary Rate Interface card	Port interface card	Provides interfaces to one T1-based Primary Rate Interface (ISDN) telephone trunk.
E1-PRI E1 Primary Rate Interface card	Port interface card	Provides interfaces to one E1-based Primary Rate Interface (ISDN) telephone trunk.

Card type	General function	Description
QT1-PRI Quad T1 Primary Rate Interface card	Port interface card	Provides interfaces to four T1-based Primary Rate Interface (ISDN) telephone trunks.
QE1-PRI Quad E1 Primary Rate Interface card	Port interface card	Provides interfaces to four E1-based Primary Rate Interface (ISDN) telephone trunks.
OLIC2 Operator Line Interface Card	Port interface card	Provides an interface to analog voice cables for 24 direct-connect headsets.

Digital switch buses The digital switch buses are integrated in the digital switch subrack and controller. The buses control signals and other information within the digital switch.

Digital switch bus name	Description
Ethernet	Carries communication network traffic between the Avaya PDS CPU and the digital switch.
SCSI	Connects the ENB I/O Transition Module to the digital switch subrack. When the call center starts a calling job, the ENBC uses the SCSI bus to download digitized voice messages to the LPVC.
Communication	Carries control signals and data between the ENBC and the cards in the digital switch subrack. When the digital switch is reset, the ENBC uses the communication bus to download application software to cards in the digital switch subrack.
PCM	Carries telephone audio information within the digital switch. The digital switch uses the PCM bus to link the ports on the port interface cards and service circuit cards in the digital switch subrack.

ENBC I/O Transition
ModuleThe ENBC (Enhance Network Bus Controller) I/O Transition Module
provides the following connections to the digital switch:

- Ethernet
- serial RS-232 communication
- SCSI
- external clock for testing

The ENBC I/O Transition Module has the following components:

- hard disk drive
- diskette drive
- serial RS-232 ports
- Ethernet connections
- SCSI connection
- ENBC connection

The hard drive contains the operating system, application software, and configuration information used by the digital switch.

Avaya PDS CPU The Avaya PDS CPU is a Hewlett-Packard computer running the HP-UX operating system. It controls all Avaya PDS operations and provides the interface that supervisors and agents use on their workstations. It contains the Avaya PDS software that calls customers, connects agents and customers, and stores system, job, and agent statistics.

The Avaya PDS CPU contains a DDS tape drive that provides data storage and is used for backing up system software.

AC power

A UPS controls power to the assemblies in the system cabinet.

Fan

The system cabinet has one fan assembly -- the digital switch subrack fan.

Maintenance modemThe Avaya PDS uses a high-speed modem to enable remote access to
the system for diagnostic and maintenance purposes. The modem
connects an analog telephone line to the access server to provide access
to the major subsystems.

Systems installed in the United States and Canada include a maintenance modem and modem cable.

	All other installations outside the United States and Canada include only a modem cable. You, your VAR, or your partner provides the modem.
Administrator console	The administrator console provides access to the Avaya PDS CPU and digital switch. It connects directly to the access server inside the system cabinet. This console consists of a monitor and keyboard. The system administrator uses it to perform basic system operations, such as backing up system files, shutting down the system, and setting the system's time and date. Do not use the administrator console to run jobs, select records, or similar tasks.
	Systems installed in the United States and United Kingdom include the administrator console. For installations outside the United States and United Kingdom, you, your VAR, or your partner provides the console or purchases one through Avaya.
Agent workstation (customer provided)	Each agent workstation consists of a computer and voice connection. During calling jobs, agents use the workstation to talk to customers and update customer records.
	An agent workstation can be a personal computer (PC) or a dumb terminal. See the <i>Avaya PDS Installation Planner</i> for specific requirements.
	Personal computers
	PCs can be network-connected or serial-connected (direct-connected). The Avaya PDS provides the best service using network connected PCs. Network connected PCs use a Windows or Windows NT operating system. The Avaya PDS supports connections to either an

Ethernet or Token Ring type of network. The Avaya PDS uses TCP/IP to move data between itself and the agent workstations. These systems can use graphical user interfaces designed by an application developer using the Avaya PDS Agent API.

Serial-connected computers require a terminal emulation package and terminal servers for connection to the Avaya PDS CPU.

Dumb terminals

Dumb terminals are usually serial-connected to the Avaya PDS through terminal servers. Dumb terminals use the character-based menu system.

Supervisor workstation (customer provided)

Supervisor workstations are usually network-attached PCs. They may also be serial-attached dumb terminals or serial-attached PCs. Supervisor workstations require a headset or telephone. System supervisors use these workstations to set up and manage system settings, set up jobs, and monitor calling activity. See the *Avaya PDS Installation Planner* for specific requirements.

Comparison

The supervisor workstation is identical to the agent workstation except it is usually a PC running Campaign Director. If it is a dumb terminal, the workstation uses a character-based menu system.

Printers The printer is used to print status messages, error messages, diagnostic information, and reports on call center operations. You are responsible for the purchase, installation, and maintenance of the printer.

The printer is connected to your call center's LAN, which makes it available to other application software. The printer connects to the Avaya PDS CPU by an Ethernet LAN connection. ------

Campaign Director

Overview	Campaign Director is a suite of call management applications that serve as the interface between a call center supervisor and the Avaya PDS. Campaign Director applications allow you to easily and dynamically design, control, monitor, and analyze call center activity. The Avaya PDS increases your call center's productivity and helps you achieve your campaign goals.
	The Avaya PDS consists of software and networked components, including the Avaya PDS cabinet, supervisor workstations, agent workstations, printers, and modems.
	The Campaign Director software provides a graphical user interface to the Avaya PDS which runs on your supervisor workstation.
New features of Campaign Director	The newest release of Campaign Director encompasses all existing functionality of earlier versions. The following list describes the new features of Campaign Director.
	Integration of monitoring and control functions The functionality of Campaign Monitor and Campaign Manager are combined into Campaign Monitor to provide a single interface to all job and agent monitor and control functions.
	Enterprise-wide monitoring Campaign Monitor allows you to view multiple dialers across the enterprise. Campaign Monitor provides the ability to focus on a single agent on a single dialer as well as provide an enterprise-view of a call center.
	Customizable views In order to satisfy the needs of a wider, more diverse audience, Campaign Monitor provides tools for customizing views of enterprise data and saving view configurations.
	Improved speed and performance Files are retrieved from and stored directly to the PDS by means of the Command and Control interface, therefore, eliminating the need to synchronize with each Avaya PDS.
	Improved User Interface (UI) The current tabular layout of Campaign Editor is replaced with a single form to maintain the same

look and feel as Campaign Monitor. This new design is similar to MicrosoftTM Outlook.

Improved usability The job and record selection editor screens display additional information which lets you view the current status of the jobs or record selections on a specified system.

Ease of use Campaign Editor automaticallys execute the record selection (if needed) and then verifies the job. If the job verification passes, you will be offered a choice of starting the job or cancelling the operation. You still have the capability to run record selections as a separate action.

Global Campaign Director features With Campaign Director's new user interface, there are several features that have been added in order to increase the ability to customize settings. The table below identifies some of the new features that are used throughout the Campaign Director applications and tools.

New feature	Description
Button bar	Allows you to use shortcuts and navigate more easily.
Sort columns	Allows you to sort data in ascending and descending order by clicking a column's heading.
Resize columns	Allows you to make a column wider or narrower by clicking the area between column headings and then dragging to the left or right.
Refresh	Allows you to refresh the data in the active window.
Launch tools	Allows you to launch various tools: Hierarchy Manager, Completion Code Manager, Agent Blending, PC Analysis telnet, and System telnet.

New feature	Description
Multiple dialer controls	Allows you to save and retrieve record selections, phone strategies, and jobs from multiple dialers if this feature is enabled. Also allows you to run reports across dialers.
Define main dialer	Allows you to define the main dialer within a pod (up to four dialers).

.....

Campaign Editor

Overview	Campaign Editor is used for a variety of tasks. Following is a sample list of tasks performed using Campaign Editor:
	• Create and modify a phone strategy, record selection, or job
	• Open a phone strategy, record selection, or job on local dialer or another dialer (if multi-dialer option is enabled)
	• Save a phone strategy, record selection, or job to another dialer
	• Display a record selection report
Campaign Editor application	Campaign Editor allows you to see large amounts of information in a single window.
	• When the Jobs button is selected, (left-hand side of your screen), you see a list of existing jobs. If you select one of the jobs in the list, you see a tree structure on the right-hand side of the window. The tree structure displays all of your settings for that particular job. To modify the job settings, double-click the fields in the tree structure.
	• When the Strategies button is selected, you see a list of existing phone strategies. If you select a phone strategy in the list, you see a wizard on the right-hand side of the window. The wizard screens contain all of your settings for the selected phone strategy. To modify phone strategy settings, use the Next and Back buttons located at the bottom of each wizard screen to navigate. On the wizard screens, append rows and double-click fields to modify phone strategy settings.

When the **Selections** button is selected, you see a list of existing record selections. If you select a record selection, you see a wizard on the right-hand side of the widow. The wizard screens contain all of your settings for the selected record selection. To modify record selection settings, use the **Next** and **Back** buttons located at the bottom of each wizard screen to navigate. On the wizard screens, append rows and double-click fields to modify record selection settings.

Campaign Monitor

Overview Campaign Monitor is used for a variety of tasks. In this version, the previous Campaign Manager functions are incorporated into Campaign Monitor.

Following is a sample list of tasks performed using Campaign Monitor:

- Monitor agents on one or multiple dialers (if multi-dialer option is enabled)
- Customize your view settings
- View detailed agent, supervisor, job, or dialer information and save customized views to use at a later time
- Sort data based on information that is relevant to your call center

User Interface

See the "Campaign Monitor personalization and navigation" section for information on Campaign Monitor.
Campaign Analyst

Overview Campaign Analyst is a reporting tool for the Avaya PDS. Campaign Analyst can filter data according to agent, supervisor, job, or dialer, depending on your call center goals.

See "Campaign Analyst" for more information.

2 Campaign Life Cycle

Overview

Purpose	The Avaya TM Predictive Dialing System (PDS) uses campaigns to target specific customers. The Campaign Life Cycle describes the day to day tasks that you perform in a typical call center.
	Following the Campaign Life Cycle description are introductions to each application within Campaign Director. This helps you understand how the Campaign Life Cycle activities are relative to Campaign Editor, Campaign Monitor, and Campaign Analyst.
Contents	This section contains the following topic:

.....

Campaign Life Cycle

Campaign Life Cycle

Overview The term campaign is used to group together calling lists, phone strategies, record selections, and jobs that share an objective. A campaign can contain several jobs, each with its own phone strategy and record selection, which target a specific group of customers.

Whether your campaigns last a day or a month, there are events that occur during every Campaign Life Cycle.



Campaign Life Cycle activities

The Campaign Life Cycle diagram creates a circular view of the activities involved during a campaign. The following table outlines those activities.

Activity	Consists of:
Preparation	verify download
	• set user accounts
	system configuration and set-up
Planning	Set campaign objectives
	 job objectives
	record selections
	• phone strategies
	• other optional features
Implementation	Implementation plan
	create phone strategies
	• create and verify record selections
	• create jobs
Operation	Manage operation
	• start jobs
	• log in to jobs
	• monitor and modify jobs
	shutdown jobs
Evaluation	Evaluation and completion
	• define and run reports
	• analyze output
	• upload results
	• backup results
Sustaining	maintain user accounts
	system administration

3 Multi-dialer

Overview

Purpose	The Avaya TM Predictive Dialing System (PDS) has the capability to be configured into a pod. A pod is a group of up to four dialers connected by a middle-tier structure.
Contents	This section contains the following topics:
	Shared features
	Primary and secondary dialers
	Pod impacts

Shared features

Overview	A pod of Avaya PDS dialers contains up to four dialers connected through a middle-tier server. Following is a list of features that are shared among dialers in a pod:			
	calling lists			
	• jobs			
	phone strategies			
	• record selections			
	A single Avaya PDS can dial up to 130,000 outbound calls per hour. With the multi-dialer feature enabled, you can manage up to four dialers with list sharing across a distributed dialer network, enabling increased outbound call volume of up to 500,000 calls per hour.			
	A multi-dialer office environment greatly increases your company's outreach capacity. The functionality allows you to manage up to four dialers in a distributed architecture using a single, unified administration and supervisor interface for faster implementation of large-scale outreach programs.			
	Campaign Director makes it easy for you to manage operations and monitor traffic and workload across the multi-dialer network.			
Shared calling list	The Avaya PDS allows you to run a job using a calling list from a different dialer. Any Avaya PDS in a pod can be used to dial another dialer's (in that same pod) calling list. This allows multiple dialers to call on the same calling list at the same time, which provides scalability on a single campaign above the physical agent limitation of one Avaya PDS.			
	The primary advantage of a shared calling list is speed. Imagine a job with 11,277 records finishing in 1/4 the normal time!			
	The shared list feature allows the agent capacity of multiple Avaya PDSs to be used for a single job. For example, one supervisor on dialer 1 (in a pod of 4) can use a calling list that resides on dialer 3, start a job that resides on dialer 2, and have agents from all 4 Avaya PDSs log in to the job to complete outbound calls.			
Pod monitoring	The pod feature combines monitoring, control, and administration of all four dialers in a pod from a single Campaign Director workstation.			

Multi-dialer agent login management

You can create and manage logins and passwords for multiple dialers from a single system. For example, a login and password created on one dialer may be populated to all dialers in a pod.

Multi-dialer monitoring

Campaign Monitor supports multiple dialers across the pod. For example, real-time job data from multiple dialers can be aggregated into a single view of the overall pod.

Multi-dialer control

Campaign Monitor provides control functions across all dialers in a pod. This allows one supervisor to stop jobs, adjust Expert Calling Ratio, assign line pools, and perform other job control functions from a single Campaign Director workstation.

Multi-dialer administration

Campaign Director applications and tools provide administration across all dialers in a pod. For example, you can copy, delete, and modify phone strategies, record selections, or jobs, regardless of the dialer they reside on. If you delete a record selection, you will first be prompted for the dialer the record selection resides on, and then you will be prompted for which record selection you want to delete.

Primary and secondary dialers

Overview	In a pod, there are dialers that are configured as the "primary" dialer and the "secondary" dialer.
Primary dialer	A pod's primary dialer is an Avaya PDS dialer that runs the mid-tier software and controls that coordinations data management are. Every Avaya PDS pod must have a primary dialer. Secondary dialers feed data to the primary dialer that processes the data and makes it available for monitoring and reporting. In this way, the system supervisor can view status or create reports that include the operation of all the dialers in the pod.
Secondary dialer	The secondary dialer is any dialer of an Avaya PDS pod that reports data to and is coordinated with other secondary dialers by a primary dialer. One secondary dialer can also be configured to take over primary dialer functions in the event of a primary dialer failure.

Pod impacts

Overview	If you work with a pod (one to four dialers), there are special considerations to think about as you create ways to manage, control, and administer settings across multiple dialers.		
Multi-dialer	Campaign Monitor always shows data for all dialers in a pod. However, the controls for multi-dialer are turned off by default. You can turn on the multi-dialer control from Settings > Options . Choose which dialers in a pod to view. See "View control functions" for more information.		
	Once the multi-dialer control is turned on, each job control dialog box (for example, Job Linking or Change Time Zones) shows a check mark. If you want to control a single dialer, clear the check box.		
Completion codes	Dialer completion codes and their corresponding code number and code description are contained in a system file called compcode.cfg. Each dialer has one compcode.cfg file.		
	Completion codes are used in a variety of ways. Initially, they are used by the agent to end a call with a customer. This tells the Avaya PDS what the outcome of that call was. Completion codes are also used as part of reporting. They are essential to accurate reporting and can be used to determine the success of a campaign.		
	If there are four dialers in a pod, that also means there are four compcode.cfg files. It is important to keep these four completion code files synchronized for a variety of reasons:		
	• Agents use the same codes for the same call outcome		
	Reporting from completion codes is accurate		
	• Eliminates the need for troubleshooting for reasons of inaccurate completion codes. Keeps all dialer completion codes synchronized		
	• To aggregate data across dialer effectively, completion code descriptions and completion code assignments (RPC, Abandon, Closure) must remain consistent across all dialers in a pod		
Jobs	Jobs should be named carefully. Use the following guidelines when creating or modifying jobs:		
	• Do not create multiple jobs on multiple dialers with the same name if they have very different job parameters.		

- If you want control like jobs in a single step (jobs with similar or like parameters), then name the jobs the same on different dialers.For example, if you want to change the quota on job1 on all dialers, you can do so in one step.
- Agents In a pod environment, agent logons must be unique across dialers.

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4 Agent types

Overview

Purpose	The Avaya TM Predictive Dialing System (PDS) places calls and uses agents to talk to customers. The agent type is a logon parameter that determines the type of calls an agent can handle during a job.
	Agents take calls placed or received by the Avaya Predictive Dialing System. The Avaya PDS supports several agent types. The agent type is a logon parameter that tells the Avaya PDS what types of calls a specific agent is allowed to take.
Contents	This section contains the following topics:

- Agent types
- Agent logons

Agent types

Agent types Agents can log on to the Avaya PDS using several agent types, which are determined by your Avaya PDS configuration. The agent type determines the type of job agents can join and the type of calls they handle during a job.

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

- Unit work list
- Managed Dialing
- 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 Avaya PDS 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 PDS. They may also handle inbound calls on the ACD or may only take outbound calls depending on which domain group they logged into on the ACD.

Agent logons

Basic logon

The following table describes the agent logons used, regardless of the blending configuration on your system.

Agent type	Logon	Joins job	Handles calls
Managed	М	outbound	outbound calls on Avaya PDS
Outbound	0	outbound or blend	outbound calls on Avaya PDS
Person to Person	РТР	outbound	outbound calls on Avaya PDS

Agent Blending logon If your system is configured with Agent Blending, the following table describes the agent logons used.

Agent type	Logon	Joins job	Handles calls
ACD	ACD	outbound	outbound calls on Avaya PDS and inbound calls on ACD

Intelligent Call Blending logon

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

Agent type	Logon	Joins job	Handles calls
Inbound	Ι	inbound or blend	inbound calls on Avaya PDS
Blend	В	blend	inbound and outbound calls on Avaya PDS

Agent types

5 Calling list

Overview

Purpose	The Avaya TM Predictive Dialing System (PDS) uses calling lists, a group of customer records, to place calls to customers.	
Contents	This section contains the following topics:	
	Calling list features	
	Download calling lists	

Calling list features

Overview A calling list is a file on the Avaya PDS containing customer records. The host system creates files of customer records for the Avaya PDS. After the customer records are downloaded from the host, the Avaya PDS adds several fields to each record to help track calling results. After the system adds the fields, it may check for and reject duplicate records and uncallable phone numbers. This process depends upon your system configuration. The Avaya PDS refers to the set of modified records as the calling list. During calling list preprocessing, the Avaya PDS performs the following actions: 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: • _ The name of the last agent to speak with the customer _ The date and time of the last call attempt The result of the last call attempt as recorded by the agent on _ the system The number of days the record has been on the system _ The record status

Download calling lists

Download calling lists	Before you begin calling activities, you need to provide the Avaya PDS with a calling list. The system uses two types of calling lists, one for outbound calling and one for inbound calling (Intelligent Call Blending systems only).		
	In most call centers, the system automatically downloads data files from the host computer for the outbound calling list. The host data files contain the records and fields you defined as necessary to your outbound call activity.		
Schedules	At scheduled times, the Avaya PDS converts the customer records in a specific calling list to your host computer's format and creates an upload file. When the host receives this file, it runs a script (written by your host application contact) that updates your customer database.		
Environment	The calling list environment is responsible for these activities:		
	• Creating the files required to convert host computer data to the Avaya PDS calling list format		
	• Preparing the calling list for calling		
	• Preparing the calling list for extracting data to send back to the host after calls have been made		

Calling list

6 Completion codes

Overview

Purpose	The Avaya TM Predictive Dialing System (PDS) uses completion codes to identify the result of a call.
Contents	This section contains the following topics:
	Completion codes
	Completion code table

Completion codes

Completion codes	A completion code identifies a call result. When a customer answers a
	phone call, the Avaya PDS transfers the call to an agent. At the end of
	the call, the agent records the outcome by pressing an agent key or by
	clicking a graphical user interface (GUI) button that is associated with
	a completion code.

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

The completion code can be an agent-generated code you specified or a standard system completion code. If the system does not pass the call to an agent, the Avaya PDS generates the completion code. The following list are examples of when the Avaya PDS would not pass a call to an agent:

- A busy signal
- A SIT (Standard Information Tone), which could represent a disconnected number or circuits that are too busy to handle the call
- A line that is idle before dialing
- No answer

A system completion code typically identifies an unsuccessful call attempt. For example, 03 (TIMEOUT) and 15 (NOANSWER). The only successful call attempts the Avaya PDS identifies are Virtual Agent 91 and 92. You can change the number of times the system attempts to call the customer.

The following list are examples of completion codes that agents would use after a call attempt:

- Recall (try back later when the desired party is available)
- Promise to pay
- Answering machine/left message
- Talked to customer

When the Avaya PDS processes a host download file, it leaves a null entry in the completion code field for each record. When the system unsuccessfully calls a phone number, it releases the record and completes the field with the appropriate system completion code.

Completion code table

Completion code table

The following table is a sample representation of completion codes. If you have Avaya's Producer software application, you can customize the completion codes.

Code Number	Code Name	Code Type	Code Description
00	NOTCALLED	System	The account has not been called.
01	CODE1		Reserved for system.
02	ERROR	System	The system detected an invalid phone number.
03	TIMEOUT	System	The system did not receive a dial tone.
04	HANG_PORT	System	The line was idle after the system called the client record phone number.
05	NOTINZONE	System	The local time for the client phone is outside calling hours.
06	MOFLASH_B	Agent	Native voice and data transfer: Agent transfers call to inbound agent without remaining on the line (blind transfer).
07	HANG_TRANS	System	No agent available for a supervisor transfer.

Code Number	Code Name	Code Type	Code Description
08	TDSS_HF_B	Agent	ADAPTS API: Agent transfers call without remaining on the line (blind hookflash transfer).
09			Reserved for system.
10			Reserved for system.
11	BUSY	System	The system detected a busy signal.
12	CONTTONE	System	The system detected a continuous tone, such as a facsimile or modem.
13	AUTOVOICE	System	The system detected an answering machine.
14	VOICE	System	Interim code when a person is on the line.
15	NOANSWER	System	The call placed was not answered.
16	RINGING	Agent	Can be user-defined but is typically defined as a phone call that was still ringing but was passed to an agent.
17	CUSTHU	Agent	Can be user-defined but is typically defined as the client hung up while the call was in the wait queue, but the call was passed to an agent.

Code Number	Code Name	Code Type	Code Description
18	TRANSFER	Agent	Can be user-defined but is typically defined as a transfer release.
19	RECALL	Agent	Can be user-defined but is typically defined as a recall release.
20 - 34		Agent	Customer-assigned codes used by agents.
35	CANCEL	System	Can be user-defined but is typically defined as the agent cancelled the managed call.
36	INTERCEPT	System	Special Information Tone (SIT) indicating an operator intercept.
37	NOCIRCUIT	System	Special Information Tone (SIT) indicating that circuits were unavailable.
38	DISCONN	System	Special Information Tone (SIT) indicating that the call was a disconnected number.
39	VACANT	System	Special Information Tone (SIT) indicating that the call could not be completed as dialed.
40	REORDER	System	The call resulted in a fast busy tone.
41	R_RINGING	System	Reserved for system.

Code Number	Code Name	Code Type	Code Description
42	LINEFAIL	System	A failure on the phone line occurred.
43	OP_RECALL	System	Operator set recall.
44	DTMF_V	System	DTMF tone detected.
45	HU_INB	System	The client hung up while in the inbound wait queue.
46	HU_OUT	System	The client hung up while in the outbound wait queue.
47	HANG_INB	System	An agent was not available for the inbound call.
48	HANG_OUT	System	An agent was not available for the outbound call.
49	OPDIED	System	The agent session ended abnormally.
50	R_HSONHOOK	System	Agent headset disconnected from the Avaya PDS.
51 - 85		Agent	Customer-assigned codes used by agents.
86 - 88		Agent	Reserved.
89	MANAGEDA	Agent	Managed Dial: Managed non- connection.
90	MANAGEDB	Agent	Managed Dial: Managed non- connection.
91	VIRTVOICE	System	Virtual Agent: Virtual message to VOICE.

Code Number	Code Name	Code Type	Code Description
92	VIRTAUTOV	System	Virtual Agent: Virtual message to AUTOVOICE.
93	SOLD	Agent	Sales Verification: Sold campaign.
94	VERIFIED	Agent	Sales Verification: Sale verified.
95	UNVERIFIED	Agent	Sales Verification: Sale not verified.
96 - 97			Reserved for system.
98	AORECALL		Agent Owned Recall.
99			Reserved for system.

Part II: Use the Avaya PDS

7 Log in to Campaign Director

Overview

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Purpose	The Avaya TM Predictive Dialing System (PDS) uses Campaign Director to interface with the hardware and software that is included
	with the system. Campaign Director contains three modules: Campaign Editor, Campaign Monitor, and Campaign Analyst.
Contents	This section contains the following topic:

• Log in to Campaign Director

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Log in to Campaign Director

Overview	The Avaya PDS allows you to access any Campaign Director application (Campaign Monitor, Campaign Editor, or Campaign Analyst) by using one password. After you are logged on to one application, you can access the others without entering another user name and password.
Log in to Campaign Director	Use the following procedure to log in to any Campaign Director application.
1	Select Start > Programs > Avaya > Campaign Monitor, Campaign Editor, or Campaign Analyst.
2	Type your log in name (must be at least 3 characters) and password, and then click OK .
	Note If you exit all applications, you will need to log in again.

8 Campaign Editor settings

Overview

Purpose	The Avaya TM Predictive Dialing System (PDS) gives you the ability to enable or disable multi-dialer commands and set your save and refresh options in Campaign Editor.
Contents	This section contains the following topics:
	Enable or disable multi-dialer commands
	• Save options
	Set refresh options

Enable or disable multi-dialer commands

Enable or disable multi- dialer commands	Use the following procedure to enable or disable multi-dialer commands.
1	In Campaign 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.)
4	Select the dialer you want to use.
5	Click Apply to save your changes, or click OK to save your changes and close the dialog box.

Save options

Save options	Use the following procedure to set Save options.
1	In Campaign 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.)
4	Click Apply to save your changes, or click OK to save your changes and close the dialog box.

Set refresh options

Set refresh options	Use the following procedure to set refresh options.
1	In Campaign Editor , select Settings > Options .
2	In the Options dialog box, click the Refresh tab.
3	Select the interval at which you want Campaign Editor to refresh.
4	Click Apply to save your changes, or click OK to save your changes and close the dialog box.

9 Phone strategy

Overview

Purpose	The Avaya TM Predictive Dialing System (PDS) uses phone strategies to call customers more effectively.
Contents	This section contains the following topics:
	Phone strategy overview
	Phone strategy preparation
	Phone strategy settings
	Create a phone strategy
	• Copy a phone strategy
	View phone strategy settings
	• Edit a phone strategy
	• Delete a phone strategy
	• List all phone strategies on a selected dialer
	• Append a phone strategy row
	• Insert a row in a phone strategy
	• Delete a row in a phone strategy
	• Move a row up in a phone strategy
	• Move a row down in a phone strategy
	• Select all rows in a phone strategy
Unselect all rows in a phone strategy

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Phone strategy overview

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Overview	A phone strategy is a set of customers during a calling PDS when and how to call call, and the frequency of c	instructions that tells the Avaya PDS to call campaign. A phone strategy tells the Avaya clients, which customer phone number to alls.
	The Avaya PDS applies the strategy to the calling list re	e criteria and settings specified in the phone ecords.
	The following parameters of	lefine a phone strategy:
	• Which phone number	to call first
	• The number of rings to allow before disconnecting	
	• The time to wait befor unanswered, or discon	re retrying a phone number that was busy, inected
	• The phone number to	call if the first phone number is unanswered
	• The number of times t	o retry a busy phone number
	• The number of times t an alternate phone num	o call a phone number before switching to nber
	• The types of calls to b detects an answer	e passed to an agent when the Avaya PDS
Phone strategy parameters	Phone strategy parameters Alternate Initial Phone, Cal following table describes ea	are grouped into four areas: Initial Phone, Il Detection Mode, and Retries. The ach group of parameters.
	Initial Phone	The first phone number the system will call.
	Alternate Initial Phone	The phone number that becomes the initial phone at a specified time of day.
	Call Detection Mode	The system detects how the phone number is answered (such as live voice, answering machine, and operator). This determines which calls are passed to agents.
	Retries	This parameter tells the system to retry a phone number depending on the previous outcome.

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Phone strategy preparation

Overview	The Avaya PDS receives and prepares the host data file and creates a calling list. A phone strategy is used to specify the phone numbers to call during a job and how to place the calls.
	Before you create a new phone strategy, you must decide which phone strategy parameters to use to define how the system places calls.
Wildcard characters	Phone strategies use one or more wildcard characters to clarify which phones are called, how often, and in what order. Using wildcard characters

Wildcard characters are symbols used to increase productivity by selecting ranges in the phone strategy.

Wildcard characters include:

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

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Phone strategy settings

Initial phone	The initial phone is the first phone number the Avaya PDS calls for each record. In the calling list, phone numbers are stored in phone fields. These fields are labeled PHONE1, PHONE2, and so on. If a record does not match the criteria you set, the system will not call the record.
	The Avaya PDS 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 Avaya PDS phone type numbers are set during your system configuration.
Alternate initial phone	The alternate initial phone setting is used to set up one or more phones that the Avaya PDS will use as alternate initial phones based on the time of day. At a particular time of day, the alternate initial phone replaces the initial phone as the first phone number to call. The system can switch to calling the alternate initial phone number at the time you specify in the alternate initial phone settings.
	Alternate initial time settings are also defined in this parameter, which changes the time the system starts calling the alternate initial phone. The system starts calling based on the local time in the selected time zone.
	Example
	You can tell the Avaya PDS to switch from calling business phones during the day (initial phone) to calling home phones (alternate initial phone) during the evening starting at 6 PM.
Call detection mode	The call detection mode is used to determine the types of calls the Avaya PDS passes to agents. Call detection modes correspond to responses that the system detects when it dials a number. Typical call detection modes include voice, autovoice, and operator intercept. The system passes calls to agents based on the selected modes.
	The type of connect criteria determines what type of connects the Avaya PDS will pass to an agent.
	Define the following parameters for call detection mode settings:
	• The ring count is the number of rings to allow before the system records a NOANSWER completion code.

• The call detection mode tells the system which calls to pass to agents.

When the Avaya PDS places a call, the system detects what type of answer occurs for each call. The following table lists the codes that are used in the Call Detection Mode tab:

Code	Answer type
V	Voice
AV	Autovoice
INT	Operator intercept
NOCIRC	No circuit available
DISCON	Disconnected number
VAC	Vacant number
REORD	Reorder

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Increase your hit rate by deciding which detection modes to use. With each additional criteria you select, more calls can be handled by your agents instead of by the system.

Retries The retries setting is used to determine how long the Avaya PDS waits before retrying a number, how many times it retries the same phone number, and which phone it calls next.

The Avaya PDS determines the settings by the result of the initial call. For example, you can tell the system to retry the call in 15 minutes when the initial call result is busy and to stop calling that record if there is no answer after three retries.

Note

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

• Retries are computer generated retries. If the Avaya PDS detects a busy signal on the first call attempt, it will retry based on the retry parameters set in the phone strategy.

• Recalls are set by agents. An agent can set either an Agent Owned Recall (the system routes the recall to the agent who set it) or a general recall (any available agent talks to the customer when the system recalls the account).

Create a phone strategy

Create a phone strategy	Use the following procedure to create a phone strategy:
1	Start Campaign Editor.
2	In your button bar, click the name of the dialer where you want your phone strategy to reside. (You can save it to other dialers or delete it from this dialer later.)
3	On the button bar, click Strategies .
4	Select File > New .
5	On the right side of the window, click the List field, select a calling list, and then click Next .
6	In the Initial Phone pane, click the Phone field and select a phone. Double-click the other fields to define your initial phone settings, and then click Next .
7	(Optional) In the Alternate Initial pane, specify alternate initial phone settings. Right-click and select Append Row . Double-click the fields to enter values. Select options as needed. Right-click and select Select All to select all options. Right-click and select Unselect All to clear all options. Click Next .
8	In the Detection Mode pane, select the detection modes to pass to the agents, and then click Next .

- 9 In the Retries pane, select the call results to retry. For each result you select, type a value in the Retry Interval (mins), Attempts, and Next Phone columns.
- **10** Select **File** > **Save**. The strategy is automatically saved to the dialer that you had selected in the button bar. If multi-dialer is enabled, select additional dialers where the strategy should be saved. Type a file name for your strategy, and then click **OK**. (If the check boxes are unavailable, enable them in the **Settings** > **Options** dialog box.)

Copy a phone strategy

Copy a phone strategy	Use the following procedure to copy a phone strategy.
1	Double-click the phone strategy you want to copy.
2	Select File > Save As .
3	Avaya PDS automatically copies the file to the selected dialer. If multi- dialer is enabled (a grayed-out check box indicates that multi-dialer is unavailable; enable and disable multi-dialer using the Settings > Options dialog box), you can copy the strategy to additional dialers. Select dialers as needed, type a file name for the phone strategy, and then click OK .

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View phone strategy settings

View phone strategy settings	Use the following procedure to view phone strategy settings.
1	Double-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 Next or Back .

Edit a phone strategy

Overview	Change phone strategy settings when doing so will help your system call 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.
Edit a phone strategy	Use the following procedure to edit a phone strategy.
1	Double-click the phone strategy you want to edit.
2	Make the necessary edits in the right-hand pane.
3	Select File > Save , and then click OK .

Delete a phone strategy

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

List all phone strategies on a selected dialer

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	On the button bar, select the dialer for which you want to list the phone strategies.
2	Click Strategies .

Append a phone strategy row

Append a phone strategy row	Appending a row adds a row beneath the bottom row. Use the following procedure to append a row to your phone strategy.
1	On the Campaign Editor button bar, click Strategies .
2	Double-click the phone strategy you want to edit.
3	In the right hand pane, click Back or Next to select the pane you want to edit.
4	Select Edit > Append Row.

Insert a row in a phone strategy

Insert a row in a phone strategy	Inserting a row adds a row directly above the row you select. Use the following procedure to insert a row in your phone strategy.	
1	On the Campaign Editor button bar, click Strategies .	
2	Double-click the phone strategy you want to edit.	
3 In the right-hand pane, click Back or Next to select the pa to edit.		
4	Select the row that the new row will appear above.	
5	Select Edit > Insert Row.	

Delete a row in a phone strategy

Delete a row in a phone strategy	Use the following procedure to delete a row from your phone strategy.	
1	On the Campaign Editor button bar, click Strategies .	
2	Double-click the phone strategy you want to edit.	
3	In the right hand pane, click Back or Next to select the pane you want to edit.	
4	Select the row you want to delete.	
5	Select Edit > Delete Row .	

Move a row up in a phone strategy

Move a row up in a phone strategy	Use the following procedure to move a row up in your phone strategy.
1	On the Campaign Editor button bar, click Strategies .
2	Double-click the phone strategy you want to edit.
3	In the right hand pane, click Back or Next to select the pane you want to edit.
4	Select the row to move.
5	Select Edit > Move Up .

Move a row down in a phone strategy

Move a row down in a phone strategy	Use the following procedure to move a row down in your phone strategy.
1	On the Campaign Editor button bar, click Strategies .
2	Double-click the phone strategy you want to edit.
3	In the right hand pane, click Back or Next to select the pane you want to edit.
4	Select the row you want to move down.
5	Select Edit > Move Down .

Select all rows in a phone strategy

Select all rows in a phone strategy	Use the following procedure to select all rows in your phone strategy.
1	On the Campaign Editor button bar, click Strategies .
2	Double-click the phone strategy you want to edit.
3	In the right hand pane, click Back or Next to select the pane you want to edit.
4	Select Edit > Select All.

Unselect all rows in a phone strategy

Unselect all rows in a phone strategy	Use the following procedure to unselect all rows in a phone strategy.
1	On the Campaign Editor button bar, click Strategies .
2	Double-click the phone strategy you want to edit.
3	In the right hand pane, click Back or Next to select the pane you want to edit.
4	Select Edit > Unselect All.

10 Record selection

Overview

Purpose	The Avaya TM Predictive Dialing System (PDS) uses record selections to determine which records to call during a job. You can create your own customized record selections that contain your own rules. For example, call only customers with an outstanding balance of $<$ \$5,000 and who live in California. After you have defined your customized record selection, you can save that record selection for use on any future calling campaign.
Contents	This section contains the following topics:
	Record selection
	Record selection organization
	Record selection wildcard characters
	Understand the Selection Reports pane
	• Open and view a record selection
	Complete the Miscellaneous pane
	Complete the Records pane
	Complete the Calling Results pane
	Complete the Time Zone pane
	Complete the Recalls pane (optional)
	• Complete the Sort pane (optional)

- Create a record selection
- Save a record selection
- Edit a record selection
- Delete a record selection
- Verify a record selection
- Run a record selection
- Copy a record selection
- List all record selections on a selected dialer
- View selection reports
- View record selection settings
- Append record selection rows
- Insert a row in a record selection
- Delete a row in a record selection
- Move a row up in a record selection
- Move a row down in a record selection
- Select all rows in a record selection

• Unselect all rows in a record selection

Record selection

Overview A record selection contains the set of instructions that tells the Avaya PDS which customer records to select from a calling list. Record selections allow supervisors to define the criteria for selecting records and target specific customers to be called during a job. A record selection consists of selection criteria and a phone strategy. Each job uses the results of a record selection and a phone strategy to call customers.

When starting a record selection, the Avaya PDS chooses 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 how many records are chosen.

Target Time Zones

You can use your record selection to target time zones such as Eastern, Central, or Pacific. This allows only records from specific time zones to be targeted. If not specified, the Avaya PDS defaults to a "follow the sun" method, meaning it calls records from east to west.

Target completion codes

You can use your record selection to target completion codes such as BUSY or NOANSWER. Use this to also select SIT tone completion codes to run a job to look for disconnected or redirected numbers, or numbers that are no longer in service.

Target goals

You can use your record selection to target goals, such as accounts more than 30 days overdue, accounts with a balance over \$2,000, or records in a particular state.

Record selection use Create a record selection when an existing record selection does not meet your current needs. Edit a record selection when you want to modify an existing record selection.

To view a record selection, open Campaign Editor and click **Selections** in the button bar. Then, double-click a record selection title. Record selection settings populate the right-hand pane, which serves as a wizard. **Back** and **Next** buttons located at the bottom of the screen allow you to switch among the various wizard screens.

The wizard screens guide you through the record selection editing process. If you are ever unsure what to enter in a field, you should double-click or single-click the field to see if there is a list of values to choose from or a blinking cursor that indicates you can type your own value in the field.

The difference between **Selections** and **Selection Reports** in the button bar is that **Selections** causes all of the record selections that you have created to appear and **Selection Reports** causes reports for all of the record selections that have already run to appear. **Selection Reports** provides detailed information about the results of the record selection, while **Selections** serves as an editor (and not a reporting mechanism).

Record selection organization

Overview	A record selection contains options defined by the supervisor. The system chooses a record if it meets specific criteria. Use the record selection in conjunction with the phone strategy to determine who you want to call (record selection) and how you want to call (phone strategy) those selected records.
	As soon as you click Selections in the button bar, your screen becomes divided into two areas: a left-hand pane and a right-hand pane. The left-hand pane lists your record selections that you have created, while the right-hand side allows you to edit a record selection's settings by using the various panes.
Record selection panes	The following table describes the various panes that appear on the right-hand area of the window; click the Next and Back buttons to switch among these panes.

Pane name	Pane description
Miscellaneous pane	Use the Miscellaneous pane to select a calling list, phone strategy file, unit work list field, time zone ignore option, or selection type (infinite or verify).
Records pane	Use the Records pane to define which records the system uses during a job based on logic statements that you create.
Time Zones pane	Use the Time Zones pane to select time zones that the system uses to determine which phone numbers to call.
Calling Results pane	Use the Calling Results pane to tell the system which phone numbers to call based on previous calling results.

Pane name	Pane description
Recalls pane	Use the Recalls pane to determine which agent-set recalls to include in the record selection.
Sort pane	Use the Sort pane to determine the record order that the system uses to call clients.

Record selection wildcard characters

Wildcard characters	Like phone strategies, record selections use wildcard characters to specify criteria for a field. Use wildcard character expressions to define the subset of records you want to call. A wildcard character expression is a combination of wildcard characters (such as $<$ or $>$) and values.
Use wildcard characters	Use wildcard characters in the Records and Recalls panes. Each wildcard character expression specifies a field name (from the records in your calling list), a wildcard character, and a value.
	Values can be numbers, letters, dates, and times. For example, account balances consist of numbers, while client names consist of letters. Wildcard characters include the following:

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Wildcard characters	Description
>	greater than
<	less than
=	equal to
~	not equal to
>=	greater than or equal to
<=	less than or equal to
-	use between a range of values
,	use between multiple values
*	wildcard character
!	list wildcard character
?	single character wildcard character

Example record selection statements include the following:

Field	Value	What is selected?
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 client records that meet the criteria in **both** statements.

Use **OR** to broaden the selection to select the client 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 pane

Sty been run. The Selection Reports pane is an area that s summary information, so you do not modify its contents. record selections in the pane that appears when you click ms in the button bar.
a selection report, double-click a selection. You can then right- d select Select All so that you can copy and paste the report into ent application.
ection Reports pane contains the following headings: Selection, itus, Records, Records Remaining, Recalls, and Select Ran at.

Heading	Description
Selection	Record selection file name
List	Calling list associated with this record selection
Status	Record selection status is In Use if being used for a currently running job or Available if not.
Records	Number of customer records associated with this record selection file
Records Remaining	Number of records that still need to be called (this number changes if the job is running)
Recalls	Number of recalls (callbacks) that this record selection file has flagged
Selection Ran at	Time and date stamp

Open and view a record selection

Use the following procedure to open and view a record selection.	
Select Start > Programs > Avaya > Campaign Director > Campaign Editor.	
On the button bar, click Selections . The list of selections for the selected dialer appear. 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.	
Double-click a record selection title to display the selection settings in the right-most pane.	

4 Use the **Next** and **Back** buttons to move through the wizard screens.

Complete the Miscellaneous pane

Complete the Miscellaneous pane	Use the following procedure to modify the fields on the Miscellaneous pane.
1	Click the List field to use the drop-down list. Select a calling list.
2	Click the Strategy File 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).
3	Click the Unit Field field and select a unit work list.
4	Click the Ignore Time Zone field and select Yes or No .
5	Click the Selection Type field and select Infinite , Verify , or blank (blank is usually the first list item and is an empty, blank option; in this case it indicates that you want <i>neither</i> Infinite nor Verify). Select Infinite if your job is an infinite job; select Verify if your job is a verify job.

Complete the Records pane

Complete the Records pane	Use the Records pane to define your record selection statement.
1	Select Next or Back to navigate to the Records pane.
2	Click the Field field to use the drop-down list. Select a field (for example, BAL).
3	Double-click the Value field to type 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 type a letter or number. For example, if you type 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 called "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 Zone pane

Complete the Time Zone pane	Use the following procedure to select which time zones the Avaya PDS 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 .

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Complete the Calling Results pane

before.

Complete the Calling Results pane	Use the following procedure to complete the calling results pane.	
1	Select each completion code you want the system to call. You can right- click and select Select All .	
2	Clear each completion code you do not want to call. Right-click and select Unselect All to clear all of the completion codes.	
	Note	
	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	

Complete the Recalls pane (optional)

Complete the Recalls pane The Recalls wizard pane is blank by default because it is optional. It is common not to define recall settings to tell the Avaya PDS to dial all scheduled agent-set recalls. 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 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).

- 1 If the Recalls pane has no visible rows, right-click and select **Append Row**.
- 2 Click the **Field** field to select a field (for example, BAL).
- **3** Double-click the **Value** field to type 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 type a letter or number. For example, if you type 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 called "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.
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Complete the Sort pane (optional)

Complete the Sort pane	This screen is blank by default because it is optional. Use the following procedure to tell the Avaya PDS how to sort the selected records.
1	If the Sort pane has no visible rows, right-click and select Append Row .
2	Click the Order field to use the drop-down list and select Ascending or Descending .
3	Click the Sorts Records By field to enter a value.
4	To change the priority, select the row and then select Move Up or Move Down .
	Note
	If you set more than nine sorts, the Avaya PDS performance will be reduced.

Create a record selection

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 Next and Back to complete the other panes.
6	When finished, select File > Save . The record selection is automatically saved to the dialer you selected.
7	Type a file name, and then click OK . (If the additional dialers were unavailable, select Settings > Options to change your multi-dialer settings.)

Save a record selection

Save a record selection	Use the following procedure to save a record selection.
1	When you finish defining settings for a record selection, select File > Save .
2	Your record selection will automatically be saved to the selected dialer. Select additional dialers on which to save your record selection. (If the check boxes are unavailable, select Settings > Options to change your multi-dialer settings.)
3	Type a file name for your record selection, and then click OK .

Edit a record selection

Edit a record selection	Use the following procedure to edit a record selection.
1	Double-click on the record selection you want to edit.
2	Make the necessary edits in the right-hand pane.
3	Select File > Save to save the changes.

Delete a record selection

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

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. The Avaya PDS displays a message if an error occurs. You should review your wizard screens 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

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 .
	Note
	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.

Copy a record selection

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

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List all record selections on a selected dialer

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 Selections . The record selections for the selected dialer appear.

View selection reports

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, while Selections serves as an editor and not a reporting mechanism. Use the following procedure to view selection reports.
1	In the button bar, select the dialer whose record selection reports you want to view.
2	Click Selection Reports.
3	Double-click the name of a selection report. 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 .

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View record selection settings

View record selection settings	Use the following procedure to view record selection settings.
1	Double-click the record selection you want to open. The record selection settings will appear in the right hand pane.
2	Click Next or Back to navigate through all of the record selection settings.

Append record selection rows

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 Campaign Editor button bar, click Selections .
2	Double-click the record selection you want to edit.
3	Click Next or Back to navigate to the pane you want to edit.
4	Select Edit > Append Row.

Insert a row in a record selection

Insert a row in a record selection	Inserting a row adds a row directly above the highlighted row. Use the following procedure to insert a row to your record selection.
1	On the Campaign Editor button bar, click Selections .
2	Double-click the record selection you want to edit.
3	Click Next or Back to navigate to the pane you want to edit.
4	Select the row that the new row will appear directly above.
5	Select Edit > Insert Row .

Delete a row in a record selection

Delete a row in a record selection	Use the following procedure to delete a row from your record selection.
1	On the Campaign Editor button bar, click Selections .
2	Double-click the record selection you want to edit.
3	Click Next or Back to navigate to the pane you want to edit.
4	Select the row you want to delete.
5	Select Edit > Delete Row .

Move a row up in a record selection

Move a row up in a record selection	Use the following procedure to move a row up in your record selection.
1	On the Campaign Editor button bar, click Selections .
2	Double-click the record selection you want to edit.
3	Click Next or Back to navigate to the pane you want to edit.
4	Select the row you want to move.
5	Select Edit > Move Up .

Move a row down in a record selection

Move a row down in a record selection	Use the following procedure to move a row down in your record selection.
1	On the Campaign Editor button bar, click Selections .
2	Double-click the record selection you want to edit.
3	Click Next or Back to navigate to the pane you want to edit.
4	Select the row you want to move.
5	Select Edit > Move Down.

Select all rows in a record selection

Select all rows in a record selection	Use the following procedure to select every row in your record selection.
1	On the Campaign Editor button bar, click Selections .
2	Double-click the record selection you want to edit.
3	Click Next or Back to navigate to the pane you want to edit.
4	Select Edit > Select All.

Unselect all rows in a record selection

Cancel a row selection in a record selection	Use the following procedure cancel a row selection in your record selection.
1	On the Campaign Editor button bar, click Selections .
2	Double-click the record selection you want to edit.
3	Click Next or Back to navigate to the pane you want to edit.
4	Select Edit > Unselect All.

11 Jobs

Overview

Purpose	A job contains all the information the Avaya TM Predictive Dialing System (PDS) needs to call clients. A job integrates a calling list, phone strategy, record selection, and other settings to place outbound calls and receive inbound calls.
Contents	This section contains the following topics:
	• Job types
	Outbound job
	• Job settings
	• Create a job
	• View job settings
	• Save a job
	• Save a job as another name or on a different dialer
	• Start a job on one or more dialers
	• Start multiple jobs on currently selected dialer
	• Copy a job
	• Edit a job
	• Verify a job on one or more dialers
	• Verify multiple jobs on the currently selected dialer

- Delete multiple jobs on the currently selected dialer
- List all jobs on a selected dialer

Overview	Jobs are part of a campaign. A job, depending on what type of system configuration you have, can make outbound calls, receive inbound calls, verify a sale, or a handle variety of other tasks.
	If you have an Intelligent Call Blending system, you can use Campaign Editor to set up three types of jobs:
	Outbound jobs
	Inbound jobs
	• Blend jobs
	If you have an Agent Blending system, you can use Campaign Editor to set up outbound jobs.
Outbound jobs	During outbound jobs, the Avaya PDS uses a calling list, phone strategy, record selection, and other settings to place outbound calls to customers. There are many settings to configure for an outbound job. These are discussed more in depth in the following section.
Inbound jobs	During inbound jobs, the Avaya PDS automatically routes inbound calls to agents. There are no inbound jobs on an Agent Blending system. All inbound calls are handled by inbound ACD agents. Because the Avaya PDS does not control the inbound call activity on the Agent Blending system, the system does not consider it a job.
Blend jobs	The term blend job refers to job run on an Intelligent Call Blending system. During an Intelligent Call Blending job, the Avaya PDS moves agents between outbound and inbound calls. Blend agents receive inbound calls during peak inbound activity and outbound calls when inbound activity decreases.
	An Avaya PDS blend agent handles both inbound and outbound calls

with Intelligent Call Blending.

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Outbound job

Overview During outbound jobs, the Avaya PDS automatically dials phone numbers and routes calls to agents. The system screens for answering machines, phone operator intercepts, busy signals, Interactive Voice Response systems (IVRs), and no answers.

Special outbound jobs

An outbound job uses settings to target customers for calling. Agent Blending and Intelligent Call Blending systems both use outbound jobs. Depending on your system configuration, there are up to five special jobs. These settings are configured when you create or modify a job.

- A Unit Work List job divides customer records into 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 Avaya PDS calls the customer. As the supervisor, you can adjust the preview time and allow agent to cancel calls depending on how the job settings are configured.
- A Sales Verification job creates a second campaign to verify a sale 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 receive new records for calling while the job is active. Use the Infinite record selection when starting an Infinite job. The Avaya PDS uses this record selection to add new records (downloaded from your host) to an existing calling list on an active infinite job. An infinite job runs until you stop it manually.
- A Virtual Agent job allows the Avaya PDS to run a job without agents. When the Avaya PDS detects a customer or an answering machine, the system plays a recorded message.

Define Sales Verification, Unit Work List, Virtual, and Managed on the second screen of the Campaign Editor Job Wizard when you create a new job. These features are optional and some features are mutually exclusive. For example, if you select Virtual, you cannot select any other choices. If you select Managed, you can only select Sales Verification with it. If you select Unit Work List, you can only select Sales Verification with it.

Job settings

Overview	There are several settings that you define for each outbound job. The settings on your system may vary depending on your configuration. The settings are grouped in the following way:	
	• Basic	
	• Outbound	
	• Managed	
	Interactive Voice Response	
	Unit Work List	
Basic job settings	Basic settings are for every type of job, regardless of whether it is outbound, inbound, or blend. The following settings are listed in the BASIC tree structure.	

Main data processing label

Use the drop-down list to select the correct main data processing label. The main data process label instructs the Avaya PDS to begin job processing and tells the system what to display on the agent screens.

Note

If you run a virtual or sales verification job, select the appropriate data process label. For example, select virtual for a virtual job, verify for a sales verification job, and generic for an outbound job.

Job description

Double-click in the text box and type a job description. This is a description of the job. For example, type a description that reflects the goal of the job such as 30-day Accounts.

Link to job

You can tell the Avaya PDS to automatically start a job when this job ends. Use the Link to job setting to select the next job to start.

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.

he following table describes the types of jobs that can link together:		
Job type	Can link to	
outbound job	outbound or blend job (includes Unit Work List jobs)	
Managed Dialing job	ONLY to managed jobs (includes Unit Work List jobs)	
inbound job	ONLY to inbound job	

blend job (blend job cannot link to

The follow

Note

blend job

virtual job

If you stop a job that has a job linked to it, the Avaya PDS will automatically start the next job.

outbound job)

ONLY virtual job

Agent keys definition file name

Use the drop-down list to select the agent keys file name to use during a job. An agent keys file is configured with different sets of functions for keys used during differently types of jobs.

Line type(s) for use on job

Double-click and the line types to use during a job. Use this setting to select or clear the groups of lines the Avaya PDS uses for a job.

Earliest start time

Double-click to set the time (numbers only) you want the Avaya PDS to begin calling customer records.

The Avaya PDS 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 system does not begin dialing until the system clock reaches the recommended time.

Latest stop time

Double-click to set the time (numbers only) you want the Avaya PDS to stop calling customer records.

Run job without agents

Select this option if you want to run your job without agents. This field does not appear unless you select Virtual in the Campaign Editor Job Wizard (when you create a new job).

Transfer on hold message number

Double-click and type the number of the message that users should hear during the call-transfer process.

Outbound job settings Outbound settings are for outbound jobs. The following settings are listed in the OUTBOUND tree structure.

Do Not Call group name

Use the drop-down list to select the Do Not Call Group file name.

Initial hit rate

Double-click and enter the initial hit rate (number only).

Initial hit rate determines the average number of calls per agent the Avaya PDS 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. When the Avaya PDS gathers statistics from actual call attempts, it readjusts the hit rate automatically to meet the minimum hit rate setting. Set the rate too low (20 to 30) and the Avaya PDS could make more connects than your agents can handle during the initial dialing period. Set the rate too high (over 70) and 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

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

Expert Calling ratio

Double-click for text boxes to enter in Expert Calling ratio settings. Following are the three choices for setting Expert Calling ratio:

Setting	Description & recommended setting
Calls in the wait queue	The Avaya PDS achieves a balance between agents waiting for a call and customers placed in the wait queue.
	Enter a percent value between 1 and 100. The recommended setting is between 4 and 31.
Agent Work Time	The Avaya PDS monitors the time agents take to complete calls and update records and adjusts the calling pace accordingly.
	Enter a percent value between 1 and 100. The recommended setting is between 29 and 71.
Agent Update Time	The Avaya PDS monitors the time agents take to update records and adjusts the calling pace accordingly.
	Enter a percent value between 1 and 100. The recommended setting is between 32 and 78.

Remember, when you use Calls in Wait Queue, customer wait times are affected. When you use Agent Work Time or Agent Update Time, the average agent idle time can be short, but there may be a large percentage of customers in the wait queue at any given time.

End jobs when no more calls remain

Select this option if you want the Avaya PDS to end jobs when each customer has been called at least once.

Clear this option if you want the Avaya PDS to end jobs after all calls are completed, including recalls.

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Select a list name from the drop-down list. The outbound calling list is the list you will use for the job.

The calling list name contains the host dialer name (where the list is stored) and the calling list name. The calling list description (if any) is listed in the right-hand column drop-down list.

Minimum hit rate

Double-click to set the minimum hit rate (number only). The minimum hit rate determines the maximum number of calls the Avaya PDS will make in order to make an agent connection.

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

Enter a value between 1 and 100 in increments of 10. A typical setting is 30.

Order calls by time zone

Select this option if you want the Avaya PDS to order calls by times zones. This means the Avaya PDS calls "following the sun," or east to west.

With either choice, time zone laws are still applied.

Quota setting (completion code, quota)

Double-click to use a drop-down list and a box. Use the drop-down list to select a completion code. Use the text box to enter a quota (for example, a quota number of 500 would mean that a job automatically stops if the number of completion codes reaches 500).

Save quota setting when the job ends

Select this option to save the quota setting when the jobs ends.

Quota settings file name

Double-click to type a file name in the field.

Recall reschedule interval (mins)

If Agent Owned Recall is configured on your system, this field will be visible. Double-click to enter the minimum amount of time that must pass before the system tries to pass the agent a recall.

Recall notification time (min)

If Agent Owned Recall is configured on your system, this field will be visible. Double-click to enter the amount of time that the system will look for the agent (to pass the recall to the agent who set it up).

Number of recall attempts

If Agent Owned Recall is configured on your system, this field will be visible. Double-click to enter the number of times to look for the agent that set up the recall.

Script label for call

Select the script label from the drop-down list. The script label is the name of the script being used for the job. This determines the messages the customer hears when placed in the wait queue.

If a customer is placed in a wait queue, the customer hears a message. The wait queue messages are created for different jobs. The message or string of messages a customer hears is the message script.

Outbound screen(s)

Select the outbound screen name from the drop-down list. This determines the outbound screen that agents see on their workstations during an outbound job.

Record selection file name

Select the record selection name from the drop-down list. The Selection parameter identifies which record selection is used for the outbound job. The record selection contains the phone strategy used for the job.

Transfer to inbound job name

Select the transfer to inbound job name from the drop-down list of inbound or blend job names that agents can transfer calls to.

Total wait delay (sec.)

Double-click the total wait delay field and enter in the number of seconds (from 0 to 999) that the customer can wait in the Avaya PDS wait queue before the system ends the call.

Managed job settingsManaged settings are settings for Managed Dialing jobs. The following
settings are listed in the MANAGED tree structure.The following settings become active only if the MANAGED check

Allow dialing from deleted record

box is selected.

Select this option to allow an agent to dial a deleted record.

Clear the check box to prevent agents from dialing a deleted record.

This setting can only be used if the MANAGED check box is selected.

Allow agents to cancel call

Select this option to allow an agent to cancel a Managed Dialing call.

Clear this option to prevent agents from cancelling a Managed Dialing call.

This setting can only be used if the MANAGED check box is selected.

Display empty record at preview

Select this option to allow an agent to display an empty record at preview.

Clear this option to prevent agents from displaying empty record at preview.

This setting can only be used if the MANAGED check box is selected.

Time limit (sec.) for preview

Double-click the time limit field and enter in a value (in seconds) between 1 and 999. This parameter sets the time that an agent can preview a record before the Avaya PDS dials the number. Use 0 (zero) to set an unlimited amount of preview time.

This setting can only be used if the MANAGED check box is selected.

Allow record search type at preview

Select one of the following three options from the drop-down list:

- NONE No search is allowed. The only way for the agent to make a call is by manually entering a phone number.
- HASH The search is done through the PDS QuickSearch method. The calling list is searched until the matching record is found.

	• LIS - The search is accomplished through the List Indexed Sequential method. 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.
	This setting can only be used if the MANAGED check box is selected.
Interactive Voice Response job settings	The INTERACTIVE VOICE RESPONSE tree structure becomes active when its check box is selected.
	IVR identifier
	Double-click the field to enter the IVR identifier.
	Script to run on the IVR
	Double-click the field to enter the script to be used for the IVR.
Unit Work List job settings	The UNIT WORK LIST tree structure becomes active when its check box is selected.
	Record selection with units
	Select a unit work list record selection from the drop-down list to use with this job.

Overview	You are not required to run a record selection before starting a job. Campaign Editor will automatically execute the record selection if needed, and then verify the job. If the job verification passes, you are offered a choice of starting the job or cancelling the action.
Create a job	Use the following procedure to create a job.
1	In the Campaign Editor button bar, select a dialer, and then click Jobs .
2	Select File > New .
3	Click Next when the Campaign Editor Job Wizard appears.
4	Select the type of job to create, the appropriate outbound or inbound calling list, and the check box next to the options you want to use: Sales Verification, Unit Work List, Virtual, or Managed, and then click Next .
5	Type a job description, and then click Finish . The default tree structure for your job type (inbound, outbound, blend, etc.) appears in the right-hand pane. Use the Setting column to edit values.

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View job settings

View job settings	Use the following procedure to view job settings.
1	Double-click the job you want to view. The job settings appear in the right-hand pane.

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Save a job	Use the following procedure to save a job.
1	Select File > Save to save the job. (If needed, provide a file name.)
2	Click OK.

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Save a job as another name or on a different dialer

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	Double-click 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 .)
3	Type a file 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

Start a job on one or more dialers	Use the following procedure to start a job on one or more dialers.
1	Double-click 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

Start multiple jobs on currently selected dialer	Use the following procedure to start multiple jobs on the currently selected dialer.
1	Control-click the jobs you want to start.
2	Select File > Run , and then click OK .

Copy a job	Use the following procedure to copy a job.
1	Double-click 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	Type a file name for the job, and then click OK .

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Edit a job

Edit a job	Use the following procedure to edit a job.
1	Select File > Open .
2	Double-click 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 in enabled, select the additional dialers to save the job to.
4	Type a file name for the job, and then click OK .

Verify a job on one or more dialers

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 . 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 .
3	In the This File is OK dialog box, click OK .

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Verify multiple jobs on the currently selected dialer

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.
3	Click OK in The File is OK dialog box.

Delete a job on one or more dialers

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

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

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.

12 Campaign Monitor settings

Overview

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Purpose	 Campaign Monitor gives you the ability to define how data is arrang specify the time range, change a job on the fly, customize a view according to completion code, customize a view according to an agent's state, and determine the refresh rate and the preferred savin method. The topics in this chapter discuss settings that are the Campaign Monitor's default settings. You can modify these settings during a j from the Campaign Monitor toolbar, but unless you save these chart 	
Contents	to a custom view and then select that custom view from the button bar the next time you open Campaign Monitor, your modified settings are lost. When you start Campaign Monitor, it applies the default settings.	
Contents	 Set the default hierarchy 	
	• Set time range	
	• Set job changes	
	• Set agent states to display	
	• Set view set	
	• Set refresh rate	
	• Set save on exit settings	

Set the default hierarchy

Set the default hierarchy	The default hierarchy is set in the Options dialog box. The preferences that you specify in the Options dialog box Scope tab dynamically affect the Hierarchy Manager option on all of the view toolbars. For some of the choices on this tab, you will need to have previously created hierarchies using the Hierarchy Manager tool.
1	In Campaign Monitor, select Settings > Options .
2	In the Options dialog box, select the Scope tab.
3	Under How should data be arranged, select one of the following: Use current dialers and jobs Use the default agent/supervisor hierarchy Use a custom hierarchy.
4	Click OK .

Set time range

Set the 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 icon on all of your views' toolbars.	
1	In Campaign Monitor, select Settings > Options .	
2	Under What time range should views support?, select or clear Show data for all jobs run since the last dialer reboot, if applicable, and then click OK.	

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Set job changes

Set job changes	Use the Multi-Dialer Control tab to choose which of the available dialers you want included in your views. Use the following procedure to set job changes.
1	In Campaign Monitor, select Settings > Options .
2	In the Options dialog box, select the Multi-Dialer Control tab.
3	To apply job changes to all dialers, select Apply job changes to all selected dialers , or to apply job changes to specific dialers, select the name of the dialer to which you want to apply job changes, and then click OK .

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Set agent states to display

Set agent states to display	Use the Agent States tab to choose which agent states to display.
1	In Campaign Monitor, select Settings > Options .
2	In the Options dialog box, select the Agent States tab.
3	Select which states to display, and then click OK .

Set view set

Set view set	Use the Appearance tab to set the view set.
1	In Campaign Monitor, select Settings > Options .
2	In the Options dialog box, select the Appearance tab.
3	Type the view set to use, or select Browse to locate your view set, and then click OK .

Set refresh rate

Set refresh rate	Use the Appearance tab to set a refresh rate.
1	In Campaign Monitor, select Settings > Options .
2	In the Options dialog box, select the Appearance tab.
3	Click the up or down arrow to set the refresh interval (in seconds) for your views, and then click OK .

Set save on exit settings

Set save on exit settings	Use the Feedback tab to choose how changes to views and view sets are saved when the application closes.
1	In Campaign 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 .

13 Campaign Monitor navigation and personalization

Overview

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Purpose	The Avaya TM Predictive Dialing System (PDS) allows you to customize the display of Campaign Monitor windows and navigate among the various tool applications within Campaign Monitor.
Contents	 This section contains the following topics: User interface Navigate among the Tool menu applications Use large icons or small icons in the button bar Open a standard view Open a view or view set from another location Create a custom view
	 Save current view Save as view set Save view set with a new name Delete a view set Add a view to the Custom button group Refresh a view

User interface

Overview	Campaign Monitor has a button bar on the left-hand side of the screen and an open space where your various windows (or views) appear. 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 your monitoring.
Campaign Monitor screen layout and usage	Campaign Monitor is highly customizable. The following is a sample list of Campaign Monitor's customizable features. In addition to these features, you should experiment with the toolbar options in each view to customize individual views. After you have a view set up the way you want it, you can save it as a custom view so that it is available for you to select from the Custom button group on the button bar. For more information on customizing individual views using the toolbar, see "View Control Functions."

Button bar

The button bar works like an accordion: it expands and contracts. In other words, when you click a button group, the group expands to display its buttons.

To learn more about the various Campaign Monitor views and how to customize each view, see the "Views" section.

Sort

You can sort the contents of a view by clicking a column heading. 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 data 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 a view by hovering your cursor between the heading titles until a double-arrow appears. Hold down the left mouse button while you drag your cursor to resize the columns.

Navigate among the Tool menu applications

Navigate among the Tool menu applications

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

- 1 Select Start > Programs > Avaya > Campaign Director > Campaign Monitor.
- 2 To start a tool, select it from the **Tools** menu. While you use the tool, Campaign Monitor 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

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 command indicates which view you are currently using.

Open a standard view

Open a standard view	Use the following procedure to open a standard view in Campaign Monitor.
1	On the Campaign Monitor button bar, click View Set , Dialer , Job , Supervisor , Agent , or Custom .
2	Select 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

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 Campaign 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 OK . The view or view set opens as a new window in the right-hand pane.

Create a custom view

Create a custom view	Use the following procedure to create a custom view.
1	In Campaign Monitor, select File > New . The Campaign Monitor View Wizard opens.
2	Follow the steps in the View Wizard to create your custom view.

Save current view

Save current view	Use the following procedure to save a current view.
1	On the Campaign Monitor button bar, click View Set , Dialer , Job , Supervisor , Agent , or Custom .
2	Select 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.

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Save as view set

Save as view set	Use the following procedure to save a view set.
1	On the Campaign Monitor button bar, click View Set, Dialer, Job , Supervisor, Agent , or 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	Type a name for your 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

Save view set with a new name	Use the following procedure to save a view set with a new name.	
1	On the Campaign Monitor button bar, click View Set , Dialer , Job , Supervisor , Agent , or Custom .	
2	Select the button for the view set you want to open. The view set opens.	
3	Select File > Save All As.	
4	Type 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 group.	

Delete a view set

Delete a view set	Use the following procedure to delete a view set.		
1	On the Campaign Monitor button bar, click View Set .		
2	Right-click the view set you want to delete, and then select Remove Viewset .		

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Add a view to the Custom button group

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	Right-click in the button bar area and select Add View to Custom.	
3	Type a name for the button, and then click OK . The view appears in the Custom button group.	

Refresh a view

Refresh a view Use the following procedure to refresh a view.

1 With a view open, press the F5 key.

Campaign Monitor navigation and personalization

14 Campaign Monitor views

Overview

Purpose	Campaign Monitor uses the button bar (left-hand side of the window) as the primary navigation point for opening views. You can open and save favorite views, display views according to completion codes, display views according to agent and supervisor relationships, and configure alerts so that you can receive notifications from the Avaya TM Predictive Dialing System (PDS). Campaign Monitor displays views in the main window (right-hand side of your screen).		
Contents	This section contains the following topics:		
	• Views		
	Dialer Status view		
	Dialer Agents view		
	Dialer Lines view		
	Dialer History view		
	Job Status view		
	Job Agents view		
	Job Detail view		
	Job Call Handling view		
	Job Completion Codes view		
	Job Wait Queues view		

- Job History view
- Job Performance view
- Supervisor Agents view
- Find Agent view
- Agent Detail view
- Agent Completion Codes view

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• Agent History view

Overview	A view displays information about dialers, jobs, agents, and completion
	codes. In Campaign Monitor, you are able to create your views, save
	them on exit, and then restore them. This allows you to display views in
	the same way without having to recreate specific views.

The button bar provides a means of organizing the available views, as well as access to those views. The button bar contains six view categories: View Set, Dialer, Job, Supervisor, Agent, and Custom.

View toolbar description There are several view control options.

Table view

Displays the data without icons (only available if the view has two presentation modes).

Graphic view

Displays the data with icons (only available 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

(For the Job Performance View only.) Allows you to select which completion code to use when monitoring job performance.

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 icon

Allows you to choose the types of data that appear in the scope selectors.

You can choose to use no hierarchy, the default supervisor/agent hierarchy (if one has been defined using **Settings** > **Options**), or another custom hierarchy (if one has been defined using **Settings** > **Options**). You can define the default supervisor/agent hierarchy and the custom hierarchy.

Hierarchy	Scope selector 1	Scope selector 2	Scope selector 3
No hierarchy	Dialer (default)	Job (default)	empty
Default agent/ supervisor hierarchy	Dialer (default)	Job (default)	supervisor (bottom level of the selected hierarchy)
Custom	Top level of the selected hierarchy	Middle level of the selected hierarchy	Bottom level of the selected hierarchy

Time Selector

Allows you to choose the time range for the data in the view.

Refresh

Refreshes the data in the open views.

View categories The following view categories are available in Campaign Monitor:

View set

You can create a view set that you can save and restore as a group. The first time you click View Set, and no view set is active, the Save As dialog box appears so you can name the set and choose its storage location. When the dialog box closes, a button for the new view set appears in the View Sets group on the button bar. If you change a view, you will be asked whether the view should be saved.

Dialer views

Use the Dialer views to see Dialer Status, Dialer Agents, Dialer Lines, and Dialer History.

Job views

Use the Job views to see Job Status, Job Agents, Job Detail, Job Call Handling, Job Completion Codes, Job Wait Queues, Job History, and Job Performance.

Supervisor view

Use the Supervisor view to see the Supervisor Agents data.

Agent view

Use the Agent views to display Agent data.

Custom view

The custom views section will vary, depending on what you choose to include. Campaign Monitor lets you save a customized view to the Custom group.
Dialer Status view

Dialer Status view The Dialer Status view displays the job, agent, and line resources used on a dialer. The view shows the agents and lines assigned to all dialers in the selected scope, as well as the jobs and the state of completion of each job.

Dialer Status	Description
DialerID	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.
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 identify data associated with that job instance in the database. Each time a job runs, the system assigns it a new job instance ID.
Status	The current status of the job (status types include stopped, running, error, or shutting down).
Start Time	The date and time the job instance started.
Stop Time	The time the job instance stopped or blank if the job is still running.
Estimated Job End	The time that Campaign 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.

The following table describes the Dialer Status views.

Dialer Status	Description
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 into each job.
Total Agents	The total number of agents logged in to each job.
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

Dialer Agents view The Dialer Agents view displays the agents active on one or more dialers.

You can choose which agent states to include in the Dialer Agent view by selecting, on the Agent States tab in the Options dialog box, the agent states you want to view. You can further limit the agent states in a single view by using the Filter option.

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.
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.
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.

The following table describes the Dialer Agents view.

Dialer Agents	Description
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 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, Acquired, and Offline.
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

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.
JobID	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.
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

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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.

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.
JobID	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.
Status	The current status of the job (status types include: stopped, running, error, or shutting down).
Start Time	The time the job started.
Stop Time	The time the job stopped.
Estimated Job End	The time that Campaign Monitor estimates the job will end. For an inbound job, this field is empty.

The following table describes the Dialer History view.

Dialer History	Description
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.
Agent Hours	The total number of hours agents have logged on 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.
Records Called	The total number of records called during the course of the job. A subtotal appears for each job and each dialer.

Job Status view

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Job Status view

The Job Status view displays the same data as the Dialer Resource 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.
JobID	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.
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.
Status	The current status of the job (status types include: stopped, running, error, or shutting down).
Start Time	The time the job started running.
Stop Time	The time the job stopped running.
Estimated Job End	The time that Campaign 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.

Job Status	Description
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

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.

You can choose the agent states that you want to include in the Job Agent view by selecting, on the Agent States tab in the Options dialog box, the states you want to view. You can limit the agent states in a single view by using the Filter.

The following table describes the Job Agents view.

Job 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.
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 Agents	Description
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 into the selected dialer.
Status	The current status of the agent. Status types include Talk, Update, Idle, ACD, Offline, off job, 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, Blend.
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

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 the Job History view.

Job Detail	Description
Job Name	The job name appears in the window title bar.
Job Number	The unique number assigned to this instance of the job by the dialer.
Dialer	The name of the dialer on which the job instance is running.
Status	The current status of the job (status types include: stopped, running, error, or shutting down).
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.
Expert Calling Ratio	The Expert Calling Ratio defined for the job. 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 Avaya PDS uses this figure to make adjustments in the Expert Calling Ratio.

The following table describes the Job Detail view.

Job Detail	Description
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.
Total Connects	The total number of inbound and outbound connects for the job.
Start Time	The time the job started running.
Time Left	The estimated time remaining to complete calling for the job. For an inbound job, this field is empty.
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.
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.
% 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.

Job Detail	Description
Records Called	The total number of records that have been called (or completed).
Connects/ 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.

Job Call Handling view

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 first scope selector and Job1 on the second scope selector to display all agents logged onto Job1, on any dialer.

Job Call Handling	Description
Agent Name	The name of the agent logged on to a specific job.
Agent ID	A unique identification number assigned to each agent by the database.
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.

The following table describes the Job Call Handling view.

Job Completion Codes view

The Job Completion Codes view displays completion codes used during the job. Additional information includes the total number of calls, connects, and RPCs; the per hour number of calls, connects, and RPCs; and the number of RPCs per connect.

Job Completion Codes	Description
Closure	A check mark indicates that you have defined the code as a closure in the Completion Code Manager.
Code	The unique identification number associated with each completion code.
RPC	The number of records released with this code as a percentage of the total number of RPCs. (For codes marked as RPC only.)
Abandon	A check mark 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.

The following table describes the Job Completion Codes view.

Job Completion Codes	Description
Closure %	The percentage of closures recorded for each completion code based on the total number of RPCs 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.

Note

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.

Campaign Monitor always uses the definitions that were in effect when the job began. If you change any of the completion code descriptions, you will not see the changes until the next time the job runs.

Job Wait Queues view

Job Wait Queues view The Job Wait Queues view 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. 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.

Note

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.

Job Wait Queues	Description
Job	The name of each job running in the current scope.
JobID	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.

	Job Wait Queues	Description
	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.
	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 client. (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 client or by the system.
	Outbound Abandoned	The total number of outbound calls abandoned by the client or by the system.

Job Wait Queues	Description
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

Job History view

The Job History view displays the same information as the Dialer History view grouped by job, rather than dialer.

The following table displays the Job History view.

Job 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 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.
Status	The current status of the job (status types include: stopped, running, error, or shutting down).
Start Time	The time the job started.
Stop Time	The time the job stopped.
Estimated End Time	The time that Campaign 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.

Job History	Description
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.
Agent Hours	The total number of hours agents have logged on 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.
Records Called	The total number of records called during the course of the job. A subtotal appears for each job and each dialer.

Job Performance view

Job Performance view The Job Performance view compares agent performance on a selected completion code. The code the system uses for comparison appears at the top of the view. 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.

Job Performance	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.
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.

The following table describes the Job Performance view.

Supervisor Agents view

Supervisor Agents view

The Supervisor Agents view displays the same data as the Dialer Agents view, but groups the data by job. This view is only available if you have defined a supervisor-agent hierarchy and selected that hierarchy as the default supervisor-agent hierarchy using **Settings** > **Options**.

You can choose which agent states should be included in the Supervisor Agent view by selecting, on the Agent States tab in the Options dialog box, the states you want to view. You can further limit the agent states in a single view by using the Filter icon.

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.
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.
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.

Supervisor Agents	Description	
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 into 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, 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

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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.

Find Agent	Description
Agent	The name of the agent to search for, or a wildcard character (*).
Status	The current status of the agent or activity and the duration of the status. Status types include Talk, Update, Idle, ACD, Offline, logging off, and off job.
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.

The following table displays the Find Agent view.

Agent Detail view

Agent Detail view

The Agent Detail view displays detailed information about the current activity and performance of an agent.

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. See note under Supervisor Agents view.		
Job	The name of the job on which the agent is working.		
Status	The current status of the agent or activity and the duration of the status. Status types include Talk, Update, Idle, ACD, Offline, off job, and logging off.		
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.		
Last Released	The last time an ACD agent was released to inbound.		
Last Acquired	The last time an ACD agent was acquired for outbound calling.		

Agent Detail	Description	
Total Talk	The total time spent talking on the job.	
Total Update	The total time spent updating records.	
Total Preview	The total time spent waiting for a call.	
Total Idle	The total time spent waiting for a call.	
Average Talk - This Agent	The average time spent talking on each call. The data appears as a number and as a section of the pie.	
Average Talk - Average Agent 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.	
Average Idle - This Agent	The average time the agent spent waiting between calls. The data appears as a number and as a section of the pie chart.	
Average Idle - Average Agent 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 preview - this agent	The average time spent previewing records. The data appears as a number and as a section of the pie chart. (Managed agents only.)	
Average Update - this Average Agent of This Type	The average time spent updating records by agents of the same type.	
AverageUpdate - this agent	The average time spent updating records by this agent.	
Average preview - average agent of this type	The average time spent previewing records by agents of the same type. The data appears as a number and as a section of the pie chart. (Managed agents only.)	

Agent Detail	Description
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.
Duty Cycle - Average Agent of This Type	The average duty cycle for agents of the same type.

Agent Completion Codes view

Agent Completion Codes view

The Agent Completion Codes view displays the calling results in terms of completion codes. Additional information includes the total number of calls, connects, and RPCs; the per hour number of calls, connects, and RPCs; and the number of RPCs per connect.

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 check mark indicates the code is an RPC.	
Closure	A check mark 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.	
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. See Job Completion Codes view.	

The following table displays the Agent Completion Codes view.

Agent Completion Codes	Description
% 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. See Job Completion Codes view.
% of Calls	The number of calls recorded for each code as a percentage of the total number of calls for the job. See Job Completion Codes view.

Agent History view

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Agent History view

The Agent History view displays detailed information about the past activity and performance of an agent.

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.		
Job	The name of a job runs during the current time scope.		
JobID	A unique identification number, automatically assigned to a job (by name), used to identify job data in the database.		
First Login	The date and time the agent first logged on to a job in yyyy/mm/dd hh:mm:ss format.		
Last Logout	The date and time the agent last logged off of a job in yyyy/mm/dd hh:mm:ss format.		
Agent Hours	The total number of hours agents have logged on to a job instance over the course of the job. A subtotal appears for each job and each dialer.		

15 View control functions

Overview

Purpose	A view is the name given to the customizable window that appears in the main area of Campaign Monitor after you click a button on the button bar. This section describes how to use views in Campaign Monitor.		
Contents	This section contains the following topics:		
	View control toolbar		
	• Filter data in a view		
	Select a performance code		
	• Set scope selectors		
	Scope selectors examples		
	• Select a time range		
	• Select a hierarchy		
	• Hide or show columns		
	Select Table View or Graphical View		
	• Save a view as HTML		

View control toolbar

Toolbar buttons within a View

Every view opens with a set of tools that help you manipulate the data in a View. The available options vary depending the view. For example, the time selector option does not appear if time scoping is not allowed for data in a view.

View tool	Button	Description
Table View		If the view has two presentation modes (graphical and table) this button displays the data without icons (not available for all views).
Graphical View		If the view has two presentation modes (graphical and table) this button displays the data by showing icons (not available for all views).
Filter Data	Y	Displays a dialog box that allows you to filter the data in the view according to one selected criteria.
Performance Code	⊒	Displays a dialog box that allows you to select a completion code to use to measure agent performance.
Hide/Show Columns		Displays a dialog box that allows you to select which of the available data fields will be displayed.
Find	# 4	Allows you to search for an item in a view.
Level 1 Scope Selector	🚓 All Level 1 💌	A drop-down list that allows you to limit the amount of data in the display.

View tool	Button	Description
Level 2 Scope Selector	🚓 All Level 2 💌	The choices in this list depend on the choice made in the Level1 Scope Selector.
Level 3 Scope Selector	🕵 All Level 3 💌	The choices offered in this list depend on the choices made in the Level1 and Level2 Scope Selectors.
Hierarchy Manager	- <u>1</u>	A pull-down list that allows you to select the types of data that will appear in the Scope Selectors.
Time Scope	Ø •	A pull-down list that lets you select the time range for the data displayed in the view.
Refresh view	Ø	Allows you to refresh a view.
Filter data in a view

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.
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, and then click OK .

Select a performance code

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**. (You may then be prompted to use the scope selector drop-down lists on the view toolbar to select a single dialer and a single job.) The Performance Completion Code dialog box appears.
- **2** Select a code, and then click **OK**. Campaign Monitor uses the selected code to measure agent performance.

Note

The Performance Completion Code dialog box lists a set of completion codes. For each code, the system displays the RPC, Closure, and Abandon attributes and a description. The RPC, Closure, and Abandon attributes are based on Completion Code Manager settings when the job started. The description, however, reflects the current completion code description from Completion Code Manager.

Scope selectors examples

Overview The three drop-down lists in the view toolbar are called scope selectors. They are used along with the Hierarchy Manager toolbar button. The option you select using the Hierarchy Manager toolbar button dynamically changes the available options in the three scope selectors. From left-to-right, the default scope selectors are dialer and job. The scope selector feature allows you to alternately narrow and broaden the range of data displayed in a view. You can select one or all items from each selector.

Note

A list of supervisors appears in the third scope selector only if you have defined an agent-supervisor hierarchy using the Hierarchy Manager tool (**Tools** > **Hierarchy Manager**) and designated that hierarchy as the default hierarchy in Campaign Monitor (**Settings** > **Options**).

Example One

Set the first selector to All Level 1, the second selector to All Level 2, and the third selector to All Level 3. The view displays data for all dialers, all jobs, and all supervisors. If you change the dialer selector to DialerA, Campaign Monitor removes the data for all other dialers from the view.

Example Two

If the first selector is set to All Level 1 and the second selector is set to 30Day, the view displays data for all jobs named 30Day regardless of the dialer on which the jobs reside.

Set scope selectors

Set scope selectors Set the scope using the three drop-down lists available from any view toolbar. The options in the lists are determined by the default hierarchy selections and by using the Hierarchy Manager toolbar button. From left-to-right, the default scope selectors are dialer and job. The scope selector feature allows you to alternately narrow and broaden the range of data displayed in a view.

 With a view open, click the arrow to the right of the Hierarchy Manager button and select one of the following: No hierarchy, Use default hierarchy, or Use custom hierarchy.

2 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.

3 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.

4 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

Select a time scope	You can expand the default time view of current data only (for example, running jobs and active agents) to include recently run jobs (for example, since last dialer restart).
	For example, change the time scope setting 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 (for example, minimum hit rate) is not summed.
Select a time range	Set the time range for your view by clicking the arrow to the right of Time Scope on any view toolbar.
1	With a view open, click the arrow to the right of Time Scope .
2	From the list, select Active Data or Active+Recent Data. Active Data means that your view will only display data for currently running jobs. Active+Recent Data will display data for currently running jobs and jobs that have run during a single day.

Select a hierarchy

Select a hierarchy	Click the arrow to the right of Hierarchy Manager (located on any
	view toolbar) and select the hierarchy items that populate the lists in the
	scope selectors. In turn, the options you select in the scope selectors
	can narrow or broaden the scope of the data displayed in your views.

- 1 With a view open, click the arrow to the right of **Hierarchy Manager**.
- 2 From the list, select **No Hierarchy**, **Use default hierarchy**, or **Use 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.

The **Use default hierarchy** option allows you to use your default hierarchy that you specify through **Settings** > **Options**. The bottom-level items of the selected hierarchy appear in the third scope selector list.

The **Use custom hierarchy** allows you to use the custom hierarchy that you specify through **Settings** > **Options**. The top-, middle-, and bottom-level items of the selected hierarchy populate the first, second, and third scope selectors, respectively.

Hide or show columns

Hide or show columns	Use the following procedure to hide or show columns. This allows you to customize your view to display only the columns you want.
1	With a view open, click the Hide/Show columns button.
2	Clear a column's check box to hide a column in your current view. Select a check box to show a column in your current view.

Select Table View or Graphical View

Select Table View or Graphical View	Use the following procedure to display views in table or graphical form. Table view is the default.
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

Save a view as HTML	Use the following procedure to save your view as HTML.
1	In Campaign Monitor, select the view to save as HTML.
2	Select File > Save as HTML . Campaign Monitor opens a new window with the HTML output. By default, the HTML file will be saved to C:\Program Files\Avaya\Campaign Director\Monitor\View Name.html.

16 Job control functions

Overview

Purpose	The Avaya TM Predictive Dialing System (PDS) allows you to adjust job settings while a job is running. You make these adjustments through the Campaign Monitor Tools menu. The new settings expire when the job ends. The 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.
Contents	This section contains the following topics:
	• Stop a job
	• Link to job
	Minimum hit rate
	• Expert calling ratio
	Inbound settings
	Reassign lines
	Managed Dialing
	• Time zones
	Unit Work Lists
	Detection modes
	Alternate initial

Recalls

Stop a job

1	In Campaign Monitor, oper you want to stop.	n a view that lists jobs, and then select the jo
2	Select Tools > Stop Job. T	he Stop Job dialog box appears.
3	Select one of the following two options:	
	Shutdown gracefully as agents complete calls	Allows you to stop a job after the agent complete their current calls. This option allows the agents to end their current calls and release the records. This is the typical method.
	Stop job immediately	Allows you to stop a job immediately. The Avaya PDS disconnects all phone conversations and closes the records immediately. As a result, agents cannot finish speaking with a customer or update customer records.

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5 Click **Yes** to stop the job.

Link to job	Use the Link to job 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 "Job Settings" located in the Jobs section.
1	Open a Campaign Monitor view that lists jobs.
2	Select a job, and then select Tools > Link to Job .
3	Select a job, and then click OK .

Minimum hit rate

Minimum hit rate	The minimum hit rate determines the maximum number of calls the Avaya PDS will make as it attempts to make an agent connection. For example, a minimum hit rate of 30% means the system will make no more than three dialing attempts for each agent. This prevents the Avaya PDS from allocating more pooled lines to a poorly performing job at the expense of a more successful job.
1	Open a Campaign Monitor view that lists jobs.
2	Select a job, and then select Tools > Minimum Hit Rate .
3	Use the slider or type a value from 1 to 100 in increments of 10, and then click OK .

Expert calling ratio

Expert calling ratio	Expert calling ratio changes the way the Avaya PDS system predicts when to make the next call. You can select any of the following three ratios: Callers in the wait queue , Agent Work Time , or Agent Update time . 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.
1	Open a Campaign Monitor view that lists jobs.
2	Select a job, and then select Tools > Expert Calling Ratio .
3	Click the Expert Calling Mode field and select either Callers in the wait queue, Agent update time, or Agent work time.
4	Double-click the Value field and enter a value from 0 to 100 in increments of 10, and then click OK . Wait at least 15 minutes before changing your expert calling ratio again because your change will not be noticeable to you for at least that long.

Inbound settings

Inbound settings	Use this menu command to adjust your inbound settings.	
1	Open a Campaign Monitor view that lists jobs.	
2	Select an inbound or blend job, and then select Tools > Inbound Settings .	
3	Double-click the Value field to enter settings, and then click OK.	

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Reassign lines

Reassign lines	When you reassign lines, you alleviate congestion on certain Avaya PDS lines so that your jobs run more quickly.
1	Open a Campaign Monitor view that lists jobs.
2	Select a job, and then select Tools > Reassign Lines .
3	A check indicates that the line group is activate (in use). Click to select or clear line groups as needed, and then click OK . Use the Activate All button to select all of the line groups. Use the Deactivate All button to clear all of the line groups.

Managed Dialing

Managed Dialing	Managed 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 "Job Settings" in the Job section.				
1	Open a Campaign Monitor view that lists jobs.				
2	Select a Managed Dialing job, and then select Tools > Managed Dialing .				
3	Modify agents' preview time setting by typing a different value in the Time Limit box.				
4	Select Allow agent to cancel calls to immediately allow agents to cancel calls, and then click OK .				

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Time zones

Time zones	Select the check box if you want the Avaya PDS to sort calls by times zones.
1	Open a Campaign Monitor view that lists jobs.
2	Select a job, and then select Tools > Time Zones .
3	Clear time zones you do not want to call, and then click OK . Click Activate All to select all time zones. Click Deactivate All to clear all time zones.

Unit Work Lists

Unit Work Lists	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. For example, you can set up a unit work list in a job so that Spanish- speaking customers are routed only to Spanish-speaking agents.				
1	Open a Campaign Monitor view that lists jobs.				
2	Select a job, and then select Tools > Unit Work Lists .				
3	Clear or select a unit work list for the currently running job, and then Click OK . Click Activate All to select all unit IDs. Click Deactivate All to clear all unit IDs.				

Detection modes

Detection modes	Use the Detection Mode option to determine the types of calls the Avaya PDS passes to agents. For more information on detection modes, see "Call detection mode settings" in the Phone Strategies section.
1	Open a Campaign Monitor view that lists jobs.
2	Select a job, and then select Tools > Detection Modes .
3	Click the Phone field to select a phone.
4	Double-click the Rings field to type a different number of rings.
5	To add a phone, click Add Phone , and then repeat steps 3 and 4 to edit the fields.
6	To remove a phone, select the phone you want to delete, click Remove Phone , and then click OK .

Alternate initial

Alternate initial	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 "Alternate Initial Phone Settings" in the Phone Strategies section.					
1	Open a Campaign Monitor view that lists jobs.					
2	Select a job, and then select Tools > Alternate Initial .					
3	Click the Phone field to select a phone.					
4	Double-click the Local Time to edit the time. To toggle between AM and PM, select it, and then use your up and down arrows.					
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.

Recalls Use the recalls setting to determine how long the Avaya PDS waits before recalling a number, how many times it recalls the same phone number, and which phone it calls next. 1 Open a Campaign Monitor view that lists jobs. 2 Select a job, and then select **Tools** > **Recalls**. 3 Double-click the various fields on 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 Click Add Recall to insert a row where you can edit a new recall. To delete a recall, select the row, and then click **Remove Recall**.

5 Click OK

17 Quotas

Overview

Purpose The AvayaTM Predictive Dialing System (PDS) uses quotas as a means to complete a certain number of calls based on a selected outcome. A quota is a maximum number of releases for a particular completion code. When the quota for a unit is reached, no more calls are placed. In Campaign Editor, you set and modify a quota that is applied when the job starts. In Campaign Monitor, you set and modify a quota that affects a currently running job. This section discusses quotas as they apply to Campaign Monitor only. See "Jobs" for more information on setting quota information in Campaign Editor.
Contents This section contains the following topics:
Job end and quotas

• Create or modify a quota

Job end and quotas

Job end and quotas	A quick review of ending a job will help you understand why you
	might want to specify a quota. Here are the ways in which a job can
	end:

- The job reaches the Latest Time to Stop setting.
- The job is manually stopped.
- The job stops only after the Avaya PDS calls all initial phones at least once.
- The job stops only after the Avaya PDS calls all recalls at least once.
- The job stops when the Avaya PDS calls all scheduled recalls, but it stops calling when it has called all initial phones at least once.
- The job stops when the agents meet the quota set for the job.

The topics that follow are concerned with the last item in the previous list. Some supervisors use the Quota feature as a way to quickly stop a job. For example, specify a quota that your agents will quickly meet for a job.

Note

Quotas are not used for inbound-only jobs.

Create or modify a quota

Create or modify a quota	Use the following procedure in Campaign Monitor to change the quota value during calling activities.
1	Start Campaign Monitor.
2	Select a job, and then select Tools > Quotas . The Quota dialog box appears.
3	Double-click the Unit ID field and type a Unit ID.
4	Click the Completion Code field to select a completion code.
5	Double-click the Quota field and type a number (the number must be greater than 0).

18 Alerts

Overview

Purpose	The Avaya TM Predictive Dialing System (PDS) uses alerts to signal to supervisors of the end of a job, a goal being met, and other campaign events.
Contents	This section contains the following topics:
	• Alerts
	Alert Settings
	Create an alert
	• Edit an alert
	• Remove an alert
	• View a log
	• Enable and disable alerts
	• Check the status of each alert

Overview	You can define up to 10 alerts that provide audio cues, visual cues, log files, e-mails, or pager signals when job/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.
	For example, you might want to know when an agent takes more than five minutes on a call or when the hit rate on a job is less than 30%. Alerts can also be set to tell you when the system needs attention, for example, a job is approaching completion.
	To access alerts, start Campaign Monitor and select Settings > Alerts .
	Note
	If you set an alert, you can close Campaign Monitor. When you restart Campaign Monitor, your alert will be saved. However, if Campaign Monitor is closed when you should receive your notification, you will not receive notification. In other words, Campaign Monitor must be active in order for you to receive a notification. After you receive an alert notification, the alert is <i>not</i> automatically enabled again. Open the Alert Viewer and select Enabled to reactivate an alert.
Alert examples	The Avaya PDS 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, as shown talking in real-time (rather than an average over multiple calls).
	• Current Update Time - the update time for all agents or a specific agent, as shown 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 utilized so that you can free up some lines (otherwise, when 100% of the lines are utilized, customers will automatically be placed in a wait queue when they call in).
- **Current Hit Rate** a hit rate is the ratio or percentage of call connects to call attempts (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** this feature is like an alarm clock: when the dialer hits a certain time of the day/night, you are alerted.
- 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; this is useful if, for example, 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; this is helpful if you want to shut down 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 called.
- **Records Left as Percent of Total** the percent of records in the entire job still left to be called.
- **Time Remaining** the estimated time left on a job.

Note

There is also one alert that you may receive that you do not configure yourself. The Avaya PDS automatically alerts you if new data has not appeared in the database for more than 12 minutes (12 is the current setting). This alert lets you know if the data you are viewing in Campaign Monitor is not being updated.

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
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

Alert settings The following table shows possible combinations of alert settings:

Condition	Dialer	Job	Agent	Relation	Value	Modifier
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.

Create an alert

Overview	You create alerts in Alerts Viewer, which is a available in Campaign Monitor.
Create an alert	Use the following procedure to create an alert.
1	Select Start > Programs > Avaya > Campaign Director > Campaign Monitor .
2	Select Settings > Alerts . (If an e-mail 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. You can skip this tab if you do not want to narrow your alert criteria.
6	On the Notifications tab, specify how Avaya PDS notifies you: a pop-up alert on your screen, an audible sound, a log file, or an e-mail. If you select Send to log , then you can view a log file that will contain all alert conditions that have been met. This log file is accessible using the View Log button on the Alert Viewer. If Send e-mail is unavailable, configure your default e-mail client on your PC. If Send e-mail is available and you want to receive an e-mail alert notification, type your e-mail address in the To box.

7 Click OK.

The alert name and summary information appear in the Alerts Viewer dialog box.

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Edit an alert

Edit an alert	Use the following procedure to edit an alert.
1	In Campaign Monitor, select Settings > Alerts . The Alert Viewer dialog box appears.
2	Select the alert you want to edit, and then click Edit . The Alert Editor dialog box appears.
3	Use the Alert Definition, Scope, and Notifications tabs to modify the alert.

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4 Click OK.
Remove an alert

Remove an alert	Use the following procedure to remove an alert.
1	In Campaign Monitor, select Settings > Alerts . The Alert Viewer dialog box appears.
2	Select the alert you want to delete, and then click Remove .
3	Click OK .

View a log	If you have selected the Send to Log option for an alert (which you set on the Notifications tab on the Alert Editor), you can use the View Log button in the Alert Viewer dialog box to display a log of all alert conditions that have been met.

- 1 In Campaign Monitor, select **Settings** > **Alerts**.
- 2 On the Alert Viewer dialog box, click **View Log**. A log file (text file) appears in a separate window.

Enable and disable alerts

Overview	In Alert Viewer, you have the option to disable alerts, which tells the Avaya PDS not to notify you about an alert. For example, if you usually monitor agent Doe everyday because he is a new hire, but 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 the Avaya PDS is actively checking the alert's condition. A check mark indicates that the Avaya PDS 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.
Enable and disable alerts	Use the following procedure to enable and disable alerts.
1	In Campaign Monitor, select Settings > Alerts .
2	Select the Enabled field to activate monitoring of the alert condition. Clear Enabled to deactivate the alert.

Check the status of each alert

Overview	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.
Check the status of each alert	Use the following procedure to check the status of each alert.
1	In Campaign Monitor, select Settings > Alerts .
2	Notice whether the Status column has an On or Off status.

19 Agent control functions

Overview

Purpose	During calling activities, Campaign Monitor provides a means to find a particular agent, and then take an action for that agent.
Contents	This section contains the following topics:
	Agent control functions
	• Find an agent
	• Transfer an agent to another job
	• Send message to an agent
	Monitor agent line

• Remove an agent from a job

Agent control functions

Overview	Campaign Mo to complete va following action	nitor allows you to search for one or more agents in order arious tasks. After an agent is found, you can initiate the ons:
	• Transfer	one or more agents to another job
	• Send a m	essage to one or more agents
	• Monitor a	an agent line
	• Remove a	an agent from a job
	Before perform	ning any of these tasks, you must first find an agent.
Hierarchies	You can find a you can search search for a sin	gents in several ways. If you know the exact agent login, a for a single agent. Use the following hierarchy groups to ngle agent or a group of agents.
	Job Search al	l agents in a job.
	Supervisor S	earch all agents reporting to a supervisor.
	Dialer Search	all agents on a dialer.
	Note An agent must agent to be fou Hierarchy Mar	be set up within the supervisor hierarchy in order for the and using this function. Set up hierarchies using mager.
Using wildcard characters	In addition to finding a single agent, you can use wildcard characters to search for multiple agents.	
	Wildcard character	Description
	Wildcard character *	Description Search for all agents. Use also for multiple agents with identical characters. For example, *smith will find all agents with anything containing the letters smith.
	Wildcard character * ?	DescriptionSearch for all agents. Use also for multiple agents with identical characters. For example, *smith will find all agents with anything containing the letters smith.Search for a single character within an agent login.
	Wildcard character * ? ,	DescriptionSearch for all agents. Use also for multiple agents with identical characters. For example, *smith will find all agents with anything containing the letters smith.Search for a single character within an agent login.Search for multiple agents by their exact login names, separated by commas.

Find an agent

Find an agent	Use the following procedure to find an agent.	
1	On the Campaign Monitor button bar, click Agent , and then click Find Agent . The Find Agent dialog box appears.	
2	Type the name of an agent or use wildcard characters to select multiple agents.	
3	Use scope selectors to filter information.	
4	Click Find . Agent names appear in the lower section of the Find Agent dialog box.	

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Transfer an agent to another job

Transfer an agent to another job	Use the following procedure to transfer an agent to another job.
1	Find the agent or agents that you want to transfer to another job.
2	Select one or more agents in the Find Agent dialog box.
3	Click Transfer Agent . A list of currently running jobs appears.
4	Select the job to transfer the agent to, and then click OK .
	Note
	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

Send message to an agent	Use the following procedure to send a message to an agent.
1	Find the agent or agents to whom you want send a message.
2	Select one or more agents in the Find Agent dialog box.
3	Click Send Message . The Send Message dialog box appears.
4	Type the message to send to an agent, and then click OK .

Monitor agent line

Monitor agent line	Use the following procedure to monitor an agent line.
1	Find the agent that you want to monitor.
2	Select the agent in the Find Agent dialog box.
3	Click Monitor Agent . A dialog box appears.
4	Enter headset ID number, and then click OK .

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Remove an agent from a job

Remove an agent from a job	Use the following procedure to immediately disconnect an agent from a call. Use this option only for emergencies when the agent cannot use a normal disconnect method. Remove Agent immediately removes the agent from the job and logs the agent out of the Avaya PDS.
1	Find the agent or agents that you want to remove from a job.
2	Select one or more agents in the Find Agent dialog box.
3	Click Remove Agent . The system prompts you, "Are you sure you want to remove this agent from the current job?"
4	Click Yes to remove the agent, or click No to close the message box without removing the agent.

Show an agent view

Show an agent view	From the Find Agent dialog box, display an agent view for a selected agent. Choose from the Agent Detail, Agent Completion Codes, and Agent History views.
1	Find the agent for whom you want see a view.
2	Select the agent in the Find Agent dialog box.
3	Click the Show an agent view arrow. A list of available views appears.
4	Select Agent Detail, Agent Completion Codes, or Agent History, and then click OK . The selected view for the selected agent appears.

20 Campaign Analyst

Overview

Purpose	Campaign Analyst generates call management reports with job, agent and system details based on Avaya Predictive Dialing System (PDS) activity.	
Contents	This section contains the following topics:	
	• Reports	
	Report categories	
	Preview a report	
	• Export a report	
	Create a new report configuration	
	Schedule a report	
	Change a report	
	• Print a report	
	Delete a report configuration	

Reports

Overview Reports provide statistical information that you can use to evaluate your calling campaigns. For example, reports can show you how agents spend their time, which completion codes are most frequently used, the amount of time a particular job ran, and the hierarchy of managers and agents. In Campaign Analyst, reports are grouped into four categories: Agent, Job, Time of Day, and Administrative. For each category, Campaign Analyst provides several reports. For example, the Agent category include reports about agent activity, performance summary, and completion code summary. For each report, Campaign Analyst provides several variations or configurations. The different configurations sort, group, and filter data differently. In Campaign Analyst, report categories appear on the button bar. For each category, the reports are listed. When you select a report, the report configurations appear in the main pane. The main pane displays five columns (from left to right): record configuration title, Group 1, Group 2, Group 3, and Criteria. The last four columns display the options that were selected for the report configuration. There are many configurations for each report, so you should compare the configurations and experiment with the New and Change reports features. These features allow you to customize a report's configuration. After you create and save a configuration, it appears with the other configurations for that report so you can access it any time you use Campaign Analyst. In addition, you can use the Schedule feature to generate reports automatically (daily, weekly, or monthly). When you set up a report schedule, you specify the exact time that Avaya PDS sends the report to your printer.

Report categories

Report categories	Campaign Analyst reports fall under the following categories: Agent, Job, Time of Day, and Administrative.
	Agent reports Agent reports present statistics on both an agent's work time (such as total work, update, and idle time) and performance (such as total connects and connects per hour).
	Job reports Job reports present job statistics by job type: inbound, outbound, or blend. These reports include statistics about how the system ran a job, system information on calling activity, and statistics about combined agent activity during a job.
	Several job report configurations also group statistics by system to accommodate a multi-dialer environment.
	Time of Day reports Time of day reports present job information grouped by time segments. Time of Day reports let you evaluate job performance at intervals of 60, 30, 20, 15, 10, or 5 minutes. The interval is set when your system is installed.
	The data in any reported interval includes only calls that ended during that interval. For example, if an agent started talking to a customer at 12:29 and ended the call with a Promise to Pay at 12:32, the total talk time, update time, idle time, the PTP completion code count and all other data associated with that transaction would be added to the 12:30-1:00 interval.
	Several Time of Day report configurations also group statistics by system to accommodate a multi-dialer environment.
	Administrative reports Administrative reports present information about the hierarchies created using Hierarchy Manager.
Managed Dialing reports	Agent, Job, and Time of Day report groups include reports designed for Managed Dialing jobs. Campaign Analyst handles connect and online time statistics for Managed Dialing jobs differently than it does for regular (outbound, inbound, and blend) jobs.

The following table summarizes the differences between regular and Managed Dialing reports with regard to the connect and online time statistics.

Statistic	Regular job	Managed Dialing job
Connect	An agent is connected to a call placed by the Avaya PDS.	An agent previewed a record and did not cancel the call.
Online time	Amount of time an agent waited for connects, talked to clients, and updated records.	Regular job online time plus the time an agent previewed records.

By default, reports for regular jobs do not contain statistics for Managed Dialing jobs. Regular job reports contain criteria to include statistics where job type is outbound (OUT), inbound (INB), or blend (BLND). If you want a report to include both Managed Dialing and regular job statistics, use the Campaign Analyst report wizard to remove the criteria. On page 4 of the wizard, remove the Job Type condition and its associated values.

Note

If you generate a report that combines statistics from both regular and Managed Dialing jobs, the numbers for online time and connects statistics might be skewed because of the differences in how those statistics are calculated.

Agent Completion Code
Summary reportsThe Completion Code Summary report in the Agent report group
contains statistics about completion codes the agents used during jobs.
The report displays up to 14 completion codes. You can control which
codes appear on the report.

Campaign Analyst selects the first 14 completion codes for which the first character of the description is an asterisk (*). (Campaign Analyst selects codes in numerical order.) Use Completion Code Manager to add an asterisk to the descriptions of the completion codes that you want the Agent Completion Code Summary report to include. If you add an asterisk to more than 14 completion code descriptions, Campaign Analyst selects the first 14 codes and disregards the rest.

In the report, the description appears in a narrow, three-line column (the asterisk does not appear in the report). Consider modifying long descriptions so that they are more readable when you view the report.

For example, possible abbreviations for a Promise to Pay description include Prom to Pay or PTP.

Note

If you are operating in a multi-dialer environment, Campaign Analyst uses the Completion Code Manager settings from the primary dialer.

Preview a report

Preview a report	When you preview a report, Campaign Analyst launches a report viewer that lets you view, print, and export a report.
1	Select Start > Programs > Avaya > Campaign Director > Campaign Analyst.
2	Select a report category on the button bar.
3	Select a report in the button bar.
4	Select a report configuration.
5	Select Reports > Preview . Campaign Analyst displays the report in a new window.

Export a report

Export a report	Export a report to use or view the data in a different application.
1	Select a report category on the button bar.
2	Select a report in the button bar.
3	Select a report configuration in the main pane.
4	Select Reports > Preview . Campaign Analyst displays the report.
5	Click Export .
6	From the Format list, select a format. For example, select Crystal Reports (RPT) .
7	Click OK .

Create a new report configuration

Overview	Create a new report configuration to define your preferred grouping (affects the indentation of your information and the hierarchical layout), timeframe (tells Campaign Analyst the time frame you want the report to cover), filtering (set the conditions that tell Campaign Analyst to include only specific information in your report), and title (specifies a title for your report configuration).
	The New menu item is unavailable until you select a report in the button bar. When you finish creating the configuration, it appears with the title you specify as the last item in the list of report configurations.
Create a new report	When you select New , the Campaign Analyst Report Wizard appears and guides you through the configuration process.
1	Select a report category on the button bar.
2	Select Reports > New . The Campaign Analyst Report Wizard appears.
3	Read the Welcome screen, and then click Next .
4	In the Data Grouping wizard page, use the drop-down lists to group your information, and then click Next .

For example, if you choose the following options:

Campaign Analyst Report Wizard Page 2 (of 5)
Data Grouping Scient the group fields for this const. Each group will groate a thetale on the const.
Select the group helds for this report. Each group will create subtotals on the report.
You must select at least the first group.
First Group By:
Job Run Month
Consul Crave Bu (or Versily
Second, Group By (optional):
T <u>h</u> ird, Group By (optional):
Job Run Date
< Back Next > Cancel

The report would look like the following sample report (notice how month, week, and date are indented based on your data grouping selections):

Campaign Analyst Test report created with various conditions

.....

Date Range: 10/10/2001 - 10/10/2001

Job Run Month					Conn		
Job Run Week	First	Last	Online		Per		
Job Run Date	Login	Logout	Time	Connects	Hr		
2001 10							
2001 41	12:28:08	20:46:12	43:36:01	3229	74.06	0	0
10/10/2001	12:28:08	20:46:12	43:36:01	3229	74.06	0	0
Section Summary	12:28:08	20:46:12	43:36:01	3229	74.06	0	0
Report Summary	12:28:08	20:46:12	43:36:01	3229	74.06	0	C

If you select a hierarchy branch as a group criteria, you must select the hierarchy name as a selection criteria (page 4 of the Campaign Analyst Report Wizard).

5 In the Date Criteria wizard page, set the date conditions for the report selection formula, and then click **Next**.

For example, if you select the following options:

Campaign Analyst Report Wizard Page	3 (of 5)
Date Criteria Set the date criteria for this report. This allows y and date ranges.	you to filter the data displayed on the report by date criteria
What time frame do you want your report to	cover?
Date Criteria Field (recommended):	Date <u>R</u> ange or Criteria:
Job Run Date 💌 💌	is equal to yesterday
Selected Date Range/Criteria: is equal to yesterday	
	< <u>B</u> ack <u>N</u> ext> Cancel

The report will look like the following sample report (notice that the date at the top of the page contains a single date: yesterday's date):

Campaign Analyst Test report created with various conditions Date Range: 10/10/2001 - 10/10/2001										
Job Run Month					Conn					
Job Run Week	First	Last	Online		Per					
Job Run Date	Login	Logout	Time	Connects	Hr					
2001 10										
2001 41	12:28:08	20:46:12	43:36:01	3229	74.06	0	0	0	0	0
10/10/2001	12:28:08	20:46:12	43:36:01	3229	74.06	0	0	0	0	0
Section Summary	12:28:08	20:46:12	43:36:01	3229	74.06	0	0	0	0	(
Report Summary	12:28:08	20:46:12	43:36:01	3229	74.06	0	0	0	0	0

6 In the Additional Report Criteria wizard page, filter your data. If you leave these settings blank (which is common), then you would not narrow the data selected by the report. Select your conditions, and then

click Next.

Consider the following example, filters data based on Job Name:

Campaign Analyst Report Wizard Pag	e 4 (of 5)
Additional Report Criteria Set up to four additional criteria for this report.	This allows you to further filter the data.
What other criteria would you like to set fo	or this report?
Second Criteria Field (optional):	Values selected:
Job Name 💌	'mytest'
Third Criteria Field (optional): Fourth Criteria Field (optional): Fifth Criteria Field (optional):	
	< <u>B</u> ack <u>N</u> ext > Cancel

The report would include only data for the job named mytest.

If you selected a hierarchy branch as a group criteria (on page 2 of the wizard), you must select the hierarchy as a selection condition.

7 In the Report Title wizard page, type a name your report configuration. For example, if you typed the following title in the title field:

Campaign Analyst Report Wizard Page 5 (of 5)
Report Title Provide a title for this report. Once you have entered a title, you have finished the configuration for this report.
Title for this report: Test report created with various conditions Click Preview button to view the report. Preview Use the Back button to return to earlier pages in the Wizard and make changes. When you're satisfied with the report, click Finish to save the configuration.
< <u>B</u> ack <u>F</u> inish Cancel

The report will look like the following sample report (notice the title just below the Campaign Analyst heading):

Date Range	: 10/10/2001	ted witl 10/10/2001	h vario	us con	ditior	15	
Job Run Month Job Run Week	First	Last	Online		Conn Per		
Job Run Date	Login	Logout	Time	Connects	Hr		
2001 10							
2001 41	12:28:08	20:46:12	43:36:01	3229	74.06	0	
10/10/2001	12:28:08	20:46:12	43:36:01	3229	74.06	0	
Section Summary	12:28:08	20:46:12	43:36:01	3229	74.06	0	
Report Summary	12:28:08	20:46:12	43:36:01	3229	74.06	0	-

8 Click **Preview** to generate and view the report or click **Finish** to end the wizard (you can make changes to it later by using the **Change**

command). After you click **Finish**, your report configuration appears as the last item in the list of report configurations.

Note

Although it is possible to have more than one instance of the report wizard open at a time, for the most reliable performance, you should always try to have only one wizard open at a time.

Schedule a report

Schedule a report	Use the following procedure to schedule a time to print reports automatically. After you have scheduled a report, you can look in the Control Panel to view your scheduled reports: Start > Settings > Control Panel"Scheduled Tasks " option.
1	In Campaign Analyst, select a report configuration to schedule.
2	Select Tools > Scheduler.
3	In the Schedule dialog box, select the frequency option that corresponds with how often you want to print the report (Once, Daily, Weekly, Monthly). If you select Weekly or Monthly, the report will print on Monday only. If you want to choose a different week day, use MS Scheduler to change the day. The settings that you specify in MS Scheduler override the Campaign Analyst schedule.
4	Select a start time and date.
5	Type the number of copies you want the Avaya PDS to print, and then click OK .

Change a report

Change a report	If there is an existing report configuration that you need to modify, use the Change command to alter it.
1	Select a report configuration.
2	Select Reports > Change . The Campaign Analyst Report Wizard appears.
3	Read the Welcome page, and then click Next .
4	Follow the on-screen instructions to change the report criteria.

Print a report

Print a report	Use the following procedure to print a Campaign Analyst report.
1	Select a report configuration.
2	Select Reports > Print .
3	Type the number of copies you want to print, and then click OK .

Delete a report configuration

Delete a report configuration	Use the following procedure to delete a Campaign Analyst report configuration.	
1	Select a report configuration.	
2	Select Reports > Delete .	
3	Click Yes to delete the report configuration, or click No to close the message box without deleting the report configuration.	

Part III: Tools

21 Hierarchy Manager

Overview

Purpose	Hierarchy Manager is a Campaign Director tool to help you group and organize data. Hierarchy Manager lets you create agent, job, or dialer hierarchies that reflect the way your company or business is organized. For example, you can create relationships between the Avaya TM Predictive Dialing System (PDS) agents and the management structure of a company. You can use hierarchies in Campaign Monitor to adjust the scope of data to view and in Campaign Analyst to group data in reports.
Contents	 This section contains the following topics: Hierarchies Start Hierarchy Manager Create a hierarchy Open a hierarchy Add a level to a hierarchy Add a data item to a hierarchy Move a level or item within a hierarchy Rename a hierarchy level Remove a level from a hierarchy

• Remove a data item from a hierarchy

- Rename a hierarchy
- Delete a hierarchy

Hierarchies

Hierarchy branches, levels, and data items

A hierarchy contains one or more branches. Each branch contains three hierarchy levels (top, middle, and bottom), with one or more data items assigned to the bottom level. Each branch can contain more than one middle level, and each middle level can contain one or more bottom levels.



For example, a job hierarchy contains two branches. Each branch follows this structure:

- Top level = Portfolio (Loans, Savings)
- Middle level = Account Type (Car, Mortgage, Certificate Deposits)
- Bottom level = Term (60 months, 30 years)Data items (job names) were assigned to the bottom level of each

branch.

When you add a job or an agent to the Avaya PDS, it becomes available for use in Hierarchy Manager immediately. Also, agents, jobs, and dialers are available in Hierarchy Manager until data in the database expires. This allows for historical reporting. For example, if you remove an agent login from the Avaya PDS but the database still contains data for that agent, the name of the agent still appears in the Hierarchy Manager list of available agents.
Hierarchy Manager supports three hierarchy types: agent, job, and dialer.

Agent hierarchies An agent hierarchy creates statistical relationships for individual agent activity and performance data that the Avaya PDS collects during calling activities. Activity and performance data examples include Talk Time, Idle Time, and Connects per Hour.

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. Campaign Monitor can use this hierarchy to group agent activity and performance data by supervisor.

Agent hierarchies are most effectively applied when monitoring agent views in Campaign Monitor and when grouping data in Campaign Analyst agent reports.

Job hierarchies A job hierarchy creates statistical relationships for individual job activity data that the Avaya PDS collects during calling activities. Examples of job activity data include Calls Placed, Connects per Hour, and Time in Wait Queue.

In a multi-dialer environment, job hierarchies apply to all jobs across all dialers unless you make all jobs unique across all dialers or 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.

Job hierarchies are most effectively applied when monitoring job views in Campaign Monitor and when grouping data in Campaign Analyst job reports.

Dialer hierarchies A dialer hierarchy creates relationships for individual dialer activity data that the Avaya PDS collects during calling activities. Dialer activity includes all available job and agent activity and performance data.

For example, in a four-dialer pod environment, the collections department uses dialer1 and dialer2 and the marketing department uses dialer3 and dialer4. A hierarchy branch could contain a level for department with individual dialers assigned to the level. Dialer hierarchies let you meaningfully group data by department and dialer.

Start Hierarchy Manager

Start Hierarchy Manager	Hierarchy Manager can be accessed from the Tools menu in either Campaign Monitor or Campaign Analyst. Use the following procedure to access the Hierarchy Manager.
1	Select Start > Programs > Avaya > Campaign Director > Campaign Monitor or Campaign Analyst.
2	Select Tools > Hierarchy Manager . The Hierarchy Manager window appears.

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Create a hierarchy

Overview Create a hierarchy	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. If you name two like levels the same under one parent level, Hierarchy Manager combines them. For example, if 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 Hierarchy > 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. To add a hierarchy level, right-click the level above where you want to add a level, and then select Add Level . Hierarchy Manager inserts a level named New Level.
4	Rename the new level. Right-click New Level , select Rename , type 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.

- Select Hierarchy > 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 Hierarchy Properties dialog box, type a name (up to 64 characters) for the hierarchy, and then click **OK**. Hierarchy Manager saves the hierarchy settings.

Open a hierarchy

Open a hierarchy	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.

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Add a level to a hierarchy

Hierarchy levels	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 that is subordinate to 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.
	(top level) can contain one or more middle levels. Each middle level can contain one or more bottom levels. Bottom levels can contain only data items. No other level can contain data items.
	If you name two like levels the same under one parent level, Hierarchy Manager combines them. For example, if a middle level contains two bottom levels named Supervisor, Hierarchy Manager combines all data items assigned to both Supervisor levels into one level and removes the duplicate level.
	Hierarchy Manager does not save branches that do not contain data items. Be sure that all branches contain data items before you save the hierarchy.
Add a level to a hierarchy	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 select Add Level . Hierarchy Manager inserts a level named New Level.
3	Right-click New Level, and then select Rename.
4	Type a new name for the level (up to 20 characters), and then press Enter .

Add a data item to a hierarchy

Add a data item to a hierarchy	Use the following procedure to add data items to a hierarchy. Hierarchy Manager lets you add data items to only the bottom-most levels of the 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.

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Move a level or item within a hierarchy

Overview	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.
Move a level or item within a hierarchy	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

Overview	Hierarchy Manager lets you rename levels in a hierarchy to reflect organizational changes. If you name two like levels the same under one parent level, Hierarchy Manager combines them. For example, if a hierarchy middle level contains two bottom levels named Supervisor, Hierarchy Manager combines all data items assigned to both Supervisor levels into one level and removes the duplicate level.
Rename a hierarchy 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 .

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Remove a level from a hierarchy

Overview	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).
Remove a level from a hierarchy	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

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

Rename a hierarchy	Use the following procedure to rename a hierarchy.
1	Open the hierarchy that you want to change.
2	Select Hierarchy > Save As .
3	In the Hierarchy Properties dialog box, type 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 .

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Hierarchy Manager saves the hierarchy settings with the new name.

Delete a hierarchy

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.

22 Completion Code Manager

Overview

Purpose	The Avaya TM Predictive Dialing System (PDS) uses Completion Code Manager to categorize completion codes as Right Party Contacts (RPCs), Abandons, and Closures.
Contents	This section contains the following topics:
	Completion code categories
	Start Completion Code Manager
	• Set a completion code as RPC
	• Set a completion code as a Closure
	• Set a completion code as an Abandon
	Remove a completion code
	Change a completion code description
	View Completion Code Manager for another dialer

Completion code categories

Overview	During an Avaya PDS job, agents use a completion code to indicate the outcome of a call, such as Promise to Pay or Left Message. You can categorize completion codes for monitoring and reporting purposes with Completion Code Manager.
Completion code categories	There are three completion code categories: RPC (Right Party Contact), Closure, and Abandon.
	RPC indicates the agent called and talked to the correct party. This designation may overlap with the Closure designation.
	 Closure indicates that the agent called and talked to a party. Closure can represent a variety of outcomes, including the following examples: Balance paid in full Bankruptcy Deceased
	 Sale verified and completed
	This designation may overlap with the RPC designation.
	Abandon indicates that a call has been abandoned and the Avaya PDS has disconnected the call. An abandon can be caused by one of several events:
	• An inbound caller hung up in the inbound wait queue
	• A customer hung up while in the outbound wait queue
	• The time limit for a call being held in a queue was met

Completion code assignments

You can assign a completion code to more than one category. For example, you can classify a verified sale as an RPC and a Closure. The following illustration shows sample completion code assignments.



Multi-dialer environment	Completion Code Manager lets you change the completion code description and code designation for your completion codes. However, if the multi-dialer feature is enabled on your system, you must take one of the following two actions:	
	• Make the identical changes on each dialer's set of completion codes	
	• Copy the completion code file to each dialer	
Completion code designation changes	When an Avaya PDS job starts, it applies the current Completion Code Manager settings. If you make changes to code designations (RPC, Closure, or Abandon) while a job is running, you need to restart the job to apply your new code designation changes.	
Completion code descriptions	If you change one or more completion code descriptions in Completion Code Manager, Campaign Monitor automatically updates to use the new descriptions. You do not need to restart a job for the Avaya PDS to recognize new descriptions.	
	If you use the Campaign Analyst Agent Completion Code Summary report, you need to designate which codes you want to appear on the report. Insert an asterisk (*) as the first character of the description for	

each completion code you want to include in the report. You can define up to 14 codes. If you define more than 14 codes, Campaign Analyst uses the first 14 codes (in numerical order) and disregards the remaining designated codes.

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Start Completion Code Manager

Start Completion Code Manager	You can start Completion Code Manager from Campaign Editor, Campaign Monitor, or Campaign Analyst. Use the following procedure to start Completion Code Manager.
1	Select Start > Programs > Avaya > Campaign Director > Campaign Editor, Campaign Monitor or Campaign Analyst.
2	Select Tools > Completion Code Manager . The Completion Code

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2 Select Tools > Completion Code Manager. The Completion Code Manager window appears.

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Set a completion code as RPC

Set a completion code as RPC	Use the following procedure to set a completion code as an RPC.
1	From the list of completion codes in the right-hand pane, select a completion code.
2	Drag the completion code to the left-hand pane and drop it under the row labeled RPCs .

Set a completion code as a Closure

Set a completion code as a Closure Use the following procedure to set a completion code as a Closure. I From the list of completion codes in the right-hand pane, select a completion code.

2 Drag the completion code to the left-hand pane and drop it under the row labeled **Closures**.

Set a completion code as an Abandon

Set a completion code as an Abandon	Use the following procedure to set a completion code as an Abandon.
1	From the list of completion codes in the right-hand pane, select a completion code.
2	Drag the completion code to the left-hand pane and drop it under the row labeled Abandons .

Remove a completion code

Remove a completion code	Use the following procedure to remove a completion code from an RPC, Closure, or Abandon category.
1	From the list of completion codes in the left-hand pane, right-click the completion code you want to remove.
2	Click Delete .

When you delete the completion code from the list of categorized completion codes, the code still appears it in the right-hand pane and is available to be selected again.

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Change a completion code description

Change a completion code description	Use the following procedure to change a completion code description.	
1	From the list of completion codes in the left-hand pane of the window, double-click the Description column of the completion code you want to change.	
2	Type the new description, and then press Enter . Completion Code Manager displays the new description.	

View Completion Code Manager for another dialer

View Completion Code Manager for another dialer	Use the following procedure to view Completion Code Manager for another dialer.
1	Start Campaign Editor, Campaign Monitor, or Campaign Analyst .
2	(Campaign Editor only) On the button bar, select the dialer you want to view.
3	Select Tools > Call Completion Codes . In Campaign Editor, the Completion Code Manager window for the selected dialer appears.
4	(Campaign Monitor and Campaign Analyst) Select a dialer from the Dialer dialog box, and then click OK . The Completion Code Manager window for the selected dialer appears.

23 PC Analysis Telnet

Overview

PurposeThe PC Analysis Telnet tool provides access to the character-based PC
Analysis menus. PC Analysis is a reporting and troubleshooting tool
included with the AvayaTM Predictive Dialing System (PDS). The PC
Analysis Telnet tool also lets you transfer extract output files to a
network location.

Contents This section contains the following topics:

- PC Analysis Telnet
- Toolbar icons
- Start PC Analysis Telnet
- Transfer PC Analysis extract output files

PC Analysis Telnet

Overview The PC Analysis Telnet tool included in Campaign Analyst provides access to the character-based PC Analysis menus, which you can use to define extract files and generate extract output files. You can also use PC Analysis Telnet to move PC Analysis extract output files from the Avaya PDS to a network location.

After you transfer the extract output files, you can use spreadsheet, word processing, and reporting packages available to you to create reports, charts, and spreadsheets.

PC Analysis Telnet is available from the Campaign Analyst Tools menu only. If access to Campaign Director is not available, you will need to use a third-party telnet tool to access Avaya PDS menu system and PC Analysis.

Toolbar iconsThe PC Analysis Telnet window includes a set of tools that help you
use and navigate the character-based menus and PC Analysis screens.
The PC Analysis Telnet toolset is similar to that of System Telnet but
also includes four additional tools designed specifically for use with PC
Analysis.

Toolbar Name	lcon	Description
Connect		Use the Connect tool to select the dialer for which you want to generate or transfer extract data files. This function is not available while you are connected to a system. You must disconnect from a dialer before you can connect to a different dialer.
Disconnect		Use the Disconnect tool to end the telnet session for the current dialer. If you exit the menu system, PC Analysis Telnet automatically disconnects your session. After you disconnect, you can connect to a different dialer or exit the PC Analysis Telnet application.
Exit out of entry	4	Use the Exit out of entry tool to move back one screen in the character-based screens. This provides the same functionality as Ctrl-x.
Done with entry	\$	Use the Done with entry tool to move to the next character-based screen. This provides the same functionality as the Done key (F1).
Select	.	Use the Select tool from the PC Analysis Extraction Configuration Edit screen. Select moves your cursor to the Select column. Press Enter after typing the Select value.

Toolbar Name	lcon	Description
Criteria		Use the Criteria tool from the PC Analysis Extraction Configuration Edit screen. Criteria moves your cursor to the Criteria column. Press Enter after typing the Criteria statement.
Run extract	9 3	Use Run extract from the PC Analysis Extraction Configuration Edit screen to generate a PC Analysis extract output file based on the configuration of the open extract file.
Get file	G	Use Get file to transfer one or more PC Analysis extract output files from the dialer to a network location.

Start PC Analysis Telnet

Start PC Analysis Telnet	The PC Analysis Telnet tool provides access to the PC Analysis character-based menus. Use the following procedure to start PC Analysis Telnet.	
1	Select Start > Programs > Avaya > Campaign Director > Campaign Analyst.	
2	Select Tools > PC Analysis Telnet . The PC Analysis Telnet window appears.	
3	Select File > Connect. The Connect to PDS 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.	

Transfer PC Analysis extract output files

Transfer PC Analysis extract output files	Use the following procedure to transfer generated PC Analysis extract output files from an Avaya PDS to a network location or to a personal computer.		
1	Start PC Analysis Telnet .		
2	Connect to an Avaya PDS 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.		
7	Click Cancel to close the FTP Client dialog box.		

24 System Telnet

Overview

Purpose	The System Telnet tool provides access to the Avaya TM Predictive Dialing System (PDS) character-based user interface.	
Contents	This section contains the following topics:	
	• System Telnet	
	Toolbar icons	
	Start System Telnet	

System Telnet

Overview Use the System Telnet tool to access the system and administrative menus. The telnet session lets you access Avaya PDS features available through character-based menu systems. For example, you can manage user accounts, check calling list status, or manage agent job lists. You can also access some Campaign Monitor and Campaign Editor features through character-based menus.

System Telnet is available from the Tools menu in Campaign Editor, Campaign Monitor, and Campaign Analyst. If access to Campaign Director is not available, you will need to use a third-party telnet tool to access Avaya PDS menu system and PC Analysis.

TIP

To access PC Analysis menus, use the PC Analysis Telnet tool in Campaign Analyst. PC Analysis Telnet includes special tools designed to help you navigate the PC Analysis extract screens.

Toolbar icons

Toolbar icons

The System Telnet window opens with a set of tools that help you use and navigate the character-based menus.

Toolbar Name	lcon	Description
Connect		Use the Connect tool to select the dialer for which you want to access character- based features. This function is not available while you are connected to a dialer. You must disconnect from a dialer before you can connect to a different dialer.
Disconnect		Use the Disconnect tool to end the telnet session for the current dialer. If you exit the menu system, System Telnet automatically disconnects your session. After you disconnect, you can connect to a different dialer or exit the System Telnet application.
Exit out of entry	4	Use the Exit out of entry tool to move back one screen in the character-based screens. This provides the same functionality as Ctrl-x.
Done with entry	\$	Use the Done with entry tool to move to the next character-based screen. This provides the same functionality as the Done key (F1).

Start System Telnet

Start System Telnet	Use the following procedure to start System Telnet to access the Avaya PDS character-based menus.		
1	Select Start > Programs > Avaya > Campaign Director > Campaign Editor, Campaign Monitor, or Campaign Analyst.		
2	Select Tools > System Telnet . A System Telnet window appears.		
3	Select File > Connect . The Connect to PDS 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 your system login and password to access the system menus or the administrator login and password to access the administrative menus. The character-based menu system associated with your user name appears in the Telnet window.		

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25 Agent Blending

Overview

Purpose	The Agent Blending tool allows you to manage domains (ACD call queues) and domain groups (every domain is a member of a domain group). Start the Agent Blending tool from the Campaign Monitor or Campaign Editor Tools menu.	
Contents	This section contains the following topics:	
	Agent blending Supported ACDs	
	Supported ACDs Switch terminology	
	• Switch terminology	
	• Domains	
	Domain Groups	
	Start the Agent Blending tool	
	Create a domain group	
	Create a domain	
	Edit domain group settings	
	Edit domain settings	
	• Delete a domain group	
	• Delete a domain	
	• Move a domain to a different group	
- Stop the blend engine
- Start the blend engine
- Reset the blend engine
- Resynch the blend engine

- View ACD statistics
- View alerts
- View transactions

Agent Blending

Overview	Agent Blending integrates outbound calling activities on your Avaya PDS with inbound calling activities on your ACD. In an Agent Blending system, ACD agents log on to the Avaya PDS and the ACD. Agent Blending monitors the activity on the ACD and uses this information to determine when to acquire agents for outbound calling and when to release ACD agents to handle inbound calls. The Avaya PDS uses a pool of ACD (blend) agents for outbound calling. The system acquires the pooled agents for outbound calling when the inbound calling activity decreases. It releases these agents to inbound calling when the inbound calling activity increases. This movement keeps the ACD blend agents busy while keeping the ACD service level within your prescribed limits.
Predictive Agent Blending	If your first priority is servicing your inbound customers and your inbound volume is fairly high, you will benefit from using Predictive Agent Blending. Predictive Agent Blending focuses on the inbound mission and only acquires agents for outbound when the Service Level or Average Speed to Answer parameters are above the desired value. These agents take inbound calls until the Avaya PDS predicts that there will be too many agents on inbound (the Avaya PDS bases the prediction on the service level requirements you set). The Avaya PDS then acquires agents from the ACD to handle outbound calls until the inbound volume increases.
	Call centers with moderate to heavy inbound traffic and more than 25 agents in an inbound pool benefit from using Predictive Agent Blending.
	Predictive Agent Blending uses events from the ACD to forecast call volume and determine when to move ACD agents between inbound and outbound calling.
	There are two control method option within Predictive Agent Blending: Average Speed to Answer and Service Level . 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. Each type requires different settings.
	Average Speed to Answer (ASA)
	This domain group type uses the target ASA field (MAAS) for calculating when to acquire and release agents. Agents are acquired 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. Agents are released 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. Agents are acquired 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. Acquisitions will stop when the actual service level reaches the Abatement Service Level value. Agents will be released back 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 If your focus is on outbound calling, but you need to service a low volume of inbound customers, you will benefit from using Proactive Agent Blending. Proactive Agent Blending focuses on outbound calls and releases agents to inbound only when an inbound calls enters a monitored queue on the ACD. When an ACD agent logs on, the Avaya PDS immediately acquires the agent for outbound calling. When an inbound call comes into the ACD queue, the Avaya PDS releases the agent to handle the call. The number of queued calls before agents release to inbound calls continue to come in, the Avaya PDS continues to release agents. As soon as the queue is empty, the Avaya PDS acquires the agent for outbound calls.

Supported ACDs

Supported ACDs

ACDs The system supports Agent Blending on the following ACDs:

- Aspect CallCenter
- DEFINITY G3
- PINNACLE 5ESS
- Northern Telecom Meridian 1
- Rockwell Spectrum
- Siemens ROLM 9751, Release 9005

The AvayaTM Predictive Dialing System (PDS) Installation Planner contains a full description of the requirements for each supported switch. Each switch has unique settings and terminology.

Regardless of the special terminology used by ACD vendors, you configure your ACD to work with the Avaya PDS. The Avaya PDS uses domains and domain groups to control Agent Blending.

Switch terminology

Aspect Agent group A set of agents handling similar types of calls. Agents log into an agent group when they log onto 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.

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. It controls communication between the Aspect CallCenter and the system. 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 systemlevel parameters.

DEFINITY G3 Expert Agent Selection (EAS) An optional Definity G3 feature. It 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. It enables 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 into a maximum of three splits.

Vector Vector settings determine how the switch handles incoming calls based on the number dialed. When the DEFINITY G3 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.

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 system 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.

Application The system treats applications as domains. In Spectrum, incoming calls are routed to applications. An application is a type or category of call you want handled in a similar way. Applications may 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, it queues agent groups, places calls in wait queues, and allows the system 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 the Predictive Dialing System.

Provisioning A set of actions that add, alter, or delete system parameters. In the system 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 Spectrum's name for its Computer Telephony Interface (CTI) link. Transaction Link is a communications channel between the Spectrum and the system. 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 system to monitor calls on Spectrum.

Meridian ACD-DN (directory number) The ACD address for a call queue. It is the Agent Blending domain address.

ACD Agent Position ID The number that identifies an agent's telephone extension. Agent Blending agents log onto the system 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 into call queues that are Agent Blending domains.

Multiple queue assignment A Meridian option that allows agents to log into 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.

ROLM 9005 ACD group or agent group A group of agent extensions that receives calls from the same pilot number. Each ACD group has its own telephones and members.

Call-progress event Any change in a call's state in ROLM 9005. CallBridge passes call-progress event messages from ROLM 9005 to CallPath. Call-progress event messages provide the information Agent Blending needs to acquire and release agents.

Class of service A code indicating the features, extensions, and trunk access available to an ACD address. Agent Blending uses agent groups with the CallPath class of service.

Directory Number (DN) An ACD address or extension associated with an ACD-defined group (such as an agent group or a hunt group) or with a device such as a telephone or a Voice Response Unit (VRU) port.

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. It uses the dummy hunt group's pilot number as the domain extension.

Domains

Overview	No matter which type of switch your system uses, the Avaya PDS requires domains and domain groups. Domains are the Avaya PDS's name for ACD call queues which are defined on the ACD and on the Avaya PDS.
	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. It uses these statistics to determine when to move ACD agents between inbound and outbound calling. It does not total statistics across domain groups and it does not monitor activity in call queues that are not part of a domain group.
	After your system is installed, assign your agents to domains. Usually you assign 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
Configure domains	The types of domains 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. It uses acquire domains to acquire agents for outbound calling.
	In addition to inbound and acquire domains, the Avaya PDS 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.

Outbound Agent Blend calls as soon as they log on to the Avaya PDS 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

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 Level . The Agent Blending Administrator window changes dynamically depending on which one of the three Control Methods you choose.
Outbound Only	The Avaya PDS acquires outbound-only agents to handle outbound calls as soon as they log onto the system 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 (no inbound domain). Select Outbound as the domain group type. Assign at least one acquire domain to the group (no inbound domain).
	If you select Outbound Only, you are required to enter a Minimum Queued for Release value. Type a value between 0 and 999. The default value is 0.

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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 system uses to calculate the Average Speed to Answer. It influences how responsive the system is to fluctuations in answer delays. It is an interval that begins each time you start the system or restart Agent Blending. 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 (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. Type a value between 1 and 999. The default value is 60.
Agent Utilization Threshold (required)	The percentage of agents available to take calls. This setting determines how quickly the system moves agents between inbound and outbound calls. The goal is to prevent agents from being acquired or released too frequently. Agents are available if they are not taking calls
	or updating records. Agent Blending tracks calling statistics and uses this information to predict future availability. To calculate the threshold, the system divides the projected inbound call volume by the projected number of available agents. Type a value between 1 and 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 option when it is more important to meet outbound goals than to service inbound calls. Type a value between 0 and 999. The default value is 0.
Initial Traffic Rate (optional)	The estimated number of calls each second. The system uses this rate for the first 30 calls. It ensures that there are enough agents to handle the first 30 calls. Type a value between 0 and 999.
Talk Time (optional)	The estimated minimum seconds agents spend connected on each inbound call. The system adds Talk time and After Call Work Time to determine agent availability. Agent availability is sometimes called service capacity. Type a value between 1 and 999.
After Call Work Time (optional)	The estimated minimum seconds agents spend, after a call, updating records and processing information. Type a value between 1 and 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. Type a value between 0 and 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. Type a value between 0 and 100 (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. Type a value between 1 and 999. The default value is 60.
Time Interval (required)	Same definition as seen in previous section.
Agent Utilization Threshold (required)	Same definition as seen in previous section.
Minimum Agents on Outbound (required)	Same definition as seen in previous section.
Initial Traffic Rate (optional)	Same definition as seen in previous section.

Parameter	Definition
Talk Time (optional)	Same definition as seen in previous section.
After Call Work Time (optional)	Same definition as seen in previous section.

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Start the Agent Blending tool

Start the Agent Blending tool	Start the Agent Blending tool from either Campaign Monitor or Campaign Editor.
1	Select Start > Programs > Avaya > Campaign Director > Campaign Monitor or Campaign Editor.
2	Select Tools > Agent Blending . The Agent Blending Administrator window appears.

Create a domain group

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 the earlier topics that discuss Outbound Only, Service Level, and Average Speed to Answer.

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Create a domain

Create a domain	You must stop your blend engine in order to create a domain. 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.
1	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 .
2	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.
3	Click OK . You have created the domains name and must now define in the domain settings.
4	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 earlier topics that discuss Domain Type, Phone Number, Gateway ID, Application ID, and PBX ID.

Edit domain group settings

Edit domain group settings	You must stop your blend engine in order to edit domain group settings.
1	In the Agent Blending Administrator window, select the domain group you want to edit.
2	Double-click the Control Method field to select Outbound Only, Service Level, or Average Speed to Answer. For descriptions of these options, see their sections shown earlier.
3	The domain group fields change dynamically depending on which Control Method option you select. See the Domain Groups section shown earlier for descriptions of the domain group fields. To determine whether the field has a drop-down list or an editable value for you to use, double-click the field. Save your work.

Edit domain settings

Edit domain settings	You must stop your blend engine in order to edit domain settings.
1	In the Agent Blending Administrator window, select the domain you want to edit.
2	Double-click the Domain Type field select Inbound, Transient Acquire, Team Acquire, or Overflow. For descriptions of these options, see the Domain section shown earlier.
3	Type values for the Phone Number , Gateway ID , Application ID , and PBX ID fields. For descriptions of these fields, see the Domains section shown earlier.

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Delete a domain group

Delete a domain group	You must stop your blend engine in order to delete a domain group.
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.

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Delete a domain

Delete a domain	You must stop your blend engine in order to delete a domain.	
1	In the Agent Blending Administrator window, select the domain you want to delete.	
2	Select File > Delete Domain , and then save your work.	

Move a domain to a different group

Move a domain to a different group	You must stop your blend engine in order to move a domain to a different domain group. 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

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 topmost level in the tree view.)
1	Open Campaign Monitor or Campaign 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

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 Campaign Monitor or Campaign Editor and select Tools > Agent Blending . The Agent Blending Administrator window appears.
2	In the tree view, select a dialer.

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3 Select **Blend Engine** > **Start**.

Reset the blend engine

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 Campaign Monitor or Campaign 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

Resynch the blend engine	The Resynch button updates the Avaya PDS system with the current ACD agent queue assignments. Use Resynch after a supervisor uses the ACD to reassign agents to different inbound queues.
1	Open Campaign Monitor or Campaign 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

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

Overview	Agent Blending alerts list Avaya PDS system and status messages about Predictive Blend. For example, the Avaya PDS system may display updates on the status of its connection to the gateway. Alerts contain a brief message. For example: "acdmn: domain 24122 (ext 24122) removed from acquire service; Gateway 1 not configured with load management".
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

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.

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Preventing Toll Fraud

Toll Fraud is the unauthorized use of your telecommunications system by an unauthorized party (for example, a person who is not a corporate employee, agent, subcontractor, or working on your company's behalf). Be aware that there is a risk of toll fraud associated with your system and that, if toll fraud occurs, it can result in substantial additional charges for your telecommunications services.

Avaya Fraud Intervention

If you suspect that you are being victimized by toll fraud and you need technical assistance or support, call the Technical Service Center's Toll Fraud Intervention Hotline at 1-800-643-2353.

Providing Telecommunications Security

Telecommunications security of voice, data, and/or video communications is the prevention of any type of intrusion to, that is, either unauthorized or malicious access to or use of, your company's telecommunications equipment by some party.

Your company's "telecommunications equipment" includes both this Avaya product and any other voice/data/video equipment that could be accessed via this Avaya product (that is, "networked equipment").

An "outside party" is anyone who is not a corporate employee, agent, subcontractor, or working on your company's behalf. Whereas, a "malicious party" is Anyone, including someone who may be otherwise authorized, who accesses your telecommunications equipment with either malicious or mischievous intent.

Such intrusions may be either to/through synchronous (time multiplexed and/or circuit-based) or asynchronous (character-, message-, or packet-based) equipment or interfaces for reasons of:

Utilization (of capabilities special to the accessed equipment)

Theft (such as, of intellectual property, financial assets, or toll-facility access)

Eavesdropping (privacy invasions to humans)

Mischief (troubling, but apparently innocuous, tampering)

Harm (such as harmful tampering, data loss or alteration, regardless of motive or intent)

Be aware that there may be a risk of unauthorized or malicious intrusions associated with your system and/or its networked equipment. Also realize that, if such an intrusion should occur, it could result in a variety of losses to your company, including but not limited to, human/data privacy, intellectual property, material assets, financial resources, labor costs, and/or legal costs. Your Responsibility for Your Company's Telecommunications Security

The final responsibility for securing both this system and its networked equipment rests with you - an Avaya customer's system administrator, your telecommunications peers, and your managers. Base the fulfillment of your responsibility on acquired knowledge and resources from a variety of sources including but not limited to:

Installation documents

System administration documents

Security documents

Hardware-/software-based security tools

Shared information between you and your peers

Telecommunications security experts

To prevent intrusions to your telecommunications equipment, you and your peers should carefully program and configure your:

Avaya provided telecommunications system and their interfaces

Avaya provided software applications, as well as their underlying hardware/software platforms and interfaces

Any other equipment networked to your Avaya products

Federal Communications Commission Statement

Part 15: Class A Statement. This equipment has been tested and found to comply with the limits for a Class A digital device, pursuant to Part 15 of the FCC Rules. These limits are designed to provide reasonable protection against harmful interference when the equipment is operated in a commercial environment. This equipment generates, uses, and can radiate radio-frequency energy and, if not installed and used in accordance with the instructions, may cause harmful interference to radio communications. Operation of this equipment in a residential area is likely to cause harmful interference, in which case the user will be required to correct the interference at his own expense.

Part 68: Network Registration Number. This equipment is registered with the FCC in accordance with Part 68 of the FCC Rules. It is identified by FCC registration number AV1USA-28011-MA-T. Refer to "Federal Communications Commission Statement" in "About This Book" for more information regarding Part 68.

Canadian Department of Communications (DOC) Interference Information

This digital apparatus does not exceed the Class A limits for radio noise emissions set out in the radio interference regulations of the Canadian Department of Communications.

Le Présent Appareil Nomérique n'émet pas de bruits radioélectriques dépassant les limites applicables aux appareils numériques de la class A préscrites dans le reglement sur le brouillage radioélectrique édicté par le ministére des Communications du Canada.

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European Union Declaration of Conformity

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

Electromagnetic Compatibility (89/336/EEC)

Telecommunications Terminal Equipment (TTE) i-CTR3 BRI and i-CTR4 PRI

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

Campaign Director

Overview

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Campaign Director is a suite of call management applications that serve as the interface between a call center supervisor and the Avaya PDS. Campaign Director applications allow you to easily and dynamically design, control, monitor, and analyze call center activity. The Avaya PDS increases your call center's productivity and helps you achieve your campaign goals.

The Avaya PDS consists of software and networked components, including the Avaya PDS cabinet, supervisor workstations, agent workstations, printers, and modems.

The Campaign Director software provides a graphical user interface to the Avaya PDS which runs on your supervisor workstation.

New features of Campaign Director

The newest release of Campaign Director encompasses all existing functionality of earlier versions. The following list describes the new features of Campaign Director.

Integration of monitoring and control functions

The functionality of Campaign Monitor and Campaign Manager are combined into Campaign Monitor to provide a single interface to all job and agent monitor and control functions.

Enterprise-wide monitoring

Campaign Monitor allows you to view multiple dialers across the enterprise. Campaign Monitor provides the ability to focus on a single agent on a single dialer as well as provide an enterprise-view of a call center.

Customizable views

In order to satisfy the needs of a wider, more diverse audience, Campaign Monitor provides tools for customizing views of enterprise data and saving view configurations.

Improved speed and performance

Files are retrieved from and stored directly to the PDS by means of the Command and Control interface, therefore, eliminating the need to synchronize with each Avaya PDS.

Improved User Interface (UI)

The current tabular layout of Campaign Editor is replaced with a single form to maintain the same look and feel as Campaign Monitor. This new design is similar to MicrosoftTM Outlook.

Improved usability

The job and record selection editor screens display additional information which lets you view the current status of the jobs or record selections on a specified system.

Ease of use

Campaign Editor automaticallys execute the record selection (if needed) and then verifies the job. If the job verification passes, you will be offered a choice of starting the job or cancelling the operation. You still have the capability to run record selections as a separate action.

Global Campaign Director features

With Campaign Director's new user interface, there are several features that have been added in order to increase the ability to customize settings. The table below identifies some of the new features that are used throughout the Campaign Director applications and tools.

New feature	Description
Button bar	Allows you to use shortcuts and navigate more easily.
Sort columns	Allows you to sort data in ascending and descending order by clicking a column's heading.
Resize columns	Allows you to make a column wider or narrower by clicking the area between column headings and then dragging to the left or right.
Refresh	Allows you to refresh the data in the active window.
Launch tools	Allows you to launch various tools: Hierarchy Manager, Completion Code Manager, Agent Blending, PC Analysis telnet, and System telnet.
Multiple dialer controls	Allows you to save and retrieve record selections, phone strategies, and jobs from multiple dialers if this feature is enabled. Also allows you to run reports across dialers.
Define main dialer	Allows you to define the main dialer within a pod (up to four dialers).


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Multi-dialer

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Shared features

Overview

A pod of Avaya PDS dialers contains up to four dialers connected through a middle-tier server. Following is a list of features that are shared among dialers in a pod:

- calling lists
- jobs
- phone strategies
- record selections

A single Avaya PDS can dial up to 130,000 outbound calls per hour. With the multi-dialer feature enabled, you can manage up to four dialers with list sharing across a distributed dialer network, enabling increased outbound call volume of up to 500,000 calls per hour.

A multi-dialer office environment greatly increases your company's outreach capacity. The functionality allows you to manage up to four dialers in a distributed architecture using a single, unified administration and supervisor interface for faster implementation of large-scale outreach programs.

Campaign Director makes it easy for you to manage operations and monitor traffic and workload across the multi-dialer network.

Shared calling list

The Avaya PDS allows you to run a job using a calling list from a different dialer. Any Avaya PDS in a pod can be used to dial another dialer's (in that same pod) calling list. This allows multiple dialers to call on the same calling list at the same time, which provides scalability on a single campaign above the physical agent limitation of one Avaya PDS.

The primary advantage of a shared calling list is speed. Imagine a job with 11,277 records finishing in 1/4 the normal time!

The shared list feature allows the agent capacity of multiple Avaya PDSs to be used for a single job. For example, one supervisor on dialer 1 (in a pod of 4) can use a calling list that resides on dialer 3, start a job that resides on dialer 2, and have agents from all 4 Avaya PDSs log in to the job to complete outbound calls.

Pod monitoring

The pod feature combines monitoring, control, and administration of all four dialers in a pod from a single Campaign Director workstation.

Multi-dialer agent login management

You can create and manage logins and passwords for multiple dialers from a single system. For example, a login and password created on one dialer may be populated to all dialers in a pod.

Multi-dialer monitoring

Campaign Monitor supports multiple dialers across the pod. For example, real-time job data from multiple dialers can be aggregated into a single view of the overall pod.

Multi-dialer control

Campaign Monitor provides control functions across all dialers in a pod. This allows one supervisor to stop jobs, adjust Expert Calling Ratio, assign line pools, and perform other job control functions from a single Campaign Director workstation.

Multi-dialer administration

Campaign Director applications and tools provide administration across all dialers in a pod. For example, you can copy, delete, and modify phone strategies, record selections, or jobs, regardless of the dialer they reside on. If you delete a record selection, you will first be prompted for the dialer the record selection resides on, and then you will be prompted for which record selection you want to delete.



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Primary and secondary dialers

Overview

In a pod, there are dialers that are configured as the "primary" dialer and the "secondary" dialer.

Primary dialer

A pod's primary dialer is an Avaya PDS dialer that runs the mid-tier software and controls that coordinations data management are. Every Avaya PDS pod must have a primary dialer. Secondary dialers feed data to the primary dialer that processes the data and makes it available for monitoring and reporting. In this way, the system supervisor can view status or create reports that include the operation of all the dialers in the pod.

Secondary dialer

The secondary dialer is any dialer of an Avaya PDS pod that reports data to and is coordinated with other secondary dialers by a primary dialer. One secondary dialer can also be configured to take over primary dialer functions in the event of a primary dialer failure.

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Pod impacts

Overview

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If you work with a pod (one to four dialers), there are special considerations to think about as you create ways to manage, control, and administer settings across multiple dialers.

Multi-dialer

Campaign Monitor always shows data for all dialers in a pod. However, the controls for multi-dialer are turned off by default. You can turn on the multi-dialer control from Settings > Options. Choose which dialers in a pod to view. See "View control functions" for more information.

Once the multi-dialer control is turned on, each job control dialog box (for example, Job Linking or Change Time Zones) shows a check mark. If you want to control a single dialer, clear the check box.

Completion codes

Dialer completion codes and their corresponding code number and code description are contained in a system file called compcode.cfg. Each dialer has one compcode.cfg file.

Completion codes are used in a variety of ways. Initially, they are used by the agent to end a call with a customer. This tells the Avaya PDS what the outcome of that call was. Completion codes are also used as part of reporting. They are essential to accurate reporting and can be used to determine the success of a campaign.

If there are four dialers in a pod, that also means there are four compcode.cfg files. It is important to keep these four completion code files synchronized for a variety of reasons:

- Agents use the same codes for the same call outcome
- Reporting from completion codes is accurate
- Eliminates the need for troubleshooting for reasons of inaccurate completion codes. Keeps all dialer completion codes synchronized
- To aggregate data across dialer effectively, completion code descriptions and completion code assignments (RPC, Abandon, Closure) must remain consistent across all dialers in a pod

Jobs

Jobs should be named carefully. Use the following guidelines when creating or modifying jobs:

- Do not create multiple jobs on multiple dialers with the same name if they have very different job parameters.
- If you want control like jobs in a single step (jobs with similar or like parameters), then name the jobs the same on different dialers. For example, if you want to change the quota on job1 on all dialers, you can do so in one step.

Agents

In a pod environment, agent logons must be unique across dialers.



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Architecture



Animation

Architecture



Architecture



Animation

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Tier Architecture
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Animation

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Campaign Life Cycle

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Completion Code Manager

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Completion code categories

Overview

During an Avaya PDS job, agents use a completion code to indicate the outcome of a call, such as Promise to Pay or Left Message. You can categorize completion codes for monitoring and reporting purposes with Completion Code Manager.

Completion code categories

There are three completion code categories: RPC (Right Party Contact), Closure, and Abandon.

RPC

indicates the agent called and talked to the correct party. This designation may overlap with the Closure designation.

Closure

indicates that the agent called and talked to a party. Closure can represent a variety of outcomes, including the following examples:

Balance paid in full

Bankruptcy

Deceased

Sale verified and completed

This designation may overlap with the RPC designation.

Abandon

indicates that a call has been abandoned and the Avaya PDS has disconnected the call. An abandon can be caused by one of several events:

An inbound caller hung up in the inbound wait queue

A customer hung up while in the outbound wait queue

The time limit for a call being held in a queue was met

Completion code assignments

You can assign a completion code to more than one category. For example, you can classify a verified sale as an RPC and a Closure. The following illustration shows sample completion code assignments.



Multi-dialer environment

Completion Code Manager lets you change the completion code description and code designation for your completion codes. However, if the multi-dialer feature is enabled on your system, you must take one of the following two actions:

- Make the identical changes on each dialer's set of completion codes
- Copy the completion code file to each dialer

Completion code designation changes

When an Avaya PDS job starts, it applies the current Completion Code Manager settings. If you make changes to code designations (RPC, Closure, or Abandon) while a job is running, you need to restart the job to apply your new code designation changes.

Completion code descriptions

If you change one or more completion code descriptions in Completion Code Manager, Campaign Monitor automatically updates to use the new descriptions. You do not need to restart a job for the Avaya PDS to recognize new descriptions.

If you use the Campaign Analyst Agent Completion Code Summary report, you need to designate which codes you want to appear on the report. Insert an asterisk (*) as the first character of the description for each completion code you want to include in the report. You can define up to 14 codes. If you define more than 14 codes, Campaign Analyst uses the first 14 codes (in numerical order) and disregards the remaining designated codes.

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Start Completion Code Manager

Start Completion Code Manager

You can start Completion Code Manager from Campaign Editor, Campaign Monitor, or Campaign Analyst. Use the following procedure to start Completion Code Manager.

- 1. Select Start > Programs > Avaya > Campaign Director > Campaign Editor, Campaign Monitor or Campaign Analyst.
- 2. Select Tools > Completion Code Manager. The Completion Code Manager window appears.



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Set a completion code as RPC

Set a completion code as RPC

Use the following procedure to set a completion code as an RPC.

- 1. From the list of completion codes in the right-hand pane, select a completion code.
- 2. Drag the completion code to the left-hand pane and drop it under the row labeled RPCs.



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Set a completion code as a Closure

Set a completion code as a Closure

Use the following procedure to set a completion code as a Closure.

- 1. From the list of completion codes in the right-hand pane, select a completion code.
- 2. Drag the completion code to the left-hand pane and drop it under the row labeled Closures.



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Set a completion code as an Abandon

Set a completion code as an Abandon

Use the following procedure to set a completion code as an Abandon.

- 1. From the list of completion codes in the right-hand pane, select a completion code.
- 2. Drag the completion code to the left-hand pane and drop it under the row labeled Abandons.



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Remove a completion code

Remove a completion code

Use the following procedure to remove a completion code from an RPC, Closure, or Abandon category.

- 1. From the list of completion codes in the left-hand pane, right-click the completion code you want to remove.
- 2. Click Delete.

Note

When you delete the completion code from the list of categorized completion codes, the code still appears it in the right-hand pane and is available to be selected again.



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Change a completion code description

Change a completion code description

Use the following procedure to change a completion code description.

- 1. From the list of completion codes in the left-hand pane of the window, double-click the Description column of the completion code you want to change.
- 2. Type the new description, and then press Enter. Completion Code Manager displays the new description.



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View Completion Code Manager for another dialer

View Completion Code Manager for another dialer

Use the following procedure to view Completion Code Manager for another dialer.

- 1. Start Campaign Editor, Campaign Monitor, or Campaign Analyst.
- 2. (Campaign Editor only) On the button bar, select the dialer you want to view.
- Select Tools > Call Completion Codes. In Campaign Editor, the Completion Code Manager window for the selected dialer appears.
- 4. (Campaign Monitor and Campaign Analyst) Select a dialer from the Dialer dialog box, and then click OK.

The Completion Code Manager window for the selected dialer appears.



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Agent Blending

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Avaya PDS User Guide

Agent Blending

Overview

Agent Blending integrates outbound calling activities on your Avaya PDS with inbound calling activities on your ACD. In an Agent Blending system, ACD agents log on to the Avaya PDS and the ACD. Agent Blending monitors the activity on the ACD and uses this information to determine when to acquire agents for outbound calling and when to release ACD agents to handle inbound calls.

The Avaya PDS uses a pool of ACD (blend) agents for outbound calling. The system acquires the pooled agents for outbound calling when the inbound calling activity decreases. It releases these agents to inbound calling when the inbound calling activity increases. This movement keeps the ACD blend agents busy while keeping the ACD service level within your prescribed limits.

Predictive Agent Blending

If your first priority is servicing your inbound customers and your inbound volume is fairly high, you will benefit from using Predictive Agent Blending. Predictive Agent Blending focuses on the inbound mission and only acquires agents for outbound when the Service Level or Average Speed to Answer parameters are above the desired value. These agents take inbound calls until the Avaya PDS predicts that there will be too many agents on inbound (the Avaya PDS bases the prediction on the service level requirements you set). The Avaya PDS then acquires agents from the ACD to handle outbound calls until the inbound volume increases.

Call centers with moderate to heavy inbound traffic and more than 25 agents in an inbound pool benefit from using Predictive Agent Blending.

Predictive Agent Blending uses events from the ACD to forecast call volume and determine when to move ACD agents between inbound and outbound calling.

There are two control method option within Predictive Agent Blending: Average Speed to Answer and Service Level. 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. Each type requires different settings.

Average Speed to Answer (ASA)

This domain group type uses the target ASA field (MAAS) for calculating when to acquire

and release agents. Agents are acquired 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. Agents are released 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. Agents are acquired 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. Acquisitions will stop when the actual service level reaches the Abatement Service Level value. Agents will be released back 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

If your focus is on outbound calling, but you need to service a low volume of inbound customers, you will benefit from using Proactive Agent Blending. Proactive Agent Blending focuses on outbound calls and releases agents to inbound only when an inbound calls enters a monitored queue on the ACD. When an ACD agent logs on, the Avaya PDS immediately acquires the agent for outbound calling. When an inbound call comes into the ACD queue, the Avaya PDS releases the agent to handle the call. The number of queued calls before agents release to inbound can be configured for each OB_ONLY domain group. If inbound calls continue to come in, the Avaya PDS continues to release agents. As soon as the queue is empty, the Avaya PDS acquires the agent for outbound calls.

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Supported ACDs

Supported ACDs

The system supports Agent Blending on the following ACDs:

- Aspect CallCenter
- DEFINITY G3
- PINNACLE 5ESS
- Northern Telecom Meridian 1
- Rockwell Spectrum
- Siemens ROLM 9751, Release 9005

The AvayaTM Predictive Dialing System (PDS) Installation Planner contains a full description of the requirements for each supported switch. Each switch has unique settings and terminology.

Regardless of the special terminology used by ACD vendors, you configure your ACD to work with the Avaya PDS. The Avaya PDS uses domains and domain groups to control Agent Blending.



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Switch terminology

Aspect

Agent group

A set of agents handling similar types of calls. Agents log into an agent group when they log onto 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.

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. It controls communication between the Aspect CallCenter and the system. 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.

DEFINITY G3

Expert Agent Selection (EAS)

An optional Definity G3 feature. It 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. It

enables 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 into a maximum of three splits.

Vector

Vector settings determine how the switch handles incoming calls based on the number dialed. When the DEFINITY G3 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.

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 system 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.

Application

The system treats applications as domains. In Spectrum, incoming calls are routed to applications. An application is a type or category of call you want handled in a similar way. Applications may 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, it queues agent groups, places calls in wait queues, and allows the system 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 the Predictive Dialing System.

Provisioning

A set of actions that add, alter, or delete system parameters. In the system 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

Spectrum's name for its Computer Telephony Interface (CTI) link. Transaction Link is a communications channel between the Spectrum and the system. 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 system to monitor calls on Spectrum.

Meridian

ACD-DN (directory number)

The ACD address for a call queue. It is the Agent Blending domain address.

ACD Agent Position ID

The number that identifies an agent's telephone extension. Agent Blending agents log onto the system 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 into call queues that are Agent Blending domains.

Multiple queue assignment

A Meridian option that allows agents to log into 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.

ROLM 9005

ACD group or agent group

A group of agent extensions that receives calls from the same pilot number. Each ACD group has its own telephones and members.

Call-progress event

Any change in a call's state in ROLM 9005. CallBridge passes call-progress event messages from ROLM 9005 to CallPath. Call-progress event messages provide the information Agent Blending needs to acquire and release agents.

Class of service

A code indicating the features, extensions, and trunk access available to an ACD address. Agent Blending uses agent groups with the CallPath class of service.

Directory Number (DN)

An ACD address or extension associated with an ACD-defined group (such as an agent group or a hunt group) or with a device such as a telephone or a Voice Response Unit (VRU) port.

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. It uses the dummy hunt group's pilot number as the domain extension.



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Domains

Overview

No matter which type of switch your system uses, the Avaya PDS requires domains and domain groups. Domains are the Avaya PDS's name for ACD call queues which are defined on the ACD and on the Avaya PDS.

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. It uses these statistics to determine when to move ACD agents between inbound and outbound calling. It does not total statistics across domain groups and it does not monitor activity in call queues that are not part of a domain group.

After your system is installed, assign your agents to domains. Usually you assign 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

Configure domains

The types of domains 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. It uses acquire domains to acquire agents for outbound calling.

In addition to inbound and acquire domains, the Avaya PDS 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.


Domain groups

Each domain group must be defined using one of the following four configurations:

- Outbound without inbound domain (OB_ONLY control method)
- Predictive-Average Speed to Answer (ASA control method)
- Predictive-Service Level (SL control method)
- Outbound with inbound domain (Proactive Blend, OB_ONLY control method)

Domains

Outbound Agent Blend

Outbound Agent Blending acquires ACD agents to handle outbound calls as soon as they log on to the Avaya PDS 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.



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Domain Groups

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 Level. The Agent Blending Administrator window changes dynamically depending on which one of the three Control Methods you choose.

Outbound Only

The Avaya PDS acquires outbound-only agents to handle outbound calls as soon as they log onto the system 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 (no inbound domain). Select Outbound as the domain group type. Assign at least one acquire domain to the group (no inbound domain).

If you select Outbound Only, you are required to enter a Minimum Queued for Release value. Type a value between 0 and 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

The interval that the system uses to calculate the Average Speed to Answer. It influences how responsive the system is to fluctuations in answer delays. It is an interval that begins each time you start the system or restart Agent Blending. 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 (30 minutes). The setting represents an average calculated over the Average Speed to Answer interval.
The average time within which agents should answer calls. Type a value between 1 and 999. The default value is 60.
The percentage of agents available to take calls. This setting determines how quickly the system moves agents between inbound and outbound calls. The goal is to prevent agents from being acquired or released too frequently.
Agents are available if they are not taking calls or updating records.
Agent Blending tracks calling statistics and uses this information to predict future availability. To calculate the threshold, the system divides the projected inbound call volume by the projected number of available agents. Type a value between 1 and 999. The default value is 200.
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 option when it is more important to meet outbound goals than to service inbound calls. Type a value between 0 and 999. The default value is 0.

Initial Traffic Rate (optional)	The estimated number of calls each second. The system uses this rate for the first 30 calls. It ensures that there are enough agents to handle the first 30 calls. Type a value between 0 and 999.
Talk Time (optional)	The estimated minimum seconds agents spend connected on each inbound call. The system adds Talk time and After Call Work Time to determine agent availability. Agent availability is sometimes called service capacity. Type a value between 1 and 999.
After Call Work Time (optional)	The estimated minimum seconds agents spend, after a call, updating records and processing information. Type a value between 1 and 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. Type a value between 0 and 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. Type a value between 0 and 100 (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. Type a value between 1 and 999. The default value is 60.
Time Interval (required)	Same definition as seen in previous section.
Agent Utilization Threshold (required)	Same definition as seen in previous section.
Minimum Agents on Outbound (required)	Same definition as seen in previous section.
Initial Traffic Rate (optional)	Same definition as seen in previous section.
Talk Time (optional)	Same definition as seen in previous section.
After Call Work Time (optional)	Same definition as seen in previous section.



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Start the Agent Blending tool

Start the Agent Blending tool

Start the Agent Blending tool from either Campaign Monitor or Campaign Editor.

- 1. Select Start > Programs > Avaya > Campaign Director > Campaign Monitor or Campaign Editor.
- Select Tools > Agent Blending. The Agent Blending Administrator window appears.



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Create a domain group

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 the earlier topics that discuss Outbound Only, Service Level, and Average Speed to Answer.



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Create a domain

Create a domain

You must stop your blend engine in order to create a domain. 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.

- 1. 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.
- 2. 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.
- 3. Click OK.

You have created the domains name and must now define in the domain settings.

4. 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 earlier topics that discuss Domain Type, Phone Number, Gateway ID, Application ID, and PBX ID.

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Edit domain group settings

Edit domain group settings

You must stop your blend engine in order to edit domain group settings.

- 1. In the Agent Blending Administrator window, select the domain group you want to edit.
- Double-click the Control Method field to select Outbound Only, Service Level, or Average Speed to Answer.
 For descriptions of these options, see their sections shown earlier.
- 3. The domain group fields change dynamically depending on which Control Method option you select. See the Domain Groups section shown earlier for descriptions of the domain group fields. To determine whether the field has a drop-down list or an editable value for you to use, double-click the field. Save your work.



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Edit domain settings

Edit domain settings

You must stop your blend engine in order to edit domain settings.

- 1. In the Agent Blending Administrator window, select the domain you want to edit.
- Double-click the Domain Type field select Inbound, Transient Acquire, Team Acquire, or Overflow.
 For descriptions of these options, see the Domain section shown earlier.
- Type values for the Phone Number, Gateway ID, Application ID, and PBX ID fields.
 - For descriptions of these fields, see the Domains section shown earlier.



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Delete a domain group

Delete a domain group

You must stop your blend engine in order to delete a domain group.

- 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.



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Delete a domain

Delete a domain

You must stop your blend engine in order to delete a domain.

- 1. In the Agent Blending Administrator window, select the domain you want to delete.
- 2. Select File > Delete Domain, and then save your work.



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Move a domain to a different group

Move a domain to a different group

You must stop your blend engine in order to move a domain to a different domain group. 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.



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Stop the blend engine

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 Campaign Monitor or Campaign 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.



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Start the blend engine

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 Campaign Monitor or Campaign 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.



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Reset the blend engine

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 Campaign Monitor or Campaign 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.



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Resynch the blend engine

Resynch the blend engine

The Resynch button updates the Avaya PDS system with the current ACD agent queue assignments. Use Resynch after a supervisor uses the ACD to reassign agents to different inbound queues.

- 1. Open Campaign Monitor or Campaign 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.



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View ACD statistics

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.



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View alerts

Overview

Agent Blending alerts list Avaya PDS system and status messages about Predictive Blend. For example, the Avaya PDS system may display updates on the status of its connection to the gateway. Alerts contain a brief message. For example: "acdmn: domain 24122 (ext 24122) removed from acquire service; Gateway 1 not configured with load management".

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.



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View transactions

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.



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System Telnet

To see topics for this section, click + in the contents list at left.



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System Telnet

Overview

Use the System Telnet tool to access the system and administrative menus. The telnet session lets you access Avaya PDS features available through character-based menu systems. For example, you can manage user accounts, check calling list status, or manage agent job lists. You can also access some Campaign Monitor and Campaign Editor features through character-based menus.

System Telnet is available from the Tools menu in Campaign Editor, Campaign Monitor, and Campaign Analyst. If access to Campaign Director is not available, you will need to use a third-party telnet tool to access Avaya PDS menu system and PC Analysis.

TIP

To access PC Analysis menus, use the PC Analysis Telnet tool in Campaign Analyst. PC Analysis Telnet includes special tools designed to help you navigate the PC Analysis extract screens.



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Toolbar icons

Toolbar icons

The System Telnet window opens with a set of tools that help you use and navigate the character-based menus.

Toolbar Name	Icon	Description
Connect		Use the Connect tool to select the dialer for which you want to access character-based features. This function is not available while you are connected to a dialer. You must disconnect from a dialer before you can connect to a different dialer.
Disconnect	8	Use the Disconnect tool to end the telnet session for the current dialer. If you exit the menu system, System Telnet automatically disconnects your session. After you disconnect, you can connect to a different dialer or exit the System Telnet application.
Exit out of entry		Use the Exit out of entry tool to move back one screen in the character-based screens. This provides the same functionality as Ctrl-x.
Done with entry	•	Use the Done with entry tool to move to the next character-based screen. This provides the same functionality as the Done key (F1).



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Start System Telnet

Start System Telnet

Use the following procedure to start System Telnet to access the Avaya PDS character-based menus.

- 1. Select Start > Programs > Avaya > Campaign Director > Campaign Editor, Campaign Monitor, or Campaign Analyst.
- 2. Select Tools > System Telnet. A System Telnet window appears.
- 3. Select File > Connect. The Connect to PDS 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.

 Type your system login and password to access the system menus or the administrator login and password to access the administrative menus. The character-based menu system associated with your user name appears in the Telnet window.



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Avaya PDS User Guide

Overview

Purpose

The AvayaTM Predictive Dialing System (PDS) uses PC Analysis for reporting and troubleshooting.

Contents

This section contains the following topics:

- <u>PC Analysis</u>
- Data sources
- Job history
- <u>Agent history</u>
- <u>Calling statistics</u>
- Calling list
- Downloading an extract file
- PC Analysis extract
- Log in to PC Analysis using cdwanal password
- Log in to PC Analysis using supervisor password
- Create an extract file
- Extract selection information
- Set up the extract file
- Edit an extract file
- Copy an extract file
- Delete extract and output files
- Execute an extract configuration file
- Display completion codes
- Display available calling lists
- Copy an extract print file
- Delete an extract print file

• <u>View and print an extract file</u>

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Data sources

Overview

When Avaya PDS places a call, information is put into "buckets" or files. The call's outcome is written to the calling list (AGENT, DATE, TIME, and CODE) and to the statistics files.

When the job is complete, summary information is gathered and written to the job and agent files.



We gather information from these files using PC Analysis.

Data sources include Job History Files, Agent History Files, Calling Information Statistics,

Data sources

Calling Transaction Statistics, and Calling List Information.

Job history and agent history files are created by an Avaya PDS binary application that uses totals from the information and transaction statistics. Depending on what you want to do, you choose the file containing the information you need as your source file.

Note: You can take information only from one source file per extract. If you want information from more than one source file on your PC, separate extracts and then combine the data in your PC application.

Data Sources

Job History

This file contains data about the last 200 jobs run on Avaya PDS. Typical data consists of job start and stop times, the total number of connects, the total number of agents working the job, and the total number of minutes the job was run.

Agent History

This file contains data about each agent's calling activity during the last 200 jobs. Typical data includes number of seconds the agent was talking with clients, the number of seconds updating records, and the number of calls the agent answered.

Statistics

There are two statistics files

Information File

This file contains data about all calls placed during a job. It includes the times agents joined and left jobs, and the time the job shut down.

Transaction File

This file contains data about inbound and outbound call processing. Avaya PDS stores the record numbers, phone numbers, recall attempt counts, agent names, talk and work times, and calling results. Typically, these statistics are stored for the past five calendar days. Some systems are configured to store up to 28 calendar days.

Calling list

This file contains data about the client's account. It typically includes the person's name, address, account information and the system-added and agent-added codes.



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Avaya[™] Predictive Dialing System User's Guide Volume 2

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Avaya Predictive Dialing System User's Guide Volume 2

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Mandatory Customer Information

Preventing Toll Fraud

Toll Fraud is the unauthorized use of your telecommunications system by an unauthorized party (for example, a person who is not a corporate employee, agent, subcontractor, or working on your company's behalf). Be aware that there is a risk of toll fraud associated with your system and that, if toll fraud occurs, it can result in substantial additional charges for your telecommunications services.

Avaya Fraud Intervention

If you *suspect that you are being victimized* by toll fraud and you need technical assistance or support, call the Technical Service Center's Toll Fraud Intervention Hotline at 1-800-643-2353.

Providing Telecommunications Security

Telecommunications security of voice, data, and/or video communications is the prevention of any type of intrusion to, that is, either unauthorized or malicious access to or use of, your company's telecommunications equipment by some party.

Your company's "telecommunications equipment" includes both this Avaya product and any other voice/ data/video equipment that could be accessed via this Avaya product (that is, "networked equipment").

An "outside party" is anyone who is not a corporate employee, agent, subcontractor, or working on your company's behalf. Whereas, a "malicious party" is Anyone, including someone who may be otherwise authorized, who accesses your telecommunications equipment with either malicious or mischievous intent.

Such intrusions may be either to/through synchronous (time multiplexed and/or circuit-based) or asynchronous (character-, message-, or packet-based) equipment or interfaces for reasons of:

- · Utilization (of capabilities special to the accessed equipment)
- · Theft (such as, of intellectual property, financial assets, or toll-facility access)
- Eavesdropping (privacy invasions to humans)
- · Mischief (troubling, but apparently innocuous, tampering)
- Harm (such as harmful tampering, data loss or alteration, regardless of motive or intent)

Be aware that there may be a risk of unauthorized or malicious intrusions associated with your system and/ or its networked equipment. Also realize that, if such an intrusion should occur, it could result in a variety of losses to your company, including but not limited to, human/data privacy, intellectual property, material assets, financial resources, labor costs, and/or legal costs.

Your Responsibility for Your Company's Telecommunications Security

The final responsibility for securing both this system and its networked equipment rests with you - an Avaya customer's system administrator, your telecommunications peers, and your managers. Base the fulfillment of your responsibility on acquired knowledge and resources from a variety of sources including but not limited to:

- Installation documents
- · System administration documents
- Security documents
- Hardware-/software-based security tools
- Shared information between you and your peers
- · Telecommunications security experts

To prevent intrusions to your telecommunications equipment, you and your peers should carefully program and configure your:

• Avaya provided telecommunications system and their interfaces

 Avaya provided software applications, as well as their underlying hardware/software platforms and interfaces

· Any other equipment networked to your Avaya products

Federal Communications Commission Statement

Part 15: Class A Statement. This equipment has been tested and found to comply with the limits for a Class A digital device, pursuant to Part 15 of the FCC Rules. These limits are designed to provide reasonable protection against harmful interference when the equipment is operated in a commercial environment. This equipment generates, uses, and can radiate radio-frequency energy and, if not installed and used in

accordance with the instructions, may cause harmful interference to radio communications. Operation of this equipment in a residential area is likely to cause harmful interference, in which case the user will be required to correct the interference at his own expense.

Part 68: Network Registration Number. This equipment is registered with the FCC in accordance with Part 68 of the FCC Rules. It is identified by FCC registration number AV1USA-28011-MA-T. Refer to "Federal Communications Commission Statement" in "About This Book" for more information regarding Part 68.

Canadian Department of Communications (DOC) Interference Information

This digital apparatus does not exceed the Class A limits for radio noise emissions set out in the radio interference regulations of the Canadian Department of Communications.

Le Présent Appareil Nomérique n'émet pas de bruits radioélectriques dépassant les limites applicables aux appareils numériques de la class A préscrites dans le reglement sur le brouillage radioélectrique édicté par le ministére des Communications du Canada.

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European Union Declaration of Conformity

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

• Electromagnetic Compatibility (89/336/EEC)

Telecommunications Terminal Equipment (TTE) i-CTR3 BRI and i-CTR4 PRI

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

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Purpose	The purpose of this guide is to provide detailed information about the operation of the Avaya TM Predictive Dialing System (PDS).
Reason for reissue	The following list describes changes to the Avaya PDS User's Guide since the last release.
	• This guide has been formatted for easier use.
	• This guide has been branded to match the change of our product names.
	• This guide contains two volumes - one for the graphical, Campaign Director interface, and the other for the Character- Based User Interface, which uses menus to navigate through the system (these two interfaces cannot be used simultaneously).
	• This guide is arranged by task rather than by application. This allows the information to flow according to user task rather than individual tasks performed within certain applications.
Intended-Audience	The audience for this manual includes any user of the Avaya PDS. This includes, but is not limited to, system supervisors, integration consultants, application consultants, and customer support engineers.

Part I: Supervisor menu

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1 Supervisor overview

Overview

Purpose	The Avaya TM Predictive Dialing System (PDS) also contains Supervisor menus that help you manage your calling activities.
Contents	This section contains the following topic:
	Supervisor main menu

Supervisor main menu

Supervisor Main menu Supervisor menus contain commands for managing the agents by assigning their login and permission levels, monitoring their calls, and sending them messages. They also include options that determine how the Avaya PDS uses your phone lines, and which records the system calls. In addition, they provide a full reporting capability so you can keep track of your calling activities.

2 Campaign overview

Overview

Purpose	The Avaya TM Predictive Dialing System (PDS) uses campaigns that you design to achieve your call center goals. One element of a campaign is a job. The objective of a job is to accomplish specific campaign goals. Campaigns can include one or more jobs. A job consists of a calling list, phone strategy, record selection, job definition, and job screens. Multiple jobs can share screens if the jobs are based on the same calling list or calling list format.
Contents	This section contains the following topics:
	• Start a campaign
	Create phone strategy
	Add initial phone
	• Add alternate initial phone (optional)
	Add ring count and call connect criteria
	Add retries
	• Edit a phone strategy
	• Copy a phone strategy
	• Delete a phone strategy
	Set Recall Times
	Record Selection

- Create a Record Selection
- Selecting Time Zones
- Selecting Call Completion Codes
- Selecting Field Names and Value
- Selecting Phone Strategies
- Sorting field names and direction (optional)
- Selecting recall field names and values
- Set ring count and call connect criteria
- Grouping expressions and statements
- Move fields and values
- Unit Record Selection
- Edit unit record selection
- Execute unit record selection
- Standard Record Edit
- Supervisor Menu Record Selection Preparation
- Edit a record selection
- Execute a record selection
- Copy a record selection
- Delete a record selection
- Create a job
- Edit an outbound job
- Managed Jobs
- Edit Managed Jobs
- Edit Sales Verification Jobs
- Edit Infinite Jobs
- Edit Virtual Jobs
- Edit Inbound Jobs
- Edit Blend Jobs
- Copy a Job
- Delete a Job
- Infinite Job Record Selection

Manage Job Linking

Start a campaign

Start a campaign	Use the following procedure to start a campaign.	
1	Set up or select phone strategies.	
2	Set up or review and run record selections.	
3	Set up and start jobs.	

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Create phone strategy

Create a phone strategy	Use the following procedure to create a phone strategy.	
1	Choose Create a phone strategy from the Phone Strategies menu.	
2	If the system has more than one calling list, type the calling list number and press Enter. (If you use only one calling list, the Avaya PDS skips this step.) The phone strategy name prompt appears.	
3	Type a strategy file name (not more than 8 characters). Do not use special characters such as hyphens, slashes, or spaces.	
4	Type Y at the prompt to process the changes or N to cancel. If you type Y, the Select Initial Phone screen appears.	

Add initial phone

Add an initial phone	Use the following procedure to add an initial phone.	
1	In the Phone column, type the phone type number $(1, 2, 3,)$ of the first phone number you want to call.	
2	Select a field by typing the field name (uppercase letters) in the Field column or press F4 (View) to select the field from the calling list.	
3 4	Type a value in the Value column. For help in setting values, see "To select field names and value criteria".	
	To add a second field and value for this phone, type AND or OR in the And/Or column; then repeat steps 2 and 3.	
5	Repeat steps 1 through 4 for each selected phone. After you enter all the fields and values for the initial phones, press F1 (Done). The Select Alternate Initial Phone screen appears.	

Add alternate initial phone (optional)

Add an alternate initial phone	Use the following procedure to add an alternate initial phone (optional).
1	In the Phone column, type the phone type number $(1, 2, 3,)$ of the alternate phone number you want to call.
2	In the Time Zones column, type the uppercase letter assigned to the time zone or type an asterisk (*) for all time zones or press F4 (View) to select a time zone from a list.
3	In the Time column, type the time you want the Avaya PDS to start calling the alternate phone (24-hour clock). Use a period to separate hours and minutes. For example, type 17.10 to enter 5:10 PM.
4	Repeat steps 1 through 3 for each alternate initial phone. Press F1 (Done). The Select System Set Recalls screen appears.

Add ring count and call connect criteria

Add ring count and call connect criteria	Use the following procedure to add ring count and call connect criteria.
1	In the Phone Field column, type the phone type number (1, 2, 3,).
2	Type the number of rings to allow in the # of Rings column. (Low number recommended, such as 3.)
3	Type the letter(s) to designate the call detection mode in the Connect.
4	Repeat steps 1 through 3 for each initial phone type.
5	Press F1 (Done). The Record Selections menu reappears. For help setting up record selections, see "Overview of Record Selections".

Add retries

Add retries	Use the following procedure to add retries.
1	In the Phone Field column, type the phone type number (1, 2, 3,).
2	Press F4 (View) to view the call completion codes list. Use the arrow keys to select a code, then press Enter. You can also type the call code directly in the Call Result column. It must match upper and lowercase characters.
3	Type the number of minutes between each calling attempts in the Min (Minutes) column.
4	Type the number of retries in the Number column.
5	In the Next Phone column, type the phone type number (1, 2, 3,). The Next Phone is the phone the Avaya PDS calls after it makes the last attempt to call the initial phone. If you leave this field blank, the system stops calling the record after the last retry.
6	Repeat steps 1 through 5 for each call result for which you want to schedule retries.
7	Press F1 (Done). The Select Ring Count and Call Connect Criteria screen appears.

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Edit a phone strategy

Edit a phone strategy 1 2 3 4 5 6 7	Use the following procedure to edit an existing phone strategy.
	Choose Edit a phone strategy from the Phone Strategies menu.
	Type the item number for the strategy file you want to edit. The Select Initial Phone screen appears. Complete the following steps or, if the screen is correct, press F1 (Done) to move to the next screen.
	Press down arrow to move to the field you want to change.
	Type the new value.
	Repeat steps 3 and 4 for each field you want to change.
	Press F1 (Done) to continue to the next screen.
	To edit the rest of the screens, follow the steps that begin with "Selecting Alternate Initial Phones".

Copy a phone strategy

Copy a phone strategy	Use the following procedure to copy an existing phone strategy.
1	Choose Copy a phone strategy from the Phone Strategies menu.
2 3 4	In the Enter Item Number field, type the item number of the phone strategy to copy.
	Type Y at the confirmation prompt to continue or N to cancel.
	Type a new file name (not more than 8 characters) at the file name prompt.
5	Type Y at the prompt to save the new file or N to cancel.

Delete a phone strategy

Delete an initial phone	Use the following procedure to delete and initial phone.	
1	Select the initial phone to delete.	
2	Choose Delete . Campaign Director removes the selected initial phone setting.	

Set Recall Times

Set recall times	Use the Select System Set Recalls screen to tell the system how long to wait before recalling a number, how many times to retry a number, and which phone to call next. The system determines the settings by the result of the initial call. For example, you can tell the system to retry the call in 15 minutes when the initial call result is busy and to stop calling that record if there is no answer after three retries.
1	In the Phone Field column, type the phone type number (1, 2, 3,).
2	Press F4 (View) to view the call completion codes list. Use the arrow keys to select a code, then press Enter. You can also type the call code directly in the Call Result column. It must match upper and lowercase characters.
3	Type the number of minutes between each calling attempts in the Min (Minutes) column.
4	Type the number of retries in the Number column.
5	In the Next Phone column, type the phone type number $(1, 2, 3,)$. The Next Phone is the phone the system calls after it makes the last attempt to call the initial phone. If you leave this field blank, the system stops calling the record after the last retry.
6	Repeat steps 1 through 5 for each call result for which you want to schedule retries.
7	Press F1 (Done). The Select Ring Count and Call Connect Criteria screen appears.

Note

To keep job productivity high, select retry times that are appropriate for the initial call's result. For example, retry a BUSY result twice, after 15-minute intervals. Retry a NOANSWER result twice, after 60minute intervals.

Record Selection

Overview A record selection tells the system which records to use to call customers. This feature gives you the ability to target specific customers for calling. For example, you can select records from specific time zones such as Eastern, Central, or Pacific, or you can select records with specific call completion codes such as BUSY or NOANSWER. You can also select records that help you satisfy specific goals such as accounts more than 30 days overdue, accounts with a balance over \$2,000, or accounts in a particular city.

You can execute a record selection immediately after you define the selection criteria or save it and execute the selection at a later time.

Choose **Record selections** from the Campaigns menu. The Record Selections menu appears. These commands are also available in Campaign Editor's Selection Editor.

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

Use the following wildcard character in record selections.

Create a Record Selection

Create a record selection	Use the following procedure to create a record selection.
1	Choose Create a record selection from the Record Selections menu.
2	If your system has more than one calling list, type the calling list number at the prompt. (The system skips this step if your system has only one calling list.)
3	Type a name for this file (not more than 8 characters). Do not use special characters such as hyphens, slashes, or spaces.
4	Type an optional report description (not more than 30 characters). The system names the report if you leave the field blank.
5	Type Y at the prompt to confirm the name or N to cancel. The Select Time Zones for Calling screen appears.

Selecting Time Zones

Overview	Use the Select Time Zones for Calling screen to select the time zones the Avaya PDS uses to call customers. The screen displays a list of all the time zones defined for the Avaya PDS. The time designated for the various zones is your Avaya PDS time. The Avaya PDS time zones are based on the local time zone where the Avaya PDS is located. An uppercase letter code in the Zone column designates the time zone code.
	State laws differ about legal calling times. Therefore, your Avaya PDS may list numerous time zones. If there are more zones than fit one page, press Ctrl+N (next page) to see the additional screens. The screen also shows the recommended start and stop times for each of these zones.
Selecting Time Zone parameters	Use the following procedure to select time zone paramters.
1	Type the Zone ID (uppercase letters only) in the Enter Time Zone Codes field. Press Enter after each Zone ID. You need to enter at least one time zone. To select all time zones, type an asterisk (*).
2	If you enter an incorrect letter or type a lowercase letter, an error message appears. Press the arrow keys to move to the error. Make the correction and press Enter. To clear an entry, press Spacebar.

3 Press F1 (Done). The Select Call Completion Codes screen appears.

Selecting Call Completion Codes

Overview	Call completion codes represent the result of the last completed call. Use the Select Call Completion Codes screen to select records based on call completion codes. In most cases, you select records that you have not contacted, such as BUSY, NOANSWER, or NOTCALLED.
	When the screen appears, the Avaya PDS positions the cursor in the first field.
Selecting Call Completion Codes	Use the following procedure to select call cmpletion codes
1	Press F4 (View) to see the Call Completion Code List.
2	To select additional codes, press Enter again. The cursor moves to the next blank field.
3	Repeat steps 1 through 3 as necessary.
4	Press F1 (Done). When the entries are correct, press F1 (Done). The Select Field Names and Values screen appears

Selecting Field Names and Value

Overview	Use the Select Field Names and Values screen to target a specific group of clients for calling. Select records based on any field in the calling list and a value for that field.
	Enter values as they would appear in the calling list records. Use expressions, comparison operator, and logical operators as needed.
Selecting Field Names and Values	Use the following procedure to select field names and values.
1	In the Name column, type the field name in uppercase letters or press F4 (View) to select a field from the calling list.
2	Type a value in the Value column and press Enter .
	Note
	You can have up to 40 fields on multiple screen pages. Press Ctrl+N
	The Start Range column for the first row contains an opening
	parenthesis. The End Range column of row 40 contains the closing

parenthesis.

Selecting Phone Strategies

Overview	Select a phone strategy file to tell the Avaya PDS how to call the selected records. This is the last step in designing a record selection.
Selecting a phone strategy	Use the following procedure to select a phone strategy to be used within the record selection.
1	Type the Strategy File Name or press F10 (Search) to scroll through the available phone strategies. Each time you press F10 a new strategy appears. If you want to confirm that you are choosing the correct strategy, press F4 (View) to review the parameters for the selected strategy.
2	Press (F1) Done. If your system setup includes expanded Record Selection reporting, the Select Fields for Report screen appears. Continue to "Selecting Fields for the Record Selection Report" in the following section. Otherwise, the Selection List Generation screen appears.

3 From the **Selection List Generation** screen, start the record selection or exit without generating the record selection.

Sorting field names and direction (optional)

Overview	 Sorting records by field names is optional. If you choose to sort records, the Avaya PDS calls the records in the order you set. Otherwise, the system calls them in the order they appear in the calling list. Ascending is the default sort order. If you want to sort in descending order, move the cursor to the Sort Direction column, type D and press Enter. To skip the Sort Field Names and Direction screen, press F1 (Done).
Selecting Fields Names and direction	Use the following procedure to select field names and direction.
1	In the Sort Direction column, press Enter to leave the sort direction as Ascending or type D and press Enter to change to descending.
2	In the Field Name column, press F4 (View) to see a list of fields. Choose the sort field.
3	To add a subcategory to sort by, press Enter to move to the next line and repeat steps 1 and 2 for each subcategory. The Avaya PDS sorts first by the field in priority 1, then priority 2, and so on.
4	Press F1 (Done). The Select Recall Field Names and Values screen appears.
Selecting recall field names and values

Overview	Use the Select Recall Field Names and Values screen to tell the Avaya PDS which agent set recalls to include in the record selection. If left blank, the system includes all agent-set recalls. To skip this screen, press F1 (Done). Set recall criteria the way you set field name and value selection criteria.
Selecting recall criteria	Use the following procedure to select recall criteria.
1	In the Name column, type a field name or press F4 (View) to select a field name from the calling list.
2	Type a value in the Value column and press Enter.
3	Press Done (F1). The Select Call Strategy File screen appears.

Set ring count and call connect criteria

Overview Use the Select Ring Count and Call Connect Criteria screen to specify two settings: The number of rings to allow before the system records a • NOANSWER call completion code. The call detection mode (Connect Criteria) to tell the system which calls to pass to agents. Call detection modes are the type of response the system detects when it dials a number. Detection modes include voice, answering machine, and special information tones. The type of connect criteria determines what type of connects the system will pass to an agent. Remember, as you decide which ones to use, that you will increase your hit rate with each additional criteria selected, as more calls will be handled by your agents instead of by the system. The connect criteria abbreviations are as follows: V - Voice AV - Autovoice **INT-** Operator Intercept NCN- Nonconnect **DIS-** Disconnected Number VAC- Vacant Number **ORD** - Reorder Set ring count and call Use the following procedure to set ring count and call connect criteria: connect criteria 1 In the Phone Field column, type the phone type number (1, 2, 3, ...). 2 Type the number of rings to allow in the # of Rings column. (Low number recommended, such as 3.)

3 Type the letter(s) to designate the call detection mode in the Connect Criteria column.

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4 Repeat steps 1 through 3 for each initial phone type.

5 Press F1 (Done). The Record Selections menu reappears.

Grouping expressions and statements

Overview	When grouping expressions or statement in order to organize sets of selection criteria, subgroups are created.
	When expressions and statements are grouped, the Avaya PDS supplies the closing parenthesis and inserts the double arrow to indicate the beginning of the next group. It also places an opening parenthesis on the next available line.
	The closing parenthesis is on line 40 or the last line possible. Enter values on all the lines that you intend to put into the group and then create the group. You can also create groups (or subgroups) consisting of only one line. This allows you to differentiate one line from other groups.
Group statements	Use the following procedure to group statesments with and AND or OR.
1	Type all the statements that will go into a group and press F3 (Group). The following prompt appears at the bottom of the screen: Group Line # to Line #
2	Type the number of the first line in the first group and press Enter.
3	Type the number of the last line in the first group and press Enter. To create a group consisting of only one line, both numbers should be the same.
4	Repeat steps 1 through 3 to make more group statements.
5	Press F1 (Done) to move o the next screen. The Sort Field Names and Direction screen appears.

Move fields and values

Move fields and values	Use the move command to move an entire expression or statement to another location.
1	To move a field name and its value, press F2 (Move). The following prompt appears at the bottom of the screen: Move line # to line #
2	Type the number of the line to move and press Enter.
3	Type the number for the target line and press Enter.
4	To move to the next screen, press F1 (Done) and the Sort Field Names and Direction screen appears.

Unit Record Selection

Create unit record selection

A unit record selection works with an outbound job that uses unit work lists. Unit work lists sort the calling list records into groups based on the value in the unit work list key field. In a unit work list job, agents handle calls from a specific set of records. This can be useful when agents are paid on commission or when a group of agents only handle specific product lines. Agents assigned to unit work lists type the Unit ID when they join the job. For example, you can assign agents to handle the accounts from a specific ZIP code. The unit IDs are unique values in the key field. For example, if you set ZIP codes as a key field, the unit IDs will be numbers such as 98292, 98293, and so on.

Creating a unit record selection is the same process as creating a standard record selection except for setting a key field for the unit work lists.

- 1 Choose **Create a unit record selection** from the Record Selections menu.
- **2** To complete the screens, follow the steps in "Creating Record Selections".
- **3** After you complete the Recalls screen, the Unit Work List Sort Field screen appears.
- **4** Type the field name in uppercase letters in the Key Field Name field or press F4 (View) to select a name from the list.
- **5** Press F1 (Done). The Select Phone Strategy screen appears.
- **6** Type the strategy file name or press F10 (Search) to scroll through a list of available strategy files.

7 Press F1 (Done). The Call Selection List Generation screen appears.

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Edit unit record selection

Edit unit record selection	Edit a unit record selection when the file's settings no longer meet your campaign goals or when you need a new unit record selection file. If you are creating a new file, copy a similar file and edit it to reflect the new goals.

1 Choose Edit a unit record selection from the Record Selections menu.

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2 Follow the steps in "Creating, Editing, and Executing Record Selections".

Execute unit record selection

Execute unit record selection	You can execute a unit record selection immediately after you create it or edit it or save the selection criteria and execute it at a later time.
1	Choose Execute a unit record selection from the Record Selections menu.
2	Type the item number for the unit record selection file you want to execute.
3	Type a report description (not more than 30 characters).
4	Type Y at the prompt to confirm your selection or N to cancel.

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Standard Record Edit

Standard record editRecord Edit has two options: Quick Search and Standard Record Edit.
Your Avaya PDS representative configures your system with both
options unless you request otherwise.With Standard Record Edit, the Avaya PDS searches through a calling
list from top-to-bottom based on the values entered in one or more
fields.Standard Record Edit is a slower method than Quick Search; however,
it accepts field values that contain special characters such as hyphens (-
) and wildcards (*). In addition, it allows you to search on multiple
fields.

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Supervisor Menu Record Selection Preparation

Overview There are action keys and shortcut keys that can be used when creating, editing, or deleting information from record selections in the menu systems.

Action	Keys
Done	F1
Move a line	F2
Group	F3
View calling list	F4
Previous page	F5
Next page	F6
View call detection modes or phone strategies	F10
Clear a field	Ctrl+E

Use the following shortcut keys when modifying record selections:

Edit a record selection

Edit a record selection	Edit a record selection when the file's settings no longer meet your campaign goals or when you need a new record selection file. If you are using copy and edit to create a record selection, choose a record selection file that has similar criteria to your campaign's goals. Copy the file and edit it to reflect the new goals.
1	Choose Edit a record selection from the Record Selections menu.
2	Type the item number for the file you want to edit.
3	Type a report description.
4	Type Y at the prompt to confirm your choice or N to cancel.
5	Use the arrow keys to move to the value you want to change on the current screen and type the new value or press F1 (Done) to skip to the screen you want to edit. For help on the individual screens, see "Creating Record Selections".
6	Press F1 (Done). The Call Selection List Generation screen appears.

Execute a record selection

Execute a record selection	You can execute a record selection immediately after you create or edit it or save the selection criteria and execute it at a later time.
1	Choose Execute a record selection from the Record Selections menu.
2	Type the item number for the record selection file you want to generate.
3	Type a report description (not more than 30 characters).
4	Type Y at the prompt to confirm your selection or N to cancel.
5	The system generates the report and returns to the Record Selections menu.

Copy a record selection

Copy a record selection	Copy an existing file and assign a new file name. You can then edit the copied file. Use this procedure when an existing record selection meets most but not all of a campaign's goals.
1	Choose Copy a record selection from the Record Selections menu.
2	Type the item number of the file to copy.
3	Type Y at the prompt to confirm your choice or N to cancel.
4	Type the new file name (not more than 8 characters) at the prompt.
5	Type Y at the prompt to save the file or N to cancel.

Delete a record selection

Delete a record selection	Use the following procedure to delete a record selection:	
1	Choose Delete a record selection from the Record Selections menu.	
2	Type the item number of the file.	
3	Type Y at the prompt to confirm the deletion or N to cancel.	

Create a job

Create a job	Before creating a job for a campaign, load the calling list and prepare the phone strategy and record selection files. Execute the record selection file, then copy the job definition and edit the copy.
1	Choose Jobs from the Campaigns menu. The Jobs menu appears.
2	Choose Copy a job from the Jobs menu and press Enter. Type the item number for the job you want to copy and press Enter.
3	Type Y in response to the prompt.
4	Type a new name for the job.
5	On the Jobs menu, choose one of the following: Edit and start an outbound job, Edit and start an inbound job, Edit and start a blend job, Edit and start a unit work list job, or Edit and start an infinite job.
6	Type the item number of the job you want to edit. The Job Run Verification screen appears. See the following sections for details on each screen.

Edit an outbound job

Edit an outbound job	Use the Outbound Job Run Verification screen to set and verify outbound job settings.	
1	Choose Edit and start an outbound job from the Jobs menu.	
2	Type the item number for the job you want to edit. The Outbound Job Run Verification screen appears. The cursor is in the first field.	
	• If the value is correct, press Enter to go to the next field. If a value is incorrect, press Ctrl+C (Change). Type the new information and press Enter to move to the next field.	
	• If a field uses only a yes or no response, use Ctrl+C to switch between YES and NO.	

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Managed Jobs

Minimum hit rate	Type a number from 0 to 100 (without the percent sign) in increments of 5. Thirty (30) is the recommended setting. Minimum hit rate determines the maximum number of calls the system will make in attempting to make an agent connection. For example, a minimum hit rate of 30% means the system will make no more than three dialing attempts for each agent.			
	Use minimum hit rate to limit the number of lines a job can use, even if the hit rate falls below this rate. This prevents the system from allocating more pooled lines to a poorly performing job at the expense of a more successful job.			
Initial hit rate	Type a number from 0 to 100 (without the percent sign) in increments of 5. Fifty (50) is the recommended setting.			
	Initial hit rate determine system makes during the the number of call com- example, an initial hit re approximately two dial connection.	tes the averag the job's first f apletions comp rate of 50% m ling attempts f	e number of calls per agent the ive minutes. The initial hit rate is pared with call attempts. For leans the system must make for each agent to get one successful	
	When the system accumulates statistics from actual call attempts (after about five minutes), it readjusts the hit rate automatically to meet the minimum hit rate setting.			
	Use the following guidelines to set the initial hit rate.			
	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	

The initial hit rate controls dialing attempts for the first five minutes only. If you set the rate too low (20 to 30), the system 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.

Expert calling ratioType a Q, a W, or a U followed by a number from 0 to 100. For
example, type Q30 to tell the system to allow 30% of the calls into the
wait queue. The major difference among Expert Calling ratio settings is
that the system bases W and U on agent productivity and Q settings
affect customer wait time. When you use W or U settings, the average
agent idle time can be short; but there may be a large percentage of
customers in the wait queue at any given time.

Parameter	Value	Recommended setting
Q	0-100	Q4 through Q31
W	0-100	W29 through W71
U	0-100	U32 through U78

See the following table for recommended settings.

The Expert Calling ratio tells the system how to predict when it should make the next call. You can select one of the following:

- Q mode The system achieves a balance between agents waiting for a call and customers placed in the wait queue. On average, when you use Q the agent idle time is longer to make sure that customers spend less time in the wait queue.
- W mode The system monitors the time agents take to complete calls and update records and adjusts the calling pace accordingly. When you use W, the average agent idle time can be short, but there may be a large percentage of customers in the wait queue at any given time.
- U mode The system monitors the time agents take to update records and adjusts the calling pace accordingly. When you use W or U, the average agent idle time can be short, but there may be a large percentage of customers in the wait queue at any given time.
- Line types Type the line type code(s). Separate multiple codes with commas. If your system has only one outbound line pool, this feature is not available for outbound calls. Line type codes are the same thing as line group (line pool) names. The ability to manage the phone lines depends upon your system configuration. If your system has multiple line

 Control the number of lines available for a particular job by assigning additional groups or by moving a competing job to another line grou If you designate more than one line group, separate them with a comma. For example, type REG1, REG2, REG3. Job description Type a job description (not more than 30 characters). The job description appears on reports and in job history files. You can sort jor reports by the job description. Selection Type the name of the record selection file. The file contains the criter the system uses to select records from the calling list. It also includes the phone strategy. Note Always execute the record selection before you define or run a job. End job when quota is met Type YES to tell the system to end a job when the agents reach the quota. You set this quota with the Quota parameter. Type NO to tell the system to disregard the quota setting. Use NO whusing unit work list jobs, unless you can set quotas for individual un work lists using Job Monitor. A job can end in one of the following ways: You can tell the system to continue making calls until it calls all initial phones at least once. You can tell the system to call scheduled recalls but stop calling when it bas called all initial phones at least once. 	nes the	g s
Job descriptionType a job description (not more than 30 characters). The job description appears on reports and in job history files. You can sort jor reports by the job description.SelectionType the name of the record selection file. The file contains the criter the system uses to select records from the calling list. It also includes 	igning it e group. a	C a I c
Selection Type the name of the record selection file. The file contains the criter the system uses to select records from the calling list. It also includes the phone strategy. Note Always execute the record selection before you define or run a job. End job when quota is met Type YES to tell the system to end a job when the agents reach the quota. You set this quota with the Quota parameter. Type NO to tell the system to disregard the quota setting. Use NO whusing unit work list jobs, unless you are going to set a quota for the entire job. Once you start the job, you can set quotas for individual un work lists using Job Monitor. A job can end in one of the following ways: You can tell the system to continue making calls until it calls all initial phones at least once. You can tell the system to continue calling until it has called all recalls at least once.	sort job	Job description T d r
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when it has called an initial phones at least once.	calling	•
• You can tell the system to stop calling when the agents meet the quota you set.	eet the	•
In any of the above cases, the system stops calling when the system time reaches the time set in the Latest time to stop calling parameter.	vstem meter.	I: ti
Order by time zone Type YES to turn on time zone ordering or NO to call customers in mixed time zones.	ers in	Order by time zone T n

When you set this parameter to YES, the system calls all the records in
the eastern most time zone; then it calls the records in the next time
zone to the west.

When you set this parameter to NO, the system calls records round robin through the time zones. This is useful when broad coverage is more important than completing calls in time zone order.

Quota Type the call completion code number, a comma, and the quota. For example, type 16,4.

The system defines the quota as a specific number of successful calls assigned a call completion code. This parameter is only effective when you set the End job when quota is met parameter to YES. When a job reaches the quota, the system stops making calls.

You have the following choices:

- Set no quota for the job. Leave the field blank or erase the existing entry by pressing Ctrl+E.
- Set one quota for the entire job. When the job meets the quota, the job ends.
- Set one quota to apply to all unit work lists. Each unit shuts down when the agent reaches the quota for that list.
- Set different quotas for each unit work list. To do this, set the quota, then set individual quotas in the Settings menu on the Job Monitor Screen. See "Editing Unit Record Selections".

Allocate all units to agents Type YES to let agents work all available unit work lists or NO to assign theagents to specific unit work lists. Use this parameter with unit work list jobs. If this is not a unit work list job, leave this field blank or type NO.

History reports by unit Type YES to generate a report by unit work lists or NO to report by job. Use this parameter with unit work list jobs. If this is not a unit work list job, leave this field blank or type NO.

Managed dialingType YES to turn on Manage Dialing or NO to turn it off. Managed
Dialing is an optional feature that lets agents preview records before
the system dials the number. See "Editing Managed Jobs" for
guidelines on other Managed Dialing settings.

Note Use Managed Dialing with normal outbound jobs, not unit work list or Predictive Blend jobs.

	The Preview limit and Allow agents to cancel calls parameters determine the Managed Dialing settings.
Preview limit (sec.)	Type a number between 0 and 999 to set the seconds to allow for preview time. It sets the time that an agent can preview a record before the system dials the number.
	Type 0 to specify unlimited preview time. This parameter is only effective if you set the Managed Dialing parameter to YES.
Allow agents to cancel calls	Type YES to allow agents to cancel calls before the system dials the number or NO to let them preview records but not cancel calls. This parameter is only effective if you set the Managed Dialing parameter to YES.
Earliest start time	Leave the field blank to accept the system recommended time or type the time using the 24-hour clock. Use a period to separate hours and minutes. For example, type 17.10 to enter 5:10 PM and 8.30 to enter 8:30 AM.
	Change this setting to meet the objective of a particular job.
	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 system does not begin dialing until the system clock reaches the recommended time.
Latest start time	Leave the field blank to accept the recommended time or type the time using the 24-hour clock. For example, type 17.10 to enter 5:10 PM and 8.30 to enter 8:30 AM.
	The latest stop time tells the system when to stop making outbound calls. If you set a time that is later than the recommended stop time, the system stops dialing at the recommended time.
Outbound list	Type the name of the calling list. Choose the outbound calling list for the job. The outbound calling list needs to be the same for the job, the record selection, and the agent screen(s).
Agent key definition file	Type the name of the agent keys file. Choose the keys file that was designed to run with the job. These are the keys that agents use during an outbound job.
Start script label	Type the message script name or press Ctrl+D to choose from a list. Choose the message the customer hears in the wait queue.

Main data process label	Type the name of the data process label for an outbound job or press Ctrl+D to choose from a list.
Outbound screen(s)	Type the screen name. If agents use more than one screen, separate the screen names with a comma. For example, type screen1, screen2, screen3. Choose the outbound screen(s) that were designed to run with the job. These are the screens that agents see on their workstations during an outbound job.
Total Wait Delay	Type the maximum number of seconds (0-999) that a customer can wait in an outbound queue before the system hangs up on the caller.
Next linked job	Type the job name to run when the current job ends.
	Link jobs when you want the system to start a job as the current 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. You can link an outbound job to any job that is not a unit work list job or a managed job. You can link multiple managed jobs to each other. Remember to run the record selection for the next job before it starts. If you do not, the job will not start.
	Transfer to job
	Transfer to job Type the name of the inbound or blend job to which agents can transfer calls.
Do not call group name	 Transfer to job Type the name of the inbound or blend job to which agents can transfer calls. Type the Do Not Call group name if you want agents to mark records as Do Not Call. Do Not Call groups contain one or more inbound or outbound calling lists. To use the Supervisor menus to mark a record as Do Not Call, see "Marking Records as Do Not Call".
Do not call group name Recall notify (mins)	 Transfer to job Type the name of the inbound or blend job to which agents can transfer calls. Type the Do Not Call group name if you want agents to mark records as Do Not Call. Do Not Call groups contain one or more inbound or outbound calling lists. To use the Supervisor menus to mark a record as Do Not Call, see "Marking Records as Do Not Call". Type the number of minutes before the recall that the system will notify the agent who owns it. Use this parameter to set up the Agent Owned Recall feature. Leave it blank to disable Agent Owned Recall.
Do not call group name Recall notify (mins) Recall reschedule (min)	 Transfer to job Type the name of the inbound or blend job to which agents can transfer calls. Type the Do Not Call group name if you want agents to mark records as Do Not Call. Do Not Call groups contain one or more inbound or outbound calling lists. To use the Supervisor menus to mark a record as Do Not Call, see "Marking Records as Do Not Call". Type the number of minutes before the recall that the system will notify the agent who owns it. Use this parameter to set up the Agent Owned Recall feature. Leave it blank to disable Agent Owned Recall. Type the number of minutes the system will wait before attempting to notify an agent again.
Do not call group name Recall notify (mins) Recall reschedule (min)	 Transfer to job Type the name of the inbound or blend job to which agents can transfer calls. Type the Do Not Call group name if you want agents to mark records as Do Not Call. Do Not Call groups contain one or more inbound or outbound calling lists. To use the Supervisor menus to mark a record as Do Not Call, see "Marking Records as Do Not Call". Type the number of minutes before the recall that the system will notify the agent who owns it. Use this parameter to set up the Agent Owned Recall feature. Leave it blank to disable Agent Owned Recall. Type the number of minutes the system will wait before attempting to notify an agent again. Use this parameter to set up the Agent Owned Recall feature. Leave it blank to disable Agent Owned Recall.

Type 0 (zero) to tell the system to look for the original agent
indefinitely. Use this parameter to set up the Agent Owned Recall
feature. Leave it blank to disable Agent Owned Recall.Infinite job resort fieldType the name of the field from the calling list record that is used to
sort records for infinite jobs.

Edit Managed Jobs

Edit a managed job	A managed job is a job that uses Managed Dialing. It allows agents to preview a record before the system dials the number. You can also give agents the option to cancel a call before the system dials the number. To set up a managed job, choose Edit and start an outbound job from the Jobs Menu. The Outbound Job Run Verification screen appears.
Set managed job parameter	Follow the steps in "Editing Outbound Jobs" for all parameters that are not specifically for managed jobs. Follow the directions below for managed job settings.
1	Set Minimum hit rate to 100. Since the agents are previewing one record at a time, the hit rate must be set to 100. This forces the system to dial only one number per agent.
2	Leave Expert Calling ratio blank. The system sets it to the appropriate level after the first five minutes.
3	Type a Job description.
4	In the Start script label field, select a Managed Dialing script. The managed script tells the system to first pass the record to the agent for preview.
5	Set Managed Dialing to YES by pressing Ctrl+C to switch between NO and YES.
6	Set a Preview limit. The range is 0 seconds to 999 seconds. If the setting is 0, the agents have unlimited time to preview the record.
7	Set Allow agents to cancel calls to YES or NO. YES allows the agents to cancel the call.

Edit Sales Verification Jobs

Edit sales verification jobs A sales verification job is an outbound (target) job used to verify a sale or commitment that a customer made during a different (source) job. The system uses a different group of agents for the target and source jobs. For more information about sales verification jobs, contact your system vendor.

When setting up a sales verification job, follow the steps in "Using Verify Record Selections," "Creating Jobs," and "Editing Outbound Jobs". Use the following special instructions.

When executing a verify record selection file

• If prompted, choose the source job's calling list.

To set up the source job

- On the Outbound Job Run Verification screen, verify that the
- Completion Code parameter is 93. If it isn't, press Ctrl+D and choose this code.

To create the sales verification job (target)

- Choose the outbound job named **Verify** as the job you want to copy.
- Type a job name that identifies it as a verification job, such as verifyam.
- On the Jobs menu, choose Edit and start an outbound job.

To set up Outbound Job Run Verification screen parameters

- Calling List: choose the source job's calling list.
- Verification job: press Ctrl+C to change the setting to Yes.
- Main data process label: confirm that the setting is Verify. If it isn't, press Ctrl+C and choose **Verify**.

Edit Infinite Jobs

Edit infinite jobs An infinite job is an optional outbound job that can receive new records for calling while the job is active. An infinite job runs until you stop it manually. An infinite job uses a special record selection called an infinite record selection. Using this record selection, the system can add new records (downloaded from your host) to an existing calling list on an active infinite job. The system adds the new records to a list segment. See "Using Infinite Record Selections".

For more information about infinite jobs, contact your system vendor.

To edit an infinite job, choose **Edit and start an outbound job** from the Jobs Menu. Select the predefined infinite job (usually called infinity). Follow the steps in "Editing Outbound Jobs" for all parameters that are not specifically for infinite jobs.

Follow the directions below for infinite job settings.

- 1. Type infinity for the Job Description.
- 2. Set the End job when quota is met parameter to No.

To download and append a new list segment, use the Transfer and Process Records menu. See "Downloading Records for Infinite Jobs".

Type Y at the prompt to continue or N to cancel. The system receives the new calling list records. An infinite job runs for long periods and must be shut down manually. If you need to restart the job, run the infinity record selection again before restarting. This ensures that the new list segments are properly incorporated into the calling list.

Edit Virtual Jobs

Edit virtual jobs	A virtual agent job is an optional outbound job during which the system manages calling activities without agents. This type of job places a call, connects the customer or answering machine to the system, and plays a recorded message. For more information about virtual agent jobs, contact your system vendor.
	When setting up a virtual agent job, follow the steps in "Creating Jobs" on and "Editing Outbound Jobs" using the following special instructions.
	When setting up a record selection file
	• Select the phone strategy named virtual.
	To create the virtual agent job
	• Choose the outbound job named Virtual as the job to copy.
	• Type a job name that identifies it as a virtual job, such as virtpm.
	• On the Jobs menu, choose Edit and start an outbound job .
	To set up Outbound Job Run Verification screen parameters
	• Agents: press Ctrl+C to change the setting to No.
	• Selection: press Ctrl+D and select the record selection file to which you assigned the virtual phone strategy.
	• Start script label: press Ctrl+D and select the virtual job script label you want to use with this job.
	• Main data process label: confirm that the setting is Virtual. If it isn't, press Ctrl+D and choose this setting.

Edit Inbound Jobs

Edit inbound jobs (Intelligent Call Blending systems only) Use the Inbound Job Run Verification screen to set and verify inbound job settings on Intelligent Call Blending systems. These settings do not affect Predictive Blend systems.

- 1 Choose Edit and start an inbound job from the Jobs menu.
- 2 Type the item number for the job you want to edit or start. The Inbound Job Run Verification screen appears. The cursor is in the first value field.

Set inbound job parameters

The following table describes each inbound job parameter listed on the Inbound Job Run Verification screen. The settings and parameters on your system vary depending upon your system configuration.

Parameter	Value	Recommended setting
Inbound list	Inbound list file name	inbnd1
Inbound screen(s)	Inbound screen name(s) separated by commas	inbnd1,inbnd2
Wait queue limit (secs)	0-999 seconds	0 to 5 seconds set an unlimited wait queue time
Job description	Up to 30 characters/ spaces	
Agent key definition file	Agent keys file name	op_cmd
Line type(s)	REG INB OTHER	INB1
Start answer label	Answer script starting label	in_wait_1

Parameter	Value	Recommended setting
Main data process label	Data process label	generic
Enable call forwarding on ACD	YES or NO	NO
Activate lines at logon	YES or NO	YES
Max agent wait (secs)	0-999 seconds	60
Max % of clients in queue	100 - 200	100
Verification job		NO
Next linked job	Job name	
Transfer wait queue label		
Do Not Call group name	Do Not Call group file name	

Inbound List

Type the name of the calling list. The inbound calling list is a template that contains the information you need from the customer. Each time the system receives a call, it adds a record to the inbound list. Some call centers upload this information to the system. In other call centers, the agents connect directly to the host and interactively update records.

Inbound Screen(s)

Type the name of the screen. If the agents use more than one screen, separate the screen names with a comma. For example, type screen1, screen2, screen3. Choose the inbound screen(s) that were designed to run with the job. These are the screens that the agents use during an inbound job.

Wait Queue Limit (Secs)

Type the maximum seconds (from 0-999) the system permits a call to remain in the inbound wait queue before it hangs up on the caller.

Job Description

Type a job description (not more than 30 characters). The job description appears on reports and in job history files. You can sort job reports by the job description.

Agent Key Definition File

Type the name of the agent keys file. Choose the keys file that was designed to run with the job. These are the keys that agents use during an inbound job.

Line Type(s)

Type the line type code(s). Separate multiple codes with commas.

Note

If your system uses line pooling, this feature is not available for inbound calls. Line type codes are the same as line group names. The ability to manage the phone lines depends upon your system configuration. If your system has multiple line groupings, use this parameter to select or clear the groups of lines the system uses for a job. Control the number of lines available for a particular job by assigning it additional groups or by moving a competing job to another line group. If you designate more than one line group, separate them with a comma. For example, type INB1,INB2,INB3 (no spaces).

Start Answer Label

Type the name of the message file. Press Ctrl+D to see a list of options. Choose the message that customers hear when they are in the wait queue.

Main Data Process Label

Type the name of the data process label for an inbound job or press Ctrl+D to choose from a list.

Enable Call Forwarding on ACD

Type YES to tell the system to pass an inbound call from the ACD to an available Avaya PDS agent. If an agent isn't available the system passes the call back to the ACD. Type NO to keep the call in the ACD wait queue. A confirmation prompt appears.

To use this parameter, your ACD must be configured to allow call forwarding through the system. For more information, consult your system vendor.

Activate Inbound Lines at Logon

Type YES to activate the lines as agents log on or NO to activate all lines at the start of the job.

You can activate an inbound line whenever a blend or inbound agent logs on. The system continues activating lines until it has activated all the inbound lines assigned to the job. Similarly, the system inactivates lines when agents log off. This keeps unused lines available to other jobs.

When this setting is on, the system keeps the number of ACD

extensions equal to the number of agents available to service the calls. When the ACD sends a call to the system and there is no agent available, the system returns a busy signal to the ACD. This keeps a caller from being placed on hold by both the ACD and the system.

Maximum Time Client Wait (Secs)

Type the maximum seconds from 0-999. This setting 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 Maximum % of clients in queue overrides the Maximum client wait.

This parameter is used only for blend jobs. (This is the same parameter on the Blend Job Run Verification screen.)

Maximum % of Clients in Queue

Type a number from 100-200 to represent the maximum percentage of calls to be in the wait queue. This parameter is used only for blend jobs. (This is the same parameter on the Blend Job Run Verification screen. We suggest that you leave it blank on the Inbound screen and complete the setting on the Blend Job Run Verification screen.) It determines the percentage of calls that can be in the wait queue before the system moves a blend agent to take calls.

Verification Job

This parameter appears only if your system has the Sales Verification feature. Type yes if this job uses sales verification.

Next Linked Job

Type the name of the job to run when this job ends. Although it is unusual, you can link an inbound job to any job that is not a managed job or a unit work list job. Link jobs when you want the system to start a job as the current 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 screen message telling the agents that they are changing jobs.

Transfer Wait Queue Label

Type the name of the message file to be used with the Native Voice and Data Transfer feature. Choose the message that your customers hear when they are in the wait queue on a blind transfer to an inbound agent.

Do Not Call Group Name

Type the Do Not Call group name if you want agents to mark records as Do Not Call. Do Not Call groups contain one or more inbound or outbound calling lists. To use the Supervisor menus to mark a record as Do Not Call, see "Marking Records as Do Not Call".

Edit Blend Jobs

Edit blend jobs	(Intelligent Call Blending systems only) A blend job is a combination of inbound and outbound jobs. The system moves agents between inbound and outbound calls to achieve a balance between customer service and agent activity. Before editing a job, create or edit the phone strategy and record selection for the outbound job. Execute the record selection file; then use the Blend Job Run Verification screen to set and verify the blend job settings.
1	Choose Edit and start a blend job from the Jobs menu.
2	Type the item number for the job you want to edit. The Blend Job Run Verification screen appears. The cursor is in the first field.
3	If the value is correct, press Enter and go to the next field. If a value is incorrect, press Ctrl+C (Change). Type the new information and press Enter to move to the next field. If a field uses only a YES or NO response, use Ctrl+C to switch between YES and NO.
	Because a blend job is a combination of an inbound and outbound job, most of the blend job parameters are the same as the inbound or outbound side of the job.
	The following section describes only the parameters that are unique to blend jobs. Refer to the outbound and inbound parameter sections for all other settings.
	Maximum Time Client Wait (Secs)
	Type the maximum seconds from 0-999. 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 Maximum % of client in queue overrides the Maximum client wait. This parameter is used only for blend jobs. (This is the same parameter on the Blend Job Run Verification screen.)

Maximum % of Clients in Queue

Type a number from 100-200. Specifies the percentage of inbound calls that can be in the wait queue before the system assigns a blend agent to inbound calling. The system bases this on the ratio of the wait queue calls to the number of inbound and blend agents. The minimum and recommended setting is 100. The Maximum % of clients in queue overrides the Maximum client wait.

In the following example, there are two blend agents and three inbound agents on a job. The example illustrates how Maximum % of clients in queue affects the system.

- If Maximum % of clients in queue is set to 100%, five calls must be in the wait queue before the system moves a blend agent to take inbound calls.
- If Maximum % of clients in queue is set to 200%, ten calls must be in the wait queue before the system moves a blend agent to take inbound calls.

Blend Agent Return Time

Type the maximum seconds from 5-995. This parameter sets the maximum time a blend agent on inbound can be idle before the system transfers an agent to take outbound calls. The minimum setting is 5; the recommended setting is 20.

Copy a job	To create a job, first copy an existing job. Assign the copy a new name and change the settings to meet your job's goals. If the new job doesn't use the same calling list as the original job, you need to select a new calling list and job screen(s).
1	Choose Copy a job from the Jobs menu.
2	In the Enter Item Number field, type the number of the job to copy.
3	Type Y at the prompt.
4	Type the new job name.
5	Type Y at the prompt to continue or N to cancel.
Delete a Job

Delete a job	Use the following procedure to delete a job:
1	Choose Delete a job from the Jobs menu.
2	Type the item number in the Enter Item Number field.
3	Type Y at the prompt to delete the job or N to cancel.

.....

Infinite Job Record Selection

Overview Use an infinite record selection with an infinite, outbound job to enable the Avaya PDS to call new records received from your host. The new records are called a list segment when the system adds them to an existing calling list. When an infinite job receives new records from your host, the Avaya PDS processes the file and generates an index. The system sorts the index by category code (also called behavioral score) in descending order and recall time in ascending order. A behavioral score is a value the Avaya PDS assigns to a record that typically identifies the fraud risk associated with a given customer. If a record has no category code, the system treats it as if the code is zero. Create, copy, & edit Infinite Creating an Infinite record selection is the same as creating a general record selection record selection, but with one difference. To create an Infinite record selection, first copy and edit any existing record selection. Follow the procedure below to create an Infinite record selection. 1 Choose Execute infinite record selection from the Record Selections menu. 2 Type the item number for the infinite record selection file you want to execute. 3 Type a report description (not more than 30 characters). 4 Type Y at the prompt to confirm your selection or N to cancel.

Manage Job Linking

Job linking

Link jobs when you want the Avaya PDS to start a job as another job ends. When you link a job, the Avaya PDS transfers agents to the next job after they complete their calls and release the records. The system displays a screen message telling the agents that they are changing jobs. Before the new job begins, the agent receives a message on their screen saying, "You are now being transferred to Job Jobname."

The second job begins as the Avaya PDS releases lines from the first job. You can link the selected job to any job that is not a unit work list or a managed job. For example, you realize that you have scheduled four small unlinked jobs. You can link the first job to the second job, then link the second to the third, and the third to the fourth.

Note

As with all jobs, you must run a call selection to select records for the linked job.

The Job Linking feature eliminates the down time between jobs that occurs when there are no more calls to be placed for a job, but all agents have not completed their current call. For the agents who finish first, this waiting period can be several minutes.

With the Job Linking feature, that down time can be avoided. Agents can move right along to the next campaign and continue to be productive. A supervisor uses Job Linking to set up several jobs in sequence for the day. The linked job will begin as soon as one agent on the prior job has no more calls for that job. Agents and telephone lines (trunks) are automatically transferred to the linked job, with no supervisory intervention. A message at the bottom of the agent screen informs agents about the job change.

Job Linking is accessed through the Campaign Manager application in Campaign Director. A call center with 12 agents has six campaigns to complete. The supervisor links the jobs so that agents move smoothly from one job to the next. Before Job Linking, each agent had about 3.5 minutes of down time between jobs, and used this time to learn about the new job and sign in to that new job. With Job Linking, the agent can use those 3.5 minutes on calls with customers. Look at how this seemingly small amount of time adds up:

- Number of agents: 12
- Time saved per agent for each job link: 3.5 minutes

- Number of job links: 6
- Total recovered agent time per day: 252 minutes (12 agents x 3.5 minutes per agent x 6 job links)
- 252 minutes per day = 4.2 hours per day
- Total recovered agent time per year: 1050 hours (4.2 hours per day x 250 working days per year) The call center gains 1050 hours of productive calling time each year!

Shut the job down More than likely, jobs that run throughout the day will be configured to stop and start automatically through job linking. Also the last jobs to run for the day will be set to stop a few minutes before the latest guard time. This is to insure that the Avaya PDS does not call past the legal calling time. At this time the agents will be automatically logged off of the job as well. The system supervisor can stop the job manually in Campaign Manager or via the CUI in Campaign Control.

Next linked job If you want to link this job to another job, enter the job name in this field. When this job nears completion it will start up the next job and start transitioning agents from one job to another. Be sure that the call selection has been executed for the linked job at least 10 minutes prior to the end of the first job. Otherwise when the job linking attempts to start the next linked job, it will fail.

3 Calling lists and users

Overview

Purpose	After the customer records are downloaded from the host, the system adds several fields to each record to help track calling results. After the system adds the fields, it may check for and reject duplicate records and uncallable phone numbers. This process depends upon your system configuration. The system refers to the modified records as the calling list. To use the calling list and users commands, choose Calling lists and users from the Supervisor Main Menu.
Contents	This section contains the following topics:
	Calling list
	Count calling list records
	• User accounts and permission levels
	Add user accounts
	Delete user accounts
	Edit user accounts
	Record Edit
	• Edit a record
	Delete a record
	Restore a deleted record
	Campaign Update

- Create an outbound Campaign Update report
- Mark records as Do Not Call

Calling list

Overview After the customer records are downloaded from the host, the system adds several fields to each record to help track calling results. After the system adds the fields, it may check for and reject duplicate records and uncallable phone numbers. This process depends upon your system configuration. The system refers to the modified records as the calling list. To use the calling list and users commands, choose **Calling lists and users** from the Supervisor Main Menu.

The following table describes some typical added fields. You can see a complete list of all the calling list fields for your system by pressing F4 or Ctrl+V (View) when the cursor is in a calling list field on a screen.

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

Field name	Description
DAYSCNT	Days on the system calling lists (optional). The number of days a record has been on the system. The Days on the System Report lists accounts that the system has downloaded for a certain number of days.
ENTRYDATE	The date a record was first downloaded.
ZONEPHONE#	The time zone stamp of a phone number. (For example, Pacific, Mountain.) The system calls a record only during the recommended calling time for that record's time zone. The system determines time zoning by the area code plus the phone number prefix.
DUPE	Indicates a duplicate record. The system can reject a record because there are two or more records in the calling list with the same phone number or account number, or any other field that you choose for duplicate checking.
	During system configuration, you choose whether you want to do duplicate checking, and if so, on which fields. The system lists these duplicate records on the Reject Report. Duplicate checking adds time to the processing time, but it eliminates unnecessary calls.
	An * in DUPE field tells you that there are duplicate records. The system places an R in the STATUSFLAG field of the second, third, and subsequent records to show that they are repeated records and won't be called.

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Count calling list records

Overview	Use this option to display the number of records in your calling lists, the lists' creation dates, and the amount of unused disk space (in kilobytes). You can use this information to confirm that you received new lists. For example, if list1 is the same size as list1.old, you may not have received a new list in the last download period. In addition, the number of records in a list can help you determine how many agents you'll need to reach your campaign goal.
Count Calling List Records	If you need more information about the contents of a list, use list distribution reports.
1	Choose Count calling list records from the Calling Lists and Users menu. The Calling Lists screen appears. It displays all the calling lists and the number of records in each list.
2	Press Ctrl+X followed by Ctrl+N to return to the Calling Lists and Users menu.

User accounts and permission levels

User accounts	Use manage user accounts to add or delete users and set or change their access to the system. A user account consists of the user name, password, and permission level. The systemsystem determines the permission level based on the group you assign to the user. The permission level determines a user's access to system features. For example, you usually assign agents to the Agent group, which grants permission to the Agent Main Menu where they have access only to call handling; you assign system administrators to the system group, which grants permission to the Administrator Main Menu, giving them access to the system maintenance functions.
	access to the system maintenance functions.

Permission levels The following table lists typical user levels, menu file names, and the corresponding system menus.

User type	Group name	Menu name
agent	agent	Agent Main Menu
supervisor	system	Supervisor Main Menu
analyst	cdwanal	PC Analysis main menu

Add user accounts

Overview	Use the following guidelines when creating user accounts:
	• User Name (also called login ID) should contain at least three but not more than eight alphanumeric characters. It's recommended that you use a letter as the first character of a user name. User names cannot contain spaces or special characters.
	• Password should contain from six to eight characters. Passwords should contain at least two letters and one numeric or special character. Also, the password should not be the same as the user name or a variation of the user name.
	• Group for Login The name of the group to which the user belongs.
	• Description (optional) Not more than 30 characters and spaces.
Add user accounts	Use the following procedure to add a user account:
1	Choose Manage user accounts from the Calling Lists and Users menu. The Manage User Accounts screen appears. The system lists the commands on the bottom of the screen.
2	Press Ctrl+L (Login).
3	Type the user name, password, group (agent, system, cdwanal), and an optional description. Both user names and passwords are case sensitive. If you create a user name using lowercase letters, the user must type lowercase letters when logging in.
4	Press Enter after you complete the last line. The system rewrites the screen and encrypts the password.
5	Press Ctrl+X (Exit).
6	Type Y to save the changes or N to abandon them.

Delete user accounts

Delete user accounts	Use the following procedure to delete user accounts:	
1	Choose Manage user accounts from the Calling Lists and Users menu. The Manage User Accounts screen appears.	
2	Press Ctrl+F (Find).	
3	Type the user name for the account you want to delete. The matching account appears on the screen.	
4	Press Ctrl+D (Delete).	
5	Type Y at the prompt to confirm the deletion or N to cancel.	
6	Press Ctrl+X (Exit).	
7	Type Y to save the changes or N to abandon them.	

Edit user accounts

Edit user accounts	When editing an account, make sure the user is not logged into the system. You can change the password, login group, and description but not the user's name. To change the user's name, delete the old account, then add a new user account.
1	Choose Manage user accounts from the Calling Lists and Users menu. The Manage User Accounts screen appears.
2	Press Ctrl+F (Find).
3	Type the user's name for the account you want to change. The matching account appears on the screen.
4	Move the cursor to the field you want to change and press Ctrl+C (Change).
5	Type the changes and press Enter after each change.
6	Press Ctrl+X (Exit).
7	Type Y to save the changes and exit or N to cancel and exit.

Record Edit

Overview Record Edit allows you to access and edit a customer record within a calling list. Use the Record Edit menu to view a calling list record, change the contents of a field in an outbound calling list, or delete a record. Use Record Edit when you do not have access to the person's account on your host computer. If you upload data to the host computer, the changes are included in the upload. On some systems, the system uploads the changes to the host computer each night.

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

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

You may have several fields available for standard search. (The fields were specified during the system configuration.) An advantage to standard search is the ability to use wild cards. For example, if you are unsure about the spelling of a name, you can search using the asterisk (*). An input of Wil* returns Williams, Williamsons, Willis, and so on.

Shortcut keys Use the following shortcut keys when editing calling list records.

Actions	Keys
Done	F1
Search for a record	F10
Delete a record	Esc,D
Undelete a record	Esc,U

Edit a record

Edit a record	Use the following procedure to edit a record.
1	Choose Record Edit from the Calling Lists and Users menu.
2	Choose Edit a record or Edit a record with Quick Search.
3	Type Y at the prompt to continue or N to cancel The Record Search Criteria screen appears.
4	Type the search values in the screen field(s). (Quick Search screens have only one field.)
5	Press F10 (Search). If the systemsystem cannot find a match, the Record Search Criteria screen reappears. Type different criteria and press F10 (Search). If the system finds a match, the record appears on your screen. To see if there is more than one match, press F10 (Search) again.
6	Use the arrow keys to move to the field you want to change.
7	Press Ctrl+C (Change) and type your changes.
8	Press F1 (Done) to save your changes or Ctrl+X to abandon them. The system prompts you to confirm the command.
9	Press Y to save the changes or N to abandon them.
10	Press Ctrl+X to return to the Record Search Criteria screen.

Delete a record

Delete a record	When you use Delete a record or Delete a record with Quick Search, the system does not actually delete the record. It marks it as deleted in the STATUSFLAG field. This keeps the system from calling the record, but you can restore the record.
1	Choose Record Edit from the Calling Lists and Users menu.
2	Choose Delete a record or Delete a record with Quick Search .
3	Type Y to continue or N to cancel.
4	If the system has more than one calling list, type the calling list number and press Enter. (If your system has only one calling list, the system skips this step.) The Record Search Criteria screen appears.
5	Type the search values in the screen field(s). (Quick Search screens have only one field.)
6	Press F10 (Search). If the systemsystem cannot find a match, the Record Search Criteria screen reappears. Type different criteria and press F10 (Search). If the system finds a match, the record appears on your screen. To see if there is more than one match, press F10 (Search) again.
7	When the record appears, press Esc,D (Delete) to mark it as "manually deleted in Record Edit." The system enters an E in the STATUSFLAG field.
8	Press Y to confirm the deletion or N to cancel.

 $\label{eq:press} \textbf{9} \quad \ \ \text{Press F1 (Done) and press Ctrl}{+}X.$

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Restore a deleted record

Restore a deleted record	Use the following procedure to restore a deleted record:
1	Choose Record Edit from the Calling Lists and Users menu.
2	Choose Delete a record or Delete a record with Quick Search .
3	Type Y to continue or N to cancel.
4	If the system has more than one calling list, type the calling list number and press Enter. (If your system has only one calling list, the system skips this step.) The Record Search Criteria screen appears.
5	Type the search values in the screen field.
6	Press F10 (Search). If the systemsystem cannot find a match, the Record Search Criteria screen reappears. Type different criteria and press F10 (Search). If the system finds a match, the record appears on your screen. To see if there is more than one match, press F10 (Search) again.
7	When the record appears, press Esc,U (Undelete). The system removes the E from the STATUSFLAG field.
8	Press F1 (Done) and press Ctrl+X.

Campaign Update

Overview	Use outbound Campaign Update to cancel a scheduled outbound call. This command marks a record as uncallable when an inbound call has come in from a customer whose record may be included in an outbound list. This is similar to deleting a record, except the system enters a C instead of an E in the STATUSFLAG field.
	Outbound Campaign Update works with one outbound calling list. To use this feature with more than one outbound calling list, contact your system vendor.
	If you have an Intelligent Call Blending system, the system automatically enters a C in a record's STATUSFLAG field, canceling the call, when an agent releases the inbound call with the appropriate code. (See your call completion codes list for the codes used on your system.)
Campaign Update	If you have an Agent Blending system, the system updates all records at a predefined time, or you can perform the update manually using the following procedure.
1	Choose Campaign Update from the Record Edit menu.
2	Type the calling list number to update and press Enter.
3	Type the search criteria (for example, account number or phone number). Then press F10 to search for the record.
4	A message appears if there are no matching records. If the system finds a match, it enters a C in the STATUSFLAG field.

Create an outbound Campaign Update report

Create an outbound Campaign Update report	Use the following procedure to create a Campaign Update report.
1	Choose Record Edit from the Calling Lists and Users menu.
2	Choose Create Outbound Campaign Update Rep from the Record Edit menu.
3	Type a date in the format CCYYMMDD. For example, type 19990921 for September 21, 1999. A message appears confirming the report generation. Use the Reports menu to view or print the report.

Mark records as Do Not Call

Overview	Use mark calling list records as DO NOT CALL to tell the sAvaya PDS not to call specific customers. After you mark a customer record, the system immediately searches the outbound calling lists specified in the Do Not Call group and marks all the customer's records. The system will not call a customer during any job if the customer's record is marked as do not call.
Mark records as do not call	Use the following procedure to mark records as DO NOT CALL.
1	Choose Mark calling list records as DO NOT CALL from the Calling Lists and Users menu. The Do Not Call menu appears.
2	Choose Mark DNC Group.
3	Type the item number for the Do Not Call group.
4	Type Y at the prompt to confirm your choice or N to cancel. The Set DO NOT CALL Status screen appears, which displays the selected group's unique identifier.
5	In the screen field, type the specific value for the customer whose record you want to mark as Do Not Call.
6	Press Enter.
7	Repeat steps 5 and 6 for each record you want to mark as Do Not Call.
8	Press Ctrl+X to exit the Set DO NOT CALL Status screen.

4 Manage active jobs

Overview

Purpose	This section describes the how active jobs are managed.
Contents	This section contains the following topics:
	Overview of job monitor
	• Open a job
	• Close a job
	Remove agents
	View job statistics
	View completion codes
	• View phone line usage
	• View call types
	• View agent screens
	Agents on active jobs
	• Send a message to an agent
	• Send a message to all agents
	Control jobs
	• Shut down a job
	• Stop a job immediately
	• Link a job

- Monitor agents
- Transfer agents to another job
- Change phone line allocations
- Change maximum time a customer waits
- Change maximum % of client in queue
- Change blend agent return time
- Job settings
- Change Minimum Hit Rate
- Change Expert Calling Ratios
- Change Managed Dialing settings
- Change cancel mode
- Change time zone ordering
- Change time zone status
- Unit Work List settings
- Set different quotas for each Unit Work List
- Change Unit Work List controls
- Change phone strategy detection mode
- Change phone strategy recall parameters
- Change phone strategy alternate phone lines
- Analyze Job Activity Screens

- Agent Activity Fields
- Line Usage Fields
- Calling activities fields for outbound calls

Overview of job monitor

Job monitor	Choose Manage an active job from the Supervisor Main Menu. The job monitor appears.
	The top of the screen contains the menu bar. Below the menu bar is the
	information line which gives a brief description of the active menu item. The bottom of the screen displays a line of additional help, such as how to choose a command or a message responding to an action.
	You can make the menu bar active from any screen in Job Monitor by pressing Ctrl+X or F1. When the menu bar is visible, you are in menu mode. When it isn't visible, you are in edit mode.
To choose a menu command	Some menu commands have shortcut keys listed in the right column. Use these keys when you are in menu mode, without the menu open. For example, F4 opens the Phone Lines command.
To exit a menu	To exit a drop-down menu, press Ctrl +X.
	To exit the main menu, press Q and press Enter.

Oveview	Managing a job begins with opening the job you want to manage. Use the Jobs menu to open and close jobs. All tasks on the Job Monitor menus are job related. If you try to use a command without selecting a job, the Avaya PDS will not complete the action. The system does not display an error message.
Open jobs	Use the following procedure to open jobs.
1	Open the Job menu.
2	Choose Open Job from the Jobs menu. A list of all active jobs appears. (If there is only one active job, the Avaya PDS automatically opens
3	Use the down arrow to choose the job you want to manage. A Job Activity Summary Statistics screen appears.
	Use the Job Activity Summary Statistics screen to monitor job status. Press Tab to cycle through three additional screens: Call Completion
	Code Results, Phone Line Usage, and Line Usage for All Lines on All
	1008.

Close a job

Close a job	Use the following procedure to close a job.	
1	Open the Job menu.	
2	Choose Close Job from the Jobs menu to stop managing a job. Choosing Close does not end the job.	
3	Choose a different job to monitor, or press Q (Quit) and Enter to return to the Supervior Main Menu.	

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Remove agents

Removing agents	You can immediately disconnect an agent from a call. Use it only for emergencies when you cannot use a normal disconnect. Not only does it remove the agent from the job, it removes the agent from the Avaya PDS. Therefore, the agent needs to log in again.
1	Open the Job menu.
2	Choose Remove Agent from the Jobs menu. The Agent Selection screen appears.
3	Use the down arrow to choose the agent you want to remove. A countdown message appears. When the count reaches 1, the Avaya PDS has removed the agent.

View job statistics

View job statistics	The Displays menu provides a variety of screens for monitoring job activity, phone line usage, and agent activity. In addition, you can send messages to agents using the Notify option. The menu groups the commands into three categories: Display Types, Display Options, and
	Notify.

- **1** Open the Job menu.
- **2** Choose Remove Agent from the Jobs menu. The Agent Selection screen appears.

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3 Use the down arrow to choose the agent you want to remove. A countdown message appears. When the count reaches 1, the Avaya PDS has removed the agent.

View completion codes

View completion codes	This screen gives a statistical count of calling results by call completion codes. A call completion code represents the result of the last completed call the Avaya PDS made. The system records the results for calls it doesn't pass to agents. Agents record the results of the calls that the Avaya PDS passes to them. The codes displayed on your screen reflect the specific setup of your system and may be different from the sample.

- 1 Open the **Displays** menu.
- 2 Choose Completion Codes from the Displays menu or press F3.
- **3** The Call completion Code Results screen appears.

Note

The following table describes the fields on the Call Completion Code results screen.

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Field	Description
Code	The number the system assigned to the call completion code
Count	The number of calls assigned to each code since the job began
Description	A description of each call completion code.

View phone line usage

View phone line usage	The Phone Line Usage screen shows how the system is using each line for a specific active job. It shows which lines are in use, the status of the lines, the time the status began, and the agent's ID. You can view the status of all lines for all jobs by pressing Tab after you choose Phone Lines.	
1	Open the Displays menu	I.
2	Choose Phone Lines from the Displays menu or press F4. (You can also reach this screen from the Job Activity Summary Statistics screen by pressing F4 or Tab.) The Phone Line Usage screen appears.	
	No. the type of activity on the line.	The number line.
	Time	System line status begins.
	Agent No.	Agent ID

View call types

View call types	The phone line usage screen shows how the system is using each line for a specific active job. It shows which lines are in use, the status of the lines, the time the status began, and the agent's ID. You can view the status of all lines for all jobs by pressing Tab after you choose Phone Lines.
1	Open the Displays menu.
2	Choose View Call Types from the Displays menu.
3	If this is a unit work list job, the screen displays unit IDs. Choose a unit ID from the list, or choose Summary to monitor all IDs (ALLID)
4	If this is a blend job, you may choose to view the job's inbound or outbound call activity. The Job Statistics screen appears with data for theselected unit ID or detail for the outbound or inbound call activity of a blend job.

View agent screens

View agent screens	Use the Agent Screen option to view the Client Information screen for the selected agent's current call. (The screen does not show agent updates.) You can use this command with Monitor Agent to simultaneously view the agent screen and listen to the agent's conversation.
1	Open the Displays menu.
2	.Choose Agent Screen from the Displays menu.
3	Choose Agent Screen from the Displays menu.

Agents on active jobs

Overview The List Agent command displays a list of all the agents that have logged into the active job. Choose List Agent from the Displays menu and the Agent screen appears.

Talk time How long an agent talks to each customer. The Avaya PDS measures talk time from initial connect to the release of the phone line.

Update time How long an agent takes to update a customer record. The Avaya PDS measures update time from the release of the phone line to the release of the record.

Idle time The total time an agent waits for a call.

Elapsed time The time since the agent logged in.

Send a message to an agent

Send a message to an agent	Send a message to a single agent or to all agents on the job. The message appears on the agent's screen after the agent releases the current record
1	Open the Displays menu.
2	.Choose Single Agent from the Displays menu. The text message box appears.
3	Type a message up to 40 characters.
4	Press Enter to end the message. The Select Agent screen appears. Use the down arrow to select an agent

Send a message to all agents

Send a message to all agents	Use the following procedurre to send a message to all agents.
1	Open the Displays menu.
2	.Choose All Agent from the Displays menu. the text message box appears.
3	Type a message up to 40 characters. Press Enter to end the message.
4	Use the down arrow to select an agent.
Overview The Control menu provides you with commands to manage the job, the agent, the phone lines, and inbound call activity. Changes made during a job affect it only while the job is running. These changes do not alter the settings in the phone strategy, record selection, or the Job Run Verification screen.

Shut down a job

Overview	A job ends when the Avaya PDS completes the call activity for the job.
	You can stop a job early. For example, some companies temporarily stop a job for meal breaks and meetings.
	Whenever possible, use the Shutdown option to stop a job. Shutdown allows agents to finish their current calls and update records.
	For rare circumstances, you can use the Abort option. For example, if there is a telephone company outage, you can end the job using Abort. Abort immediately stops a job. Calls are disconnected, and agents cannot update records.
Shut down a job	Use the following procedures to shutdown jobs:
1	Open the Control menu
2	.Choose Shutdown from the Control menu or proess Ctrl + E.
3	Type Y at the prompt to confirm the shutdown or N to cancel
4	Press Ctrl+X to return to the Job Monitor menu
5	Press Enter to end the message. The Select Agent screen appears.
6	Use the down arrow to select an agent.

Stop a job immediately

Overview	It is important to note that Abort is only used in unusual situations that require immediate action. When you use the Abort command, the Avaya PDS instantly cuts off all calls and often cannot retrieve data for reporting.
Stop a job immediately	Use the following procedure to stop a job immediately.
1	Open the Control menu
2	.Choose Abort from the Control menu.
3	Type Y at the prompt to confirm the shutdown or N to cancel. A
4	Press Ctrl + X to return to the Job Monitor menu.
5	Press Ctrl+X to return to the Job Monitor menu.
6	Press Enter to end the message. The Select Agent screen appears.
7	Use the down among to select on econt

7 Use the down arrow to select an agent.

Linking jobs	Link jobs when you want the Avaya PDS to start a job as another job ends. When you link a job, the system transfers agents to the next job after they complete their calls and release the records. The system displays a screen message telling the agents that they are changing jobs. Unlink a job when you don't want it to start a job automatically when the selected job ends or if you want to start the job ahead of schedule.
1	Open the Contro l menu
2	Choose Job Link Modification from the Control menu. The Job Link screen appears.
3	Choose Delete from the Control menu. The Job Link screen appears.
4	Choose the job to delete.
5	Type Y to delete the designated job. A confirmation message appears at the bottom of the screen.

Monitor agents

Monitor agents	You can listen to the conversation between an agent and a customer. No warning tone sounds in the agent's headset. This option may not be legal in some areas. If it is, it is useful for training and quality control.
1	Open the Control menu
2	Choose Monitor Agent from the Control menu.
3	Choose the agent's logon ID from the logon ID list.
	Note
	If the agent is talking with a customer, the Avaya PDS immediately connects your headset to the agent's port. If the agent is not talking with a customer, a message appears to tell you the agent is not on a line.

When you finish listening to an agent's conversation, choose Disconnect Agent from the Control menu.

Transfer agents to another job

Transfer agents to different jobs	You can transfer an agent to another job. The transfer takes place after the agent releases the record for the current call. The Avaya PDS displays a transfer message on the agent's screen.
1	Open the Control menu
2	Choose Transfer Agent from the Control menu.
3	Choose yes to confirm the transfer or No to cancel.

Change phone line allocations

Change phone line allocations	Use Phone Line Allocation to change the phone lines used by the active job.Phone lines remain assigned for the duration of a job. Even if they are idle, another job cannot use them. The only way for another job to use these idle lines is for the current job to release them. You can acquire or release groups of phone lines with the Phone Line Allocation command on the Control menu. The changes you make affect only the current job.
1	Open the Control menu.
2	Choose Phone Line Allocation from the Control menu.
3	Choose Add or Delete.
4	Type the name of the group of lines to acquire or release and press Enter.

Note

If your system uses line pooling, this feature affects only the inbound lines. If the lines are available, the system immediately assigns the lines to the active job and displays the number of lines it releases. However, if the lines are in use by another job or system, the system waits until the designated lines are available. The system displays a 0 if it is using all the phone lines and cannot release them.

Change maximum time a customer waits

Change the maximum time a client waits	Inbound Service Time is the time an inbound call can be in the wait queue before the system assigns a blend agent to handle the call. Decrease client wait time if you want to emphasize customer service.
1	Open the Control menu.
2	Choose Inbound Service Time from the Control menu.
3	Type the number of seconds (5-999).

Change maximum % of client in queue

Overview	(Intelligent Call Blending systems only) The commands grouped in the Inbound Parameters option affect only inbound calls on blend jobs. Use these settings to ensure maximum coverage of inbound calls in a blend job. For more details on these settings, see "Editing Blend Jobs."
Change the maximum % of clients in queue	The Queue Factor setting determines the percentage of inbound calls that can be in the wait queue before the system assigns a blend agent to inbound calling.
1	Open the Control menu.
2	Choose Queue Factor from the Control menu.
3	Type a number of 100 or above.

Change blend agent return time

Change blend agent return time	Return Time is the time a blend agent assigned to inbound calling can be inactive before the system reassigns them to outbound calling.
1	Open the Control menu.
2	Choose Return Time from the Control menu.
3	Type a number of seconds (0-999).

Job settings

Job settings The Settings menu allows you to change settings for active jobs. This ability lets you fine tune your settings and make adjustments to meet changing circumstances. Changes made during a job affect it only while the job is active. These changes do not alter the settings displayed on the Job Run

Change Minimum Hit Rate

Change Minimum Hit Rate	Change the Minimum Hit Rate setting when you need to alter the calling pace. The Minimum Hit Rate predicts how many calls the system makes before it gets a connection.
1	Open the Settings menu.
2	Choose Minimum Hit Rate from the Settings menu.
3	Type a Q, W, or U and a number between 1-100.
4	The new setting appears in the status field at the bottom of the Job Activity screen.
	Note Although the settings change immediately, allow a minimum of fifteen minutes to permit the new value to run and set its pace. Frequent changes to the Minimum Hit Rate setting can disrupt the calling pace.

Change Expert Calling Ratios

Change expert calling ratios	Change the Expert Calling ratio when you want to change the method the system uses to determine when to make the next call.
1	Open the Settings menu.
2	Choose Expert Calling from the Settings menu.
3	Type a number between 1-100.
4	The new setting appears in the status field at the bottom of the Job Activity screen.

Change Managed Dialing settings

Overview	Managed Dialing lets agents preview a call before the system dials the number. You can also give the agents the option of canceling a call before the system dials. Your changes affect all agents on the selected job.
Change preview length	Change the time an agent can preview a record before the system dials the number.
1	Open the Settings menu.
2	Choose Preview Length from the Settings menu.
3	Type the new preview length from 0 to 999 (seconds). Type 0 to allow unlimited preview time.

Change cancel mode

Change cancel mode	Cancel Mode lets agents stop a dialing attempt and continue with the next record.
1	Open the Settings menu.
2	Choose Cancel Mode from the Settings menu.
3	Choose Activate to enable the Cancel key or Inactivate to disable the Cancel key.

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Change time zone ordering

Overview	Time zone ordering sets the pattern of calls by time zone. When turned on, the system starts calling in the eastern most time zone. The calling pattern continues from east to west as the system exhausts numbers or they become ineligible. When time zone ordering is turned off, the system dials numbers at random.
Change time zone ordering	Use the following procedure to change time zone ordering:
1	Open the Settings menu.
2	Choose Order Time Zone(s) from the Settings menu.
3	Choose Activate to turn on time zone ordering or choose Inactivate to turn it off.

Change time zone status

Change time zone status	When calls are unproductive in a time zone, you can inactivate that	
	time zone. Inactivating a time zone shuts off calls to that time zone.	
	When it becomes advantageous to resume calling, reactivate the time	
	zone.	

- **1** Open the **Settings** menu.
- 2 Choose **Time Zone(s)** Control from the Settings menu. The Time Zone screen appears.

3 Choose the time zone and press Enter. Pressing Enter causes the status to switch between active and inactive.

Time zone status

The following status information appears for all time zones defined on the active job.

Column	Description
1st column	Lists each time zone by capital letter
Start/Stop	The recommended start and stop time for each zone
Status	The status for each zone: A (active) or I (inactive)
First	The total initial phone numbers that are available in each zone
Subseq	The total subsequent numbers in each zone
Recall	The current number of recall phone numbers that are available for
	calling in each zone

Unit Work List settings

Overview You can turn off unit work lists for the active job and change the quota for a call completion code. You cannot turn a job into a unit work list job by activating the unit work list control. You must first define a unit work list job with a unit work list record selection file. Quotas: A quota is the designated number of calls with a particular a call completion code. When a job or a unit ID reaches the quota, the system stops making calls. You have the following choices: Set no quota for the job. Leave the field blank or erase the existing • entry by pressing Ctrl+E. Set one quota for the entire job. When the job meets the quota, the job ends. Set one quota to apply to all unit work lists. Each unit shuts down when the agent reaches the quota for that list. To do this, type the call completion code number, a comma, and the quota. For example, type 16,4. Set different quotas for each unit work list. To do this, set the quota as you did in the previous step; then, set individual quotas in the Settings

menu.

Set different quotas for each Unit Work List

Set different quotas for each unit work list	Use the following procedure to set different quotas for each unit work list.
1	Open the Settings menu.
2	Choose Quota from the Settings menu.
3	Press Tab to move to the Quota column.
4	If you have multiple Unit IDs, use the arrow keys to move to the quota you want to change.
5	Type the new quota.

Change Unit Work List controls

Change unit work list(s) controls	Unit Work List(s) Control options let you turn on or off a unit work list. The system ignores this command for standard jobs.
1	Open the Settings menu.
2	Choose Unit Work List(s) Control from the Settings menu.
3	Choose Activate or Inactivate.
4	Choose the unit ID you want to activate or inactivate.

Change phone strategy detection mode

Overview	The commands grouped under Phone Strategy Control let you change some of the phone strategy settings for this job. These changes do not change the settings in the phone strategy file.
Change detection modes	The Detection Mode controls the number of rings the system allows before recording a NOANSWER and which detection modes it passes to agents.
1	Open the Settings menu.
2	Choose Detection Mode from the Settings menu. The Select Ring Count and Call Detection Mode screen appears.
3	Use the down arrow to move to the line you want to change.
4	Press Tab to move across the line to the # of Rings column.
5	Type a new number; the new number replaces the old number.
6	Choose Yes to save your changes.

Change phone strategy recall parameters

Change recall parameters	Select the recall intervals and the number of retries for each phone type in the phone field column. The change does not affect records marked for recall before your changes.
1	Open the Settings menu.
2	Choose Recalls from the Settings menu. The Select System Set Recalls screen appears.
3	Type the phone type number $(1, 2, 3)$ to recall in the Phone Field column. Press Enter to move to the Call Result field.
4	Press Enter to display the call completion codes.
5	To choose the call completion codes, use the arrow keys to move to a code and press Spacebar to mark it. Repeat the process until you have selected all the codes you want to include. Press Enter to return to the screen.
6	To change the time between retries, type a number in the Min (minutes) column and press Enter.
7	To change the number of retries, type a number in the Number column and press Enter.
8	To select a phone to call after the last retry, type a phone type number $(1, 2, 3)$ in the Next Phone column. Leave Next Phone blank if you do not want the system to call an alternate phone.

9 Press Ctrl+X to exit the screen. Choose **Yes** to save your changes and return to the Job Activity screen.

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Change phone strategy alternate phone lines

Change alternate phone lines	Change the alternate initial phone, the time zone(s), and the time to switch to the alternate initial phone. For more details, see "Selecting Alternate Initial Phones".	
1	Open the Settings menu.	
2	Choose Alternate from the Settings menu. The Select Alternate Initial	
3	Phone screen appears. Use Overstrike edit mode because Tab does not	
4	work in Insert mode.	
5 6 7	Type the phone type number $(1, 2, 3)$ for the alternate initial phone in	
	the Phone field and press Tab.	
	 If the Time Zones column is blank, press Enter to display the time zones. Use the down arrow to move to the time zone you want to select. If you are selecting only one time zone, press Enter. If you want to select multiple time zones, press Spacebar; then press the down arrow to move to the next zone. When you have selected all the zones, press Enter. 	
8	Move to the Time column and type the time (24-hour clock) to start	
9	calling that alternate initial phone. For example, type 18.00 for 6:00 PM.	

10	Repeat steps 2 through 5 for each alternate initial phone you selected.
11	Press Ctrl+X to exit the screen.
12	Choose Yes to save your changes and return to the Job Activity screen.

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Analyze Job Activity Screens

Analyze job activity screens

The Job Activity screens display the activity status of outbound, inbound, and blend agents, the dialing statistics for outbound and inbound calls, and the operating status of each phone line. The system divides the screen into four sections: job information header, agent activity area, line usage area, and call activity area. The Job Activity Summary Statistics screen shows the activity for the current

job, including information about agent activity, line usage, and record status. Press Tab to cycle through three additional screens: Call Completion Code Results, Phone Line Usage, and All Lines on All Jobs. You can also access these screens directly from the Displays menu.

Agent Activity Fields

Agent Activity Fields

The agent activity area provides information on how many agents you assigned to the job and how many have logged in and are on a call. This screen is particularly useful for blend jobs because it indicates the volume of outbound versus inbound calls.

Field	Description
Logged in	The number and type of agents logged in to the job
Assigned	Current agent assignments
All	Total number of agents working in the current job
Outbd	(Outbound) Agents handling calls made to the customers
Inbd	(Inbound) Agents receiving calls from customers
Blnd	(Blend) Agents handling both outbound and inbound calls
РТР	(Person to Person) Agents handling the overflow of outbound calls
On a Phone	The number of each type of agent currently handling calls

Line Usage Fields

Line usage fields

The line usage area shows the status of each line group or line type. It compares the number of lines needed to the number of lines available. It displays only the lines with the label requested by the job. Line usage settings reflect the type of active job. For example, both outbound and inbound line usage appear only if a blend job is running.

Field	Description
Outbound Demand	The current, average, and peak number of lines needed to handle the current number of agents and the call activity.
	The average and peak statistics reflect job activity since you
	started the job monitor. system calculates the
	statistics in regular intervals.
Outbound Available	The current, average, and peak number of outbound lines
	that are available for calling. The system calculates
	the average and peak statistics during the last interval
	(usually 5 minutes).
Inbound Activate	The current number of lines activated for the job. The
	system activates lines based on the number of agents
	on the job and the job state.
Inbound Available	The number of inbound lines that are assigned to the job.

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Calling activities fields for outbound calls

Field	Description
Records selected	The number of records available for calling based on the
	record selection and initial phone type selected in the phone
	strategy.
Phone calls made	The number of calls since the job began.
Cur/Run Hit Rate	The percentage of connects for the last five minutes and the
	percentage of dialing attempts resulting in connects since
	the job began.
Agent connects	The number of calls passed to agents.
Queue	The number of calls that are currently in the wait queue.
Recalls	The number of records that the system scheduled
	for recall.
Calls left	The number of records that the system has not
	called or the number of subsequently loaded records after
	the job began. It does not include the recalls.

Overview Calling Activities Fields for Outbound Calls

Field	Description
Received	The number of calls received by the system.
Agents Connects	The number of calls handled by agents.
Queue	The number of calls in the wait queue.
Average Wait Time	The average time a caller was on hold.
Average speed to answer	The average number of seconds it takes for the system to answer a call.
Percent calls delayed	The total calls placed in wait queue divided by total calls received, converted to a percentage.
Percent abandoned	The total number of abandoned calls in the queue divided by the total calls received, converted to a percentage.

Calling Activities Fields for Inbound Calls

5 Screenbuilder

Overview

Purpose	The Avaya TM Predictive Dialing System (PDS) uses Screenbuilder to create custom agent screens.
Contents	 This section contains the following topics: Screenbuilder overview Screenbuilder menus Open Screenbuilder Create a screen Add text to screen Add text to screen Copy a screen Find a screen Edit a screen Delete field and text in a screen Save screen changes Edit screens with Menu System Add screens to jobs Spell-check your screen Delete screens from a job
	Change screens and cannig lists

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- Field Attributes
- Change field appearance
- Set field edit capabilities
- Change field sequence order
- Field verification formats
- Set field verification formats
- Validate delimiters
- Acceptable field entries
- Set acceptable field entries
- Field reference information
- Set field reference information

- Build helpful screens
- Screenbuilder reports
- Create and view reports
- Print a report

Screenbuilder overview

Overview	Screenbuilder is an optional Avaya PDS tool set that lets you change the information that agents see on their workstation screens. Use Screenbuilder to design up to 20 screens for each job. With Screenbuilder's tools, you can easily adapt your agent's screens to meet your changing needs.	
Background information	Before you change or create a job screen, you need to understand how it fits into the Avaya PDS.	
	A campaign is a strategy that you design to achieve your call center goals. One element of a campaign is a job. It is a job's objective to accomplish specific campaign goals. Campaigns can include one or more jobs. A job consists of a calling list, phone strategy, record selection, job definition, and job screens. Multiple jobs can share screens if the jobs are based on the same calling list or calling list format.	
	Agents see job screens on their workstations when the Avaya PDS passes them a call. If a job uses more than one screen, the agent uses the function keys to move to the subsequent screens. F2 moves to the second screen, F3 to the third, and so on. The Avaya PDS fills some of the fields with customer information from the calling list. The agents may complete additional information.	
	A job screen is always based on a specific calling list. The calling list determines the available fields for a screen. The Avaya PDS maintains a separate file, the calling list dictionary, with lists of the fields. The calling listdictionary also contains information about the size of each field and the kind of information in the field.	
Screen information	Screens contain the following information for the agent:	
	• Fields contain information specific to the current record. The Avaya PDS may complete some of the fields and the agents may complete others.	
	• Field Labels give a brief description of the information in a field. For example, the label Last Name tells an agent that the information in that field is the customer's last name.	
	• Scripts contain the questions you want asked or the information you want the agents to distribute.	

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General Information provides function key names and system instructions.

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Screenbuilder menus

Overview	Screenbuilder starts in menu the screen. It stays in menu in edit mode. (You are in me between menu and edit mod create, delete, or edit screen command.	a mode with the menu bar across the top of mode until you open a screen, then you are enu mode if you can see the menu.) Switch les by pressing Ctrl+X. Use edit mode to s, and use menu mode to choose a menu	
	The Screenbuilder menu is a different tasks.	a menu bar with drop-down menus for	
	The top of the screen contain information line which give item. The bottom of the scree as how to choose a comman	ns the menu bar. Below the menu bar is the s a brief description of the active menu een displays a line of additional help, such d or a message responding to an action.	
	You can make the menu bar pressing Ctrl+X or F1. Whe mode. When it is not visible	active from any screen in Screenbuilder by n the menu bar is visible, you are in menu , you are in edit mode.	
	When you decide to create a screen, compare the new screen to existing screens. If the new screen does not resemble any of the screens on the system, create a screen to meet your needs. Otherwise, make a copy of an existing screen and edit the copy. You can often save time by copying a screen from another job, and copying helps to keep the screen design consistent.		
	Screenbuilder has two typin asterisk (*) on the lower right mode. Press Ctrl+O to switch default edit mode is Overwr type replace the existing text to delete characters. Use Inst existing characters, then switt mode, Screenbuilder moves characters. Use the arrow ke	eenbuilder has two typing modes: Overwrite and Insert. Th ere is an brisk (*) on the lower right corner when the screen is in Overwrite de. Press Ctrl+O to switch between Overwrite and Insert. The ault edit mode is Overwrite. In Overwrite mode, the characters you e replace the existing text to the right of the cursor. Use Backspace lelete characters. Use Insert mode to type characters between sting characters, then switch back to Overwrite mode. In Insert de, Screenbuilder moves existing text to the right as you type new racters. Use the arrow keys to move around the screen.	
Action keys	/s Use the following action keys when using Screenbuilder.		
	Action Key	Function	

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Action Key	Function
Shift+F1	Open Screen
Shift+F3	Save Screen As

Action Key	Function
Shift+F4	Close Screen
F2	Insert line
F3	Delete line
F4	Save Screen
F5	Cut block
F6	Copy block
F7	Paste block
F8	Clear block
F9	Tag all fields
F10	Quit Screenbuilder
Ctrl+A	Add field
Ctrl+C	Clear all tags
Ctrl+D	Clear to end of line
Ctrl+O	Switch between insert and overwrite
Ctrl+X	Switch between menu and edit mode
Ctrl+Z	Undo edit
Open Screenbuilder

Open Screenbuilder	Use the following pro	cedure to open Screenbuilder.
1	Choose Calling lists a	nd users from the Supervisor Main Menu.
2	Choose Start Screenbuilder from the Calling Lists and Users menu. Use these shortcut keys when you are in menu mode.	
	Shortcut Key	Description
	Ctrl+X	To exit a drop-down menu
	Q + Enter	To exit the main menu
	Shift+F4	To close a screen
	Ctrl+A	adds a field
	Tab	To move through the drop-down

menus

Create a screen

Create a screen	Use the following procedure to create a screen using Screenbuilder.
1	Choose Screen from the Screenbuilder menu.
2	Choose New Screen from the Screen menu.
3	Type a name for the screen (not more than 9 characters). The NEWSCRN: Select File Dictionary screen appears. It lists the calling lists for your system.
4	Use the arrow key to move the cursor to the callin g list you want to elect. Press Enter and a blank screen appears.

Add text to screen

Add text to screen	Use the following procedure to add text to a screen using Screenbuilder.
1	Use the arrow keys to move the cursor to where you want the text to begin.
2	Type the text you want to appear on the screen.
3	Repeat steps 1 and 2 for each text entry you want to add.

Add fields to screen

Add fields in screen	Use the following procedure to add fields in your screen using Screenbuilder.
1	Use the arrow keys to move to where you want the field to begin.
2	Press Ctrl+A (Add) and Enter. The field list appears.
3	Press down arrow to move to the field you want to add and press Enter.
4	Repeat steps 1 through 3 for each field you want to add.
5	Choose Save Screen from the Screen menu, then choose Close from the Screen menu.

Copy a screen

Copy a screen	Use the following procedure to copy a screen using Screenbuilder.
1	Choose Open Screen from the Screen menu.
2	Press the down arrow to move to the screen you want to copy and press Enter.
3	Choose Save Screen As from the Screen menu.
4	Type a new name for the screen. The original screen file remains unchanged and the copy is open on your screen.
5	To make changes, follow the steps in "To change or add text."

Find a screen

Find a screen	More than one job can use a screen. Before editing a screen, determine which jobs use the screen. Use the following procedure to determine what job(s) use the screen.
1	Choose Jobs from the Screenbuilder menu.
2	Choose All Jobs.
3	Choose either Outbound or Inbound.
4	Press down arrow to move to the job you want to view.
5	Press Enter and the screen list for the selected job appears.
6	Note the screens the job uses.
7	Press Ctrl+X to exit the list.
	Important
	Do not edit a screen on an active job.

Edit a screen

Change or add text in screens	Use the following procedure to add or change text in screens using Screenbuilder.
1	Choose Open Screen from the Screen menu.
2	Use the arrow keys to move to the screen you want to edit.
3	Press Enter and the screen appears.
4	Use the arrow keys to move to the text you want to change or to the place where you want to add text.
5	Make your changes or additions.

Delete field and text in a screen

Delete fields and text	Use the following procedure to add fields using Screenbuilder.
1	Use the arrow keys to move the cursor to the information you want to delete.
2	Position the cursor at the beginning of the field label or text. Press F5 (Cut) and use the right arrow to highlight the area to cut. Press Enter to select the highlighted area.
3	Type Y at the prompt to confirm the deletion or N to abandon the change.

Save screen changes

Save changes	Use the following procedure to save changes to screens.
1	Switch to menu mode (Ctrl+X).
2	Choose Save Screen from the Screen menu or press F4 (Save).

Edit screens with Menu System

Using the Menu to edit screen fields	If you need to make many changes to a screen, you may find it easier to use the menu edit method. Use the following procedure to edit screen fields using the menus.
1	Open the screen.
2	Use the arrow keys to move to the field you want to change.
3	Tag the field by pressing T. (You can clear a tag by pressing T when the cursor is in a tagged field.)
4	Tag all the fields that you want to change.
5	Choose Change Field(s) from the Field menu. The Field Attribute screen appears.
6	Choose the first letter of the attribute for the first field. The attribute list appears.
7	When you finish making changes to the first field, press Tab or choose NEXT to move to the next field, PREVIOUS to move to the previous field, or DONE to save the changes and quit.
8	Clear all tags by pressing Ctrl+C (Clear all tags).

Add screens to jobs

Overview	You can use the same screen(s) for more than on e active job as long as the jobs use the same calling list or calling list format. Use screenbuilder to change which screens the agents see at their workstations.Agents see the first screen of a job when the Avaya PDS passes them a record. The agents use function keys to choose the next screen. The second function key (F2) accesses the second screen, the third function key (F3) accesses the third screen and so on.
Add screens to a job	Use the following procedure to add a screen to a job.
1	Choose All Jobs from the Jobs menu.
2	Choose either Outbound or Inbound.
3	Press the down arrow to move to the job you want to change. Press Enter and the screen list for the selected job appears.
4	Position the cursor where you want to add the screen name. If necessary, switch to Insert mode (Ctrl+O).
5	Type a comma, then the name of the screen that you want to add. Use the appropriate uppercase and lowercase letters. Use a comma to separate screen names. The order in which they appear is agent, outbound, inbound. List the agent screen name first, then the outbound screen name, then the inbound screen name.
6	Press Ctrl+X to switch to menu mode.
7	Choose Save Screen from the Screen menu or press F4 (Save).

Spell-check your screen

Spell-check your screen	The exact spelling and capitalization of screen names is crucial. Before you add the new screen name, use the following steps to check the spelling. Use the following procedure to check to spelling on your new screens.
1	Choose Open Screen from the Screen menu. The screen list appears.
2	Use the arrow keys to move to the screen name you want to add.
3	Verify the spelling and capitalization. (job1 is not the same as Job1 or JOB1.)
4	Use Ctrl+X to exit the selection box without opening a screen.

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Delete screens from a job

Delete screens from a job	Use the following procedure to delete a screen from a job.		
1	Choose All Jobs from the Jobs menu.		
2	Choose either Outbound or Inbound.		
3	Press the down arrow to move to the job you want to change. Press Enter and the screen list for the selected job appears.		
4	Move the cursor to the comma before the screen name you want to delete.		
5	Press Spacebar repeatedly to type over the screen name up to the next comma or the end of the list, then press Enter. Screenbuilder cleans up the extra spaces and commas in the list.		
6	Press Ctrl+X to switch to menu mode.		
7	Choose Save Screen from the Screen menu or press F4 (Save).		

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Change screens and calling lists

Overview	The screen's calling list determines the screen fields. If the job's calling list changes, you need to update the screens. The following actions require that you change a screen's calling list:	
	• When you change a job's calling list(s)	
	• When you use a copied screen in a job that has a different calling list than the one used by the original screen	
	• When you change a calling list's name	
Change screen calling lists	Use the following procedure to change screen calling lists.	
1	Choose Open Screen from the Screen menu. The screen list appears.	
2	Use the arrow keys to move to the screen name you want to open, then press Enter.	
3	Choose Change Dictionary from the Fields menu.	
4	Choose either Deleting (D) or Remapping (R).	
5	Choose OK to proceed or Cancel to quit.	
6	Choose a new calling list.	
7	If you choose Remapping, confirm the substitutions.	
8	Choose Save Screen from the Screen menu or press F4 (Save).	

Field Attributes

Overview	Each field in a calling list has a set of properties known as attributes. Changing a field's attributes changes the field's appearance on the screen, how the screen displays data, and what type of data the field accepts. The changes you make do not change the calling list fields; they change only the way the screen uses these fields. Although the field attributes are predetermined and you do not need to change them, changes often enhance the screen's appearance and usability.	
How field attributes work	Each field attribute affects one of four aspects of the screen:	
	• Appearance affects how the field appears on the screen. For example, do the blank spaces fill with dots?	
	• Use order affects the sequence in which agents use the fields.	
	• Acceptable entries limits agents' field entries three ways: edit capabilities, verification format, and acceptable entries. For example, you can require that certain fields always have an entry, accept only dates, or restrict entries to specific responses such as yes or no.	
	• Reference information contains the following information about	

• Reference information contains the following information about the field: field name, maximum number of characters, field type, and field location on the screen.

Shortcut letter	Attribute	Value	Description
Ν	Name	Field names	The labels assigned to fields.
Р	Position	1-23 rows 1-79 columns	Location on the screen.
С	Comment	1-256 characters	Clarifies the use of a field. If CP are the first two letters in a comment, the field is a cut-and-paste field.

Shortcut letter	Attribute	Value	Description
F	Edit format	Accessible Protected Optional Required	Determines if and how agents enter information in the field.
V	Verification format	Time Date Numeric	Verifies that fields contain valid entries.
A	Acceptable entry list	Spaces Dots	Displays list of acceptable field entries.
L	Edit acceptable entry list		Alphanumeric - Lets you change the acceptable entries.
D	Filler characters		Specifies whether to fill field blanks with spaces or dots.
S	Sequence number		Specifies the order that agents use fields.

You can change field attributes in several ways. Use the following guidelines to choose an edit method.

Number of Edits	Action
One attribute for one field	Move the cursor to the field you want to change. Press the shortcut letter for the attribute you want to change.

Number of Edits	Action
Several attributes for one field	Move your cursor to the field you want to change. Press E (Edit). Press the shortcut letter for the attribute you want to change. Use Tab to move between buttons or type the requested information. Press Enter. Press Shift+F2 (Save current screen).
Several attributes for several fields	Move your cursor to each field you want to change. Press T (Tag). After you tag all fields, press E (Edit). Press the shortcut letter for the attribute that you want to change. When you finish making the changes for the first field, choose either NEXT or PREV to edit more fields. Move your cursor to the DONE button. Press Shift+F2 (Save current screen).

Fields can be from 1 to 78 characters long; however, a record's data may not fill all the spaces in a field. For example, a name field may be 30 characters, but a record with Jones in the name field uses only 5 spaces. You still need to allow for all 30 characters on the screen.

Change field appearance

Change field appearance	The dot or space-filled attribute determines what goes into the empty spaces in a field. You can have any combination of field fills on a screen. During cut, copy, clear, and paste operations, Screenbuilder fills spaces with vertical lines or dots. If an agent updates a dot-filled field, the Avaya PDS replaces the dots with blank spaces.
1	Open the screen.
2	Use the arrow keys to move to the field you want to change.
3	Press D, the shortcut key for fill characters. The fill attributes list appears.
4	Use Tab to switch between Spaces and Dots. Press Enter when the cursor is on the attribute you want to use.
5	Repeat steps 2 through 4 for each change.
6	Switch to menu mode (Ctrl+X).

Set field edit capabilities

Set field edit capabilities	Field edit capabilities specify fields in which agents can or must enter data. The following table lists edit capabilities.			
	Open the screen.			
	Use the arrow keys to move to the field you want to change. Press F, the shortcut key for edit format. The Edit Format list appears.			
				Select Accessible, Protected, Optional, or Required. Press Enter when the cursor is on the format you want to use.
	Capability	Description		
	Accessible	The cursor does not automatically go to accessible fields. Agents can move the cursor to these fields but can't change the data.		
		Optional	Agents can choose whether to enter data. Comment fields are usually optional entry fields.	
	Protected	Agents cannot change protected fields.		
5 6	Required	Agents must enter information into required entry fields before they can release a record.		
	Repeat steps 2 throu	gh 4 for each change.		
	Choose Save Screen	from the Screen menu.		

Hint

You can improve data quality using three options to limit the information the agents put in a field

- field editing capabilities
- field verification formats

• acceptable field entries

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Change field sequence order

Overview	Field sequence is the order in which an agent's cursor moves. It does not have to move in the same order as the fields appear on a screen. Screenbuilder has two field sequencing modes: auto-sequencing and manual-sequencing. You can turn auto-sequencing on or off by changing the default settings in the Command menu. When auto sequencing is on, the Avaya PDS displays fields from left-to-right, top- to-bottom. When it is off, the system determines the field order by the order in which you added the fields to the screen. Each field has a sequence number. You can see the current field's
	sequence number in the status bar. It is the value that follows S When you rearrange fields on a screen with auto-sequencing turned on, Screenbuilder changes the field sequence to left-to-right, top-to- bottom. When you manually sequence fields, you determine the order in which you want agents to use the fields.
Change field sequence order	Use the following procedure to change the field sequence order.
1	Open the screen.
2	Use the arrow keys to move to the field you want to change.
3	Press S, the shortcut key for Sequencing. The sequencing attribute list appears.
4	Type the new sequence number.
5	Repeat steps 2 through 4 for each change.
6	Choose Save screen from the Screen menu.

Field verification formats

Overview Verification format determines the format of the information that agents enter into a field.

Verification formats are valid for only three types of fields

- time
- date
- numeric

The Avaya PDS validates both the format elements and delimiters. For example, if you specify a time format of HH.MM, the agent must include the period between the hour and minute values for the system to successfully validate the information.

The acceptable entry list limits agents' entries to specific choices. For example, limit a field to a Yes or No response.

Format name	Format elements	Sample formats
time	HH hours	HH.MM.SS
	MM minutes	HH.MM
	SS seconds	
date	CCYY year	CCYY/MM/DD
	MM month	MM/DD/CCYY
	DD day	DD/MM/CCYY
numeric	Numbers only	#######

Set field verification formats

Set field verification formats	Use the following procedure to set field verification formats using Screenbuilder.
1	Open the screen.
2	Use the arrow keys to move to the field you want to change.
3	Press V, the shortcut key for Verification Edit. The Verification Edit list appears.
4	Type the appropriate format structure.
5	Repeat steps 2 through 4 for each change.
6	Choose Save Screen from the Screen menu.

Validate delimiters

Validate delimiters	The Avaya PDS validates both the format elements and delimiters. For example, if you specify a time format of HH.MM, the agent must include the period between the hour and minute values for the system to successfully validate the information.
1	Open the screen.
2	Use the arrow keys to move to the field you want to change.
3	Press V, the shortcut key for Verification Edit. The Verification Edit list appears.
4	Type the appropriate format structure.
5	Repeat steps 2 through 4 for each change.
6	Choose Save Screen from the Screen menu.

Acceptable field entries

Overview The acceptable entry list limits agents' entries to specific choices. For example, limit a field to a Yes or No response.

You control which entries are acceptable in a field by creating a list of acceptable entries and assigning it to the field. The Avaya PDS assigns a number to each list. Multiple jobs can use the same list and you can edit the list as long as it is not being used by a current job.

Set acceptable field entries

Set acceptable field entries	Use the following procedure to set acceptable field entries.
1	Open the screen.
2	Use the arrow keys to move to the field you want to change.
3	Press A, the shortcut key for Acceptable entry list. The Acceptable entry list appears.
4	Choose the acceptable entry list number.
5	Repeat steps 2 through 4 for each change.
6	Choose Save screen from the Screen menu.

Field reference information

Overview The field attributes screen includes five types of information (attributes) for each field

- name position, and comments
- width
- type
- position
- comments

However, you cannot change the name, width, or type of field. You can, however, change the position on the screen and edit the comments attribute.

When you change the comment for a screen field, your change does not affect the comment in the calling list. This is helpful when you use a field for different purposes on different screens.

The other use of the comment field is to designate a field as a cut-andpaste field. The Avaya PDS uses cut-and-paste fields to transfer information to the host computer. The system designates cut-and-paste fields with CP in the first two spaces of the comment field.

Note

Do not move these fields to different locations. This will disable the cut-and-paste function.

Set field reference information

Set field reference information	Use the following procedure to set field reference information.
1	Open the screen.
2	Use the arrow keys to move to the field you want to change.
3	Press C, the shortcut key for Comment. The comment box appears.
4	Type the new comment. If the field is a CP field, add the comment after the CP. You cannot have more than 256 characters in a comment.
5	Repeat steps 2 through 4 for each change.
6	Choose Save screen from the Screen menu.

Build helpful screens

Tips and hints

A well-designed screen is effective and easy to use. The easier a screen is to use, the better your agents can communicate with your customers. A well-designed screen provides agents with the information they need about an account, product, or job.

Reference Information	Description	Change? Yes or No
Name	Calling list field name	No
Width	Maximum number of characters in the field	No
Туре	N - number, C - alphanumeric characters, D - date, \$- monetary value, or T - time.	No
Position	Location on screen. Row and column of the first field character	Move only
Comments	Field information. If "CP" appears if the field, it is a cut-and-paste field. Do not change field locations for cut-and-paste fields.	Yes

Thoughtful questions

Ask yourself the following questions when designing screens:

- What should these screens accomplish?
- Is this information useful to your agents' success?
- Can agents find the information that they need quickly?
- Are the screens consistent?

Layout tips

Use the following tips when designing the layout for your new screen.

- Present information in the order that the agents use it.
- Group related pieces of information.
- Leave blank rows between groups of data.
- Maintain consistent left and right margins.
- Arrange field labels and fields so that they visually go together.

• Align field labels and the starting point of data fields.

Tips for fields Think of the following items when naming fields.

- Carefully named field labels save time and prevent confusion.
- Keep field labels less than 16 characters or not longer than four words.
- Start field labels with an uppercase letter, followed by lowercase letters.
 - Example: Label a field Name instead of NAME. This helps to distinguish labels from data, which are always uppercase letters.
- Use consistent wording, abbreviations, and labels.

Miscellaneous Finally, a couple of tips that will help agents use the screens designed for them.

- Include a list of the function keys on the screen that display the next screen and release the record.
- Take extra care to associate an inbound calling list with inbound screens and inbound jobs, and an outbound calling list with outbound screens and outbound jobs.

Screenbuilder reports

Overview Screenbuilder reports include field attribute labels and field content descriptions. Empty comment fields do not appear on the reports. Use Screenbuilder reports to compare two screens or to train agents on a new screen.

Create and view reports

Create and view a report	Use the following procedure to create and view Screenbuilder reports.
1	Press Shift+F2 (Open).
2	Press Ctrl+X to switch to menu mode.
3	Choose Report from the Screen menu.
4	Press Ctrl+X to switch to edit mode. Choose Y to create the report.
5	Press F10 (Quit). Choose Reports from the Supervisor Main Menu to print the report.

Print a report

Print a report	Use the following procedure to print Screenbuilder reports.
1	Choose Reports from the Supervisor Main Menu.
2	Choose View or print reports from the Reports menu.
3	To view a report, press F4 or Ctrl+V (View). Type the number that corresponds to the report you want to view and press Enter.
4	The report appears on the screen. Press Ctrl+N (Next) or Ctrl+P (Previous) to see the entire report.
5	To print the report, press F2 or Ctrl+O (Print).
6	Press Ctrl+X (Exit) to return to the Report Files Status screen.

Screenbuilder

6 Reports

Overview

Purpose	The purpose of this section is to explain Avaya TM Predictive Dialing System (PDS) reports.
Contents	This section contains the following topics:
	Avaya PDS reports overview
	Agent history report fields
	Generate agent history reports
	• View or print an agent history report
	Job history report fields
	Generate job history reports
	Generate a previously run job history report
	List distribution
	Calling list data
	List distribution report design
	Generate list distribution reports
	Select list distribution fields
	Select list distribution field values
	Select range in list distribution
	• Set list distribution filters

- Change list distribution report titles
- Move fields and values
- Clear fields and values
- Delete fields
- Change or delete a value
- Edit filters
- Copy a list distribution report
- Delete a list distribution report file
- Execute and print list distribution reports
- List distribution report analysis

- Calling list reports
- Generate calling list reports
- System reports
- Generate system reports
Avaya PDS reports overview

Overview Use the Reports commands to analyze and track the progress of your daily call activities. Throughout the day, the Avaya PDS collects data about your calling lists, jobs, and agents. The system uses this data to generate various reports. You can also use PC Analysis to create reports. See the next section for details about PC Analysis.

Choose Reports from the Supervisor Main Menu.

Agent history report fields

Name	Description
For the period	Specifies the date or period when the system captured the report information.
Report date	Displays the date that the Avaya PDS created the report.
Time	Displays the time that the Avaya PDS created the report.
Agent name	Displays the agent's logon ID.
Job information	Describes the job. The information includes job name, system identification number, job type, and the record selection file name. It displays the day and time the job started and finished.
Total Activity time on job (hh:mm)	Displays the total time the agent spent on each job. Active time is the time the agent worked with the customer record, was on the phone, or waited between calls.
Total inbound connects	Displays the total inbound calls passed to the agent.
Total outbound connects	Displays the total dialing attempts passed to the agent.
Total connects per active hour	Displays the average call connects made each hour. The system calculates the total call connects and divides by the
	total active time on the job. The Avaya PDS calculates the
	average hours to one decimal place.

Overview The following list describes agent history report fields.

Name	Description
Avg. Agent Related Time Intervals	Provides a heading for the report field that shows the average time the agent performed specific tasks on each job.
Time Agent Working with Record	Calculates the average work time the agent talked with a customer and worked on customer records. Time begins with the call connection and ends with record release. This is the total of Time Agent on Phone and Time Agent on Record After Call.
Time Agent on Phone	Calculates the average talk time the agent was on the phone with each job. Time begins with the call connection and ends with the phone line release.
Time Agent on Record After Call	Calculates the average time to update records. Time begins with the phone line release and ends when the record release
Time Waiting Between Calls	Calculates the average time the agent waited between calls. If this time is too long, you may want to change the Expert Dialing setting.

Generate agent history reports

Overview	Agent history reports provide data on agent performance. The menu offers two types of reports: Agent History Reports (based on job type) and the Agent Activity Report. The following illustration shows the items on the Agent History Reports menu. You have a choice of outbound, inbound, or blend reports. Each report shows data on all the jobs worked by the agent for a specified period. Information includes the total time an agent was on a job and how the agent spent the time.	
Generate agent history Use the following procedure to generate agent history reports.		
1	Choose Agent history reports from the Reports menu.	
2	Choose Outbound , Inbound , or Blend Agent History Report from the Agent History Reports menu.	
3	Type a Sort Field name. The sort name labels the columns in your report and organizes the information in alphanumeric order. To generate an agent history report, enter one or more of the following selection criteria:	
	Job Name(s)	Specify one job or a range of jobs.
	Job Description Label	not more than 30 characters
	Record Selection file name(s)	Separate multiple files with a comma.
	Phone Strategy file name(s).	Separate multiple files with a comma

Job Start Date	The system retrieves job information based on this date. The start date can be one day or a range of days. Type dates in the CCYY/MM/DD format. Separate a range with a comma or a hyphen. For example, to include jobs that started on June 14 and 15, 1999 type 1999/06/14- 1999/06/15 or 1999/06/14, 1999/06/15. To limit the report summary to one day, enter the date as a range. For example, to enter June 14, 1999, type 1999/06/ 14-1999/06/14.
Job Number(s)	Separate a range with a dash and multiple job numbers with a comma. For example, type 1-3 or 1,2,3.
Agent Name	Include only one agent
Report Description	not more than 30 characters

4 Type the number of the Totalling Strategy. Here are what the numbers mean:

0	Details by job
1	Details by job and totals for a selected period
2	Totals for a selected period
3	Totals for a selected period
4	Subtotals for each job type and totals for a selected period
5	Details by job, subtotals by job type, and totals for a selected period

5 Type Y at the prompt if the entries are correct or type N to edit your selections. The cursor returns to the first field. Press Enter to move to the field you want to correct. When all the fields are correct, type Y and the Agent History Reports menu appears.

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6 Choose View or print reports from the Agent History Reports menu.

View or print an agent history report

View or print an agent history report	Use the following procedure to generate an agent history report.	
1	Choose Agent Activity Report from the Agent History Reports menu. The Avaya PDS displays a prompt to tell you it's generating the report. The Agent History Reports menu appears when the system completes the report.	
2	Choose View or print reports from the Agent History Reports menu.	

Job history report fields

Overview The job history reports provide data on job performance. The menu offers two types of reports: Job History Reports (based on job type) and the Previously Run Jobs Report. The following illustration shows the items on the Job History Reports menu.

Name	Description
For the period	Specifies the date or period when the system captured the report information.
Report Date	Displays the date that the Avaya PDS created the report.
Time	Displays the time that the Avaya PDS created the report.
Job Information	Describes the job. The information includes job name, system identification number, job type, and the record selection file name. It displays the day and time the job started and finished.
Time System on Line (hh:mm)	Displays the active time for an outbound job. It does not include start up time and job suspension time.
Total Agent Hrs on Line	Displays the time agents were on the job.
Average Agents On line	Records the average number of agents logged into each job.
Total Number of Inbound Calls	Displays the total inbound calls received by the system.

Name	Description
Inbound Calls per System Hour	Displays the average number of inbound calls
	received per system hour.
Inbound Calls per Agent Hour	Displays the average number of inbound calls received per agent hour. (Total calls divided by total agent hours logged to the job)
Total Connects	Displays the total inbound calls passed to agents.
Total Number of Outbound Calls	Displays the total dialing attempts made by the Avaya PDS. It includes all attempts, including those not passed to agents.
Dials per System Hour	Displays the average call connects made each hour. The Avaya PDS calculates the total call connects and divides by the total active time on the job. The system calculates the average hours to one decimal place.
Dials per Agent Hour	Displays the average number of dial attempts per agent hour.
Total Connects	Displays the total outbound calls passed to agents.
Connects per System Hour	Displays the average number of connects for the
	time the job was active.
Connects per Agent Hour	Displays the average number of inbound calls
	received per agent hour.

Name	Description
Rate of Connects to Calls (inbound)	Displays a decimal amount based on the number of inbound calls passed to agents divided by the number of inbound calls received by the system.
Rate of Connects to Calls (outbound)	Displays a decimal amount based on the total number of connects divided by the total number of dial attempts received by the system.
Average Agent Related Intervals	Provides a heading for the report fields that classify the average time agents spent performing specific tasks on each job.
Time Agent on Record After Call	Calculates the average time to update records. Time begins with the line release and ends with the record release.
Time Agent Working with Record	Calculates the average time agents spent talking with a customer and working on the records. Time begins with the call connection and ends when the agent releases the record. This is the total Time Agent on Record After Call and Time Agent on Call.
Time Agent on Call	Calculates the average time agents spent on the phone for each job.
Time Waiting Between Calls	Calculates the average time agents waited between calls.
Queue Statistics	Displays the number of outbound and inbound calls that were placed in wait queue.

Name	Description
Connect Release Classification (Agent)	Displays the different call completion codes and the corresponding number of calls released.
System Release Classification	Displays the number of calls released by the system according to standard release classifications or call completion codes such as NOANSWER and BUSY.

Generate job history reports

Overview	The Job History Reports me outbound jobs, inbound jobs reports provide information includes the number of dials work time, agent update tim	enu allows you to generate reports for s, blend jobs, or combination reports. The on the selected job for a specific period. It and connects, call completion codes, agent te, and agent wait time between calls.
Generate job history reports	Use the following procedure	e to generate job history reports.
 Choose Job history reports from the Reports menu. Choose Outbound, Inbound, or Blend Job Report from the J History Reports menu. Type the name of the sort field. 		s from the Reports menu.
		d, or Blend Job Report from the Job
		eld.
4	To generate the report, type one or more of the following report selection criteria:	
	Job Name(s)	Specify one job or a range of jobs.
	Job Description Label	not more than 30 characters
	Record Selection file name(s)	Separate multiple files with a comma.
	Phone Strategy file name(s).	Separate multiple files with a comma

Job Start Date	The system retrieves job information based on this date. The start date can be one day or a range of days. Type dates in the CCYY/MM/DD format. Separate a range with a comma or a hyphen. For example, to include jobs that started on June 14 and 15, 1999 type 1999/06/14- 1999/06/15 or 1999/06/14, 1999/06/15. To limit the report summary to one day, enter the date as a range. For example, to enter June 14, 1999, type 1999/06/ 14-1999/06/14.
Job Number(s)	Separate a range with a dash and multiple job numbers with a comma. For example, type 1-3 or 1,2,3.
Agent Name	Include only one agent
Report Description	not more than 30 characters

5 Type the number of the **Totalling Strategy**.

6 Type Y at the prompt if the entries are correct or type N to edit your selections. The cursor returns to the first field. Press Enter to move to the field you want to correct. When the entries are correct, type Y and the Job History Reports menu appears.

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7 Choose View or print reports from the Job History Reports menu.

Generate a previously run job history report

Overview	This report provides a list of the last 200 to 500 jobs run by the Avaya PDS. (The actual number of jobs depends on how your system was set up.) It includes the name, number, unit work list, job date, job start time, job stop time, and the number of calls the system placed. You can use it as a reference to help you to select appropriate categories for job or agent history reports.
Generate a previously run job history report	Use the following procedure to generate a previously run job history report.
1	Choose Job History Reports from the Reports menu.
2	Choose Previously Run Jobs Report from the Job History Reports menu. The system displays a confirmation prompt.
3	Type \mathbf{Y} to generate the report or \mathbf{N} to quit without generating a report.

List distribution

Overview Although List Distribution is easy to use, it involves several words and ideas that may be new to you.

List Distribution is a reporting tool that helps you analyze the records in your outbound calling list. Analyze records before you run an outbound job. It creates reports that count the records in the categories (or distributions) you set. Using List Distribution allows you to focus on your campaign objective by assisting with the following topics:

Job planning

By understanding how many accounts are in different categories, you can estimate the size of the record selection. If the selection is too large, you can change the record selection criteria to select fewer records. The information helps you design effective record selections.

• Job analysis

By viewing the results of call activity during a job, you can adjust your calling operations to get the best results.

The criteria you set for List Distribution reports do not affect the calling list. The settings only determine how the Avaya PDS displays the data in the reports.

Use the following shortcut keys when working with List Distribution.

Actions	Keys
Done	F1
Insert field	F2
Delete field	F3
View calling list	F4
Next page	F5
Previous page	F6
Change	F7
Filter	F8
Move	F9
Clear	F11

Calling list data

Overview Each calling list record consists of fields containing data for each record. You can sort the calling list data by any field; then tell the Avaya PDS to give you totals for the records in ranges for each field. For example, you can ask for a count of records by balances in \$1,000 increments. The system displays numbers of records in each incremental group in a row format. You can further sort the information in the report by adding other criteria. For example, you can sort the records in each \$1,000 group into subgroups by credit rating. The Avaya PDS displays the numbers of records that fall into each subgroup in a row and column format. You can add other criteria sorting the numbers in the report by another calling list field. For example, you could add the type of account, personal or business to the previous example. The new report separates the totals into groups called tables. Filter data The Avaya PDS gives you the ability to further refine your selection by using filters. The use of filters is always optional. A filter is a set of requirements that eliminate records that don't match the settings. Use filters to narrow your selection of records to specific values. You can also use a call completion code filter to count the records based on call completion codes. If you set filters, they apply to all the reports you generate from that List Distribution file. For example, you can use filters to limit the report to customers in Colorado or Washington, and you can add a call completion code filter that eliminates all records except those marked NOTCALLED.

List distribution report design

Overview Now that you are familiar with the types of reports, let's take a look at how you design them. Your first decision is the type of report: row, row and column, or table.

- Design a row report if you want information from only one field.
- Design a row and column report if you want information from two fields.
- Design a table report if you want information from three fields.

When trying to decide which fields to use for the row, column, or table headings, use the following guidelines:

- When deciding between columns and rows, use the field name that has the largest number of categories for the row label. For example, you want to sort by AREA_CODE and the amount in the LAST_ORDER field. You have divided LAST_ORDER into four separate ranges, and the calling list has 50 area codes. Make AREA_CODE the row label because it has the largest number (50) of categories. Make LAST_ORDER the column label because it has the fewest number (4) of categories. You can add column criteria at the same time you are entering row criteria.
- When deciding between row, column, and table groups, use the field name with the fewest categories for the table groups.
- The Avaya PDS assumes a 0 (zero) for the first increment in a range of values. You do not have to enter 0.

There are spaces on the List Distribution Field Selection screen for entering many row and column criteria. We recommend keeping the list distributions simple and creating as many as you need to keep the reports simpler to read.

Generate list distribution reports

Generate list distribution reports	Use the following procedure to generate list distribution reports.
1	Choose List Distribution from the Reports menu.
2	Choose Create a list distribution from the List Distributio n menu.
3	Type the item number of the calling list.
4	Type a List Distribution file name (not more than 10 characters). It is helpful to give the file the same name as the record selection you create with the information.
5	Type an optional report title (not more than 30 characters). If you do not name it, the Avaya PDS names the report "List Distribution Report."
6	Type Y at the prompt to continue or N to cancel. The List Distribution Field Selection screen appears.

Select list distribution fields

Overview	You can choose fields by typing the field name or by choosing them from the calling list. Because you need to type the name exactly as it appears in the calling list, it is often easier and faster to choose from the list.
Select list distribution fields	Use the following procedure to select list distribution fields
1	To select a row label, press F4 to see the list of fields. Type the number associated with the field. If you are sorting by only one field, see "To select List Distribution field values"; otherwise, go to the next step.
2	To select the column label, press Enter to move the cursor to the blank cell under the Column heading.
3	To select a column label, press F4 to see the list of fields. Type the number associated with the field. If you are sorting by only two fields, see "To select List Distribution field values"; otherwise, go to the next step.
4	To select the table label, press Enter to move the cursor to the blank cell under the Table heading.
5	To select a table label, press F4 to see the list of fields. Type the number associated with the field.
6	When you complete your selection(s), move the cursor to the first field.
7	If you want to choose values for additional reports, complete the next line by following steps 1 through 6. You can design 15 reports for each List Distribution.

8 When you finish selecting fields, press F7 (Change). The List Distribution Field Value Selection screen appears.

Select list distribution field values

Overview	The following guidelines must be followed:
	• Range sorts records into sets based on ranges. Use the following guidelines when using ranges to sort report data:
	• Ranges must be numbers.
	• Ranges cannot contain commas or decimals.
	• Ranges must be in ascending order (low to high).
	• Item selects records to match a value. For example, you can search for area codes in the 206 region. Use the following guidelines when using Item to sort report data:
	 Items can be in ascending or descending order.
	– Items can be letters, numbers, or symbols.
Select list distribution field values	Use the following procedure to select list distribution field values.
1	Type R for Range or I for Item (uppercase or lowercase) and press Enter. The cursor moves to the first blank line in the left column.
2 3	If you choose Range, complete the steps on the following page:
	When you have entered all the values for the first field, press Done . The List Distribution Field Selection screen reappears.
4	Move to the next field and repeat steps 1 and 2.
5	Press Done when you have entered all the values or press F8 (Filters) to enter filters.

Select range in list distribution

Select range in list distribution	Use the following procedure to select range in a list distribution report.
1	Type the first value in the range. The cursor moves down to the next line. The number represents the upper limit of the first range. For example, to include all records from 0-500, type 500.
2	Type the next value.
3	Repeat until you have set all the values. If you want an unlimited upper value, type 99999999999 (ten nines).
4	If you choose Item, complete the following steps:
5	Type the value for the item(s) you want to include in the list. The cursor moves down to the next line.
6	Type the value for the next item.

Set list distribution filters

Overview Use the List Distribution Filter Criteria screen to set List Distribution filters. Press F8 (Filter) with the cursor on any line in the List Distribution Field Selection screen to display the following screen.

When you specify criteria for a field in a filter, you use an expression. An expression is a combination of comparison operators (such as < or >) and values (letters or numbers).

With List Distribution, use the following comparison operators.

Operator	Description
>	greater than
<	less than
>=	greater than or equal to
<=	less than or equal to
=	equal to
~	not equal to
*	wild card character
-	range
,	or
!	list wild card

Set list distribution filters

Use the following procedure to set list distribution filters.

- **1** In the filter screen, press F4 (View) to view the calling list fields. Then type a field number and press Enter.
- **2** Type a value for the field in the Value column.

3 To use call completion codes as filters, position the cursor on the blank line beneath Call Completion Code Selections. Press F4 (View) to view the list of available codes. Then type a code number. To continue adding

call completion codes, press Enter to move to the next line and repeat steps 1 and 2.

- 4 Press F1 (Done) to return to the List Distribution Field Selection screen.
- **5** Press F1 (Done) again. The List Distribution Report Generation screen appears.
- **6** Type C and press Enter to generate the report, or press Ctrl+X to save the file and return to the List Distribution menu.

Change list distribution report titles

Overview	Once you create a List Distribution file, you can change it to adjust the report results. You can edit a report file to change and delete sort fields, values, and filters, or rename the report. For example, if the results show many customers with balances between \$100 and \$500, you may want to refine the BALANCE value criteria. You can redefine the range to 100, 200, 300, 400, and 500 to show the distribution of customers for smaller ranges.
Change list distribution report titles	Use the following procedure to change a list distribution report title.
1	Choose List Distribution from the Reports menu.
2	Choose Edit list distribution from the List Distribution menu.
3	Type the item number of the List Distribution file.
4	Type the calling list name.
5	Type a new List Distribution report title (not more than 30 characters). The Avaya PDS names the report "List Distribution Report" if you do not name the report.
6	Type \mathbf{Y} at the prompt to continue or \mathbf{N} to cancel.
7	Press F1.
8	If you want to generate the report now, press C and press Enter ; otherwise, press Ctrl+X to save the file and return to the List Distribution menu.

Move fields and values

Move fields and values	Use the following procedure to move fields and values.
1	On the List Distribution Field Selection screen, position the cursor on the field you want to move and press F9 (Move).
2	Type R to move the field to a row, C to a column, or T to a table; then press Enter.
3	Type the line number to which you want to move the field.
4	When you finish moving fields, press F1 (Done).
5	If you want to generate the report now, type C and press Enter; otherwise, press Ctrl+X to save the file and return to the List Distribution menu.

Clear fields and values

Clear fields and values	Use the following procedure to clear fields and values.
1	Open the List Distribution Field Selection screen.
2	Position the cursor on the field that you want to clear and press F11 (Clear).
3	Type Y at the prompt to remove the field and its value or N to cancel.
4	When you finish clearing fields, press F1 (Done).
5	Type C and press Enter to generate the report, or press Ctrl+X to save the file and return to the List Distribution menu.

Delete fields

Delete fields	Use the following procedure to delete fields.
1	Open the List Distribution file you want to edit.
2	Position the cursor on the field you want to delete. Press F3 (Delete).
3	Press Y at the prompt to delete the field or N to cancel.
4	When you finish deleting fields, press F1 (Done).

Change or delete a value

Change or delete a value	Use the following procedure to change or delete a value.
1	Open the List Distribution file you want to change.
2	Move to the field whose value you want to change.
3	Press F7 (Change).
4	Position the cursor on the value. Press F3 (Delete).
5	Type a new value or go to step 6.
6	Press F1 (Done).

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Edit filters

Edit filters	Use the following procedure to edit filters.
1	Open the List Distribution file you want to edit.
2	On the List Distribution Field Selection screen, press F8 (Filter). The Distribution Filter Criteria screen appears.
3	Position the cursor on the line you want to edit, and press F3 (Delete) or F11 (Clear).
4	To add a filter, press F4 (View) to select a field from the list. Type the field number. Type a field value, if necessary.
5	Press F1 (Done) to return to the List Distribution Field Selection screen.
6	If you want to generate the report now, type C and press Enter; otherwise, press Ctrl+X to save the file and return to the List Distribution menu.

Copy a list distribution report

Copy a list distribution report	Use the following procedure to copy a list distribution report.
1	Choose List Distribution from the Reports menu.
2	Choose Copy a list distribution from the List Distribution menu.
3	Type the item number of a List Distribution file.
4	Type Y at the prompt to continue or N to cancel. The List Distribution Report Generation screen appears.
5	Type a new file name for the copy.
6	Type Y at the prompt to continue or N to cancel.
7	Press any key to return to the List Distribution menu.

Delete a list distribution report file

Delete a list distribution report file	Use the following procedure to delete a list distribution report file. After you delete a list distribution file, any report files generated from the file remain on the Avaya PDS until the end of the following day.
1	Choose List Distribution from the Reports menu.
2	Choose Delete a list distribution from the List Distribution menu.
3	Type the item number of the List Distribution file you want to delete.
4	Type Y at the prompt to continue or N to cancel.
5	Press any key to return to the List Distribution menu.

Execute and print list distribution reports

Overview	When you execute a List Distribution file, the Avaya PDS creates a report with the records organized according to the criteria you set in the List Distribution file. You can view and print the report or save the results for later use.
	You can execute a List Distribution file two ways:
	• Press Ctrl+C after completing the steps for creating or editing a file.
	• Use the Execute a list distribution file command.
Execute and print list distribution reports	Use the following procedure to execute and print list distribution reports.
1	Choose List Distribution from the Reports menu.
2	Choose Execute a list distribution from the List Distribution menu.
3	Type the item number for the file.
4	Type an optional report title (not more than 30 characters). The Avaya PDS names the report "List Distribution Report" if you don't name the report.
5	Type Y at the prompt to continue or N to cancel. The List Distribution Report Generation screen appears.
6	If you want to generate the report now, press C and press Enter; otherwise, press Ctrl+X to store the List Distribution results and generate the report later.
7	Press any key to return to the List Distribution menu.

List distribution report analysis

Overview The top portion of each report lists the Avaya PDS call completion codes. It helps determine how many records you have left to call based on the last recorded calling result. These totals are independent of the list distribution criteria you enter. The totals may change if you have jobs running.

The bottom portion of each report displays how many records match the criteria you set when you defined your list distribution. The information will help you design your record selections. Once you've looked at the results, you may want to go back and change the criteria fields values you chose. For example, if you have a large number that appears between the balance ranges of \$1000 and \$5000, you can edit the criteria to add a \$2500 range.

Calling list reports

Overview During the download process, the Avaya PDS extracts the data for three calling list reports:

- Days on PDS Report shows the nonproductive contact records. Nonproductive contact records are records for which no customer contact has occurred within a certain time. The time is determined during the Avaya PDS configuration. The system marks these records and includes them on a report after the specified number of days. Depending on your system configuration, the system will either continue to call the records or not call those records again.
- Reject Report shows the records the Avaya PDS rejected due to duplicate account numbers, invalid telephone numbers, or time zone sorting failures.
- Release Code Report (call completion codes) shows all records with a specific call completion code. For example, you can request a report of all calls that resulted in a customer who has promised to make a payment.

Generate calling list reports

Overview	During the Avaya PDS configuration, the intervals at which the system generates reports and the call completion codes for the reports were set. The system generates calling list reports during the daily download process.
Generate calling list reports	Use the following procedure to generate a calling list report.
1	Choose Calling list reports from the Reports menu.
2	Choose Days on PDS Report, Reject Report, or Release Code Report (Call Completion Code Report) from the Calling List Reports menu.
3	Type a report description (not more than 30 characters).
4	Type Y at the prompt to continue or N to cancel. The Avaya PDS generates the report.
5	Choose View or print reports.
System reports

Overview	The Avaya PDS generates four system reports:
	• Agent Login Report shows the agent number, the login menu, and the agent ID.
	• Multiple Call Report sorts records by phone numbers. It lists the number of times the Avaya PDS called the record, the date, the account number(s), call completion code, agent, and calling list record number.
	• Program Information File (PIF) Report shows a list of the previous data processing programs run on the Avaya PDS. Use this report to help troubleshoot system problems.
	• Hourly Inbound Activity Report shows the number of inbound calls received as well as the number of inbound calls placed on hold or abandoned.

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Generate system reports

Generate system reports	Use the following procedure to generate a system report.
1	Choose System reports from the Reports menu.
2	Choose Agent Login Report, Multiple Call Report, Program Information File Report, or Hourly Inbound Activity Report from the System Reports menu.
3	If you chose Multiple Call Report, type a phone number in the format NNN-NNNNN.
4	Type a report description (not more than 30 characters).
5	Type Y at the prompt. The Avaya PDS generates the report.
6	Choose View or print reports .

7 PC Analysis

Overview

Purpose	The Avaya TM Predictive Dialing System (PDS) uses PC Analysis for reporting and troubleshooting.
Contents	 This section contains the following topics: PC Analysis Data sources Job history Agent history Calling statistics Calling list Downloading an extract file
	 PC Analysis extract Log in to PC Analysis using cdwanal password Log in to PC Analysis using supervisor password Create an extract file Extract selection information Set up the extract file Edit an extract file Copy an extract file

- Delete extract and output files
- Execute an extract configuration file
- Display completion codes
- Display available calling lists
- Copy an extract print file
- Delete an extract print file
- View and print an extract file

PC Analysis

Overview PC Analysis allows you to use data from the Avaya PDS to prepare reports, charts, mail merge letters, and spreadsheets using PC software. Using PC Analysis, you can extract five statistics files:

- job history
- agent history
- calling information
- calling transactions
- calling lists

The extract is in a comma delimited file without headings. In order to use the information, you need to import it into a PC program such as Excel, Lotus, a word processing merge file, or database. You can then create the reports, charts, letters and spreadsheets from the PC program.

When you run PC Analysis, you may see a significant reduction in system performance. For this reason, we suggest that you run the extract when there are no active jobs. Understanding the information in the Avaya PDS files helps you create extracts that contain the data you need.

Overview When Avaya PDS places a call, information is put into "buckets" or files. The call's outcome is written to the calling list (AGENT, DATE, TIME, and CODE) and to the statistics files.

When the job is complete, summary information is gathered and written to the job and agent files.



We gather information from these files using PC Analysis.

Data sources include Job History Files, Agent History Files, Calling Information Statistics, Calling Transaction Statistics, and Calling List Information.

Job history and agent history files are created by an Avaya PDS binary application that uses totals from the information and transaction statistics. Depending on what you want to do, you choose the file containing the information you need as your source file.

Important! You can take information only from one source file per extract. If you want information from more than one source file on your PC, separate extracts and then combine the data in your PC application.

Data Sources Job History This file contains data about the last 200 jobs run on Avaya PDS. Typical data consists of job start and stop times, the total number of connects, the total number of agents working the job, and the total number of minutes the job was run.

Agent History This file contains data about each agent's calling activity during the last 200 jobs. Typical data includes number of seconds the agent was talking with clients, the number of seconds updating records, and the number of calls the agent answered.

Statistics There are two statistics files

Information File

This file contains data about all calls placed during a job. It includes the times agents joined and left jobs, and the time the job shut down.

Transaction File

This file contains data about inbound and outbound call processing. Avaya PDS stores the record numbers, phone numbers, recall attempt counts, agent names, talk and work times, and calling results. Typically, these statistics are stored for the past five calendar days. Some systems are configured to store up to 28 calendar days.

Calling list This file contains data about the client's account. It typically includes the person's name, address, account information and the system-added and agent-added codes.

Job history

Overview The job history file contains data on the last 200 completed jobs. Avaya PDS separates the data into inbound and outbound job information. The information is taken from the information and transactions statistics files. Unlike the statistics files, the job history file provides averages and group totals.

Information in this file includes the following:

- Last 200 jobs
- Job start and stop times
- Number of connects
- Number of agents on the job at any given time
- Number of minutes the job was suspended

Job information The following table describes the fields in the job history file:

Name	Description
JOBNAME	Job name.
JOBNUMBER	Avaya PDS identification number assigned to a job. The number increases each time Avaya PDS runs the job.
JOBTYPE	Indicates the job type: inbound, outbound or blend.
UNITID	Unit work list key value for a unit work list job. For example, if you base the unit work lists on ZIP codes, the field contains the ZIP codes used by that job.
JOBDATE	Job start date.
STARTTIME	Job start time.
ENDTIME	Job stop time.
ACTIVETIME	Total job call processing time. It does not include start time or suspension time.

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Name	Description	
JOB_CLOCKTIME	Total agent hours on a job. JOB_TALKTIME + JOB_UPDATETIME + JOB_IDLETIME.	
JOB_IDLETIME	Total time agents were idle. Does not include the time between an agent's login and the first call or the time between the release of an agent's final record and log off. For a blend job, it includes the transfer time between jobs.	
JOB_TALKTIME	Total talk time for all agents on all jobs.	
JOB_UPDATETIME	Total update time for all agents on all jobs.	
JOB_WORKTIME	Total work time for all agents on all jobs. JOB_TALKTIME + JOB_UPDATETIME	
JOB_IDLECOUNT	Number of times agents were idle.	
JOB_CALLSWORKED	Total calls handled by agents on all jobs.	
JOB_CALLSANSWERED	Total calls handled on inbound jobs.	
JOB_WAITQUEUETIME	Time (in seconds) clients spent in wait queue.	
JOB_CALLSINWAIT	Total calls placed in wait queue.	
OUT_CLOCKTIME	Total time agents were on outbound jobs.	
OUT_IDLETIME	Total idle time on outbound jobs.	
OUT_TALKTIME	Total talk time on outbound jobs.	
OUT_UPDATETIME	Total update time on outbound jobs.	
OUT_WORKTIME	Total work time on outbound jobs. OUT_TALKTIME + OUT_UPDATETIME	

Name	Description
OUT_IDLECOUNT	Number of times agents were idle on outbound jobs.
OUT_CALLSWORKED	Total outbound calls handled by agents.
OUT_CALLSANSWERED	Total outbound calls answered.
OUT_WAITQUEUETIME	Total time outbound clients spent in the wait queue.
OUT_CALLSINWAIT	Total number of outbound calls placed in the wait queue.
OUT_CALLSPLACED	Total outbound calls placed.
OUT_RECALLSPLACED	Total recalls placed.
INB_CLOCKTIME	Total time on inbound calls. INB_TALKTIME +
	INB_UPDATETIME + INB_IDLETIME
INB_IDLETIME	Total idle time on inbound calls.
INB_TALKTIME	Total talk time on inbound calls.
INB_UPDATETIME	Total update time on inbound calls.
INB_WORKTIME	Total work time on inbound calls. INB_TALKTIME + INB_UPDATETIME
INB_IDLECOUNT	Number of times agents were idle on inbound calls.
INB_CALLSWORKED	Total inbound calls handled.
INB_CALLSANSWERED	Total inbound calls received per job.
INB_WAITQUEUETIME	Total time clients spent in the inbound wait queue.
INB_CALLSINWAIT	Total calls placed in the inbound wait queue.
XOUT_CLOCKTIME	Total time spent as Person to Person (PTP) agent.

Name	Description
XOUT_IDLETIME	Total PTP idle time.
XOUT_IDLECOUNT	Number of times PTP agents were idle.
XOUT_CALLSWORKED	Total PTP calls.
PREVIEWTIME	Total time agents spent previewing records during Managed Dialing.
LISTNAME	Calling list name.
JOBLABEL	Job description from job file
SELECTNAME	Record selection file name.
STRATEGYNAME	Phone strategy file name.
COMPCODE01- COMPCODE99	Call completion codes 01-99.

Agent history

Overview The agent history files contain data on each agent's calling activity during the last 200 jobs. There is a file for each agent. Information within each file is separated for outbound and inbound calls.

The file provides the following data:

- Last 200 jobs
- Number of seconds an agent was online
- Number of seconds agent spent talking, idle, and updating records
- Number of calls the agent answered

Agent information The following table describes the fields in the agent history file:

Name	Description
JOBNAME	Job name.
JOBNUMBER	The Avaya PDS identification number assigned to a job. It increases each time a job runs.
UNITID	Unit work list identification.
JOBDATE	Job run date.
STARTTIME	Job start time.
ENDTIME	Job end time.
LOGINTIME	Agent's first log in time.
LOGOUTTIME	Agent's first log off time.
AGENTNAME	Agent's user name.
JOB_CLOCKTIME	Total agent hours on a job. JOB_TALKTIME + JOB_UPDATETIME + JOB_IDLETIME

Name	Description
JOB_IDLETIME	Total agent idle time. Does not include time between an agent's login and the first call or time between the release of an agent's final record and log off. For a blend job, includes transfer time between jobs
JOB_TALKTIME	Total talk time.
JOB_UPDATETIME	Total update time.
JOB_WORKTIME	Total work time. JOB_TALKTIME + JOB_UPDATETIME
JOB_IDLECOUNT	Number of times agent was idle.
JOB_CALLSWORKED	Total calls handled during a job
OUT_CLOCKTIME	Total time on outbound jobs
OUT_IDLETIME	Total idle time on outbound jobs
OUT_TALKTIME	Total talk time on outbound jobs
OUT_UPDATETIME	Total update time on outbound jobs
OUT_WORKTIME	Total work time on outbound jobs. OUT_TALKTIME + OUT_UPDATETIME.
OUT_IDLECOUNT	Number of times agent was idle on outbound jobs
OUT_CALLSWORKED	Total outbound calls handled.
INB_CLOCKTIME	Total time on inbound calls. INB_TALKTIME + INB_UPDATETIME + INB_IDLETIME
INB_IDLETIME	Total idle time on inbound calls
INB_TALKTIME	Total talk time on inbound calls
INB_UPDATETIME	Total update time on inbound calling
INB_WORKTIME	Total work time on inbound calls. INB_TALKTIME + INB_UPDATETIME

Name	Description
INB_IDLECOUNT	Number of times agent was idle on inbound calls
INB_CALLSWORKED	Total inbound calls handled.
XOUT_CLOCKTIME	Total time as Person to Person (PTP) agent.
XOUT_IDLETIME	Total PTP idle time.
XOUT_IDLECOUNT	Number of times PTP agent was idle.
XOUT_CALLSWORKED	Total PTP calls.
PREVIEWTIME	Total time agent spent previewing records during Managed Dialing.
LISTNAME	Calling list name.
OFFLINE	Total time spent off-line (i.e. logged in but not on a job).
RELEASE	Time spent released to the ACD in Predictive Blend.
COMPCODE01- COMPCODE99	Call completion codes 01-99.

Calling statistics

Information statistics overview

Calling information statistics provide information about the duration of certain events. For example, hit rate statistics every ten minutes, line usage statistics every two minutes, and events.

Avaya PDS stores the calling statistics in two files:

- Information Statistics
- Transaction Statistics

Reports from both of these files give you information about the job up to the time Avaya PDS generates the report. Avaya PDS uses the concept of a job as that day's calling activity and tracks it with the job number. Job numbers increase each time Avaya PDS runs a job.

The *information statistics file* contains general data sorted by job number. The information statistics file provides information about the duration of certain events.

The transaction statistics file contains data about each call.

Avaya PDS generates statistics for the events at different intervals. For example, Avaya PDS generates hit rate statistics every ten minutes and line usage statistics every two minutes. Some events have fields assigned to them and others use the INF_EVENTLABL and INF_FREE fields. For example, when an agent joins a job, log on appears in the INF_EVENTLABL field and either blend, outbound, or inbound appears in INF_FREE. The other fields used by this event are INF_AGENTNAME, INF_CALLTYPE, and INF_LOGTYPE. The data is a running history of events.

Information statistics The following table describes the fields in the information statistics file:

Name	Description
INF_JOBNUM	The Avaya PDS identification number assigned to a job. It increases each time Avaya PDS runs the job.
INF_DATE	Date the event occurred.
INF_TIME	Time the event occurred.

Name	Description
INF_EVENTLABL	The name of the event being reported; for example, line usage, hit rate, acquire, release, log on.
INF_FREE	Data for the event in the event label field. For example, hit rate would show the current hit rate; line usage would show the current line usage.
INF_AGENTNAME	Agent's user name.
INF_CLOCKTIME	Has several uses: For LOG OFF events it is the total work time for last assignment, not the time since log on. For JOBTIME, the last entry in the file, it is the total
INF_IDLETIME	Amount of idle time between calls of the same type.
INF_IDLETYPE	The job type to which the idle agent is assigned.
INF_CALLTYPE	The type of call: outbound, inbound, blend.
INF_UNITED	Unit work list identification.
INF_LOGTYPE	Agent's log on type: outbound, inbound, blend, managed, PTP.

Note

If you transferred an agent from any other job, it would be the time on this job.

Transaction statistics
overviewThe transaction statistics file contains data about each call the Avaya
PDS processed for a particular job. Avaya PDS stores the record
numbers, phone numbers, recall attempt counts, agent names, talk and
work times, and calling results for each call.

Transaction statistics

The following table describes the fields in the transactions statistics file:

Name	Description
TRN_JOBNUM	The Avaya PDS identification number assigned to a job.
TRN_DATE	Date the event occurred.
TRN_TIME	Time the event occurred.
TRN_WAITTIME	Total time this client was in wait queue.
TRN_USERFIELD	User defined field.
TRN_TELELINE	Line number used by this call.
TRN_COMPCODE	Call completion code entered by system for this call.
TRN_RECNUM	Record number.
TRN_PHONENUM	Phone number (outbound).
TRN_AGENTNAME	Agent's user name.
TRN_RECALLCNT	Number of times Avaya PDS has recalled this record.
TRN_TALKTIME	Agent talk time for this call.
TRN_WORKTIME	Agent work time for this call.
TRN_V_TO_HANG	Time from client answer to line release.
TRN_OFF_TO_HNG	Time from the Avaya PDS initiating call to line release.
TRN_P_FIELDNUM	Phone number (inbound).
TRN_CONNECT	Connect flag.
TRN_UNITID	Unit ID for this call.
TRN_UPDATETIME	Agent update time for this record.
TRN_PREVTIME	Time agent spent previewing record on a managed job.
TRN_TRANSTYPE	Call type: inbound or outbound.

Name	Description
TRN_AGCOMPCODE	Call completion code entered by agent.
TRN_LOGTYPE	Agent log on type: outbound, inbound, blend, managed, PTP.

Calling list

Overview	If your agents update t calling list file contain two days. The content installation. Use PC A mailing lists, form lett	he host or you update information to the host, the s information about your calling list for the past s of your calling lists are unique to your nalysis to extract data from this file to generate ers, and status reports.	
Avaya PDS added calling list fields	The following table describes the Avaya PDS added calling list fields.		
	Name	Description	
	OPER	Agent that took call (left blank if no agent)	
	DTE	Date call was completed	
	ТМЕ	Time call was completed	
	CODE	Release code	
	ENTRYDATE	Date that the record first loaded on the system (consecutively downloads)	
	STATUSFLAG	Record status, if anything other than a "null" (might appear as a blank entry), then record is considered uncallable:	
		• T = failed time zone	
		 B = bad phone number D = too many days on system 	
		 R = duplicate record 	
		• E = manual delete via record edit	
		 C = call on inbound campaign, cancelled in outbound campaign N = Do Not Call 	
		Data set for agant set recell	
	RECALLDATE		
	RECALLTIME	Time set for agent set recall	
	RECALLPHONE	Phone to call for agent set recall	
	DAYSCNT	Number of days consecutively that the record has been loaded on system	
	PHONESTAT	System status of Phones (1 byte for each phone, position 1 for phone1 etc.) *	

Name	Description
ZONEPHONE1	Time zone flag for PHONE1
ZONEPHONE2	Time zone flag for PHONE2
CURPHONE	Current active phone
PHONECNT1	Number of attempts on PHONE1
PHONECNT2	Number of attempts on PHONE2
DUR4	System talk time
DUPE	Duplicate flag (if field contains an * duplicate records exist)
FRSTDATE1	Date of first attempt on PHONE1
FRSTTIME1	Time of first attempt on PHONE1
FRSTSTAT1	Result of first attempt on PHONE1
FRSTDATE2	Date of first attempt on PHONE2
FRSTTIME2	Time of first attempt on PHONE2
FRSTSTAT2	Result of first attempt on PHONE2
JOBNAME	Name of job last attempting record
CALLTYPE	Type of call (I=inbound, O=outbound)

Note

PHONESTAT is initially set when setzones is executed. PHONESTAT is constantly changing during daily processing. Each phone in the calling list will have a corresponding byte in PHONESTAT. For example, if list1 has two phones, the PHONESTAT field will be two bytes long. Byte 1 corresponds to PHONE1, byte 2 corresponds to PHONE2. Each byte in PHONESTAT may contain one of five different characters:

- N = notcalled
- B = bad number
- C = called
- O = passed to agent
- A = active/set for recall

PHONESTAT is used by Avaya PDS to determine which phone is bad. Phones that have a B in their corresponding PHONESTAT byte will

not be attempted. When a callselection is executed, PHONESTAT's with C or O are reset back to N.

Example of PHONESTAT field from calling list:

Def Name	Len	Тур	Pos	Data
PHONESTAT	4	С	613	NCBB

Function keys used with PC Analysis

You can use function keys and other key-combinations to work in PC Analysis.

Action	Keys
Toggle Help	Esc,H
Select a field	Esc,S
Select criteria	Esc,C
Quit without saving	Esc,Q
Change output file name	Esc,O
Change input file name	Esc,I
Toggle quoting on and off	Esc,T
Done	Esc,X
Run an extract	Ctrl+G

Downloading an extract file

Overview The download process includes the following:

- extract file
- download options
- downloading the output file

The download process using Campaign Directory includes the following:

- connecting to the Avaya PDS call management system
- transferring the extract file

Popular software packages The following software can be used to display your extract file once it is populated with data:

- Word
- Access
- Excel
- PowerPoint
- Lotus 1 2 3

Filename.prn

Filename.prn

jon,smith,123303,34.55,123elmstreet,seattle,wa maryann,james,111111,55.00jstreet,everett,wa mike,vidal,543436,50.00,marketplace,everett,wa sally,fields,000343,7.00,e.,james,seattle,wa bob,jones,121212,333.80,way,drive,tacoma,wa All data will have "quotes" around the data unless Esc,T is used to remove them, otherwise the default is with quotes.

Using the executed PC Analysis extract

When you execute an extract configuration file, you create an output file with the extension prn (e.g., filename.prn). PC Analysis lists the available files in the ITEMS column. You can download the file to a PC using the transfer utility in PC Analysis Tools with Campaign Director.

Select A Mosaix System:	PC Download Directory:
Coho 🔺 Orca Guppy	C:\WINDOWS\temp
PC Analysis File(s): alljob.ofg allop.ofg junk ettere tet	Transfer Files
rjh.txt	Close

Using the executed letter generation extract	Some spreadsheet, database, and word processing applications require fields to be separated by quotation marks. PC Analysis allows you to separate by quotation marks. At the PC Analysis Extracts Menu, select item 5 to Execute a Letter Generation extract. The output file will have a .txt extension. Check with your administrator to ensure that your format is acceptable for your worksite.
Download extracts	PC Analysis creates files in standard ASCII file format. ASCII files are compatible with a wide range of PC software programs. The downloaded file contains one line per data record with fields separated by commas or quotation marks.
	After you have downloaded your output file to your PC, you can manipulate your data by loading it into a PC program. The files are in standard ASCII comma or quote delimited format. You can use these files with Microsoft Excel, Access, Word or other mail merge applications, and databases.

PC Analysis extract

PC Analysis extract

You can take information only from one source file per extract. If you want information from more than one source file, perform separate extracts and then combine stats in your PC application.



When you design a PC Analysis extract, you create an extract configuration file. The file is a template that determines the type of information PC Analysis retrieves from the Avaya PDS. The extract configuration file defines the data fields you want to select, the values for the fields, and the order in which the reports display the information.

Teinet Default		
File Edit Options	Send Receive V	window Help
		/ CI
	DC ANALVETS	EVEN CONFLOR ATION EDIT
Innut File: ALI	PU ANALIJIS	Dutnut File: training.nrp
Input Defn: Cal	1 Tran Stat D	et
FIERD	SEPFCI	
TRN_JOBNUM		
TRN_DATE	1	
TRN_TIME	2	
TRN_WAITTIME		
TRN_USERFIELD		
TRN_TELELINE	3	
TRN_COMPCODE	4	03
TRN_RECNOM		
TEN_PROMEMOR		
TRN_RGENIMALE		
TRN TALKTIME		
TRN WORKTIME		
TRN_V_TO_HANG		
TRN_DFF_TO_HNG		
* RN_P_FIELDNUM		
		20 0000
	ANDI TCP/IP 14:	20 0000

Log in to PC Analysis using cdwanal password

Overview	On most systems there are two ways to log into PC Analysis. You may log in using the cdwanal password, which allows access to PC Analysis only or you may login as system supervisor.
	If logging in with the cdwanal password, the login you use must be set up as an analysis operator in the "Manage user accounts" menu accessed from the Supervisor Main Menu on the Avaya PDS.
Log in to PC Analysis using cdwanal password	Use the following procedure to log in to PC Analysis.
1	At the Avaya PDS login prompt, type your login name.
2	Type a PC Analysis password (pcanal or cdwanal). Press the Enter key.

Log in to PC Analysis using supervisor password

Log in to PC Analysis using supervisor password)	Use the following procedure to log in to PC Analysis using the supervisor password.
1	To use PC Analysis , select Reports .
2	From the Reports menu, the PC Analysis Extracts and PC Analysis Tools menu options are available.
	Note

The following procedures assume that you are using this method.

Create an extract file

Create an extract file	Use the following procedure to create an extract file.	
1	Select PC Analysis extracts from the Reports menu.	
2	Select Create an extract.	
3	Type Y at the prompt to continue or N to abandon.	
4	Type a name for the extract file.	
5	Select the type of extraction you desire to perform. For example, to select Job History, type J. Your available choices include the following: J-Job History, A-Agent History, I-Calling Info Statistics, T-Calling Trans Statistics, and L-Calling List.	
6	Type Y at the prompt to continue or N to cancel.	
	An Input and Output File Definition screen will appear for you to fill out. An input file is the information type and an output file is the filename (.cfg) of the configuration file to hold the extracted data.	
7	Use the table below as a naming convention when choosing an input file name.	

Information Type	Input File Required
Job history	Type ALL or jbmstr
Agent history	Type ALL to select information on all agents. Type a specific agent's login ID to get information on a single agent.
Information and transaction	Type ALL to select information on all jobs. Type a job number to get information on a particular job.
Calling list	Type the name of a calling list. Use only lowercase letters.

8 Type the name of the output file to receive the data.

Extract selection information

Extract selection
informationUse the PC Analysis Extraction Configuration Edit screen to select
fields, determine their order, and define field value criteria for the
extract file. Each file you create requires a list of fields arranged in a
specific order. Adding criteria for fields is optional.
The available fields differ with the type of information you select.
Generally, you need to page through two or more screens to see all the
possible file selections. Use Ctrl+N to go to the next screen, and Ctrl+P
to go to the previous screen.If any of the fields contains commas, such as addresses, turn quoting on
by pressing Esc, T. When quoting is turned on, Avaya PDS separates
the fields with quote marks. When quoting is off, Avaya PDS separates
fields with commas. This may cause a problem when importing the
information into some applications that use commas as field separators.

Set up the extract file

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Set up the extract file	Use the follow	ving procedure to set up the extract file.	
1	Select the info field you want	rmation fields by pressing the down arrow t t to select and press Enter.	to move to the
2	To set the extra a number for e cursor returns	act order, press Esc,S to move to the Select ach chosen field in the Select column and pr to the Field column.	column. Type ress Enter. The
3	If you don't w PDS processes	ant to specify an order, type 1 in all Select s the fields in the order they appear.	fields. Avaya
4	To select field Type the desir	values, press Esc,C to move to the Criteri ed value in the Criteria column then press	a Column. Enter.
5	You can set va using a hypher comparison sy	lues using commas as separators or set a ran as a separator. In addition, you can use the vertice of the second se	ange of values e following
	Symbol	Comparison operation	
	> < ∄ ∜	greater than less than greater than or equal to less than or equal to equal to not equal to match on any character (wild card) match on a single character	

6 Repeat these steps for each field you want to use as a selection criteria.

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7 Press **Done** to save the extract configuration file.

Edit an extract file

	Actions	Keys
	Change the criteria for a field	Esc,C
	Displays a field description	Esc,H
	Change the input file name	Esc,I
	Change the output file	Esc,O
	Change the selection order	Esc,S
	Remove Quotes	Esc,T
1	Choose PC Analysis extracts fro	m the menu
1	Choose PC Analysis extracts fro Choose Edit an extract from the	m the menu. PC Analysis Extracts menu.
1 2 3	Choose PC Analysis extracts fro Choose Edit an extract from the Type the number of the extract fil	m the menu. PC Analysis Extracts menu. e to edit.
1 2 3 4	Choose PC Analysis extracts from Choose Edit an extract from the Type the number of the extract fil Type Y at the prompt to continue Extraction Configuration Edit s	m the menu. PC Analysis Extracts menu. e to edit. or N to cancel. The PC Analysis screen appears.
1 2 3 4 5	Choose PC Analysis extracts from the Choose Edit an extract from the Type the number of the extract file Type Y at the prompt to continue Extraction Configuration Edit s Press Done to save your changes	m the menu. PC Analysis Extracts menu. e to edit. or N to cancel. The PC Analysis screen appears. and return to the menu.

Copy an extract file

Copy an extract file	Use the following procedure to copy an extract file.
1	Choose PC Analysis extracts from the menu.
2	Choose Copy an extract from the PC Analysis Extracts menu.
3	Type the extract file number to copy.
4	Type Y at the prompt to continue or N to cancel.
5	Type a name of the new output file.
6	Type Y at the prompt to continue or N to cancel.
7	Press any key to return to the menu.

Delete extract and output files

Delete extract and output files	Use the following procedure to delete extract and output files.
1	Choose PC Analysis extracts from the menu.
2	Choose Delete an extract from the PC Analysis Extracts menu.
3	Type the extract file number to delete.
4	Type Y at the prompt to continue or N to cancel.
5	Press any key to return to the menu.

Execute an extract configuration file

Execute an extract configuration file	Use the following procedure to execute an extract configuration file.
1	Choose PC Analysis Extracts from the menu.
2	Choose Execute an extract .
3	Type the number of the extract file to execute.
4	Type \mathbf{Y} at the prompt to continue or \mathbf{N} to cancel. The screen shows you the number of records selected and the number of records checked.
5	Press any key to return to the menu.
Display completion codes

Display completion codes	Use the following procedure to display completion codes.
1	Choose PC Analysis extracts from the menu.
2	Choose Display call completion codes from the PC Analysis Extracts menu.
3	Type Y at the prompt to continue or N to cancel.
4	Type the name of the job whose call completion codes you want to view; then press Enter.
5	Type \mathbf{Y} at the prompt to continue or \mathbf{N} to cancel.
6	Press any key to return to the menu.

Display available calling lists

Overview	The display has two parts. The top shows you the current date and time along with free disk space available on the calling list area of the hard disk. This is helpful if running out of disk space is a concern. The bottom displays the calling lists and number of records in the list.
Display available calling lists	Use the following procedure to display available calling lists.
1	Choose PC Analysis extracts from the menu.
2	Choose Display available calling lists from the PC Analysis Extracts menu.
3	Type Y at the prompt to continue or N to cancel.
4	The screen shows the current date and time along with a breakdown of space available on the calling area of the hard disk. Press any key to return to the menu.

Copy an extract print file

Copy an extract print file	Use the following procedure to copy an extract print file.
1	Choose PC Analysis Tools from the Reports menu.
2	Choose Copy an extract print file from the PC Analysis Tools menu.
3	Type the item number of the file to copy.
4	Type Y at the prompt to continue or N to cancel.

Delete an extract print file

Delete an extract print file	Use the following procedure to delete an extract print file.
1	Choose PC Analysis Tools from the Reports menu.
2	Choose Delete an extract print file from the PC Analysis Tools menu.
3	Type the item number of the file to copy.
4	Type Y at the prompt to continue or N to cancel.

View and print an extract file

View and print an extract file	Use the following procedure to view and print an extract file.
1	Choose Analysis Tools from the PC Analysis Main menu.
2	Choose View or print extracts.
3	Type the number of the output file to display. The Report Files Status Screen appears, press $F2$ to print or $F4$ to view the contents of the output file.

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PC Analysis

Part II: Administrative menu

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8 Administrator overview

Overview

Purpose	The following chapters describe how to perform administrative tasks, back up and restore the Avaya PDS files, maintain the inbound calling list, and transfer and process calling list records. These commands are on the Administrator Main Menu.
Contents	This section contains the following topic:

• Log in to the Avaya PDS

Log in to the Avaya PDS

Log in to the Avaya PDSLog into the Avaya PDS as an administrator and type the password to
use the Administrator Main Menu commands. The Administrator
Main Menu appears.

9 Avaya PDS administrative tasks

Overview

Purpose	The purpose of this section is to describe administrative tasks that you can perform in the Administrator menus on the Avaya TM Predictive Dialing System (PDS).
Contents	This section contains the following topics:
	Change administrator passwords
	• Restart the Avaya PDS
	• Shut down the Avaya PDS
	• Set the Avaya PDS date and time
	Monitor agent lines
	• Stop monitoring an agent
	Terminate user session
	Area codes and prefixes
	• Edit area codes and prefixes
	• View current area codes and prefixes
	• View time zones
	• Add an area code or a prefix to a time zone
	• View current area code and prefix settings
	• Delete an area code or prefix

- Change a country code
- Save area code and prefix changes

- Discard area code and prefix changes
- Restore a previous version of area code and prefix settings
- Start the Avaya PDS

Change administrator passwords

Change administrator passwords	The Administrator Main Menu includes sensitive features such as shutting down and restarting the Avaya PDS. To protect your system, change the administrator's password often.
1	Choose Change administrator password from the Administrative Tasks menu.
2	Type Y at the prompt to continue or N to cancel.
3 4	Type the current password and press Enter.
	Type the new password and press Enter. It must contain at least 6 characters, 3 of which need to be different from the old password. It also needs to contain at least 2 letters and 1 number. After you press Enter, the Avaya PDS prompts you to type the new password again.
5	Type the new password again and press Enter.

Restart the Avaya PDS

Restart the Avaya PDS	This procedure must be completed from the Administrator's console. If you attempt to restart the Avaya PDS from any other workstation, an error message will appear. Make sure to shut down all jobs and tell all users to log off before restarting the Avaya PDS.
1	Choose Restart system from the Administrative Tasks menu.

2 Type Y at the prompt to continue or N to cancel. A series of messages appear. When the restart is complete, the system displays the login prompt.

Shut down the Avaya PDS

Overview	The Avaya PDS should always remain on except for the following situations:
	• You plan to stop calling operations for several days.
	• There is the possibility of large power surges and electrical damage.
	• You plan to move your system.
Shut down the Avaya PDS 1 2	To avoid damaging the system components or losing data in active jobs, stop all jobs and log all users off before shutting down the Avaya PDS.
	Choose Shut down system from the Administrative Tasks menu.
	Type Y at the prompt to continue or N to cancel. The following prompt appears: Are you sure you want to shutdown HP-UX? Enter Y or N.
3	Type Y at the prompt to continue or N to cancel. The following message appears: Halted, you may now cycle power.
4	Go to the Avaya PDS cabinet and turn off the power to all components. Most systems have the components connected to a power strip. The easiest way to turn off the equipment is to turn off the power strip.

Set the Avaya PDS date and time

Overview This option is used to reset the Avaya PDS date and time. It is important to keep the system time accurate due to time zone legalities. Make sure to log all other users off and shut down all jobs before choosing this option.

Warning

If you change the date or time during the Avaya PDS operations, you can critically affect system operation and data.

Note

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

Set the Avaya PDS date and time Log off all other users and shut down all jobs before choosing this command. You can critically affect system operation and data if you change the date or time during Avaya PDS operations.

- 1 Choose Set system date and time from the Administrative Tasks menu.
- **2** Type Y at the prompt to continue or N to cancel.

3 Type a new time in the format HH.MM. The Avaya PDS uses a 24 hour clock and requires a period between the hours and minutes. For example, type 15.25 for 3:25 PM.

- **4** Type a new date in the format CCYY/MM/DD. For example, type 1999/06/01 for June 1, 1999.
- **5** Press any key to return to the menu. The new time and date take effect immediately.

Monitor agent lines

Overview	The Monitor agent lines command lets you silently monitor an agent's conversation. A beep does not sound in the agent's headset when you monitor the call. Therefore, this command is for troubleshooting purposes only and may be illegal in your area.
Monitor agent lines	Use the following procedure to begin monitoring an agent's line
1	Choose Monitor agent lines from the Administrative Tasks menu.
2	Type Y at the prompt to continue or N to cancel.
3	Type Y at the prompt. The Job Control menu appears.
4	Choose Open Job (Ctrl+C) from the Jobs menu. If there is more than one current job, choose the job name from the list.
5	Choose Monitor Agent from the Control menu.
6	Choose the agent's user name from the list. If the agent is talking with a customer, the Avaya PDS immediately connects your headset to the agent's port. If the agent is not talking with a customer, a message appears to tell you the agent is not on a line.

Stop monitoring an agent

Stop monitoring an agent	Use the following procedure to stop monitoring an agent.
1	When you finish listening to an agent's conversation, choose Disconnect Agent from the Control menu.

Terminate user session

Overview	Use this command to end a user session when users log off incorrectly or their workstations malfunction. When you terminate a user session, the Avaya PDS stops the process associated with the user and restores control to the system.
	If more than one user is using the same login name, this process may terminate the wrong session. Tell all users who are logged in with that login name to log off. For example, if two users are logged in as "system" and one session is frozen, then the other user should log off before continuing.
Terminate user session	Use the following procedure to terminate a user session.
1	Choose Terminate a user session from the Administrative Tasks menu.
2	Type Y at the prompt to continue or N to cancel.
3	Type the login name for the session you want to terminate, or press Enter to exit.
4	Type Y at the prompt to continue or N to cancel.
5	The Avaya PDS searches for the user session and displays a message when it finds the process or if it cannot find a session for the login name you entered.
6	Press any key to return to the menu.

Area codes and prefixes

Overview Telephone companies frequently add new area codes and prefixes to existing phone systems. The Avaya PDS needs the up-to-date area code and prefix information to call phone numbers that use the new codes. The Edit Area Codes and Prefixes option lets you update the area code and prefix settings on your Avaya PDS. Telephone numbers generally consist of three parts: an area code, a prefix (also known as an exchange), and a line number. For example, in the telephone number 206-555-1212, the area code is 206, the prefix is 555, and the line number is 1212. The Avaya PDS associates prefixes with area codes based on systemdefined time zones. The Avaya PDS configuration includes the standard time zones, such as Eastern, Central, Mountain, and Pacific. The Avaya PDS configuration also includes several additional time zones designed to accommodate local and regional ordinances regarding legal calling hours. For example, the Illinois time zone addresses laws specific to the state of Illinois. Several other Avaya PDS time zones accommodate areas that do not follow daylight savings time. See "Time Zones" beginning on page 267 for a list of Avaya PDS time zones.

> Avaya PDS time zones have associated zone codes. A zone code is a one-letter designation that the Avaya PDS uses to reference a time zone. Zone codes are case-specific. For example, zone code C (upper case) represents the Atlantic No Daylight time zone while zone code c (lower case) represents the United Kingdom time zone. The Time Zone and Exchange Prefix Editor prompts you to type the zone code to which you add (or remove) area code and prefix settings. The list of Avaya PDS time zones on page 267 includes the corresponding zone codes.

Another important telephone system designation is country code. The Time Zone and Exchange Prefix Editor default country code is 1, which represents the United States and Canada. Usually, you'll make time zone and prefix setting changes to country code 1. The editor, however, includes an option to select a different country code if necessary. See "Country Codes" for a list of selected country codes.

Note

Some states limit or prohibit placing certain types of telephone

calls during specific times, usually before a certain time in the morning or after a certain time at night. Area code fields in the System controls may be modified by the customer in order to respond to regional area code changes. Such modifications may result in telephone calls being made in violation of after-hours calling limitations. The customer is solely responsible for any violations of applicable laws or regulations resulting from area code modifications.

Edit area codes and prefixes

Edit area codes and prefixes	Use the following procedure to edit area codes and prefixes.
1	From the Administrative Tasks menu, choose Edit area codes/prefixes . The Area Code & Exchange Prefix Editor menu appears.
2	Type the option number or the first letter of the command name.
3	The Avaya PDS saves changes you make using the Area Code and Exchange Prefix Editor to a temporary file. When the Avaya PDS restarts, it activates the changes.

View current area codes and prefixes

Overview	The Query option displays the area codes and area code and prefix combinations that currently exist on the Avaya PDS. It lists the settings according to time zones. Use the Query option to determine if you need to change any existing settings. You can also use the Query option to identify zone codes for which you need to change area code and prefix settings. You need to know the zone code(s) when you add or delete area code and prefix settings.
	Note
	You can also view current area codes and prefixes from the Add and Delete options. See the following sections, "Adding an Area Code or a Prefix to a Time Zone" and "Deleting an Area Code or a Prefix," for more information.
View current area codes and prefixes	Use the following procedure to view current area codes and prefixes.
1	Choose Query from the Area Code & Exchange Prefix Editor menu. The Query Area Codes and Prefixes screen appears.
2	Type an area code; area code and prefix combination; zone code; or zone code, area code, and prefix combination. See the following section, "Query Options," for more information.
	The query results appear at the bottom of the query screen. If the query results fill more than one screen, press Enter to view subsequent pages.
	Query Options
	The Query Area Codes and Prefixes option accepts the following four types
	of queries:
	Area Code
	The Avaya PDS lists all zone codes that contain the pecified area code. For each zone code, it also lists the prefixes associated with the area code.
	• Area Code and Prefix, separated by a colon

The system identifies the zone code in which the specific area code and prefix combination is listed.

• Zone Code (for example, L, the zone code for Pacific Daylight time zone)

The system generates a list of all area codes and prefixes for the specified zone code.

• Zone Code followed by a space and an area code or an area code and prefix combination

Use this option to query for a very specific item. If your criteria is too limited and the system finds no matches, the system reports the area code or prefix as "not found."

An asterisk (*) in query results represents all prefixes for this area code that aren't explicitly listed under another zone code. There can be only one asterisk entry for any given area code. Other entries must contain specific, unique exchange prefixes. For example, area code 709 exists under two zones, Newfoundland Daylight time zone (A) and Atlantic Daylight time zone (B). The asterisk in the Newfoundland Daylight Prefix List represents all prefixes that don't appear in the Atlantic Daylight prefix list.

View time zones

Overview	The Timezone/Guard Time Query option lists the Avaya PDS time zones and calling guard times. Guard times define the earliest and latest times of day that the Avaya PDS can place phone calls.
	Use this option to identify to which time zones you need to add a new area code or area code and prefix combination.
	You can query Avaya PDS time zones using a descriptive string (such as eastern or pacific), by zone code, or using an asterisk (*). An asterisk returns a listing of all Avaya PDS time zones.
	If you don't know a particular zone code, query using the asterisk or see "Time Zones" on page 267 for a list of Avaya PDS time zones and associated zone codes. You need to know the zone code(s) when you add or delete area code and prefix settings.
View time zones	Use the following procedure to view time zones.
1	Choose Timezone/Guard Time Query from the Area Code & Exchange Prefix Editor menu. The Timezone/Guard Time Query screen appears.
2	Type a time zone code, search string, or asterisk (*), then press Enter. Avaya PDS displays the results below your query. If the results fill more than one screen, press Enter to view the following page.

Add an area code or a prefix to a time zone

Overview Use the Add option to add area codes or area code and prefix combinations to your Avaya PDS. You add area code information based on a time zone that you specify. When you select Add from the Area Code and Exchange Prefix Editor menu, the Avaya PDS prompts you to type a time zone code. For example, to add an area code to the Central Daylight time zone, specify zone code G.

You can add one area code at a time, add more than one area code separated by commas, or add area code and prefix combinations. To add one or more area codes (implicitly including all prefixes) to the selected zone code, type an area code or a list of area codes separated by commas. For example, to add the 218, 219, 220, and 221 area codes, type 218,219,220,221.

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

The Avaya PDS compares your request to the current area code and prefix settings to identify duplicate area codes or area code prefix combinations. If the settings do exist, Avaya PDS doesn't add the duplicate settings and displays a message. The Avaya PDS displays a status message if it successfully adds your requested area code and prefix information.

Note

You can't add a prefix to an area code that has an asterisk listed as its prefix. The asterisk indicates that the prefix is included implicitly in this area code, provided it's not explicitly listed elsewhere. Also, verify that you're adding the area code and prefix to the correct time zone.

Add an area code or an area code/prefix combination

Use the following procedure to add an area code or an area code/prefix combination.

1 Choose Add from the Area Code & Exchange Prefix Editor menu. The Add Area Codes and Prefixes screen appears.

- **2** Type the zone code for the time zone to which you want to add an area code or prefix.
- **3** Type one or more area codes or area code and prefix combinations to add to the selected time zone.
- **4** To change the time zone, press Enter with nothing typed on the Enter Choice line.

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5 Type a different time zone code to continue adding area codes, or press Enter with no selection to exit the Add option.

View current area code and prefix settings

View current area code and prefix settings	You can query the current area code and prefix settings (same as the Query menu option) from the Add feature. Do this to verify your changes.
1	Type q or Q at the prompt instead of an area code or prefix. The Query Area Codes and Prefixes screen appears.
2	Type the area code, area code and prefix combination, or zone code that you want to view.

Delete an area code or prefix

Overview	Use the Delete option to delete area codes and prefixes from specific time zones. When you select the Delete option from the Area Code and Exchange Prefix Editor menu, the Avaya PDS prompts you to type a zone code for the time zone you want to modify. You can delete one or more area codes or area code and prefix combinations. To delete one or more area codes from the selected zone, type a single area code or a list of area codes separated by commas. For example, to delete the 418 and 419 area codes, type 418, 419. To delete specific prefixes from an area code, type the area code followed have order or and one prefixes area codes.
	For example, to delete the 937, 938, and 229 prefixes from the 418 area code, type 418:937,938,229.
Delete an area code or prefix	To delete an area code or an area code and prefix combination
1	Choose Delete from the Area Code & Exchange Prefix Editor menu. The Delete Area Codes and Prefixes screen appears.
2	Type the zone code for the time zone from which you want to delete an area code or prefix.
3	Type one or more area codes or area code and prefix combinations to delete. The system displays the results of delete action.
4	To change the time zone, press Enter with nothing typed on the Enter Choice line.
5	Type a different time zone code to delete area codes from another time zone, or press Enter with no selection to exit the Delete option.

Change a country code

Change a country code	Each country has a unique telephone system. Country codes are used to differentiate one country's settings from another. The Area Code and Exchange Prefix Editor default country code is 1, which represents the United States and Canada. If you want to view or change area code and prefix information for another country, use the Change Country Code option to change the country code. See "Country Codes" for a list of selected country codes.
1	Choose Change Country Code from the Area Code & Exchange Prefix Editor menu. The Change Country Code screen appears.
2	Type a country code, then press Enter. The new country code appears on the Area Code and Exchange Prefix Editor main menu.

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Save area code and prefix changes

Overview	Use the Save Changes menu option to save the area code and prefix modifications you make. The Avaya PDS saves area code and prefix information to a temporary file. When the system is restarted, manually or during the nightly restart, the changes take effect.
Save area code and prefix changes	Note If you exit the Area Code and Exchange Prefix editor without saving your changes, the system automatically prompts you to save current changes, discard current changes, or cancel the exit command. Use the following procedure to save area code and prefix changes.
1	Choose Save Changes from the Area Code & Exchange Prefix Editor menu. The Confirm: Save Current Changes screen appears.
2	Type Y to confirm the save or N to cancel the save command.

Discard area code and prefix changes

Overview	The Discard Changes option lets you abandon changes you made since the most recent save (or since you started the editor if you haven't saved yet). The Discard Changes option restores the original file that the system loaded when you started the editor or the last saved version. If there are no changes to discard, the system notifies you and cancels the command.
Discard area code and prefix changes	Use the following procedure to discard area code and prefix changes.
1	Choose Discard Changes from the Area Code & Exchange Prefix Editor menu. The Confirm: Discard Current Changes screen appears.
2	Type Y to discard the changes or N to cancel the discard command.

Restore a previous version of area code and prefix settings

Overview	The Rollback option allows you to cancel saved area code and prefix changes. You can recover area code and prefix settings under two different circumstances: Rollback to current live version and Rollback to last backup version.
	Choose the Rollback to current live version option if you saved changes in error but have not restarted the Avaya PDS. Avaya PDS loads the current live area code and prefix settings into the editor. Save the restored settings as is or make additional changes. You must save the restored version and restart the Avaya PDS for the restored settings to take effect.
	Choose the Rollback to last backup version if you saved changes in error and have since restarted the Avaya PDS. Avaya PDS loads the most recently backed up version of the live area code and prefix settings into the editor. Save the restored settings as is or make additional changes. You must save the restored version and restart the Avaya PDS for the restored settings to take effect.
Restore a previous version of area code and prefix settings	Use the following procedure to restore a previous version of area code and prefix settings.
1	Choose Rollback from the Area Code & Exchange Prefix Editor menu. The Rollback to Previous Version screen appears.
2	Choose 1 to restore the current live version or choose 2 to restore to the last backup version.
3	Add or delete area codes or prefixes as necessary.
4	Save the restored area code and prefix settings.

Start the Avaya PDS

Start the Avaya PDS	Starting the Avaya PDS reloads all of the system's programs and files.
1	Turn on the power to the following equipment: Administrator workstation, digital switch rack, digital switch controller, terminal server, mass storage unit, bridge
2	Wait at least 10 seconds, then turn on the power to the tape drive, modem, and central processing unit (CPU). Start up is successful when you see the login prompt on the screen.

10 File transfers

Overview

Purpose	The purpose of this section is to explain how file transfers on the Avaya TM Predictive Dialing System (PDS) work.
Contents	This section contains the following topics:
	• File transfer
	Record formats
	• FTP
	• Download host records to the Avaya PDS
	• Downloads
	• Upload the Avaya PDS records to a host computer
	Recover calling list
	Count calling list records
	• Download records for infinite jobs

File transfer

Overview	The Avaya PDS uses data from the host computer database. This database may reside on a mainframe, a minicomputer, a server, or any other kind of host. The data must be transferred in the form of one or more files from the host system to the Avaya PDS.
	All file transfers on the Avaya PDS are controlled by a series of scripts. These scripts allow automatic processing by the system or when invoked from the Transfer and Process Records menu. Transfers to the Avaya PDS are called downloads. Transfers from the Avaya PDS are called uploads.
	The Avaya PDS supports the FTP (file transfer protocol) transfer method. To use the FTP method, your host must support the TCP/IP protocol and contain the FTP utility software. There must also be a direct link between your host and the Avaya PDS Ethernet connection.
	If you are not sure about your file transfer configuration, contact your Avaya PDS vendor for details.
File transfer	Account information comes from the host in raw data form, in an ASCII or EBCDIC file format.
	The raw data is transferred to the PDS in one of two ways. Anonymous FTP, also known as host-initiated FTP, is the most common. In this method, the Avaya PDS waits for the raw data to be sent to it from the host.
	The PDS uses data from the customer's database. This database may reside on an IBM mainframe, a minicomputer, a Windows NT server, or any other kind of host. The data must be transferred in the form of one or more text files from the customer's host system to the Avaya PDS.
	A convenient, reliable, and inexpensive solution for file transfer is FTP, the user interface to the ARPANET standard File Transfer Protocol. It is widely used on the Internet for transferring files between disparate platforms, and FTP software exists for almost every system type. FTP works in a client/server arrangement.
	FTP uses TCP/IP and the ethernet connection of the Avaya PDS to connect to the host. Either the Avaya PDS waits for the files to be sent to it, or the Avaya PDS initiates a file transfer retrieval from the host. In either case, FTP is generally easier to set up, troubleshoot, support, and test than any other file transfer solution.
A typical file transfer might look like this:

- 1. At 4:00am the host system initiates an FTP session with the Avaya PDS via the TCP/IP connection.
- 2. The host logs on and sends specified data files into a directory on the Avaya PDS, then disconnects.
- 3. At 4:10am the Avaya PDS finds the files and processes them into one or more callable lists.

The method illustrated in this example is known as anonymous or hostinitiated FTP, which allows the host to send file(s) to the Avaya PDS. The host was the client and the Avaya PDS acted as the FTP server. After this happens, either an automatic or manual process on the Avaya PDS can convert the received data into one or more calling lists.

The Avaya PDS can instead be configured to directly connect to the host and retrieve files from it before creating calling lists. This method is known as direct-connect or Avaya PDS-initiated FTP. With this approach there is more Avaya PDS control over the file transfer and more responsibility for it. It is slightly more difficult to configure but is preferred by customers who lack the ability to schedule FTP transfers on the host.

FTP is the best transfer method to use with the Avaya PDS. It does not require the use of any additional hardware and is fast and reliable. Also, changes are easy to make, including changing hosts or adding additional lists. FTP is the recommended option for any host system that can support it.

Not all host systems can use FTP. The host must support the TCP/IP protocol and FTP utility software, and there must be a network link between the host and the Avaya PDS. Some older mainframes do not support TCP/IP.

Record formats

Download record formats	The download record formats contain field definitions for the records that will be downloaded from the host to the Avaya PDS.
	Your host application contact writes a script (such as JCL procedures) that instructs the host to generate one or more files (ASCII or EBCDIC) that contain customer records. After the Avaya PDS receives the files, the system converts each file into a format it can use. It then creates a calling list.
Upload Record Formats	Upload record formats are optional. If your agents update customer records on the host during calling operations, you may not require Avaya PDS-to-host uploads. If you will upload records to the host, read the following information.
	Upload record formats define the customer data that you want the Avaya PDS to return to your host computer. Your host application contact will write a script that instructs the host to accept one or more files that contain customer records. At scheduled times, the Avaya PDS converts the customer records in a specific calling list into the host computer's format and creates an upload file. When the host receives this file, it follows the script and updates the host database.

Overview FTP is a convenient, effective, and inexpensive file transfer method. It does not require the use of any additional hardware and is fast and reliable. Also, changes are easy to make, including changing hosts or adding calling lists.

FTP is the user interface to the ARPANET standard File Transfer Protocol. It is widely used on the Internet for transferring files between disparate platforms, and FTP software exists for almost every system type.

FTP uses TCP/IP and the Ethernet connection of the Avaya PDSPDS to connect to the host. Either the system waits for the files to be sent to it, or it initiates a file transfer retrieval from the host. In either case, FTP is easy to set up, troubleshoot, support, and test.

Note

If you are using the FTP file transfer method, an Ethernet board and the file sets needed to run TCP/IP and the FTP application are already installed on your Avaya PDS.

Anonymous FTP Anonymous (or host-initiated FTP), allows the host to send file(s) to the Avaya PDS. After this happens, you can use either an automatic or manual process on the system to convert the received data into one or more calling lists.

A typical file transfer using FTP might look like this:

- 1. At 4:00 AM, the host system connects to the Avaya PDS using TCP/IP.
- 2. The host uses FTP to place specified data files into a directory on the Avaya PDS and disconnects.
- 3. At 4:10 AM, the Avaya PDS finds the files and processes them into one or more callable lists.

Typically, the FTP file transfer processes occur automatically. If, however, the file transfers are not automated or an automated process fails, you can use the Transfer and Process Records menu to manually start a transfer.

Direct-connect FTP The Avaya PDS can also be configured to directly connect to the host and retrieve files from it before creating calling lists. This method is known as direct-connect (Avaya PDS-initiated) FTP. With this

approach, the Avaya PDS has more control over the file transfer and more responsibility for it.

It is slightly more difficult to configure but is preferred by customers who lack the ability to schedule FTP transfers on the host or who need the increased security.

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Download host records to the Avaya PDS

Download host records to the Avaya PDS	Use the following procedure to download host records to the Avaya PDS.
1	At the Administrator workstation, choose Download host records to

- 1 At the Administrator workstation, choose **Download host records to PDS** from the Transfer and Process Records menu.
- **2** Type Y at the prompt to continue or N to cancel. The host transmits the calling list records to the Avaya PDS.

Downloads

Downloads	All file transfers on the Avaya PDS platform are controlled by a series of scripts. These scripts allow automatic processing of the transfer method when invoked by the crontab (an automatic scheduler for HP- UX) or by manual control when invoked from a menu. Transfers to the Avaya PDS are called downloads. Transfers from the Avaya PDS are called uploads.
Test Downloads During Configuration	At least four weeks before the scheduled Avaya PDS installation, send your Avaya PDS representative a sample file of customer data. Include a printout of each file. After configuring your Avaya PDS, your vendor uses the sample data to test your system by simulating calling operations.
	Use the following guidelines to create one sample file for each record format you use:
	• Include a minimum of 250 actual or simulated host records in ASCII or EBCDIC format.
	• If you use simulated records, assign unique account and telephone numbers to each record.
	• Include a range of host customer data rather than repeating one record.
	• Don't use packed or signed fields.
	• Don't include record headers or trailers.
	Test the Upload Process at Your Site
	Upon your request, your Avaya PDS representative will send you sample upload files. Use these files to test the script that updates the host database with the Avaya PDS data.

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Upload the Avaya PDS records to a host computer

Overview	The Avaya PDS can operate independently of your host computer to protect your calling operations. After operating in no-host mode, you need to upload the system's data to your host computer system.
Upload the Avaya PDS records to a host computer	The Avaya PDS sites where agents directly update the host customer database do not need to upload data files to the host computer regularly. These call centers use uploads after the system resumes operations when the host is down or inaccessible
1	Choose Upload records to host from the Transfer and Process Records menu.
2	Type Y at the prompt to continue or N to cancel. The Avaya PDS

transmits the calling list records to the host computer.

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Recover calling list

Overview	If you do not receive a new calling list from your host computer, you can recover the old calling list to use for your daily calling activities. Every evening the Avaya PDS saves your calling list to a backup file named list.old. This list usually contains enough uncalled records for you to use until you receive a new list from the host.
Recover calling list	Restoring an old calling list writes over the existing calling list. Be sure to print your reports, back up your list, or perform any other required procedures before proceeding.
1	Choose Recover old calling list from the Transfer and Process Records menu.
2	Type Y at the prompt to continue or N to cancel.

Count calling list records

Count calling list records	Use this command at any time to display the number of records in a calling list, its creation date, and the amount of disk space it occupies.
	Choose Count calling list records from the Transfer and Process Records menu.
2	Type Y at the prompt to process the changes or N to cancel.

Download records for infinite jobs

Overview This command is available if you have set up infinite jobs on the Avaya PDS. For more information about infinite jobs, contact your Avaya PDS vendor. Use this command to manually download and process new records to add to a calling list used by an infinite job. It downloads and processes a list segment while the job is active. This download command also performs a duplicate record check, if required. The Avaya PDS then executes the infinity record selection only on the new list segment and makes the new records available for calling on the infinite job. The new number of records will appear in the Records Selected and Calls Left fields of the Job Monitor screen. These records have the same priority as first attempt records. Before using this command, set up an infinity record selection and edit and start an infinite job. Download records for an Use the following procedure to download records for an infinite job. infinite job 1 Choose Download records for Infinite Job from the Transfer and Process Records menu.

2 Type Y at the prompt to continue or N to cancel. The host transmits the calling list records to the Avaya PDS.

11 Inbound lists

Overview

Purpose	The Avaya TM Predictive Dialing System (PDS) uses inbound lists to capture information from inbound calls.
	These commands are available if your Avaya PDS uses Intelligent Call Blending.
	An inbound calling list contains the fields that the agents use when handling inbound calls. Once created, the inbound calling list file is a permanent part of the Avaya PDS.
Contents	This section contains the following topics:
	Create an empty inbound calling list
	Clear existing inbound calling lists
	Count calling list records

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Create an empty inbound calling list

Create an empty inbound calling list	Use the following procedure to create an empty inbound calling list.
1	Choose Create empty inbound data list from the Inbound Lists menu.
2	Type Y at the prompt. If the list already exists, the Avaya PDS does not create a new one.
3	When the system completes the process, press any key to return to the Inbound Lists menu.

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Clear existing inbound calling lists

Clear existing inbound calling lists	Use this command to clear the data in the inbound calling list. Clear this list after completing inbound calling and uploading all data to your host.
1	Choose Clear an existing inbound data list from the Inbound Lists menu.
2	Type Y at the prompt to continue or N to cancel.
3	When the Avaya PDS completes the process, press any key to return to the Inbound Lists menu.

Count calling list records

Count calling list records	Use this command to display the name of each calling list and the number of records in each list. You can also check the available disk space on your system.
1	Choose Count calling list records from the Inbound Lists menu.
2	The date and disk free space (in kilobytes) appears along with the outbound and inbound calling lists and the number of records in each list.

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12 Backup and recovery

Overview

Purpose	Backup is a method used to archive software, which provides a way to restore operations should the system or its software be damaged. The Administrator menus allow you to perform a variety of administrative tasks on your Avaya TM Predictive Dialing System (PDS). From here you can shutdown or restart the Avaya PDS, backup and restore the system, manage inbound lists, and a host of other functions.
Contents	 This section contains the following topics: Back up and restore commands Backup Avaya PDS Verify backup files Maintain backup tapes Restore Avaya PDS Monitor DAT drive status Back up a calling list Restore a calling list

Back up and restore commands

Back up commands From the Administrator Backup Menu you can access sub-menus to backup the Avaya PDS. You can backup/restore the entire Avaya PDS, the calling lists only, or the host gateway files.

Full or Incremental Backup - If you choose any of the backup menu options you will be asked if you want to perform a full or incremental backup A full backup will backup all the files in a selected category. An incremental backup will backup only those files that have been changed since the last backup.

The following table describes the available backup commands.

Command	Description
Back up complete system	This is the most comprehensive backup option. The backup includes the entire root file system, the Avaya PDS, and all calling lists. Use this option to prepare for events such as major system upgrades and service pack installations.
Back up Avaya PDS & calling lists	This command backs up the entire Avaya PDS and all customer calling lists. Use this option for routine daily system backups.
Back up Avaya PDS only	This command backs up the entire Avaya PDS excluding the calling lists (specifically, all data in the /usr/vl/xfer/clist directory).
Back up Avaya PDS configuration files	This command backs up all the Avaya PDS configuration files. These are the files needed to customize a newly installed Avaya PDS to the customer's applications.
Back up Avaya PDS data/stat files	This command backs up the data files needed to run reports using the Avaya PDS PC Analysis tools.

Restore Commands

The following table describes the available restore commands.

Command	Description
Restore all from tape	This command restores all files from the backup tape.
Restore a file from tape	This command attempts to restore a single user-specified file from the backup tape.
List/verify a file on tape	This command attempts a search for a single user-specified file on the backup tape.
List/verify tape contents	This command lists the entire contents of the backup tape.
List tape volume info	This command displays the creation information of the backup tape.

Backup Avaya PDS

Overview	The standard backup medium is a 4mm, 90-meter, 2.2 GB digital data storage (DDS) tape. However, you can also use a 9-track tape.	
	Back up the following files on a regular basis:	
	outbound calling lists	
	• inbound calling results	
	call activity statistics	
	files containing user passwords	
	files containing host network (IP) addresses	
Backup Avaya PDS	Use the following procedure to back up the Avaya PDS.	
1	Locate the tape drive in the Avaya PDS cabinet.	
2	Insert a new DDS tape in the drive.	
3	Choose a command from the Back Up and Restore Avaya PDS menu. For routine daily system backups, choose option 3, Back up Avaya PDS & Calling Lists.	
4	Select full or incremental backup.	
5	After the backup is complete, rewind and remove the tape.	
6	Store the tape in antistatic environment at the proper temperature and humidity.	

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Verify backup files

Verify backup files	Use the following procedure to verify that you have a successful backup of your files.		
1	Choose a List/Verify command from the Back Up and Restore menu.		
2	Type Y at the prompt to continue or N to cancel.		
3	Follow the tape loading instructions on the screen.		
4	Type C to continue or press Ctrl+X to exit. Byte count, date, size, and file names appear on the screen during the tape verification process.		
5	After verifying the tape, follow the unloading instructions on the screen.		
6	Type C to return to the Back Up and Restore menu.		

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Maintain backup tapes

Maintain backup tapes	Eac the wri the	the day, use the eject button to remove the previous day's tape from tape drive. Before loading the new tape, check to make sure it is te-enabled. To prevent data loss, we recommend that you observe following items:
	•	Keep a minimum of two sets of backup tapes. In each set, keep one tape for each day.
	•	Store one backup set away from your Avaya PDS site.
	•	Store backup tapes in a controlled environment. Optimal tape

storage environment is 50% relative humidity at 22° C.
Replace each DDS tape after 100 uses, approximately two years.

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- Clean the tape drive monthly using a cleaning tape.
- Replace cleaning tapes after 25 uses.

Restore Avaya PDS

Overview	You can restore files from any backup tape created from the Avaya PDS backup menus or with the HP-UX fbackup utility. You can restore a single user-specified file or all files from a backup tape.
	Note
	You cannot restore files from backup tapes created on earlier versions of the Avaya PDS.
Restore Avaya PDS	Use the following procedure to restore the Avaya PDS from a backup tape.
1	Locate the tape drive in the Avaya PDS cabinet.
2	Insert the backup tape containing the files to be restored.
3	Choose a restore command from the Back Up and Restore Avaya PDS menu.
4	After the backup is complete, rewind and remove the tape.
5	Store the tape in an antistatic environment at the proper temperature and humidity.

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Monitor DAT drive status

Overview You need to monitor the tape drive status during backup and restore procedures. There are two LEDs on the tape drive. The LED on the left is the cassette LED. The LED on the right is the drive LED. When the Avaya PDS uses the tape drive, both lights flash in different color combinations.

LED color These combinations identify the tape drive's status.

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

Back up a calling list

Overview	Making a backup of your calling list allows you to keep working if your host information becomes damaged. You can back up all calling lists on the Avaya PDS or select specific calling lists to back up.
	The records on a backup calling list remain in the Avaya PDS format, not in your host computer format.
Back up a calling list	Use the following procedure to backup a calling list.
1	Locate the tape drive in the Avaya PDS cabinet.
2	Insert a new DDS tape in the drive.
3	Choose a backup command from the Back Up and Restore Avaya PDS Calling Lists menu.
4	After the backup is complete, rewind and remove the tape.
5	Store the tape in an antistatic environment at the proper temperature and humidity.

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Restore a calling list

Restore a calling list	If a calling list becomes unusable, you can restore a previously backed up list. When you restore calling list data, the Avaya PDS writes over all, same-named calling list data stored on the system. Be sure to print reports, upload lists, or perform any other required procedures before continuing.
1	Locate the tape drive in the Avaya PDS cabinet.
2	Insert a DDS tape with the backup calling list in the drive.
3	Choose a restore command from the Back Up and Restore Avaya PDS Calling Lists menu.
4	Type Y at the prompt to continue or N to cancel.
5	After the restoration is complete, rewind the tape.
6	Remove the tape from the tape drive.

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13 System security event monitor

Overview

Purpose	The purpose of this section is to provide information about monitoring.		
Contents	This section contains the following topics:		
	Monitor security logs		
	• Use the system log monitor		

• Change the monitor interval

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Monitor security logs

Overview Use the Monitor security log command to monitor security-related system activity. The System Log Monitor, at a specified time interval, continually checks the status of critical system and log files. Specifically, the security monitor checks whether critical system files have been modified since the last status check and whether the Avaya PDS recorded particular events in the system audit and log files. Events include users logging into and out of the Avaya PDS; changes to the permissions, ownership, and content of sensitive system files; attempts to log into restricted user accounts, and changes to the system date and time.

The System Log Monitor displays results including the date and time of the event, the event type, whether the event succeeded or failed, and other event details such as the user name associated with the event. The monitor also provides additional file information when the file has been changed. For example, for the current and previous versions of a file, the System Log Monitor lists the permissions, owner, group, file size, and date and ti me stamps.

Note

The System Log Monitor tracks system events only when it is active. Events that occur when the monitor is not running are not reported. However, if you have ESP access to your Avaya PDS, it is possible to identify security events that occurred while the monitor was not running.

Use the system log monitor

Use the system log monitor	Use the following procedure to use the system log monitor.	
1	To start the System Log Monitor, choose Monitor security log from the System Log Monitor main menu. At a specified interval, the monitor updates the screen with information about targeted events.	
2	To close the System Log Monitor, type X, then press Enter.	

Change the monitor interval

Overview	The System Log monitor checks system files and log files at regular intervals, for example, every 60 seconds. The Change Monitor refresh interval command lets you change the interval setting to increase or decrease the monitor's update frequency.
	You can set the interval to any positive whole number. Recommended settings are between 15 and 300 seconds.
	After you type and confirm a new refresh interval, the Avaya PDS automatically starts the System Log Monitor.
Change the monitor interval	Use the following procedure to change the monitor interval.
1	From the System Log Monitor main menu, choose Change Monitor refresh interval. The Additional Entry for Change Monitor refresh interval screen appears.
2	Type a new refresh interval, in seconds, then press Enter.
3	At the Are above entries correct prompt, type Y for yes or N for no.

Part III: Agent Blending

14 Agent Blending

Overview

Purpose	The purpose of this section is to provide procedural information regarding CUI agent blending. For a thorough discussion of agent blending, please refer to the <i>Avaya PDS Installation Planner</i> .
Contents	This section contains the following topics:
	Agent Blending menus
	• Exit a Menu
	Control Predictive Blend
	Modify domain groups
	Modify Service Level domain groups
	Modify Average Speed to Answer domain groups
	Modify Outbound only groups
	Modify domain group optional fields
	Modify control methods
	Delete domain groups
	Display groups
	Control and monitor domains
	• Delete a domain
	Monitor a domain

- Display system alerts
- Change extensions
- Add extensions
- List extensions
- Delete extensions

Agent Blending menus

Agent blending menu	Choose Predictive Blend from the Supervisor Main Menu. The following screen appears.
	Admin Domain Group Domain Alerts Extension Quit INFO: Administration
	[Use first letter to select option]
	The top of the screen contains the menu bar. Below the menu bar is the information line which gives a brief description of the active menu item. The bottom of the screen displays a line of additional help, such as how to choose a command or a message responding to an action. You can make the menu bar active from any Predictive Blend screen by pressing Ctrl+X or F1. When the menu bar is visible, you are in menu mode. When it isn't visible, you are in edit mode.
To choose menu commands	Some menu commands have shortcut keys listed in the right column. Use these keys when you are in menu mode, without the menu open. The drop-down menus list the shortcut keys in the column on the right. Use these keys when you are in menu mode, with the menu open. For example, F3 starts Predictive Blend and Ctrl+Y quits the menu. You do not have to press Enter after choosing a shortcut key.

Exit a Menu

Exit a menu	Use the following procedure to exit a menu.
1	To exit a drop-down menu, press Ctrl+X.
2	To exit the main menu, press Q and press Enter.

Control Predictive Blend

Control Predictive Blend

Choose **Admin** from the Predictive Blend menu to stop, start, and reset Predictive Blend, as well as to resynchronize blend agents (Meridian 1 only). The Admin menu appears.



Use first letter to select option

Stop predictive blend	Choose Stop Predictive Blend from the Admin menu to make configuration changes such as installing ACD hardware or performing other maintenance. Agents continue to make and receive calls, but the system cannot acquire or release agents. When you restart Predictive Blend, the system starts accumulating new statistics on call performance.
	Note
	Stopping Predictive Blend does not affect other processes running on the system.
	It is not necessary to stop Predictive Blend to change domain group parameters, such as adding domains and domain groups. These changes take effect immediately. However, when you delete domains and domain groups, you must reset Predictive Blend for the changes to take effect.
Start Predictive Blend	Choose Start Predictive Blend from the Admin menu to restart Predictive Blend. The system starts accumulating new statistics on call performance.

Reset predictive blend	Choose Reset Predictive Blend from the Admin menu to stop Predictive Blend and immediately restart it. Use this command to update the system after deleting domains and domain groups and start accumulating new statistics.
	This command has the same effect as choosing Stop Predictive Blend, then choosing Start Predictive Blend.
Resynchronize agents	(For Meridian systems only)
	Choose Resynch Agents from the Admin menu to update the ACD agent queue assignments. Use this command after you reassign agents to different domains.
Control and monitor domain groups	Use commands on the Domain Group menu to create and modify domain groups. Because there are innumerable variables in the calling environment, including agent availability and talk time, it is impossible to ensure that the settings are absolutes. Use them as goals.
	Choose Damain Group from the Predictive Blend menu The Domain

Choose **Domain Group** from the Predictive Blend menu. The Domain Group menu appears.



Use first letter to select option

Domain group control methods

Predictive Blend manages agents within each domain group based on a control method you choose. The three control methods are:

- Average Speed to Answer (ASA)
- Service Level (SL)
- Outbound-only (OB_ONLY)

A blend domain group blends inbound and outbound calling. It uses either the ASA or SL control method. Each control method has an
associated set of parameters, which the system supervisor specifies during calling operations.

An outbound-only domain group uses the OB_ONLY control method.

Modify domain groups

Overview Although changes to domain group settings take effect immediately, it may take some time before you see the results of your modifications. Allow at least 30 minutes before you readjust them.

Warning

It is possible to cause Predictive Blend to malfunction if you set the parameters incorrectly. If you have any doubt about settings, please talk to your ACD programmer or your system vendor.

Modify Service Level domain groups

Modify Service Level domain groups	Use the following procedure to modify Service Level domain groups.
1	Choose Modify SL Group from the Domain Group menu. The screen appears with all SL domain groups listed.
2	Move to the field that you want to modify and make your changes, or move to the last line and add a domain group.

3 Press Ctrl+X to exit.

Modify Average Speed to Answer domain groups

Modify Average Speed to Answer domain groups	Use the following procedure to modify Average Speed to Answer domain groups.
1	Choose Modify ASA Group from the Domain Group menu. The screen appears with all ASA domain groups listed.
2	Move to the field that you want to modify and make your changes, or move to the last line and add a domain group.
3	Press Ctrl+X to exit.

Modify Outbound only groups

Modify Outbound only groups	Use the following procedure to add groups to the Outbound only domain group.
1	Choose Modify OB_ONLY Group from the Domain Group menu. The screen appears with all OB_ONLY domain groups listed.
2	Move to the last line and add the new domain.
3	Press Ctrl+X to exit.

Modify domain group optional fields

Modify domain group optional fields	Edit a domain group's three optional fields: initial Traffic Rate, minimum Talk Time, and minimum After Call Work Time.		
1	Choose Modify Domain Group Optional Fields from the Domain Group menu. The screen appears with all domain groups listed.		
2	Move to the field that you want to modify and make your changes.		
3	Press Ctrl+X to exit the screen. A confirmation prompt appears.		
4	Press Enter to accept Yes or press Tab to move to Cancel and press Enter.		

Modify control methods

Modify control methods	Use the following procedure to modify control methods.		
1 Choose Modify Control Method from the Domain Group met screen appears with all the domains listed.			
2	Use the down arrow to move to the domain you want to change and press Enter. The Select a Control Method screen appears. To leave the screen without making a change, use Tab to move to Cancel and press Enter.		
3	Use the down arrow to move to the method you want to use and press Enter. The Modify screen appears.		
4	Enter settings as appropriate for your ACD. (See the Avaya Predictive Dialing System Installation Planner for information about specifying each ACD supported by the system.)		
5	Press Ctrl+X to exit the screen. A confirmation prompt appears.		
6	Press Enter to accept Yes or press Tab to move to Cancel and press Enter.		

Delete domain groups

Delete domain groups	Deleting a domain group takes effect only after you restart Predictive Blend using the Reset Predictive Blend command on the Admin menu.
1	Choose Delete Group from the Domain Group menu.
2	Choose the group to delete from the list of domain group names.
3	Press Enter to accept Yes or press Tab to move to Cancel and press Enter.
4	Choose Reset Predictive Blend from the Admin menu for your changes to take effect.

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Display groups

Display Service Level (SL) Groups	 Choose Display SL Group from the Domain Group menu to view current settings for all SL groups. The SL Domain Groups screen displays the status of the following fields: 				
	• Time Interval				
	Service Criteria				
	• Desired Service Level (DSL)				
	Abatement Service Level (ASL)				
	Minimum Agents on Outbound				
Display Average Speed to Answer (ASA) Groups	Choose Display ASA Group from the Domain Group menu to view current settings for all ASA groups. The ASA Domain Groups screen displays the status of the following fields:				
	Time Interval				
	Control Method				
	• Average Speed to Answer (ASA)				
	Traffic Intensity				
	Minimum Agents on Outbound				
Display Outbound-Only (OB_ONLY) Groups	Choose Display OB_ONLY Group from the Domain Group menu to view a list of all OB_ONLY groups.				
Display Group Optional Fields	Choose Display Group Optional Fields from the Domain Group menu to view the Traffic Rate, Talk Time, and After Call Work Time for all jobs.				
Display ACD Statistics	Choose Display Statistics from the Domain Group menu to view the Performance, Acquisitions, and Releases for all jobs.				
	Performance is the average answer delay (Service Level).				
	Releases are the number of completed releases that the system requested. It does not include releases caused by the agent ending the acquired call or the agent logging off of the system. If the domain is outbound only, the releases represent the number of agents that have logged off or hung up on an acquired call.				

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Control and monitor domains



Delete a domain

Delete a domain	Deleting a domain does not take effect until you restart the Predictive Blend system using the Reset Predictive Blend command on the Admin menu.
1	Choose Delete Domain from the Domain menu.
	A box appears with a list of all domains.
2	Use the down arrow to choose the domain to delete.
3	Press Enter.
4	Choose Reset Predictive Blend from the Admin menu for the changes to take effect.

Monitor a domain

Monitor a domain	Use the following procedure to monitor a domain.		
1	Choose Display Domain from the Domain menu to see a list of all domains.		

Display system alerts

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Display system alerts Choose **Alerts** from the Predictive Blend menu and the Alerts menu appears.

Press Enter and all system alerts for the calling day appear on the screen.

Admin	. Domain	Group	Domain	Alerts	Extension	Quit
INFO: D	lisplay U	o To 30	Alerts			



[Use first letter to select option

Change extensions

Change extensions Choose **Extensions** from the Predictive Blend menu to add, list, and delete ACD extensions.



Use first letter to select option

Add extensions

Add extensions	Use the following procedure to add an extension.
1	Choose Add from the Extension menu to add an ACD extension.
2	Type an SCAI Link ID and press Tab to move to the next column.
3	Type an Extension number and press Tab.
4	Press Ctrl+X to exit.

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List extensions

List extensions	Use the following procedure to list extensions.		
1	Choose List from the Extension menu to display a list of ACD extensions.		
2	Press Ctrl+X to return to the Predictive Blend menu.		

Delete extensions

Delete extensions	Use the following procedure to delete extensions.
1	Choose Delete from the Extension menu.

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Preventing Toll Fraud

Toll Fraud is the unauthorized use of your telecommunications system by an unauthorized party (for example, a person who is not a corporate employee, agent, subcontractor, or working on your company's behalf). Be aware that there is a risk of toll fraud associated with your system and that, if toll fraud occurs, it can result in substantial additional charges for your telecommunications services.

Avaya Fraud Intervention

If you suspect that you are being victimized by toll fraud and you need technical assistance or support, call the Technical Service Center's Toll Fraud Intervention Hotline at 1-800-643-2353.

Providing Telecommunications Security

Telecommunications security of voice, data, and/or video communications is the prevention of any type of intrusion to, that is, either unauthorized or malicious access to or use of, your company's telecommunications equipment by some party.

Your company's "telecommunications equipment" includes both this Avaya product and any other voice/data/video equipment that could be accessed via this Avaya product (that is, "networked equipment").

An "outside party" is anyone who is not a corporate employee, agent, subcontractor, or working on your company's behalf. Whereas, a "malicious party" is Anyone, including someone who may be otherwise authorized, who accesses your telecommunications equipment with either malicious or mischievous intent.

Such intrusions may be either to/through synchronous (time multiplexed and/or circuit-based) or asynchronous (character-, message-, or packet-based) equipment or interfaces for reasons of:

Utilization (of capabilities special to the accessed equipment)

Theft (such as, of intellectual property, financial assets, or toll-facility access)

Eavesdropping (privacy invasions to humans)

Mischief (troubling, but apparently innocuous, tampering)

Harm (such as harmful tampering, data loss or alteration, regardless of motive or intent)

Be aware that there may be a risk of unauthorized or malicious intrusions associated with your system and/or its networked equipment. Also realize that, if such an intrusion should occur, it could result in a variety of losses to your company, including but not limited to, human/data privacy, intellectual property, material assets, financial resources, labor costs, and/or legal costs. Your Responsibility for Your Company's Telecommunications Security

The final responsibility for securing both this system and its networked equipment rests with you - an Avaya customer's system administrator, your telecommunications peers, and your managers. Base the fulfillment of your responsibility on acquired knowledge and resources from a variety of sources including but not limited to:

Installation documents

System administration documents

Security documents

Hardware-/software-based security tools

Shared information between you and your peers

Telecommunications security experts

To prevent intrusions to your telecommunications equipment, you and your peers should carefully program and configure your:

Avaya provided telecommunications system and their interfaces

Avaya provided software applications, as well as their underlying hardware/software platforms and interfaces

Any other equipment networked to your Avaya products

Federal Communications Commission Statement

Part 15: Class A Statement. This equipment has been tested and found to comply with the limits for a Class A digital device, pursuant to Part 15 of the FCC Rules. These limits are designed to provide reasonable protection against harmful interference when the equipment is operated in a commercial environment. This equipment generates, uses, and can radiate radio-frequency energy and, if not installed and used in accordance with the instructions, may cause harmful interference to radio communications. Operation of this equipment in a residential area is likely to cause harmful interference, in which case the user will be required to correct the interference at his own expense.

Part 68: Network Registration Number. This equipment is registered with the FCC in accordance with Part 68 of the FCC Rules. It is identified by FCC registration number AV1USA-28011-MA-T. Refer to "Federal Communications Commission Statement" in "About This Book" for more information regarding Part 68.

Canadian Department of Communications (DOC) Interference Information

This digital apparatus does not exceed the Class A limits for radio noise emissions set out in the radio interference regulations of the Canadian Department of Communications.

Le Présent Appareil Nomérique n'émet pas de bruits radioélectriques dépassant les limites applicables aux appareils numériques de la class A préscrites dans le reglement sur le brouillage radioélectrique édicté par le ministére des Communications du Canada.

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European Union Declaration of Conformity

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

Electromagnetic Compatibility (89/336/EEC)

Telecommunications Terminal Equipment (TTE) i-CTR3 BRI and i-CTR4 PRI

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



GUI versus CUI March 2002

GUI applications



Name System Menus

Administrator Menus



Tasks

Used for routine tasks - duplicates much of the functionality usually accomplished in the GUI applications.

Used for system administration tasks, such as creating and editing user logins, system backups and system reboots.







Supervisor menus March 2002

-	1.0	1.0	200
Land Contemport	-	100	-
200	-	1000	-
1000	-	1000	-
200	100	1000	
1000	-	1000	1
200	-	100	-
-	100	100	

Additional resources

Your instructor will demonstrate the tasks you need to perform using the supervisor menu. The new NIS+ feature automatically duplicates user logons and passwords on every dialer in the pod. Any user only needs to be added to one dialer in order to be able to log onto any dialer.

You can find additional information about these tasks, and related discussions, at the following links.

System Telnet supervisor menu	Overview	Procedure
Overview System Telnet	•	
Logging in to the Avaya PDS		
Counting Calling List Records		
Download verification		
Add user accounts		
Record edit		
Job monitor		•
Campaign Update		
Mark Records Do Not Call		

(HOME) PREV NEXT





Related tasks March 2002



Additional resources

Your instructor will demonstrate the Hierarchy Manager and Completion Code Manager briefly. These can have an important role in preparation, but are discussed later in this class in more detail.

Completion Code Manager	Overview	Procedure
Overview of Completion Code Manager		
Start Completion Code Manager		
Set a Completion Code as RPC		
Set a Completion Code as Closure		
Set a Completion Code as a Abandon		
Change completion Code description		•

Hierarchy Manager	Overview	Procedure
Overview of Hierarchy Manager		
Create a hierarchy		
Open a hierarchy		
Adding levels to Hierarchies		
Adding data items to hierarchies		
Moving levels within hierarchies		
Blend Manager	Overview	Procedure
Blend Manager		







Avaya PDS Agent March 2002

The Avaya PDS Agent application is a simplified customer contact agent application designed for those customers who need a basic tools for agents to use with the Avaya PDS. This application is not included in the Beta release of the Avaya PDS. Customers will have a choice between using the Avaya PDS Agent application, Vlterm, or a variety of other agent applications that can be integrated with the Avaya PDS.

😵 Avaya PDS Agent					- D X
Agent Job Work Ph	one Screen	⊻iew Settings <u>H</u> elp			
80800	≥n 80 = 4 b b = 33			00	
\$ 1 \$2345678		🍫 🖉			
Customer Information	Home pho	ne - 2034571616			
S		Custon	er Screen	1	4
screen1					
Ē					
screen2	Name:			Account Number: 430220986017	4188
ា	Name2:	JOHN DOE		Balance:	
	Hone:	2034571616		Del Ant:	
screens	Vork:	2034813471		City:	_ 1
	Zip:	7860		State:	
Release Line					
Finish Work	Consent:				
Quick Release					
Agent > how's it going Agent > i am fine, that Agent > thanks for as	g? nks king				*
					×
					Send
Successfully hung up the	cal			Received a call	× 24



Avaya PDS Agent	Overview	Procedure
Overview of Avaya PDS Agent		
Using the Avaya PDS Agent		•







Menu exercise March 2002

Complete the exercise found in your Student Workbook.

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Supervisor main menu

Supervisor Main menu

Supervisor menus contain commands for managing the agents by assigning their login and permission levels, monitoring their calls, and sending them messages. They also include options that determine how the Avaya PDS uses your phone lines, and which records the system calls. In addition, they provide a full reporting capability so you can keep track of your calling activities.



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Count calling list records

Overview

Use this option to display the number of records in your calling lists, the lists' creation dates, and the amount of unused disk space (in kilobytes). You can use this information to confirm that you received new lists. For example, if list1 is the same size as list1.old, you may not have received a new list in the last download period.

In addition, the number of records in a list can help you determine how many agents you'll need to reach your campaign goal.

Count Calling List Records

If you need more information about the contents of a list, use list distribution reports.

1. Choose Count calling list records from the Calling Lists and Users menu.

The Calling Lists screen appears. It displays all the calling lists and the number of records in each list.

2. Press Ctrl+X followed by Ctrl+N to return to the Calling Lists and Users menu.



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Downloads

Downloads

All file transfers on the Avaya PDS platform are controlled by a series of scripts. These scripts allow automatic processing of the transfer method when invoked by the crontab (an automatic scheduler for HP-UX) or by manual control when invoked from a menu. Transfers to the Avaya PDS are called downloads. Transfers from the Avaya PDS are called uploads.

Test Downloads During Configuration

At least four weeks before the scheduled Avaya PDS installation, send your Avaya PDS representative a sample file of customer data. Include a printout of each file. After configuring your Avaya PDS, your vendor uses the sample data to test your system by simulating calling operations.

Use the following guidelines to create one sample file for each record format you use:

- Include a minimum of 250 actual or simulated host records in ASCII or EBCDIC format.
- If you use simulated records, assign unique account and telephone numbers to each record.
- Include a range of host customer data rather than repeating one record.
- Don't use packed or signed fields.
- Don't include record headers or trailers.

Test the Upload Process at Your Site

Upon your request, your Avaya PDS representative will send you sample upload files. Use these files to test the script that updates the host database with the Avaya PDS data.



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Add user accounts

Overview

Use the following guidelines when creating user accounts:

- User Name (also called login ID) should contain at least three but not more than eight alphanumeric characters. It's recommended that you use a letter as the first character of a user name. User names cannot contain spaces or special characters.
- Password should contain from six to eight characters. Passwords should contain at least two letters and one numeric or special character. Also, the password should not be the same as the user name or a variation of the user name.
- Group for Login The name of the group to which the user belongs.
- Description (optional) Not more than 30 characters and spaces.

Add user accounts

Use the following procedure to add a user account:

- 1. Choose Manage user accounts from the Calling Lists and Users menu. The Manage User Accounts screen appears. The system lists the commands on the bottom of the screen.
- 2. Press Ctrl+L (Login).
- 3. Type the user name, password, group (agent, system, cdwanal), and an optional description. Both user names and passwords are case sensitive. If you create a user name using lowercase letters, the user must type lowercase letters when logging in.
- 4. Press Enter after you complete the last line. The system rewrites the screen and encrypts the password.
- 5. Press Ctrl+X (Exit).
- 6. Type Y to save the changes or N to abandon them.



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Record Edit

Overview

Record Edit allows you to access and edit a customer record within a calling list. Use the Record Edit menu to view a calling list record, change the contents of a field in an outbound calling list, or delete a record. Use Record Edit when you do not have access to the person's account on your host computer. If you upload data to the host computer, the changes are included in the upload. On some systems, the system uploads the changes to the host computer each night.

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

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

You may have several fields available for standard search. (The fields were specified during the system configuration.) An advantage to standard search is the ability to use wild cards. For example, if you are unsure about the spelling of a name, you can search using the asterisk (*). An input of Wil* returns Williams, Williamsons, Willis, and so on.

Shortcut keys

Use the following shortcut keys when editing calling list records.

Actions	Keys
Done	F1
Search for a record	F10
Delete a record	Esc,D
Undelete a record	Esc,U



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Overview of job monitor

Job monitor

Choose Manage an active job from the Supervisor Main Menu. The job monitor appears.

The top of the screen contains the menu bar. Below the menu bar is the

information line which gives a brief description of the active menu item. The bottom of the screen displays a line of additional help, such as how to choose a command or a message responding to an action.

You can make the menu bar active from any screen in Job Monitor by pressing Ctrl+X or F1. When the menu bar is visible, you are in menu mode. When it isn't visible, you are in edit mode.

To choose a menu command

Some menu commands have shortcut keys listed in the right column. Use these keys when you are in menu mode, without the menu open. For example, F4 opens the Phone Lines command.

To exit a menu

To exit a drop-down menu, press Ctrl +X.

To exit the main menu, press Q and press Enter.



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Campaign Update

Overview

Use outbound Campaign Update to cancel a scheduled outbound call. This command marks a record as uncallable when an inbound call has come in from a customer whose record may be included in an outbound list. This is similar to deleting a record, except the system enters a C instead of an E in the STATUSFLAG field.

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

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

Campaign Update

If you have an Agent Blending system, the system updates all records at a predefined time, or you can perform the update manually using the following procedure.

- 1. Choose Campaign Update from the Record Edit menu.
- 2. Type the calling list number to update and press Enter.
- 3. Type the search criteria (for example, account number or phone number). Then press F10 to search for the record.
- 4. A message appears if there are no matching records. If the system finds a match, it enters a C in the STATUSFLAG field.



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Mark records as Do Not Call

Overview

Use mark calling list records as DO NOT CALL to tell the sAvaya PDS not to call specific customers. After you mark a customer record, the system immediately searches the outbound calling lists specified in the Do Not Call group and marks all the customer's records. The system will not call a customer during any job if the customer's record is marked as do not call.

Mark records as do not call

Use the following procedure to mark records as DO NOT CALL.

- 1. Choose Mark calling list records as DO NOT CALL from the Calling Lists and Users menu. The Do Not Call menu appears.
- 2. Choose Mark DNC Group.
- 3. Type the item number for the Do Not Call group.
- 4. Type Y at the prompt to confirm your choice or N to cancel. The Set DO NOT CALL Status screen appears, which displays the selected group's unique identifier.
- 5. In the screen field, type the specific value for the customer whose record you want to mark as Do Not Call.
- 6. Press Enter.
- 7. Repeat steps 5 and 6 for each record you want to mark as Do Not Call.
- 8. Press Ctrl+X to exit the Set DO NOT CALL Status screen.



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Planning March 2002

Module contents

<u>CLC activity</u> <u>Quiz</u>

Objectives

At the end of this module you will be able to:

- Describe the Campaign Life Cycle and understand the purpose of each component
- Identify which Campaign Director software application is used in each of the Campaign Life Cycle phases

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Menus quiz - update March 2002





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Avaya PDS User Guide

Overview

Purpose

The AvayaTM Predictive Dialing System (PDS) also contains Supervisor menus that help you manage your calling activities.

Contents

This section contains the following topic:

• <u>Supervisor main menu</u>



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Avaya PDS User Guide

Campaign overview

To see topics for this section, click + in the contents list at left.



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Calling list

Overview

After the customer records are downloaded from the host, the system adds several fields to each record to help track calling results. After the system adds the fields, it may check for and reject duplicate records and uncallable phone numbers. This process depends upon your system configuration. The system refers to the modified records as the calling list. To use the calling list and users commands, choose Calling lists and users from the Supervisor Main Menu.

The following table describes some typical added fields. You can see a complete list of all the calling list fields for your system by pressing F4 or Ctrl+V (View) when the cursor is in a calling list field on a screen.

Description	
Record attempt counter. Number of times the system called the record.	
The agent who handled the call.	
The date of the last attempt on the record.	
The time of the last attempt on the record.	
Call completion code.	
The status of the record. If blank, the record is available for calling.	
B = all bad numbers; the Reject Report lists the records rejected by the system because the system could not match them to a time zone or the number was not callable (bad number).	
C = received inbound call from account; so cancelled outbound call	
D = maximum days on the system	
E = manually deleted in Record Edit	
R = repeated (duplicate) account	
T = time zone could not be determined	

DAYSCNT	Days on the system calling lists (optional). The number of days a record has been on the system. The Days on the System Report lists accounts that the system has downloaded for a certain number of days.
ENTRYDATE	The date a record was first downloaded.
ZONEPHONE#	The time zone stamp of a phone number. (For example, Pacific, Mountain.) The system calls a record only during the recommended calling time for that record's time zone. The system determines time zoning by the area code plus the phone number prefix.
	Indicates a duplicate record. The system can reject a record because there are two or more records in the calling list with the same phone number or account number, or any other field that you choose for duplicate checking.
DUPE	During system configuration, you choose whether you want to do duplicate checking, and if so, on which fields. The system lists these duplicate records on the Reject Report. Duplicate checking adds time to the processing time, but it eliminates unnecessary calls.
	An * in DUPE field tells you that there are duplicate records. The system places an R in the STATUSFLAG field of the second, third, and subsequent records to show that they are repeated records and won't be called.

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User accounts and permission levels

User accounts

Use manage user accounts to add or delete users and set or change their access to the system. A user account consists of the user name, password, and permission level. The systemsystem determines the permission level based on the group you assign to the user. The permission level determines a user's access to system features. For example, you usually assign agents to the Agent group, which grants permission to the Agent Main Menu where they have access only to call handling; you assign system administrators to the system group, which grants permission to the Administrator Main Menu, giving them access to the system maintenance functions.

Permission levels

The following table lists typical user levels, menu file names, and the corresponding system menus.

User type	Group name	Menu name
agent	agent	Agent Main Menu
supervisor	system	Supervisor Main Menu
analyst	cdwanal	PC Analysis main menu



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Avaya PDS User Guide

Download host records to the Avaya PDS

Download host records to the Avaya PDS

Use the following procedure to download host records to the Avaya PDS.

- 1. At the Administrator workstation, choose Download host records to PDS from the Transfer and Process Records menu.
- 2. Type Y at the prompt to continue or N to cancel. The host transmits the calling list records to the Avaya PDS.



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Upload the Avaya PDS records to a host computer

Overview

The Avaya PDS can operate independently of your host computer to protect your calling operations. After operating in no-host mode, you need to upload the system's data to your host computer system.

Upload the Avaya PDS records to a host computer

The Avaya PDS sites where agents directly update the host customer database do not need to upload data files to the host computer regularly. These call centers use uploads after the system resumes operations when the host is down or inaccessible..

- 1. Choose Upload records to host from the Transfer and Process Records menu.
- 2. Type Y at the prompt to continue or N to cancel. The Avaya PDS transmits the calling list records to the host computer.

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Delete user accounts

Delete user accounts

Use the following procedure to delete user accounts:

- 1. Choose Manage user accounts from the Calling Lists and Users menu. The Manage User Accounts screen appears.
- 2. Press Ctrl+F (Find).
- 3. Type the user name for the account you want to delete. The matching account appears on the screen.
- 4. Press Ctrl+D (Delete).
- 5. Type Y at the prompt to confirm the deletion or N to cancel.
- 6. Press Ctrl+X (Exit).
- 7. Type Y to save the changes or N to abandon them.



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Edit user accounts

Edit user accounts

When editing an account, make sure the user is not logged into the system. You can change the password, login group, and description but not the user's name. To change the user's name, delete the old account, then add a new user account.

- 1. Choose Manage user accounts from the Calling Lists and Users menu. The Manage User Accounts screen appears.
- 2. Press Ctrl+F (Find).
- 3. Type the user's name for the account you want to change. The matching account appears on the screen.
- 4. Move the cursor to the field you want to change and press Ctrl+C (Change).
- 5. Type the changes and press Enter after each change.
- 6. Press Ctrl+X (Exit).
- 7. Type Y to save the changes and exit or N to cancel and exit.



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Edit a record

Edit a record

Use the following procedure to edit a record.

- 1. Choose Record Edit from the Calling Lists and Users menu.
- 2. Choose Edit a record or Edit a record with Quick Search.
- 3. Type Y at the prompt to continue or N to cancel.. The Record Search Criteria screen appears.
- 4. Type the search values in the screen field(s). (Quick Search screens have only one field.)
- 5. Press F10 (Search). If the systemsystem cannot find a match, the Record Search Criteria screen reappears. Type different criteria and press F10 (Search). If the system finds a match, the record appears on your screen. To see if there is more than one match, press F10 (Search) again.
- 6. Use the arrow keys to move to the field you want to change.
- 7. Press Ctrl+C (Change) and type your changes.
- 8. Press F1 (Done) to save your changes or Ctrl+X to abandon them. The system prompts you to confirm the command.
- 9. Press Y to save the changes or N to abandon them.
- 10. Press Ctrl+X to return to the Record Search Criteria screen.



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Overview

Purpose

This section describes the how active jobs are managed.

Contents

This section contains the following topics:

- Overview of job monitor
- Open a job
- <u>Close a job</u>
- <u>Remove agents</u>
- <u>View job statistics</u>
- <u>View completion codes</u>
- View phone line usage
- <u>View call types</u>
- <u>View agent screens</u>
- Agents on active jobs
- Send a message to an agent
- Send a message to all agents
- <u>Control jobs</u>
- Shut down a job
- Stop a job immediately
- Link a job
- Monitor agents
- Transfer agents to another job
- Change phone line allocations
- Change maximum time a customer waits
- Change maximum % of client in queue
- <u>Change blend agent return time</u>

- Job settings
- Change Minimum Hit Rate
- Change Expert Calling Ratios
- <u>Change Managed Dialing settings</u>
- <u>Change cancel mode</u>
- Change time zone ordering
- <u>Change time zone status</u>
- Unit Work List settings
- Set different quotas for each Unit Work List
- Change Unit Work List controls
- Change phone strategy detection mode
- Change phone strategy recall parameters
- Change phone strategy alternate phone lines
- Analyze Job Activity Screens
- Agent Activity Fields
- Line Usage Fields
- <u>Calling activities fields for outbound calls</u>



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Open a job

Oveview

Managing a job begins with opening the job you want to manage. Use the Jobs menu to open and close jobs. All tasks on the Job Monitor menus are job related. If you try to use a command without selecting a job, the Avaya PDS will not complete the action. The system does not display an error message.

Open jobs

Use the following procedure to open jobs.

- 1. Open the Job menu.
- 2. Choose Open Job from the Jobs menu. A list of all active jobs appears. (If there is only one active job, the Avaya PDS automatically opens
- 3. Use the down arrow to choose the job you want to manage. A Job Activity Summary Statistics screen appears.

Use the Job Activity Summary Statistics screen to monitor job status. Press Tab to cycle through three additional screens: Call Completion

Code Results, Phone Line Usage, and Line Usage for All Lines on All

Jobs.



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Restore a deleted record

Restore a deleted record

Use the following procedure to restore a deleted record:

- 1. Choose Record Edit from the Calling Lists and Users menu.
- 2. Choose Delete a record or Delete a record with Quick Search.
- 3. Type Y to continue or N to cancel.
- 4. If the system has more than one calling list, type the calling list number and press Enter. (If your system has only one calling list, the system skips this step.) The Record Search Criteria screen appears.
- 5. Type the search values in the screen field.
- 6. Press F10 (Search). If the systemsystem cannot find a match, the Record Search Criteria screen reappears. Type different criteria and press F10 (Search). If the system finds a match, the record appears on your screen. To see if there is more than one match, press F10 (Search) again.
- 7. When the record appears, press Esc,U (Undelete). The system removes the E from the STATUSFLAG field.
- 8. Press F1 (Done) and press Ctrl+X.

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Avaya PDS User Guide

Create an outbound Campaign Update report

Create an outbound Campaign Update report

Use the following procedure to create a Campaign Update report.

- 1. Choose Record Edit from the Calling Lists and Users menu.
- 2. Choose Create Outbound Campaign Update Rep from the Record Edit menu.
- 3. Type a date in the format CCYYMMDD. For example, type 19990921 for September 21, 1999. A message appears confirming the report generation. Use the Reports menu to view or print the report.



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Avaya PDS User Guide

Manage active jobs

To see topics for this section, click + in the contents list at left.



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Campaign Life Cycle activity March 2002

Complete the exercise found in your Student Workbook.

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CLC quiz March 2002

The Implementation phase uses which Avaya	The Evaluation phase uses which Avaya PDS
Agent Monitor	Campaign Analyst
Campaign Monitor	Completion Code Manager
Campaign Analyst	Blend Manager
Hierorohy Managor	Hiararahy Managar
Which phase uses Campaign Monitor the most?	In which phase do you create phone strategies?
Which phase uses Campaign Monitor the most?	In which phase do you create phone strategies?
Which phase uses Campaign Monitor the most? Implementation	In which phase do you create phone strategies? Development Planning
Which phase uses Campaign Monitor the most? Implementation Sustaining	In which phase do you create phone strategies? Development Planning
Which phase uses Campaign Monitor the most? Implementation Sustaining mid tier	In which phase do you create phone strategies? Development Planning Evaluation
 Which phase uses Campaign Monitor the most? Implementation Sustaining mid tier Planning 	In which phase do you create phone strategies? Development Planning Evaluation Implementation
 Which phase uses Campaign Monitor the most? Implementation Sustaining mid tier Planning 	In which phase do you create phone strategies? Development Planning Evaluation Implementation

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Implementation March 2002

Module Contents

Campaign Editor Phone strategies Record selections Jobs Completion Code Manager Campaign Editor activity

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Campaign Editor March 2002

Use Campaign Editor to create phone strategies, record selections and jobs. There are three different displays available: jobs, selections, and strategies.

Additional resources		
Use the following links to take you to the relevant material	in the online Ava	ya PDS User's Guide.
Campaign Editor	Overview	Procedure
Campaign Editor		
Enable/disable multi-dialer features		•

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Phone strategies March 2002

A phone strategy tells the Avaya PDS when and how to call clients, which client phone number to call, and the frequency of those calls.

The Avaya PDS applies the criteria and settings specified in the phone strategy to the calling list records.

Following are parameters defined in a phone strategy:

- Which phone number to call first
- The number of rings to allow before disconnecting
- The time to wait before re-trying a phone number that was busy, unanswered, or disconnected
- The phone number to call if the first phone number is unanswered
- The number of times to retry a busy phone number
- The number of times to call a phone number before switching to an alternate phone number
- The types of calls to be passed to an agent, when the Avaya PDS detects an answer

Тір

You must create your phone strategies first because you will need to assign specific strategies when setting up your record selections. Once you have designed an effective phone strategy you can re-use it on all calling campaigns with similar characteristics.



Additional resources

Use the following links to take you to the relevant material in the online Avaya PDS User's Guide.

Phone strategy	Overview	Procedure	
Phone strategy			
Phone strategy preparation			
Phone strategy settings			
Create a phone strategy			







Record selections March 2002

A record selection contains the set of instructions that tells the Avaya PDS which customer records to select from a calling list. Record selections allow supervisors to define the criteria for selecting records and target specific customers to be called during a job. Record selections consist of selection criteria and a phone strategy. Each job uses a record selection and a phone strategy to call customers.

Record selection chooses records based on the following criteria:

- Calling list fields
- Time zones
- Previous calling results
- Agent set recalls
- Unit work lists
- Phone strategy

You assign a phone strategy to a record selection so that the Avaya PDS knows how to place the calls that are selected.

Before you start a job, you must run a record selection to identify the records that will be called during the job.



Additional resources

Use the following links to take you to the relevant material in the online Avaya PDS User's Guide.

Record selection ⁽	Overview	Procedure
Record selection		
Record selection organization		
Record selection wildcards		
Create a record selection		
Run a record selection		•







Jobs March 2002

Jobs are part of campaign. A job, depending on what type of system configuration you have, can make outbound calls, receive inbound calls, verify a sale, or a variety of other tasks.

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

- Outbound jobs
- Inbound jobs
- Blend jobs

If you have an Agent Blending system, you can use Campaign Editor to set up outbound jobs. There are various types of outbound jobs.



Additional resources

Use the following links would take you to the relevant material in the online Avaya PDS User's Guide.

Jobs	Overview	Procedure
Jobs Overview		
Job settings		
Job Types		
Create a job		

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Completion Code Manager March 2002

The Completion Code Manager allows you to categorize one or more completion codes as either right party connects (RPCs), abandons, or closures.

For each code, enter a description, and designate it as an RPC, Closure, or Abandon. You can view reports via Monitor and Analyst to view the percentages of these three codes.

Right party connects, abandons and closures account for a percentage of all the calls the dialer considers as "answered".





Additional resources

Use the following links to take you to the relevant material in the online Avaya PDS User's Guide.

Completion Code Manager	Overview	Procedure
Overview of Completion Code Manager		
Start Completion Code Manager		

Completion Code Manager

Set a Completion Code as RPC	•
Set a Completion Code as Closure	•
Set a Completion Code as a Abandon	•
Change completion Code description	•

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Campaign Editor project March 2002

Complete the exercise found in your Student Workbook.

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Phone strategy exercise March 2002

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Avaya PDS User Guide

Phone strategy overview

Overview

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A phone strategy is a set of instructions that tells the Avaya PDS to call customers during a calling campaign. A phone strategy tells the Avaya PDS when and how to call clients, which customer phone number to call, and the frequency of calls.

The Avaya PDS applies the criteria and settings specified in the phone strategy to the calling list records.

The following parameters define a phone strategy:

- Which phone number to call first
- The number of rings to allow before disconnecting
- The time to wait before retrying a phone number that was busy, unanswered, or disconnected
- The phone number to call if the first phone number is unanswered
- The number of times to retry a busy phone number
- The number of times to call a phone number before switching to an alternate phone number
- The types of calls to be passed to an agent when the Avaya PDS detects an answer

Phone strategy parameters

Phone strategy parameters are grouped into four areas: Initial Phone, Alternate Initial Phone, Call Detection Mode, and Retries. The following table describes each group of parameters.

Initial Phone	The first phone number the system will call.	
Alternate Initial Phone	ate Initial Phone The phone number that becomes the initial phone at a speci- time of day.	
Call Detection Mode	The system detects how the phone number is answered (such as live voice, answering machine, and operator). This determines which calls are passed to agents.	
Retries	This parameter tells the system to retry a phone number depending on the previous outcome.	



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Phone strategy preparation

Overview

The Avaya PDS receives and prepares the host data file and creates a calling list. A phone strategy is used to specify the phone numbers to call during a job and how to place the calls.

Before you create a new phone strategy, you must decide which phone strategy parameters to use to define how the system places calls.

Wildcard characters

Phone strategies use one or more wildcard characters to clarify which phones are called, how often, and in what order.

Using wildcard characters

Wildcard characters are symbols used to increase productivity by selecting ranges in the phone strategy.

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

Wildcard characters include:



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Phone strategy settings

Initial phone

The initial phone is the first phone number the Avaya PDS calls for each record. In the calling list, phone numbers are stored in phone fields. These fields are labeled PHONE1, PHONE2, and so on. If a record does not match the criteria you set, the system will not call the record.

The Avaya PDS 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 Avaya PDS phone type numbers are set during your system configuration.

Alternate initial phone

The alternate initial phone setting is used to set up one or more phones that the Avaya PDS will use as alternate initial phones based on the time of day. At a particular time of day, the alternate initial phone replaces the initial phone as the first phone number to call. The system can switch to calling the alternate initial phone number at the time you specify in the alternate initial phone settings.

Alternate initial time settings are also defined in this parameter, which changes the time the system starts calling the alternate initial phone. The system starts calling based on the local time in the selected time zone.

Example

You can tell the Avaya PDS to switch from calling business phones during the day (initial phone) to calling home phones (alternate initial phone) during the evening starting at 6 PM.

Call detection mode

The call detection mode is used to determine the types of calls the Avaya PDS passes to agents. Call detection modes correspond to responses that the system detects when it dials a number. Typical call detection modes include voice, autovoice, and operator intercept. The system passes calls to agents based on the selected modes.

The type of connect criteria determines what type of connects the Avaya PDS will pass to an agent.

Define the following parameters for call detection mode settings:

- The ring count is the number of rings to allow before the system records a NOANSWER completion code.
- The call detection mode tells the system which calls to pass to agents.

When the Avaya PDS places a call, the system detects what type of answer occurs for each call. The following table lists the codes that are used in the Call Detection Mode tab:

Code	Answer type
V	Voice
AV	Autovoice
INT	Operator intercept
NOCIRC	No circuit available
DISCON	Disconnected number
VAC	Vacant number
REORD	Reorder

Тір

Increase your hit rate by deciding which detection modes to use. With each additional criteria you select, more calls can be handled by your agents instead of by the system.

Retries

The retries setting is used to determine how long the Avaya PDS waits before retrying a number, how many times it retries the same phone number, and which phone it calls next.

The Avaya PDS determines the settings by the result of the initial call. For example, you can tell the system to retry the call in 15 minutes when the initial call result is busy and to stop calling that record if there is no answer after three retries.

Note

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

- Retries are computer generated retries. If the Avaya PDS detects a busy signal on the first call attempt, it will retry based on the retry parameters set in the phone strategy.
- Recalls are set by agents. An agent can set either an Agent Owned Recall (the system routes the recall to the agent who set it) or a general recall (any available agent talks to the customer when the system recalls the account).



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Phone strategy quiz March 2002



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Record selection activity March 2002

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Record selection

Overview

A record selection contains the set of instructions that tells the Avaya PDS which customer records to select from a calling list. Record selections allow supervisors to define the criteria for selecting records and target specific customers to be called during a job. A record selection consists of selection criteria and a phone strategy. Each job uses the results of a record selection and a phone strategy to call customers.

When starting a record selection, the Avaya PDS chooses 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 how many records are chosen.

Target Time Zones

You can use your record selection to target time zones such as Eastern, Central, or Pacific. This allows only records from specific time zones to be targeted. If not specified, the Avaya PDS defaults to a "follow the sun" method, meaning it calls records from east to west.

Target completion codes

You can use your record selection to target completion codes such as BUSY or NOANSWER. Use this to also select SIT tone completion codes to run a job to look for disconnected or redirected numbers, or numbers that are no longer in service.

Target goals

You can use your record selection to target goals, such as accounts more than 30 days overdue, accounts with a balance over \$2,000, or records in a particular state.

Record selection use

Create a record selection when an existing record selection does not meet your current needs. Edit a record selection when you want to modify an existing record selection.

To view a record selection, open Campaign Editor and click Selections in the button bar. Then, double-click a record selection title. Record selection settings populate the right-hand pane, which serves as a wizard. Back and Next buttons located at the bottom of the screen allow you to switch among the various wizard screens.

The wizard screens guide you through the record selection editing process. If you are ever unsure what to enter in a field, you should double-click or single-click the field to see if there is a list of values to choose from or a blinking cursor that indicates you can type your own value in the field.

The difference between Selections and Selection Reports in the button bar is that Selections causes all of the record selections that you have created to appear and Selection Reports causes reports for all of the record selections that have already run to appear. Selection Reports provides detailed information about the results of the record selection, while Selections serves as an editor (and not a reporting mechanism).



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Record selection organization

Overview

A record selection contains options defined by the supervisor. The system chooses a record if it meets specific criteria. Use the record selection in conjunction with the phone strategy to determine who you want to call (record selection) and how you want to call (phone strategy) those selected records.

As soon as you click Selections in the button bar, your screen becomes divided into two areas: a left-hand pane and a right-hand pane. The left-hand pane lists your record selections that you have created, while the right-hand side allows you to edit a record selection's settings by using the various panes.

Record selection panes

The following table describes the various panes that appear on the right-hand area of the window; click the Next and Back buttons to switch among these panes.

Pane name	Pane description
Miscellaneous pane	Use the Miscellaneous pane to select a calling list, phone strategy file, unit work list field, time zone ignore option, or selection type (infinite or verify).
Records pane	Use the Records pane to define which records the system uses during a job based on logic statements that you create.
Time Zones pane	Use the Time Zones pane to select time zones that the system uses to determine which phone numbers to call.
Calling Results pane	Use the Calling Results pane to tell the system which phone numbers to call based on previous calling results.
Recalls pane	Use the Recalls pane to determine which agent-set recalls to include in the record selection.
Sort pane	Use the Sort pane to determine the record order that the system uses to call clients.



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Record selection wildcard characters

Wildcard characters

Like phone strategies, record selections use wildcard characters to specify criteria for a field. Use wildcard character expressions to define the subset of records you want to call. A wildcard character expression is a combination of wildcard characters (such as < or >) and values.

Use wildcard characters

Use wildcard characters in the Records and Recalls panes. Each wildcard character expression specifies a field name (from the records in your calling list), a wildcard character, and a value.

Values can be numbers, letters, dates, and times. For example, account balances consist of numbers, while client names consist of letters. Wildcard characters include the following:

Wildcard characters	Description
>	greater than
<	less than
=	equal to
~	not equal to
>=	greater than or equal to
<=	less than or equal to
-	use between a range of values
,	use between multiple values
*	wildcard character
!	list wildcard character
?	single character wildcard character

Example record selection statements include the following:

Field	Value	What is selected?
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 client records that meet the criteria in both statements.

Use OR to broaden the selection to select the client 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.



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Record selection quiz March 2002



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Jobs activity March 2002

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Avaya PDS User Guide

Overview

Purpose

A job contains all the information the AvayaTM Predictive Dialing System (PDS) needs to call clients. A job integrates a calling list, phone strategy, record selection, and other settings to place outbound calls and receive inbound calls.

Contents

This section contains the following topics:

- Job types
- Outbound job
- Job settings
- Create a job
- View job settings
- <u>Save a job</u>
- Save a job as another name or on a different dialer
- Start a job on one or more dialers
- Start multiple jobs on currently selected dialer
- Copy a job
- Edit a job
- Verify a job on one or more dialers
- Verify multiple jobs on the currently selected dialer
- Delete a job on one or more dialers
- Delete multiple jobs on the currently selected dialer
- List all jobs on a selected dialer

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Job types

Overview

Jobs are part of a campaign. A job, depending on what type of system configuration you have, can make outbound calls, receive inbound calls, verify a sale, or a handle variety of other tasks.

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

- Outbound jobs
- Inbound jobs
- Blend jobs

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

Outbound jobs

During outbound jobs, the Avaya PDS uses a calling list, phone strategy, record selection, and other settings to place outbound calls to customers. There are many settings to configure for an outbound job. These are discussed more in depth in the following section.

Inbound jobs

During inbound jobs, the Avaya PDS automatically routes inbound calls to agents. There are no inbound jobs on an Agent Blending system. All inbound calls are handled by inbound ACD agents. Because the Avaya PDS does not control the inbound call activity on the Agent Blending system, the system does not consider it a job.

Blend jobs

The term blend job refers to job run on an Intelligent Call Blending system. During an Intelligent Call Blending job, the Avaya PDS moves agents between outbound and inbound calls. Blend agents receive inbound calls during peak inbound activity and outbound calls when inbound activity decreases.

An Avaya PDS blend agent handles both inbound and outbound calls with Intelligent Call Blending.



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Job settings

Overview

There are several settings that you define for each outbound job. The settings on your system may vary depending on your configuration. The settings are grouped in the following way:

- Basic
- Outbound
- Managed
- Interactive Voice Response
- Unit Work List

Basic job settings

Basic settings are for every type of job, regardless of whether it is outbound, inbound, or blend. The following settings are listed in the BASIC tree structure.

Main data processing label

Use the drop-down list to select the correct main data processing label. The main data process label instructs the Avaya PDS to begin job processing and tells the system what to display on the agent screens.

Note

If you run a virtual or sales verification job, select the appropriate data process label. For example, select virtual for a virtual job, verify for a sales verification job, and generic for an outbound job.

Job description

Double-click in the text box and type a job description. This is a description of the job. For example, type a description that reflects the goal of the job such as 30-day Accounts.

Link to job

You can tell the Avaya PDS to automatically start a job when this job ends. Use the Link to job setting to select the next job to start.

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.

Job type	Can link to
outbound job	outbound or blend job (includes Unit Work List jobs)
Managed Dialing job	ONLY to managed jobs (includes Unit Work List jobs)
inbound job	ONLY to inbound job
blend job	blend job (blend job cannot link to outbound job)
virtual job	ONLY virtual job

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

Note

If you stop a job that has a job linked to it, the Avaya PDS will automatically start the next job.

Agent keys definition file name

Use the drop-down list to select the agent keys file name to use during a job. An agent keys file is configured with different sets of functions for keys used during differently types of jobs.

Line type(s) for use on job

Double-click and the line types to use during a job. Use this setting to select or clear the groups of lines the Avaya PDS uses for a job.

Earliest start time

Double-click to set the time (numbers only) you want the Avaya PDS to begin calling customer records.

The Avaya PDS 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 system does not begin dialing until the system clock reaches the recommended time.

Latest stop time

Double-click to set the time (numbers only) you want the Avaya PDS to stop calling customer records.

Run job without agents

Select this option if you want to run your job without agents. This field does not appear unless you select Virtual in the Campaign Editor Job Wizard (when you create a new job).

Transfer on hold message number

Double-click and type the number of the message that users should hear during the call-transfer process.

Outbound job settings

Outbound settings are for outbound jobs. The following settings are listed in the OUTBOUND tree structure.

Do Not Call group name

Use the drop-down list to select the Do Not Call Group file name.

Initial hit rate

Double-click and enter the initial hit rate (number only).

Initial hit rate determines the average number of calls per agent the Avaya PDS 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. When the Avaya PDS gathers statistics from actual call attempts, it readjusts the hit rate automatically to meet the minimum hit rate setting. Set the rate too low (20 to 30) and the Avaya PDS could make more connects than your agents can handle during the initial dialing period. Set the rate too high (over 70) and 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

Expert Calling ratio

Double-click for text boxes to enter in Expert Calling ratio settings.

Following are the three choices for setting Expert Calling ratio:

Setting	Description & recommended setting
Calls in the wait queue	The Avaya PDS achieves a balance between agents waiting for a call and customers placed in the wait queue.
	Enter a percent value between 1 and 100. The recommended setting is between 4 and 31.
Agent Work Time	The Avaya PDS monitors the time agents take to complete calls and update records and adjusts the calling pace accordingly.
	Enter a percent value between 1 and 100. The recommended setting is between 29 and 71.
Agent Update Time	The Avaya PDS monitors the time agents take to update records and adjusts the calling pace accordingly.
	Enter a percent value between 1 and 100. The recommended setting is between 32 and 78.

Remember, when you use Calls in Wait Queue, customer wait times are affected. When you use Agent Work Time or Agent Update Time, the average agent idle time can be short, but there may be a large percentage of customers in the wait queue at any given time.

End jobs when no more calls remain

Select this option if you want the Avaya PDS to end jobs when each customer has been called at least once.

Clear this option if you want the Avaya PDS to end jobs after all calls are completed, including recalls.

Outbound calling list

Select a list name from the drop-down list. The outbound calling list is the list you will use for the job.

The calling list name contains the host dialer name (where the list is stored) and the calling list name. The calling list description (if any) is listed in the right-hand column drop-down list.

Minimum hit rate

Double-click to set the minimum hit rate (number only). The minimum hit rate determines the maximum number of calls the Avaya PDS will make in order to make an agent connection.

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

Enter a value between 1 and 100 in increments of 10. A typical setting is 30.

Order calls by time zone

Select this option if you want the Avaya PDS to order calls by times zones. This means the Avaya PDS calls "following the sun," or east to west.

With either choice, time zone laws are still applied.

Quota setting (completion code, quota)

Double-click to use a drop-down list and a box. Use the drop-down list to select a completion code. Use the text box to enter a quota (for example, a quota number of 500 would mean that a job automatically stops if the number of completion codes reaches 500).

Save quota setting when the job ends

Select this option to save the quota setting when the jobs ends.

Quota settings file name

Double-click to type a file name in the field.

Recall reschedule interval (mins)

If Agent Owned Recall is configured on your system, this field will be visible. Double-click to enter the minimum amount of time that must pass before the system tries to pass the agent a recall.

Recall notification time (min)

If Agent Owned Recall is configured on your system, this field will be visible. Double-click to enter the amount of time that the system will look for the agent (to pass the recall to the agent who set it up).

Number of recall attempts

If Agent Owned Recall is configured on your system, this field will be visible. Double-click

to enter the number of times to look for the agent that set up the recall.

Script label for call

Select the script label from the drop-down list. The script label is the name of the script being used for the job. This determines the messages the customer hears when placed in the wait queue.

If a customer is placed in a wait queue, the customer hears a message. The wait queue messages are created for different jobs. The message or string of messages a customer hears is the message script.

Outbound screen(s)

Select the outbound screen name from the drop-down list. This determines the outbound screen that agents see on their workstations during an outbound job.

Record selection file name

Select the record selection name from the drop-down list. The Selection parameter identifies which record selection is used for the outbound job. The record selection contains the phone strategy used for the job.

Transfer to inbound job name

Select the transfer to inbound job name from the drop-down list of inbound or blend job names that agents can transfer calls to.

Total wait delay (sec.)

Double-click the total wait delay field and enter in the number of seconds (from 0 to 999) that the customer can wait in the Avaya PDS wait queue before the system ends the call.

Managed job settings

Managed settings are settings for Managed Dialing jobs. The following settings are listed in the MANAGED tree structure.

The following settings become active only if the MANAGED check box is selected.

Allow dialing from deleted record

Select this option to allow an agent to dial a deleted record.

Clear the check box to prevent agents from dialing a deleted record.

This setting can only be used if the MANAGED check box is selected.

Allow agents to cancel call

Select this option to allow an agent to cancel a Managed Dialing call.

Clear this option to prevent agents from cancelling a Managed Dialing call.

This setting can only be used if the MANAGED check box is selected.

Display empty record at preview

Select this option to allow an agent to display an empty record at preview.

Clear this option to prevent agents from displaying empty record at preview.

This setting can only be used if the MANAGED check box is selected.

Time limit (sec.) for preview

Double-click the time limit field and enter in a value (in seconds) between 1 and 999. This parameter sets the time that an agent can preview a record before the Avaya PDS dials the number. Use 0 (zero) to set an unlimited amount of preview time.

This setting can only be used if the MANAGED check box is selected.

Allow record search type at preview

Select one of the following three options from the drop-down list:

- NONE No search is allowed. The only way for the agent to make a call is by manually entering a phone number.
- HASH The search is done through the PDS QuickSearch method. The calling list is searched until the matching record is found.
- LIS The search is accomplished through the List Indexed Sequential method. 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.

This setting can only be used if the MANAGED check box is selected.

Interactive Voice Response job settings

The INTERACTIVE VOICE RESPONSE tree structure becomes active when its check box is selected.

IVR identifier

Double-click the field to enter the IVR identifier.

Script to run on the IVR

Double-click the field to enter the script to be used for the IVR.

Unit Work List job settings

The UNIT WORK LIST tree structure becomes active when its check box is selected.

Record selection with units

Select a unit work list record selection from the drop-down list to use with this job.



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Module contents

Introduction to Campaign Monitor Manage jobs

Manage agents Hierarchy Manager

Agent Blending

Campaign Manager project

Objectives

At the end of this module you will be able to:

- To open and operate the Campaign Monitor application
- To view dialer, job, and agent statistics
- To create, save and share customized views of statistics
- To modify the execution of jobs to meet campaign objectives
- To monitor agent operations
- To set alerts to notify you of job performance issues
- To create hierarchies using Hierarchy Manager

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Avaya PDS User Guide

Overview

Purpose

The AvayaTM Predictive Dialing System (PDS) uses phone strategies to call customers more effectively.

Contents

This section contains the following topics:

- <u>Phone strategy overview</u>
- Phone strategy preparation
- <u>Phone strategy settings</u>
- Create a phone strategy
- <u>Copy a phone strategy</u>
- <u>View phone strategy settings</u>
- Edit a phone strategy
- Delete a phone strategy
- List all phone strategies on a selected dialer
- <u>Append a phone strategy row</u>
- Insert a row in a phone strategy
- <u>Delete a row in a phone strategy</u>
- Move a row up in a phone strategy
- Move a row down in a phone strategy
- Select all rows in a phone strategy
- <u>Unselect all rows in a phone strategy</u>



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Create a phone strategy

Create a phone strategy

Use the following procedure to create a phone strategy:

- 1. Start Campaign Editor.
- 2. In your button bar, click the name of the dialer where you want your phone strategy to reside. (You can save it to other dialers or delete it from this dialer later.)
- 3. On the button bar, click Strategies.
- 4. Select File > New.
- 5. On the right side of the window, click the List field, select a calling list, and then click Next.
- 6. In the Initial Phone pane, click the Phone field and select a phone. Double-click the other fields to define your initial phone settings, and then click Next.
- 7. (Optional) In the Alternate Initial pane, specify alternate initial phone settings. Right-click and select Append Row. Double-click the fields to enter values. Select options as needed. Right-click and select Select All to select all options. Right-click and select Unselect All to clear all options. Click Next.
- 8. In the Detection Mode pane, select the detection modes to pass to the agents, and then click Next.
- 9. In the Retries pane, select the call results to retry. For each result you select, type a value in the Retry Interval (mins), Attempts, and Next Phone columns.
- Select File > Save. The strategy is automatically saved to the dialer that you had selected in the button bar. If multi-dialer is enabled, select additional dialers where the strategy should be saved. Type a file name for your strategy, and then click OK. (If the check boxes are unavailable, enable them in the Settings > Options dialog box.)

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Overview

Purpose

The AvayaTM Predictive Dialing System (PDS) uses record selections to determine which records to call during a job. You can create your own customized record selections that contain your own rules. For example, call only customers with an outstanding balance of < \$5,000 and who live in California. After you have defined your customized record selection, you can save that record selection for use on any future calling campaign.

Contents

This section contains the following topics:

- <u>Record selection</u>
- Record selection organization
- <u>Record selection wildcard characters</u>
- <u>Understand the Selection Reports pane</u>
- Open and view a record selection
- Complete the Miscellaneous pane
- Complete the Records pane
- Complete the Calling Results pane
- <u>Complete the Time Zone pane</u>
- Complete the Recalls pane (optional)
- <u>Complete the Sort pane (optional)</u>
- Create a record selection
- Save a record selection
- Edit a record selection
- Delete a record selection
- <u>Verify a record selection</u>
- <u>Run a record selection</u>
- Copy a record selection
- List all record selections on a selected dialer

- <u>View selection reports</u>
- <u>View record selection settings</u>
- Append record selection rows
- Insert a row in a record selection
- Delete a row in a record selection
- Move a row up in a record selection
- Move a row down in a record selection
- <u>Select all rows in a record selection</u>
- Unselect all rows in a record selection

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Avaya PDS User Guide

Understand the Selection Reports pane

Overview

When you click Selection Reports in the button bar, the Selection Reports pane appears and shows a list of record selections that have previously been run. The Selection Reports pane is an area that contains summary information, so you do not modify its contents. Modify record selections in the pane that appears when you click Selections in the button bar.

To view a selection report, double-click a selection. You can then right-click and select Select All so that you can copy and paste the report into a different application.

Understand the Selection Reports pane

The Selection Reports pane contains the following headings: Selection, List, Status, Records, Records Remaining, Recalls, and Select Ran at.

Heading	Description
Selection	Record selection file name
List	Calling list associated with this record selection
Status	Record selection status is In Use if being used for a currently running job or Available if not.
Records	Number of customer records associated with this record selection file
Records Remaining	Number of records that still need to be called (this number changes if the job is running)
Recalls	Number of recalls (callbacks) that this record selection file has flagged
Selection Ran at	Time and date stamp

The following table describes these headings:

Understand the Selection Reports pane



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Jobs quiz March 2002

Latest stop time sets The last time calls are made on a job
The last time agents can log on
The first time an agent can log on
The first time calls are made on a job
Which of the following is not a MANAGED tree setting?
Allow agents to cancel call
Time limit for preview
Allow dialing from deleted record
Key field release code

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Jobs

To see topics for this section, click + in the contents list at left.



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Outbound job

Overview

During outbound jobs, the Avaya PDS automatically dials phone numbers and routes calls to agents. The system screens for answering machines, phone operator intercepts, busy signals, Interactive Voice Response systems (IVRs), and no answers.

Special outbound jobs

An outbound job uses settings to target customers for calling. Agent Blending and Intelligent Call Blending systems both use outbound jobs. Depending on your system configuration, there are up to five special jobs. These settings are configured when you create or modify a job.

- A Unit Work List job divides customer records into 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 Avaya PDS calls the customer. As the supervisor, you can adjust the preview time and allow agent to cancel calls depending on how the job settings are configured.
- A Sales Verification job creates a second campaign to verify a sale 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 receive new records for calling while the job is active. Use the Infinite record selection when starting an Infinite job. The Avaya PDS uses this record selection to add new records (downloaded from your host) to an existing calling list on an active infinite job. An infinite job runs until you stop it manually.
- A Virtual Agent job allows the Avaya PDS to run a job without agents. When the Avaya PDS detects a customer or an answering machine, the system plays a recorded message.

Define Sales Verification, Unit Work List, Virtual, and Managed on the second screen of the Campaign Editor Job Wizard when you create a new job. These features are optional and some features are mutually exclusive. For example, if you select Virtual, you cannot select any other choices. If you select Managed, you can only select Sales Verification with it. If you select Unit Work List, you can only select Sales Verification with it.



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Avaya PDS User Guide

Create a job

Overview

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

Create a job

Use the following procedure to create a job.

- 1. In the Campaign Editor button bar, select a dialer, and then click Jobs.
- 2. Select File > New.
- 3. Click Next when the Campaign Editor Job Wizard appears.
- 4. Select the type of job to create, the appropriate outbound or inbound calling list, and the check box next to the options you want to use: Sales Verification, Unit Work List, Virtual, or Managed, and then click Next.
- 5. Type a job description, and then click Finish. The default tree structure for your job type (inbound, outbound, blend, etc.) appears in the right-hand pane. Use the Setting column to edit values.

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View job settings

View job settings

Use the following procedure to view job settings.

1. Double-click the job you want to view. The job settings appear in the right-hand pane.



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Avaya PDS User Guide

Save a job

Save a job

Use the following procedure to save a job.

- 1. Select File > Save to save the job. (If needed, provide a file name.)
- 2. Click OK.



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Avaya PDS User Guide

Save a job as another name or on a different dialer

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. Double-click 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.)

3. Type a file 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.



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Avaya PDS User Guide

Start a job on one or more dialers

Start a job on one or more dialers

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

- 1. Double-click the job you want to start.
- 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.



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Avaya PDS User Guide

Start multiple jobs on currently selected dialer

Start multiple jobs on currently selected dialer

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

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



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Avaya PDS User Guide

Copy a job

Copy a job

Use the following procedure to copy a job.

- 1. Double-click the job you want to copy.
- Select File > Save As. If the multi-dialer option is enabled, select the dialer where you want to copy a job.
- 3. Type a file name for the job, and then click OK.



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Edit a job

Edit a job

Use the following procedure to edit a job.

- 1. Select File > Open.
- 2. Double-click the job you want to edit, and then make the necessary edits in the right-hand pane.
- Select File > Save to save the job.
 If the multi-dialer option in enabled, select the additional dialers to save the job to.
- 4. Type a file name for the job, and then click OK.



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Avaya PDS User Guide

Verify a job on one or more dialers

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.
- Select File > Verify.
 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.
- 3. In the This File is OK dialog box, click OK.



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Avaya PDS User Guide

Verify multiple jobs on the currently selected dialer

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.
- 3. Click OK in The File is OK dialog box.

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Avaya PDS User Guide

Delete a job on one or more dialers

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.
- 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.



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Avaya PDS User Guide

Delete multiple jobs on the currently selected dialer

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.

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List all jobs on a selected dialer

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.



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Intro to Campaign Monitor March 2002

The Main Menu in Campaign Monitor is the primary navigation point for:

- opening views
- opening and saving favorite views
- completion codes
- agent/supervisor relationships
- setting and viewing alerts

Individual views operate within the main window which can be adjusted to fit your needs.

A view displays information on dialers, jobs, agents, and completion codes. In Campaign Monitor, you are able to create your views and save them on exit and restore them on start up, which allows you to display views in the same way without having to recreate specific views.



Additional resources

Use the following links to take you to the relevant material in the online Avaya PDS User's Guide.

Campaign Monitor	Overview	Procedure
Campaign Monitor		
Campaign Monitor User Intrface		
View Control toolbar		
Campaign Monitor views		
Agent Detail view		•
Agent Completion Code view		•
Agent History view		•
Supervusor Agents view		•
Dialer Status View		•
Dialer Agents view		•
Dialer Lines view		•

Intro to Campaign Monitor

Dialer History view	
Job Status View	
Job Agents view	
Job Detail view	
Job Call Handling view	
Job Completion Code view	
Job Wait Queue view	
Job History View	
Job Performance view	
Set Scope Selectors	
Find Agents view	
Create Custom view	

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Managing jobs March 2002

This lesson shows you how to modify dialer, job, and agent settings from Campaign Monitor. In different views, select a field and use the right-click menu to display the settings that can be changed:

- Start or stop a job
- Change expert calling ratio
- Change hit rate
- Change line usage
- Change job linking
- Add or change unit work lists
- Modify phone strategy settings
- Create and modify alert



Additional resources

Use the following links to take you to the relevant material in the online Avaya PDS User's Guide.

Campaign Monitor	Overview	Procedure
Campaign Monitor		
Campaign Monitor User Intrface		
View Control toolbar		
Campaign Monitor views		
Agent Detail view		
Agent Completion Code view		•
Agent History view		•
Supervusor Agents view		
Dialer Status View		
Dialer Agents view		
Dialer Lines view		

Managing Jobs

Dialer History view	•
Job Status View	•
Job Agents view	•
Job Detail view	•
Job Call Handling view	•
Job Completion Code view	•
Job Wait Queue view	•
Job History View	•
Job Performance view	•
Set Scope Selectors	•
Find Agents view	•
Create Custom view	•

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Managing agents March 2002

This lesson shows you how to review and monitor agent activities from Campaign Monitor. In different views, select a field and use the right-click menu to display action options:

- Remove an agent from a job
- Transfer an agent to a job
- Listen to an agent call
- Monitor Agent screen
- Send a message to an agent



Additional resources

Use the following links to take you to the relevant material in the online Avaya PDS User's Guide.

Campaign Monitor	Overview	Procedure
Campaign Monitor		
Campaign Monitor User Intrface		
View Control toolbar		
Campaign Monitor views		
Agent Detail view		
Agent Completion Code view		•
Agent History view		•
Supervusor Agents view		•
Dialer Status View		
Dialer Agents view		•
Dialer Lines view		•
Dialer History view		•
Job Status View		
Job Agents view		•

Managing Agents

Job Detail view	
Job Call Handling view	•
Job Completion Code view	
Job Wait Queue view	
Job History View	
Job Performance view	
Set Scope Selectors	
Find Agents view	
Create Custom view	

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Hierarchy Manager March 2002

Hierarchy Manager is a tool you can use to group data. Hierarchy Manager lets you create agent, job, or dialer hierarchies that reflect the way your company or business is organized. For example, you can create relationships between Avaya PDS agents and the management structure of a company. You can use hierarchies in Campaign Monitor to adjust the scope of data to view and in Campaign Analyst to group data in reports. This section describes Hierarchy Manager and how to use it.

Hierarchy Manager			×
Herarchy Help			
Agent Hierarchies	Hierarchy	Available	Allocated
-			
Job Hierarchies			
Dialer Hierarchies			I
Agent Hierarchies			li.



Additional resources

Use the following links to take you to the relevant material in the online Avaya PDS User's Guide.

Hierarchy Manager	Overview	Procedure
Overview of Hierarchy Manager		
Create a hierarchy		•
Open a hierarchy		•

Managing Jobs

Adding levels to Hierarchies	•
Adding data items to hierarchies	•
Moving levels within hierarchies	•

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Agent Blending March 2002

Agent Blending integrates outbound calling activities on your Avaya PDS with inbound calling activities on your ACD. In an Agent Blending system, ACD agents log on to the Avaya PDS and the ACD. Agent Blending monitors the activity on the ACD and uses this information to determine when to acquire agents for outbound calling and when to release ACD agents to handle inbound calls.

The Agent Blending tool allows you to manage domains (ACD call queues) and domain groups (every domain is a member of a domain group). Start the Agent Blending tool from the Campaign Monitor or Campaign Editor Tools menu.



Additional resources

Use the following links to take you to the relevant material in the online Avaya PDS User's Guide.

Blend Manager	Overview	Procedure	
Blend Manager			
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Campaign Monitor project March 2002

Your instructor will direct you in an activity with the Avaya PDS Campaign Monitor application that builds upon the skills you learned in previous activities about the Operations phase of the Campaign Life Cycle.

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Campaign Monitor activity March 2002

Complete the exercise found in your Student Workbook.

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User interface

Overview

Campaign Monitor has a button bar on the left-hand side of the screen and an open space where your various windows (or views) appear. 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 your monitoring.

Campaign Monitor screen layout and usage

Campaign Monitor is highly customizable. The following is a sample list of Campaign Monitor's customizable features. In addition to these features, you should experiment with the toolbar options in each view to customize individual views. After you have a view set up the way you want it, you can save it as a custom view so that it is available for you to select from the Custom button group on the button bar. For more information on customizing individual views using the toolbar, see "View Control Functions."

Button bar

The button bar works like an accordion: it expands and contracts. In other words, when you click a button group, the group expands to display its buttons.

To learn more about the various Campaign Monitor views and how to customize each view, see the "Views" section.

Sort

You can sort the contents of a view by clicking a column heading. 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 data 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 a view by hovering your cursor between the heading titles until a double-arrow appears. Hold down the left mouse button while you drag your cursor to resize the columns.



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View control toolbar

Toolbar buttons within a View

Every view opens with a set of tools that help you manipulate the data in a View. The available options vary depending the view. For example, the time selector option does not appear if time scoping is not allowed for data in a view.

View tool	Button	Description
Table View		If the view has two presentation modes (graphical and table) this button displays the data without icons (not available for all views).
Graphical View	⊗	If the view has two presentation modes (graphical and table) this button displays the data by showing icons (not available for all views).
Filter Data	Y	Displays a dialog box that allows you to filter the data in the view according to one selected criteria.
Performance Code	₫	Displays a dialog box that allows you to select a completion code to use to measure agent performance.
Hide/Show Columns		Displays a dialog box that allows you to select which of the available data fields will be displayed.
Find	<i>0</i> 4	Allows you to search for an item in a view.
Level 1 Scope Selector	🚉 All Level 1 💌	A drop-down list that allows you to limit the amount of data in the display.
Level 2 Scope Selector	😤 All Level 2 💌	The choices in this list depend on the choice made in the Level1 Scope Selector.

Level 3 Scope Selector	🚉 All Level 3 💌	The choices offered in this list depend on the choices made in the Level1 and Level2 Scope Selectors.
Hierarchy Manager	- <u>11</u>	A pull-down list that allows you to select the types of data that will appear in the Scope Selectors.
Time Scope	Ø •	A pull-down list that lets you select the time range for the data displayed in the view.
Refresh view	Ø	Allows you to refresh a view.



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Views

Overview

A view displays information about dialers, jobs, agents, and completion codes. In Campaign Monitor, you are able to create your views, save them on exit, and then restore them. This allows you to display views in the same way without having to recreate specific views.

The button bar provides a means of organizing the available views, as well as access to those views. The button bar contains six view categories: View Set, Dialer, Job, Supervisor, Agent, and Custom.

View toolbar description

There are several view control options.

Table view

Displays the data without icons (only available if the view has two presentation modes).

Graphic view

Displays the data with icons (only available 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

(For the Job Performance View only.) Allows you to select which completion code to use when monitoring job performance.

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 icon

Allows you to choose the types of data that appear in the scope selectors.

You can choose to use no hierarchy, the default supervisor/agent hierarchy (if one has been defined using Settings > Options), or another custom hierarchy (if one has been defined using Settings > Options). You can define the default supervisor/agent hierarchy and the custom hierarchy.

Hierarchy	Scope selector 1	Scope selector 2	Scope selector 3
No hierarchy	Dialer (default)	Job (default)	empty
Default agent/supervisor hierarchy	Dialer (default)	Job (default)	supervisor (bottom level of the selected hierarchy)
Custom	Top level of the selected hierarchy	Middle level of the selected hierarchy	Bottom level of the selected hierarchy

Time Selector

Allows you to choose the time range for the data in the view.

Refresh

Refreshes the data in the open views.

View categories

The following view categories are available in Campaign Monitor:

View set

You can create a view set that you can save and restore as a group. The first time you click View Set, and no view set is active, the Save As dialog box appears so you can name the set and choose its storage location. When the dialog box closes, a button for the new view set appears in the View Sets group on the button bar. If you change a view, you will be asked whether the view should be saved.

Dialer views

Use the Dialer views to see Dialer Status, Dialer Agents, Dialer Lines, and Dialer History.

Job views

Use the Job views to see Job Status, Job Agents, Job Detail, Job Call Handling, Job Completion Codes, Job Wait Queues, Job History, and Job Performance.

Supervisor view

Use the Supervisor view to see the Supervisor Agents data.

Agent view

Use the Agent views to display Agent data.

Custom view

The custom views section will vary, depending on what you choose to include. Campaign Monitor lets you save a customized view to the Custom group.



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Managing jobs activity March 2002

Complete the exercise found in your Student Workbook.

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Managing jobs quiz **March 2002**

What do you need to change to make the pace of jobs go faster?

Change expert calling ratio



Change job linking



Change line usage

Modify phone strategy

When job1 is linked to job2, what happens when job1 ends?



Agents must log into job2

Agents are logged into job2

The system supervisor is alerted

The dialer enters runlevel 0



How do you ensure that you are notified when a job is complete?



Monitor the job



Create a unit work list



Use managed jobs

Set an alert

An infinite job







Managing agents activity March 2002

Complete the exercise found in your Student Workbook.

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Managing agents quiz March 2002









Hierarchy Manager activity March 2002

Complete the exercise found in your Student Workbook.

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Managing hierarchies quiz March 2002



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Evaluation March 2002

Module contents

Campaign Analyst

PC Analysis

System reports

Objectives

At the end of this module you will be able to:

- Use Campaign Analyst to query and run standard reports
- Understand how to access and run the standard reports provided with the product
- Generate and evaluate System reports
- Use PC Analyst to generate reports

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Avaya PDS User Guide

Overview

Purpose

The AvayaTM Predictive Dialing System (PDS) allows you to customize the display of Campaign Monitor windows and navigate among the various tool applications within Campaign Monitor.

Contents

This section contains the following topics:

- <u>User interface</u>
- Navigate among the Tool menu applications
- Use large icons or small icons in the button bar
- Open a standard view
- Open a view or view set from another location
- Create a custom view
- Save current view
- Save as view set
- <u>Save view set with a new name</u>
- <u>Delete a view set</u>
- Add a view to the Custom button group
- <u>Refresh a view</u>

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Avaya PDS User Guide

Navigate among the Tool menu applications

Navigate among the Tool menu applications

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

- 1. Select Start > Programs > Avaya > Campaign Director > Campaign Monitor.
- 2. To start a tool, select it from the Tools menu. While you use the tool, Campaign Monitor remains open in the background so that you can navigate back to it when you are finished using the tool.



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Avaya PDS User Guide

Overview

Purpose

A view is the name given to the customizable window that appears in the main area of Campaign Monitor after you click a button on the button bar. This section describes how to use views in Campaign Monitor.

Contents

This section contains the following topics:

- <u>View control toolbar</u>
- Filter data in a view
- <u>Select a performance code</u>
- <u>Set scope selectors</u>
- <u>Scope selectors examples</u>
- <u>Select a time range</u>
- Select a hierarchy
- Hide or show columns
- Select Table View or Graphical View
- Save a view as HTML



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Filter data in a view

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.
- 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, and then click OK.



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Overview

Purpose

Campaign Monitor uses the button bar (left-hand side of the window) as the primary navigation point for opening views. You can open and save favorite views, display views according to completion codes, display views according to agent and supervisor relationships, and configure alerts so that you can receive notifications from the Avaya Predictive Dialing System (PDS). Campaign Monitor displays views in the main window (right-hand side of your screen).

Contents

This section contains the following topics:

- <u>Views</u>
- Dialer Status view
- Dialer Agents view
- Dialer Lines view
- Dialer History view
- Job Status view
- Job Agents view
- Job Detail view
- Job Call Handling view
- Job Completion Codes view
- Job Wait Queues view
- Job History view
- Job Performance view
- Supervisor Agents view
- Find Agent view
- Agent Detail view
- Agent Completion Codes view
- Agent History view



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Dialer Status view

Dialer Status view

The Dialer Status view displays the job, agent, and line resources used on a dialer. The view shows the agents and lines assigned to all dialers in the selected scope, as well as the jobs and the state of completion of each job.

The following table describes the Dialer Status views.

Dialer Status	Description	
DialerID	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.	
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 identify data associated with that job instance in the database. Each time a job runs, the system assigns it a new job instance ID.	
Status	The current status of the job (status types include stopped, running, error, or shutting down).	
Start Time	The date and time the job instance started.	
Stop Time	The time the job instance stopped or blank if the job is still running.	
Estimated Job End	The time that Campaign 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 person-to-person agents logged in to each job.
ACD Agents	The total number of ACD Agents logged into each job.
Total Agents	The total number of agents logged in to each job.
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.

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Campaign Analyst March 2002

The final phase of the Campaign Life Cycle is Evaluation. This is when you run reports and analyze the data from your campaigns. You evaluate how successfully you designed jobs and managed both jobs and agents.

Campaign Analyst is an integrated part of Campaign Director and provides various reports that allow you to track job and agent statistics. This business analysis tool can be used to measure call center performance through generating reports with job, agent and system details.

One big advantage of this latest version of Campaign Director is that Hierarchy Manager and hierarchy reporting share the same data, so hierarchy reporting is very dynamic.



Additional resources

Use the following links to take you to the relevant material in the online Avaya PDS User's Guide.

Campaign Analyst	Overview	Procedure
Overview of Campaign Analyst		
Campaign Analyst reports	•	
Create a new report		
Print a report		
Preview a report		•
Schedule a report		•

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PC Analysis March 2002

The PC Analysis Telnet tool provides access to the character-based PC Analysis menus. PC Analysis is a reporting and troubleshooting tool included with the Avaya PDS and lets you transfer extract output files to a network location.



Additional resources

Use the following links to take you to the relevant material in the online Avaya PDS User's Guide.

PC Analysis (Telnet)	Overview	Procedure
Overview of PC Analysis Telnet		
PC Analysis toolbar		
Start PC Analysis Telnet		
Transfer PC Analysis extract output files		•

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System reports March 2002

The Avaya PDS system generates four system reports:

- Agent Login Report shows the agent number, the login menu, and the agent ID.
- Multiple Call Report sorts records by phone numbers. It lists the number of times the Avaya PDS system called the record, the date, the account number(s), call completion code, agent, and calling list record number.
- Program Information File (PIF) Report shows a list of the previous data processing programs run on the Avaya PDS system. Use this report to help troubleshoot system problems.
- Hourly Inbound Activity Report shows the number of inbound calls received as well as the number of inbound calls placed on hold or abandoned.



Additional resources

Use the following links to take you to the relevant material in the online Avaya PDS User's Guide.

System reports	Overview	Procedure
System reports overview		
Agent history report fields		
Generate agent history reports		•
Job history report fields		
Generate job history reports		•
Calling list report fields		
Generating calling list reports		•
System report fields		
Generate system reports		•

System Reports



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Campaign Analyst activity March 2002

Complete the exercise found in your Student Workbook.

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Reports

Overview

Reports provide statistical information that you can use to evaluate your calling campaigns. For example, reports can show you how agents spend their time, which completion codes are most frequently used, the amount of time a particular job ran, and the hierarchy of managers and agents.

In Campaign Analyst, reports are grouped into four categories: Agent, Job, Time of Day, and Administrative. For each category, Campaign Analyst provides several reports. For example, the Agent category include reports about agent activity, performance summary, and completion code summary. For each report, Campaign Analyst provides several variations or configurations. The different configurations sort, group, and filter data differently.

In Campaign Analyst, report categories appear on the button bar. For each category, the reports are listed. When you select a report, the report configurations appear in the main pane.

The main pane displays five columns (from left to right): record configuration title, Group 1, Group 2, Group 3, and Criteria. The last four columns display the options that were selected for the report configuration.

There are many configurations for each report, so you should compare the configurations and experiment with the New and Change reports features. These features allow you to customize a report's configuration. After you create and save a configuration, it appears with the other configurations for that report so you can access it any time you use Campaign Analyst.

In addition, you can use the Schedule feature to generate reports automatically (daily, weekly, or monthly). When you set up a report schedule, you specify the exact time that Avaya PDS sends the report to your printer.



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Campaign Analyst quiz March 2002



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PC Analysis activity March 2002

Complete the exercise found in your Student Workbook.

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PC Analysis Telnet

Overview

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The PC Analysis Telnet tool included in Campaign Analyst provides access to the character-based PC Analysis menus, which you can use to define extract files and generate extract output files. You can also use PC Analysis Telnet to move PC Analysis extract output files from the Avaya PDS to a network location.

After you transfer the extract output files, you can use spreadsheet, word processing, and reporting packages available to you to create reports, charts, and spreadsheets.

PC Analysis Telnet is available from the Campaign Analyst Tools menu only. If access to Campaign Director is not available, you will need to use a third-party telnet tool to access Avaya PDS menu system and PC Analysis.



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Toolbar icons

Toolbar icons

The PC Analysis Telnet window includes a set of tools that help you use and navigate the character-based menus and PC Analysis screens. The PC Analysis Telnet toolset is similar to that of System Telnet but also includes four additional tools designed specifically for use with PC Analysis.

Toolbar Name	Icon	Description
Connect		Use the Connect tool to select the dialer for which you want to generate or transfer extract data files. This function is not available while you are connected to a system. You must disconnect from a dialer before you can connect to a different dialer.
Disconnect	<u>8</u>	Use the Disconnect tool to end the telnet session for the current dialer. If you exit the menu system, PC Analysis Telnet automatically disconnects your session. After you disconnect, you can connect to a different dialer or exit the PC Analysis Telnet application.
Exit out of entry		Use the Exit out of entry tool to move back one screen in the character-based screens. This provides the same functionality as Ctrl-x.
Done with entry	\$	Use the Done with entry tool to move to the next character-based screen. This provides the same functionality as the Done key (F1).
Select		Use the Select tool from the PC Analysis Extraction Configuration Edit screen. Select moves your cursor to the Select column. Press Enter after typing the Select value.
Criteria	B	Use the Criteria tool from the PC Analysis Extraction Configuration Edit screen. Criteria moves your cursor to the Criteria column. Press Enter after typing the Criteria statement.

Run extract	8 2	Use Run extract from the PC Analysis Extraction Configuration Edit screen to generate a PC Analysis extract output file based on the configuration of the open extract file.
Get file	4	Use Get file to transfer one or more PC Analysis extract output files from the dialer to a network location.



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PC Analysis quiz March 2002



http://pds.au.avaya.com/esp/mos12/Redtrain/UsingPDS/Eval/230.html [4/5/2002 3:26:57 PM]





System reports activity March 2002

Complete the exercise found in your Student Workbook.

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Avaya PDS reports overview

Overview

Use the Reports commands to analyze and track the progress of your daily call activities. Throughout the day, the Avaya PDS collects data about your calling lists, jobs, and agents. The system uses this data to generate various reports. You can also use PC Analysis to create reports. See the next section for details about PC Analysis.

Choose Reports from the Supervisor Main Menu.



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Agent history report fields

Overview

The following list describes agent history report fields.

For the period	Specifies the date or period when the system captured the report information.
Report date	Displays the date that the Avaya PDS created the report.
Time	Displays the time that the Avaya PDS created the report.
Agent name	Displays the agent's logon ID.
Job information	Describes the job. The information includes job name, system identification number, job type, and the record selection file name. It displays the day and time the job started and finished.
Total Activity time on job (hh:mm)	Displays the total time the agent spent on each job. Active time is the time the agent worked with the customer record, was on the phone, or waited between calls.
Total inbound connects	Displays the total inbound calls passed to the agent.
Total outbound connects	Displays the total dialing attempts passed to the agent.
Total connects per active hour	Displays the average call connects made each hour. The system calculates the total call connects and divides by the total active time on the job. The Avaya PDS calculates the
	average hours to one decimal place.

Avg. Agent Related Time Intervals	Provides a heading for the report field that shows the average time the agent performed specific tasks on each job.
Time Agent Working with Record	Calculates the average work time the agent talked with a customer and worked on customer records. Time begins with the call connection and ends with record release. This is the total of Time Agent on Phone and Time Agent on Record After Call.
Time Agent on Phone	Calculates the average talk time the agent was on the phone with each job. Time begins with the call connection and ends with the phone line release.
Time Agent on Record After Call	Calculates the average time to update records. Time begins with the phone line release and ends when the record release
Time Waiting Between Calls	Calculates the average time the agent waited between calls. If this time is too long, you may want to change the Expert Dialing setting.



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Generate agent history reports

Overview

Agent history reports provide data on agent performance. The menu offers two types of reports: Agent History Reports (based on job type) and the Agent Activity Report. The following illustration shows the items on the Agent History Reports menu.

You have a choice of outbound, inbound, or blend reports. Each report shows data on all the jobs worked by the agent for a specified period. Information includes the total time an agent was on a job and how the agent spent the time.

Generate agent history reports

Use the following procedure to generate agent history reports.

- 1. Choose Agent history reports from the Reports menu.
- 2. Choose Outbound, Inbound, or Blend Agent History Report from the Agent History Reports menu.
- 3. Type a Sort Field name. The sort name labels the columns in your report and organizes the information in alphanumeric order. To generate an agent history report, enter one or more of the following selection criteria:

Job Name(s)	Specify one job or a range of jobs.
Job Description Label	not more than 30 characters
Record Selection file name(s)	Separate multiple files with a comma.
Phone Strategy file name(s).	Separate multiple files with a comma
Job Start Date	The system retrieves job information based on this date. The start date can be one day or a range of days. Type dates in the CCYY/MM/DD format. Separate a range with a comma or a hyphen. For example, to include jobs that started on June 14 and 15, 1999 type 1999/06/14-1999/06/15 or 1999/06/14, 1999/06/15. To limit the report summary to one day, enter the date as a range. For example, to enter June 14, 1999, type 1999/06/ 14-1999/06/14.

Job Number(s)	Separate a range with a dash and multiple job numbers with a comma. For example, type 1-3 or 1,2,3.
Agent Name	Include only one agent
Report Description	not more than 30 characters

4. Type the number of the Totalling Strategy. Here are what the numbers mean:

0	Details by job
1	Details by job and totals for a selected period
2	Totals for a selected period
3	Totals for a selected period
4	Subtotals for each job type and totals for a selected period
5	Details by job, subtotals by job type, and totals for a selected period

- 5. Type Y at the prompt if the entries are correct or type N to edit your selections. The cursor returns to the first field. Press Enter to move to the field you want to correct. When all the fields are correct, type Y and the Agent History Reports menu appears.
- 6. Choose View or print reports from the Agent History Reports menu.

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Job history report fields

Overview

The job history reports provide data on job performance. The menu offers two types of reports: Job History Reports (based on job type) and the Previously Run Jobs Report. The following illustration shows the items on the Job History Reports menu.

Name	Description
For the period	Specifies the date or period when the system captured the report information.
Report Date	Displays the date that the Avaya PDS created the report.
Time	Displays the time that the Avaya PDS created the report.
Job Information	Describes the job. The information includes job name, system identification number, job type, and the record selection file name. It displays the day and time the job started and finished.
Time System on Line (hh:mm)	Displays the active time for an outbound job. It does not include start up time and job suspension
Total Agent Hrs on Line	Displays the time agents were on the job.
Average Agents On line	Records the average number of agents logged into each job.
Total Number of Inbound Calls	Displays the total inbound calls received by the
	system.

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Inbound Calls per System Hour	Displays the average number of inbound calls
	received per system hour.
Inbound Calls per Agent Hour	Displays the average number of inbound calls received per agent hour. (Total calls divided by total agent hours logged to the job)
Total Connects	Displays the total inbound calls passed to agents.
Total Number of Outbound Calls	Displays the total dialing attempts made by the Avaya PDS. It includes all attempts, including those not passed to agents.
Dials per System Hour	Displays the average call connects made each hour. The Avaya PDS calculates the total call connects and divides by the total active time on the job. The system calculates the average hours to one decimal place.
Dials per Agent Hour	Displays the average number of dial attempts per
	agent hour.
Total Connects	Displays the total outbound calls passed to agents.
Connects per System Hour	Displays the average number of connects for the
	time the job was active.
Connects per Agent Hour	Displays the average number of inbound calls
	received per agent hour.
Rate of Connects to Calls (inbound)	Displays a decimal amount based on the number of inbound calls passed to agents divided by the number of inbound calls received by the system.
Rate of Connects to Calls (outbound)	Displays a decimal amount based on the total number of connects divided by the total number of dial attempts received by the system.
Average Agent Related Intervals	Provides a heading for the report fields that classify the average time agents spent performing specific tasks on each job.

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Time Agent on Record After Call	Calculates the average time to update records. Time begins with the line release and ends with the record release.
	Calculates the average time agents spent talking
Time Agent Working with Record	with a customer and working on the records. Time begins with the call connection and ends when the agent releases the record. This is the total Time Agent on Record After Call and Time
	Agent on Call.
	Calculates the average time agents spent on the
Time Agent on Call	
	phone for each job.
Time Waiting Between Calls	Calculates the average time agents waited between calls.
Queue Statistics	Displays the number of outbound and inbound calls that were placed in wait queue.
Connect Release Classification (Agent)	Displays the different call completion codes and the corresponding number of calls released.
System Release Classification	Displays the number of calls released by the system according to standard release classifications or call completion codes such as NOANSWER and BUSY.



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Generate job history reports

Overview

The Job History Reports menu allows you to generate reports for outbound jobs, inbound jobs, blend jobs, or combination reports. The reports provide information on the selected job for a specific period. It includes the number of dials and connects, call completion codes, agent work time, agent update time, and agent wait time between calls.

Generate job history reports

Use the following procedure to generate job history reports.

- 1. Choose Job history reports from the Reports menu.
- 2. Choose Outbound, Inbound, or Blend Job Report from the Job History Reports menu.
- 3. Type the name of the sort field.
- 4. To generate the report, type one or more of the following report selection criteria:

Job Name(s)	Specify one job or a range of jobs.
Job Description Label	not more than 30 characters
Record Selection file name(s)	Separate multiple files with a comma.
Phone Strategy file name(s).	Separate multiple files with a comma
Job Start Date	The system retrieves job information based on this date. The start date can be one day or a range of days. Type dates in the CCYY/MM/DD format. Separate a range with a comma or a hyphen. For example, to include jobs that started on June 14 and 15, 1999 type 1999/06/14-1999/06/15 or 1999/06/14, 1999/06/15. To limit the report summary to one day, enter the date as a range. For example, to enter June 14, 1999, type 1999/06/ 14-1999/06/14.
Job Number(s)	Separate a range with a dash and multiple job numbers with a comma. For example, type 1-3 or 1,2,3.
Agent Name	Include only one agent

- 5. Type the number of the Totalling Strategy.
- 6. Type Y at the prompt if the entries are correct or type N to edit your selections. The cursor returns to the first field. Press Enter to move to the field you want to correct. When the entries are correct, type Y and the Job History Reports menu appears.
- 7. Choose View or print reports from the Job History Reports menu.

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Calling list reports

Overview

During the download process, the Avaya PDS extracts the data for three calling list reports:

- Days on PDS Report shows the nonproductive contact records. Nonproductive contact records are records for which no customer contact has occurred within a certain time. The time is determined during the Avaya PDS configuration. The system marks these records and includes them on a report after the specified number of days. Depending on your system configuration, the system will either continue to call the records or not call those records again.
- Reject Report shows the records the Avaya PDS rejected due to duplicate account numbers, invalid telephone numbers, or time zone sorting failures.
- Release Code Report (call completion codes) shows all records with a specific call completion code. For example, you can request a report of all calls that resulted in a customer who has promised to make a payment.



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Generate calling list reports

Overview

During the Avaya PDS configuration, the intervals at which the system generates reports and the call completion codes for the reports were set. The system generates calling list reports during the daily download process.

Generate calling list reports

Use the following procedure to generate a calling list report.

- 1. Choose Calling list reports from the Reports menu.
- 2. Choose Days on PDS Report, Reject Report, or Release Code Report (Call Completion Code Report) from the Calling List Reports menu.
- 3. Type a report description (not more than 30 characters).
- 4. Type Y at the prompt to continue or N to cancel. The Avaya PDS generates the report.
- 5. Choose View or print reports.



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System reports

Overview

The Avaya PDS generates four system reports:

- Agent Login Report shows the agent number, the login menu, and the agent ID.
- Multiple Call Report sorts records by phone numbers. It lists the number of times the Avaya PDS called the record, the date, the account number(s), call completion code, agent, and calling list record number.
- Program Information File (PIF) Report shows a list of the previous data processing programs run on the Avaya PDS. Use this report to help troubleshoot system problems.
- Hourly Inbound Activity Report shows the number of inbound calls received as well as the number of inbound calls placed on hold or abandoned.



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Generate system reports

Generate system reports

Use the following procedure to generate a system report.

- 1. Choose System reports from the Reports menu.
- 2. Choose Agent Login Report, Multiple Call Report, Program Information File Report, or Hourly Inbound Activity Report from the System Reports menu.
- 3. If you chose Multiple Call Report, type a phone number in the format NNN-NNN-NNNN.
- 4. Type a report description (not more than 30 characters).
- 5. Type Y at the prompt. The Avaya PDS generates the report.
- 6. Choose View or print reports.



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Avaya PDS User Guide

Overview

Purpose

Campaign Analyst generates call management reports with job, agent, and system details based on Avaya Predictive Dialing System (PDS) activity.

Contents

This section contains the following topics:

- <u>Reports</u>
- <u>Report categories</u>
- <u>Preview a report</u>
- Export a report
- Create a new report configuration
- Schedule a report
- Change a report
- Print a report
- Delete a report configuration



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Report categories

Report categories

Campaign Analyst reports fall under the following categories: Agent, Job, Time of Day, and Administrative.

Agent reports

Agent reports present statistics on both an agent's work time (such as total work, update, and idle time) and performance (such as total connects and connects per hour).

Job reports

Job reports present job statistics by job type: inbound, outbound, or blend. These reports include statistics about how the system ran a job, system information on calling activity, and statistics about combined agent activity during a job.

Several job report configurations also group statistics by system to accommodate a multi-dialer environment.

Time of Day reports

Time of day reports present job information grouped by time segments. Time of Day reports let you evaluate job performance at intervals of 60, 30, 20, 15, 10, or 5 minutes. The interval is set when your system is installed.

The data in any reported interval includes only calls that ended during that interval. For example, if an agent started talking to a customer at 12:29 and ended the call with a Promise to Pay at 12:32, the total talk time, update time, idle time, the PTP completion code count and all other data associated with that transaction would be added to the 12:30-1:00 interval.

Several Time of Day report configurations also group statistics by system to accommodate a multi-dialer environment.

Administrative reports

Administrative reports present information about the hierarchies created using Hierarchy Manager.
Managed Dialing reports

Agent, Job, and Time of Day report groups include reports designed for Managed Dialing jobs. Campaign Analyst handles connect and online time statistics for Managed Dialing jobs differently than it does for regular (outbound, inbound, and blend) jobs.

The following table summarizes the differences between regular and Managed Dialing reports with regard to the connect and online time statistics.

Statistic	Regular job	Managed Dialing job
Connect	An agent is connected to a call placed by the Avaya PDS.	An agent previewed a record and did not cancel the call.
Online time	Amount of time an agent waited for connects, talked to clients, and updated records.	Regular job online time plus the time an agent previewed records.

By default, reports for regular jobs do not contain statistics for Managed Dialing jobs. Regular job reports contain criteria to include statistics where job type is outbound (OUT), inbound (INB), or blend (BLND). If you want a report to include both Managed Dialing and regular job statistics, use the Campaign Analyst report wizard to remove the criteria. On page 4 of the wizard, remove the Job Type condition and its associated values.

Note

If you generate a report that combines statistics from both regular and Managed Dialing jobs, the numbers for online time and connects statistics might be skewed because of the differences in how those statistics are calculated.

Agent Completion Code Summary reports

The Completion Code Summary report in the Agent report group contains statistics about completion codes the agents used during jobs. The report displays up to 14 completion codes. You can control which codes appear on the report.

Campaign Analyst selects the first 14 completion codes for which the first character of the description is an asterisk (*). (Campaign Analyst selects codes in numerical order.) Use Completion Code Manager to add an asterisk to the descriptions of the completion codes that you want the Agent Completion Code Summary report to include. If you add an asterisk to more than 14 completion code descriptions, Campaign Analyst selects the first 14 codes and disregards the rest.

In the report, the description appears in a narrow, three-line column (the asterisk does not appear in the report). Consider modifying long descriptions so that they are more readable when you view the report. For example, possible abbreviations for a Promise to Pay

Report categories

description include Prom to Pay or PTP.

Note

If you are operating in a multi-dialer environment, Campaign Analyst uses the Completion Code Manager settings from the primary dialer.

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Avaya PDS User Guide

Overview

Purpose

The PC Analysis Telnet tool provides access to the character-based PC Analysis menus. PC Analysis is a reporting and troubleshooting tool included with the AvayaTM Predictive Dialing System (PDS). The PC Analysis Telnet tool also lets you transfer extract output files to a network location.

Contents

This section contains the following topics:

- PC Analysis Telnet
- Toolbar icons
- Start PC Analysis Telnet
- <u>Transfer PC Analysis extract output files</u>



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Start PC Analysis Telnet

Start PC Analysis Telnet

The PC Analysis Telnet tool provides access to the PC Analysis character-based menus. Use the following procedure to start PC Analysis Telnet.

- 1. Select Start > Programs > Avaya > Campaign Director > Campaign Analyst.
- Select Tools > PC Analysis Telnet. The PC Analysis Telnet window appears.
- Select File > Connect. The Connect to PDS 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.



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Sustaining activities March 2002

Module contents

Administrative menus

Event Monitor

Objectives

At the end of this module you will be able to:

- Add or change Area Codes or prefixes through the Administrator menu
- Understand how the Event Monitoring option is used
- Create a backup to the Avaya PDS and understand the different types of backups
- Understand the Transfers and Process Records option

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Avaya PDS User Guide

Overview

Purpose

The purpose of this section is to explain AvayaTM Predictive Dialing System (PDS) reports.

Contents

This section contains the following topics:

- Avaya PDS reports overview
- Agent history report fields
- Generate agent history reports
- View or print an agent history report
- Job history report fields
- Generate job history reports
- Generate a previously run job history report
- List distribution
- Calling list data
- List distribution report design
- Generate list distribution reports
- Select list distribution fields
- Select list distribution field values
- <u>Select range in list distribution</u>
- Set list distribution filters
- Change list distribution report titles
- Move fields and values
- <u>Clear fields and values</u>
- <u>Delete fields</u>
- <u>Change or delete a value</u>
- Edit filters

Overview

- Copy a list distribution report
- <u>Delete a list distribution report file</u>
- Execute and print list distribution reports
- List distribution report analysis
- Calling list reports
- Generate calling list reports
- <u>System reports</u>
- <u>Generate system reports</u>

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Avaya PDS User Guide

View or print an agent history report

View or print an agent history report

Use the following procedure to generate an agent history report.

- 1. Choose Agent Activity Report from the Agent History Reports menu. The Avaya PDS displays a prompt to tell you it's generating the report. The Agent History Reports menu appears when the system completes the report.
- 2. Choose View or print reports from the Agent History Reports menu.



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Generate a previously run job history report

Overview

This report provides a list of the last 200 to 500 jobs run by the Avaya PDS. (The actual number of jobs depends on how your system was set up.) It includes the name, number, unit work list, job date, job start time, job stop time, and the number of calls the system placed. You can use it as a reference to help you to select appropriate categories for job or agent history reports.

Generate a previously run job history report

Use the following procedure to generate a previously run job history report.

- 1. Choose Job History Reports from the Reports menu.
- 2. Choose Previously Run Jobs Report from the Job History Reports menu. The system displays a confirmation prompt.
- 3. Type Y to generate the report or N to quit without generating a report.



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List distribution report analysis

Overview

The top portion of each report lists the Avaya PDS call completion codes. It helps determine how many records you have left to call based on the last recorded calling result. These totals are independent of the list distribution criteria you enter. The totals may change if you have jobs running.

The bottom portion of each report displays how many records match the criteria you set when you defined your list distribution. The information will help you design your record selections. Once you've looked at the results, you may want to go back and change the criteria fields values you chose. For example, if you have a large number that appears between the balance ranges of \$1000 and \$5000, you can edit the criteria to add a \$2500 range.



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Avaya PDS User Guide

PC Analysis

To see topics for this section, click + in the contents list at left.



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Administrator menus March 2002

The Administrator menus allow you to perform a variety of administrative tasks on your Avaya PDS. The menu will allow you to shutdown or restart the system, backup and restore the system, manage inbound lists, and various other functions.



Additional resources

Use the following links to take you to the relevant material in the online Avaya PDS User's Guide.

System Telnet administrator menu	Overview	Procedure	
Restart the Avaya PDS			
Shut down the Avaya PDS			
Edit area codes and prefixes			
Backup Avaya PDS			
Create an empty inbound list			
Download host records			
Upload records to host			
Backup a calling list			
Restore a calling list			
Count calling list records		•	

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Event Monitor March 2002

Use the Monitor security log command to monitor security-related system activity. The System Log Monitor, at a specified time interval, continually checks the status of critical system and log files.



Additional resources

For the final Using PDS class, the following links would take you to the relevant material in the online Avaya PDS User's Guide.

Event Monitor	Overview	Procedure
Event Monitor		
Monitor security logs		
Change monitor interval		







Administrative menus activity March 2002

Complete the exercise found in your Student Workbook.

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Restart the Avaya PDS

Restart the Avaya PDS

This procedure must be completed from the Administrator's console. If you attempt to restart the Avaya PDS from any other workstation, an error message will appear. Make sure to shut down all jobs and tell all users to log off before restarting the Avaya PDS.

- 1. Choose Restart system from the Administrative Tasks menu.
- 2. Type Y at the prompt to continue or N to cancel. A series of messages appear. When the restart is complete, the system displays the login prompt.



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Shut down the Avaya PDS

Overview

The Avaya PDS should always remain on except for the following situations:

- You plan to stop calling operations for several days.
- There is the possibility of large power surges and electrical damage.
- You plan to move your system.

Shut down the Avaya PDS

To avoid damaging the system components or losing data in active jobs, stop all jobs and log all users off before shutting down the Avaya PDS.

- 1. Choose Shut down system from the Administrative Tasks menu.
- 2. Type Y at the prompt to continue or N to cancel. The following prompt appears: Are you sure you want to shutdown HP-UX? Enter Y or N.
- 3. Type Y at the prompt to continue or N to cancel. The following message appears: Halted, you may now cycle power.
- 4. Go to the Avaya PDS cabinet and turn off the power to all components. Most systems have the components connected to a power strip. The easiest way to turn off the equipment is to turn off the power strip.



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Edit area codes and prefixes

Edit area codes and prefixes

Use the following procedure to edit area codes and prefixes.

- 1. From the Administrative Tasks menu, choose Edit area codes/prefixes. The Area Code & Exchange Prefix Editor menu appears.
- 2. Type the option number or the first letter of the command name.
- 3. The Avaya PDS saves changes you make using the Area Code and Exchange Prefix Editor to a temporary file. When the Avaya PDS restarts, it activates the changes.



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Backup Avaya PDS

Overview

The standard backup medium is a 4mm, 90-meter, 2.2 GB digital data storage (DDS) tape. However, you can also use a 9-track tape.

Back up the following files on a regular basis:

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

Backup Avaya PDS

Use the following procedure to back up the Avaya PDS.

- 1. Locate the tape drive in the Avaya PDS cabinet.
- 2. Insert a new DDS tape in the drive.
- 3. Choose a command from the Back Up and Restore Avaya PDS menu. For routine daily system backups, choose option 3, Back up Avaya PDS & Calling Lists.
- 4. Select full or incremental backup.
- 5. After the backup is complete, rewind and remove the tape.
- 6. Store the tape in antistatic environment at the proper temperature and humidity.



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Avaya PDS User Guide

Create an empty inbound calling list

Create an empty inbound calling list

Use the following procedure to create an empty inbound calling list.

- 1. Choose Create empty inbound data list from the Inbound Lists menu.
- 2. Type Y at the prompt. If the list already exists, the Avaya PDS does not create a new one.
- 3. When the system completes the process, press any key to return to the Inbound Lists menu.

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Back up a calling list

Overview

Making a backup of your calling list allows you to keep working if your host information becomes damaged. You can back up all calling lists on the Avaya PDS or select specific calling lists to back up.

The records on a backup calling list remain in the Avaya PDS format, not in your host computer format.

Back up a calling list

Use the following procedure to backup a calling list.

- 1. Locate the tape drive in the Avaya PDS cabinet.
- 2. Insert a new DDS tape in the drive.
- 3. Choose a backup command from the Back Up and Restore Avaya PDS Calling Lists menu.
- 4. After the backup is complete, rewind and remove the tape.
- 5. Store the tape in an antistatic environment at the proper temperature and humidity.

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Restore a calling list

Restore a calling list

If a calling list becomes unusable, you can restore a previously backed up list. When you restore calling list data, the Avaya PDS writes over all, same-named calling list data stored on the system. Be sure to print reports, upload lists, or perform any other required procedures before continuing.

- 1. Locate the tape drive in the Avaya PDS cabinet.
- 2. Insert a DDS tape with the backup calling list in the drive.
- 3. Choose a restore command from the Back Up and Restore Avaya PDS Calling Lists menu.
- 4. Type Y at the prompt to continue or N to cancel.
- 5. After the restoration is complete, rewind the tape.
- 6. Remove the tape from the tape drive.



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Count calling list records

Count calling list records

Use this command at any time to display the number of records in a calling list, its creation date, and the amount of disk space it occupies.

- 1. Choose Count calling list records from the Transfer and Process Records menu.
- 2. Type Y at the prompt to process the changes or N to cancel.



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Administrator menu quiz March 2002









CUI campaigns March 2002

Module contents

CUI strategies

CUI record selections

CUI jobs

CUI campaign activity

Objectives

At the end of this module you will be able to:

- Create phone strategies, record selections, and set job parameters
- Start and edit a job
- Understand how to access Job Monitor through the CUI appellation and manage an active job and agent activities

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Monitor security logs

Overview

Use the Monitor security log command to monitor security-related system activity. The System Log Monitor, at a specified time interval, continually checks the status of critical system and log files. Specifically, the security monitor checks whether critical system files have been modified since the last status check and whether the Avaya PDS recorded particular events in the system audit and log files. Events include users logging into and out of the Avaya PDS; changes to the permissions, ownership, and content of sensitive system files; attempts to log into restricted user accounts, and changes to the system date and time.

The System Log Monitor displays results including the date and time of the event, the event type, whether the event succeeded or failed, and other event details such as the user name associated with the event. The monitor also provides additional file information when the file has been changed. For example, for the current and previous versions of a file, the System Log Monitor lists the permissions, owner, group, file size, and date and ti me stamps.

Note

The System Log Monitor tracks system events only when it is active. Events that occur when the monitor is not running are not reported. However, if you have ESP access to your Avaya PDS, it is possible to identify security events that occurred while the monitor was not running.



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Change the monitor interval

Overview

The System Log monitor checks system files and log files at regular intervals, for example, every 60 seconds. The Change Monitor refresh interval command lets you change the interval setting to increase or decrease the monitor's update frequency.

You can set the interval to any positive whole number. Recommended settings are between 15 and 300 seconds.

After you type and confirm a new refresh interval, the Avaya PDS automatically starts the System Log Monitor.

Change the monitor interval

Use the following procedure to change the monitor interval.

- 1. From the System Log Monitor main menu, choose Change Monitor refresh interval. The Additional Entry for Change Monitor refresh interval screen appears.
- 2. Type a new refresh interval, in seconds, then press Enter.
- 3. At the Are above entries correct prompt, type Y for yes or N for no.

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Change administrator passwords

Change administrator passwords

The Administrator Main Menu includes sensitive features such as shutting down and restarting the Avaya PDS. To protect your system, change the administrator's password often.

- 1. Choose Change administrator password from the Administrative Tasks menu.
- 2. Type Y at the prompt to continue or N to cancel.
- 3. Type the current password and press Enter.
- 4. Type the new password and press Enter. It must contain at least 6 characters, 3 of which need to be different from the old password. It also needs to contain at least 2 letters and 1 number. After you press Enter, the Avaya PDS prompts you to type the new password again.
- 5. Type the new password again and press Enter.



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Set the Avaya PDS date and time

Overview

This option is used to reset the Avaya PDS date and time. It is important to keep the system time accurate due to time zone legalities. Make sure to log all other users off and shut down all jobs before choosing this option.

Warning

If you change the date or time during the Avaya PDS operations, you can critically affect system operation and data.

Note

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

Set the Avaya PDS date and time

Log off all other users and shut down all jobs before choosing this command. You can critically affect system operation and data if you change the date or time during Avaya PDS operations.

- 1. Choose Set system date and time from the Administrative Tasks menu.
- 2. Type Y at the prompt to continue or N to cancel.
- 3. Type a new time in the format HH.MM. The Avaya PDS uses a 24 hour clock and requires a period between the hours and minutes. For example, type 15.25 for 3:25 PM.
- 4. Type a new date in the format CCYY/MM/DD. For example, type 1999/06/01 for June 1, 1999.
- 5. Press any key to return to the menu. The new time and date take effect immediately.



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Area codes and prefixes

Overview

Telephone companies frequently add new area codes and prefixes to existing phone systems. The Avaya PDS needs the up-to-date area code and prefix information to call phone numbers that use the new codes. The Edit Area Codes and Prefixes option lets you update the area code and prefix settings on your Avaya PDS.

Telephone numbers generally consist of three parts: an area code, a prefix (also known as an exchange), and a line number. For example, in the telephone number 206-555-1212, the area code is 206, the prefix is 555, and the line number is 1212.

The Avaya PDS associates prefixes with area codes based on system-defined time zones. The Avaya PDS configuration includes the standard time zones, such as Eastern, Central, Mountain, and Pacific. The Avaya PDS configuration also includes several additional time zones designed to accommodate local and regional ordinances regarding legal calling hours. For example, the Illinois time zone addresses laws specific to the state of Illinois. Several other Avaya PDS time zones accommodate areas that do not follow daylight savings time. See "Time Zones" beginning on page 267 for a list of Avaya PDS time zones.

Avaya PDS time zones have associated zone codes. A zone code is a one-letter designation that the Avaya PDS uses to reference a time zone. Zone codes are case-specific. For example, zone code C (upper case) represents the Atlantic No Daylight time zone while zone code c (lower case) represents the United Kingdom time zone. The Time Zone and Exchange Prefix Editor prompts you to type the zone code to which you add (or remove) area code and prefix settings. The list of Avaya PDS time zones on page 267 includes the corresponding zone codes.

Another important telephone system designation is country code. The Time Zone and Exchange Prefix Editor default country code is 1, which represents the United States and Canada. Usually, you'll make time zone and prefix setting changes to country code 1. The editor, however, includes an option to select a different country code if necessary. See "Country Codes" for a list of selected country codes.

Note

Some states limit or prohibit placing certain types of telephone

calls during specific times, usually before a certain time in the morning or after a certain time at night. Area code fields in the System controls may be modified by the customer in order to respond to regional area code changes. Such modifications may result in telephone

calls being made in violation of after-hours calling limitations. The customer is solely responsible for any violations of applicable laws or regulations resulting from area code modifications.



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View current area codes and prefixes

Overview

The Query option displays the area codes and area code and prefix combinations that currently exist on the Avaya PDS. It lists the settings according to time zones. Use the Query option to determine if you need to change any existing settings. You can also use the Query option to identify zone codes for which you need to change area code and prefix settings. You need to know the zone code(s) when you add or delete area code and prefix settings.

Note

You can also view current area codes and prefixes from the Add and Delete options. See the following sections, "Adding an Area Code or a Prefix to a Time Zone" and "Deleting an Area Code or a Prefix," for more information.

View current area codes and prefixes

Use the following procedure to view current area codes and prefixes.

- 1. Choose Query from the Area Code & Exchange Prefix Editor menu. The Query Area Codes and Prefixes screen appears.
- 2. Type an area code; area code and prefix combination; zone code; or zone code, area code, and prefix combination. See the following section, "Query Options," for more information.

The query results appear at the bottom of the query screen. If the query results fill more than one screen, press Enter to view subsequent pages.

Query Options

The Query Area Codes and Prefixes option accepts the following four types

of queries:

• Area Code

The Avaya PDS lists all zone codes that contain the pecified area code. For each zone code, it also lists the prefixes associated with the area code.

• Area Code and Prefix, separated by a colon

The system identifies the zone code in which the specific area code and prefix combination is listed.

• Zone Code (for example, L, the zone code for Pacific Daylight time zone)

The system generates a list of all area codes and prefixes for the specified zone code.

• Zone Code followed by a space and an area code or an area code and prefix combination

Use this option to query for a very specific item. If your criteria is too limited and the system finds no matches, the system reports the area code or prefix as "not found."

An asterisk (*) in query results represents all prefixes for this area code that aren't explicitly listed under another zone code. There can be only one asterisk entry for any given area code. Other entries must contain specific, unique exchange prefixes. For example, area code 709 exists under two zones, Newfoundland Daylight time zone (A) and Atlantic Daylight time zone (B). The asterisk in the Newfoundland Daylight Prefix List represents all prefixes that don't appear in the Atlantic Daylight prefix list.



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Back up and restore commands

Back up commands

From the Administrator Backup Menu you can access sub-menus to backup the Avaya PDS. You can backup/restore the entire Avaya PDS, the calling lists only, or the host gateway files.

Full or Incremental Backup - If you choose any of the backup menu options you will be asked if you want to perform a full or incremental backup A full backup will backup all the files in a selected category. An incremental backup will backup only those files that have been changed since the last backup.

Command	Description	
Back up complete system	This is the most comprehensive backup option. The backup includes the entire root file system, the Avaya PDS, and all calling lists. Use this option to prepare for events such as major system upgrades and service pack installations.	
Back up Avaya PDS & calling lists	This command backs up the entire Avaya PDS and all customer calling lists. Use this option for routine daily system backups.	
Back up Avaya PDS only	This command backs up the entire Avaya PDS excluding the calling lists (specifically, all data in the /usr/vl/xfer/clist directory).	
Back up Avaya PDS configuration files	This command backs up all the Avaya PDS configuration files. These are the files needed to customize a newly installed Avaya PDS to the customer's applications.	
Back up Avaya PDS data/stat files	This command backs up the data files needed to run reports using the Avaya PDS PC Analysis tools.	

The following table describes the available backup commands.

Restore Commands

The following table describes the available restore commands.

Command	Description	
Restore all from tape	This command restores all files from the backup tape.	
Restore a file from tape	This command attempts to restore a single user-specified file from the backup tape.	
List/verify a file on tape	This command attempts a search for a single user-specified file on the backup tape.	
List/verify tape contents	This command lists the entire contents of the backup tape.	
List tape volume info	This command displays the creation information of the backup tape.	



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Verify backup files

Verify backup files

Use the following procedure to verify that you have a successful backup of your files.

- 1. Choose a List/Verify command from the Back Up and Restore menu.
- 2. Type Y at the prompt to continue or N to cancel.
- 3. Follow the tape loading instructions on the screen.
- 4. Type C to continue or press Ctrl+X to exit. Byte count, date, size, and file names appear on the screen during the tape verification process.
- 5. After verifying the tape, follow the unloading instructions on the screen.
- 6. Type C to return to the Back Up and Restore menu.



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Avaya PDS User Guide

Overview

Purpose

The AvayaTM Predictive Dialing System (PDS) uses inbound lists to capture information from inbound calls.

These commands are available if your Avaya PDS uses Intelligent Call Blending.

An inbound calling list contains the fields that the agents use when handling inbound calls. Once created, the inbound calling list file is a permanent part of the Avaya PDS.

Contents

This section contains the following topics:

- Create an empty inbound calling list
- Clear existing inbound calling lists
- Count calling list records



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Avaya PDS User Guide

Clear existing inbound calling lists

Clear existing inbound calling lists

Use this command to clear the data in the inbound calling list. Clear this list after completing inbound calling and uploading all data to your host.

- 1. Choose Clear an existing inbound data list from the Inbound Lists menu.
- 2. Type Y at the prompt to continue or N to cancel.
- 3. When the Avaya PDS completes the process, press any key to return to the Inbound Lists menu.

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Monitor DAT drive status

Overview

You need to monitor the tape drive status during backup and restore procedures. There are two LEDs on the tape drive. The LED on the left is the cassette LED. The LED on the right is the drive LED. When the Avaya PDS uses the tape drive, both lights flash in different color combinations.

LED color

These combinations identify the tape drive's status.

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



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System security event monitor

To see topics for this section, click + in the contents list at left.



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Recover calling list

Overview

If you do not receive a new calling list from your host computer, you can recover the old calling list to use for your daily calling activities. Every evening the Avaya PDS saves your calling list to a backup file named list.old. This list usually contains enough uncalled records for you to use until you receive a new list from the host.

Recover calling list

Restoring an old calling list writes over the existing calling list. Be sure to print your reports, back up your list, or perform any other required procedures before proceeding.

- 1. Choose Recover old calling list from the Transfer and Process Records menu.
- 2. Type Y at the prompt to continue or N to cancel.



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Download records for infinite jobs

Overview

This command is available if you have set up infinite jobs on the Avaya PDS. For more information about infinite jobs, contact your Avaya PDS vendor.

Use this command to manually download and process new records to add to a calling list used by an infinite job. It downloads and processes a list segment while the job is active.

This download command also performs a duplicate record check, if required. The Avaya PDS then executes the infinity record selection only on the new list segment and makes the new records available for calling on the infinite job. The new number of records will appear in the Records Selected and Calls Left fields of the Job Monitor screen. These records have the same priority as first attempt records.

Before using this command, set up an infinity record selection and edit and start an infinite job.

Download records for an infinite job

Use the following procedure to download records for an infinite job.

- 1. Choose Download records for Infinite Job from the Transfer and Process Records menu.
- 2. Type Y at the prompt to continue or N to cancel. The host transmits the calling list records to the Avaya PDS.



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Event Monitor activity March 2002

Complete the exercise found in your Student Workbook.

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CUI phone strategies March 2002

The character-based user interface (CUI) to the Avaya PDS is provided as a secondary means of controlling and monitoring the dialer operations. In many contact centers a significant amount of investment has been made in customization based on the CUI and therefore, although more limited than the graphical user interface (GUI), these customers may continue to use the CUI for certain key operations.

It is important to note that CUI applications control and manage a single dialer, whereas the Campaign Director suite can manage multiple dialers.



Additional resources

Use the following links to take you to the relevant material in the online Avaya PDS User's Guide.

Phone strategy (CUI)	Overview	Procedure
Create a phone strategy		
Add initial phone		
Add alternate initial phone		
Add ring count and call connect criteria		
Add retries		•

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CUI record selections March 2002

You can execute a record selection immediately after you define the selection criteria or save it and execute the selection at a later time.



Additional resources

Use the following links to take you to the relevant material in the online Avaya PDS User's Guide.

Record selection (CUI)	Overview	Procedure
Create a record selection		
Selecting Time Zones		
Selecting Call Completion Codes		
Selecting field names and values		
Selecting phone strategies		
Sorthing field names and direction (optional)		
Selecting recall field names and values		

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CUI jobs March 2002

Before creating a job for a campaign, load the calling list and prepare the phone strategy and record selection files. Execute the record selection file, then copy the job definition and edit the copy.



Additional resources

Use the following links to take you to the relevant material in the online Avaya PDS User's Guide.

Jobs (CUI)	Overview	Procedure
Create a job		
Edit outbound job		
Managed jobs		
Edit Managed Jobs		
Edit sales verification jobs		•
Edit infinite jobs		•
Edit virtual jobs		
Edit inbound jobs		•
Edit blend jobs		
Copy a job		•
Delete a job		•

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CUI campaign activity March 2002

Complete the exercise found in your Student Workbook.

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Avaya PDS User Guide

Overview

Purpose

The purpose of this section is to provide information about monitoring.

Contents

This section contains the following topics:

- Monitor security logs
- <u>Use the system log monitor</u>
- Change the monitor interval



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Use the system log monitor

Use the system log monitor

Use the following procedure to use the system log monitor.

- 1. To start the System Log Monitor, choose Monitor security log from the System Log Monitor main menu. At a specified interval, the monitor updates the screen with information about targeted events.
- 2. To close the System Log Monitor, type X, then press Enter.



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Agent Blending

To see topics for this section, click + in the contents list at left.



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CUI phone strategy activity March 2002

Complete the exercise found in your Student Workbook.

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Create phone strategy

Create a phone strategy

Use the following procedure to create a phone strategy.

- 1. Choose Create a phone strategy from the Phone Strategies menu.
- 2. If the system has more than one calling list, type the calling list number and press Enter. (If you use only one calling list, the Avaya PDS skips this step.) The phone strategy name prompt appears.
- 3. Type a strategy file name (not more than 8 characters). Do not use special characters such as hyphens, slashes, or spaces.
- 4. Type Y at the prompt to process the changes or N to cancel. If you type Y, the Select Initial Phone screen appears.



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Add initial phone

Add an initial phone

Use the following procedure to add an initial phone.

- 1. In the Phone column, type the phone type number (1, 2, 3, ...) of the first phone number you want to call.
- 2. Select a field by typing the field name (uppercase letters) in the Field column or press F4 (View) to select the field from the calling list.
- 3. Type a value in the Value column. For help in setting values, see "To select field names and value criteria".
- 4. To add a second field and value for this phone, type AND or OR in the And/Or column; then repeat steps 2 and 3.
- 5. Repeat steps 1 through 4 for each selected phone. After you enter all the fields and values for the initial phones, press F1 (Done). The Select Alternate Initial Phone screen appears.



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Add alternate initial phone (optional)

Add an alternate initial phone

Use the following procedure to add an alternate initial phone (optional).

- 1. In the Phone column, type the phone type number (1, 2, 3, ...) of the alternate phone number you want to call.
- 2. In the Time Zones column, type the uppercase letter assigned to the time zone or type an asterisk (*) for all time zones or press F4 (View) to select a time zone from a list.
- 3. In the Time column, type the time you want the Avaya PDS to start calling the alternate phone (24-hour clock). Use a period to separate hours and minutes. For example, type 17.10 to enter 5:10 PM.
- 4. Repeat steps 1 through 3 for each alternate initial phone. Press F1 (Done). The Select System Set Recalls screen appears.



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Add ring count and call connect criteria

Add ring count and call connect criteria

Use the following procedure to add ring count and call connect criteria.

- 1. In the Phone Field column, type the phone type number (1, 2, 3, ...).
- 2. Type the number of rings to allow in the # of Rings column. (Low number recommended, such as 3.)
- 3. Type the letter(s) to designate the call detection mode in the Connect.
- 4. Repeat steps 1 through 3 for each initial phone type.
- 5. Press F1 (Done). The Record Selections menu reappears. For help setting up record selections, see "Overview of Record Selections".

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Add retries

Add retries

Use the following procedure to add retries.

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

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CUI phone strategy quiz March 2002

What is not allowed in a phone strategy name?



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To specify all times zones in the alternative initial





CUI record selection activity March 2002

Complete the exercise found in your Student Workbook.

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Create a Record Selection

Create a record selection

Use the following procedure to create a record selection.

- 1. Choose Create a record selection from the Record Selections menu.
- 2. If your system has more than one calling list, type the calling list number at the prompt. (The system skips this step if your system has only one calling list.)
- 3. Type a name for this file (not more than 8 characters). Do not use special characters such as hyphens, slashes, or spaces.
- 4. Type an optional report description (not more than 30 characters). The system names the report if you leave the field blank.
- 5. Type Y at the prompt to confirm the name or N to cancel. The Select Time Zones for Calling screen appears.



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Selecting Time Zones

Overview

Use the Select Time Zones for Calling screen to select the time zones the Avaya PDS uses to call customers. The screen displays a list of all the time zones defined for the Avaya PDS. The time designated for the various zones is your Avaya PDS time. The Avaya PDS time zones are based on the local time zone where the Avaya PDS is located. An uppercase letter code in the Zone column designates the time zone code.

State laws differ about legal calling times. Therefore, your Avaya PDS may list numerous time zones. If there are more zones than fit one page, press Ctrl+N (next page) to see the additional screens. The screen also shows the recommended start and stop times for each of these zones.

Selecting Time Zone parameters

Use the following procedure to select time zone paramters.

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



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Selecting Call Completion Codes

Overview

Call completion codes represent the result of the last completed call. Use the Select Call Completion Codes screen to select records based on call completion codes. In most cases, you select records that you have not contacted, such as BUSY, NOANSWER, or NOTCALLED.

When the screen appears, the Avaya PDS positions the cursor in the first field.

Selecting Call Completion Codes

Use the following procedure to select call cmpletion codes

- 1. Press F4 (View) to see the Call Completion Code List.
- 2. To select additional codes, press Enter again. The cursor moves to the next blank field.
- 3. Repeat steps 1 through 3 as necessary.
- 4. Press F1 (Done). When the entries are correct, press F1 (Done). The Select Field Names and Values screen appears

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Selecting Field Names and Value

Overview

Use the Select Field Names and Values screen to target a specific group of clients for calling. Select records based on any field in the calling list and a value for that field.

Enter values as they would appear in the calling list records. Use expressions, comparison operator, and logical operators as needed.

Selecting Field Names and Values

Use the following procedure to select field names and values.

- 1. In the Name column, type the field name in uppercase letters or press F4 (View) to select a field from the calling list.
- 2. Type a value in the Value column and press Enter.

Note

You can have up to 40 fields on multiple screen pages. Press Ctrl+N next page) and Ctrl+P (previous page) to move through screen pages. The Start Range column for the first row contains an opening parenthesis. The End Range column of row 40 contains the closing parenthesis.



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Selecting Phone Strategies

Overview

Select a phone strategy file to tell the Avaya PDS how to call the selected records. This is the last step in designing a record selection.

Selecting a phone strategy

Use the following procedure to select a phone strategy to be used within the record selection.

- 1. Type the Strategy File Name or press F10 (Search) to scroll through the available phone strategies. Each time you press F10 a new strategy appears. If you want to confirm that you are choosing the correct strategy, press F4 (View) to review the parameters for the selected strategy.
- 2. Press (F1) Done. If your system setup includes expanded Record Selection reporting, the Select Fields for Report screen appears. Continue to "Selecting Fields for the Record Selection Report" in the following section. Otherwise, the Selection List Generation screen appears.
- 3. From the Selection List Generation screen, start the record selection or exit without generating the record selection.

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Sorting field names and direction (optional)

Overview

Sorting records by field names is optional. If you choose to sort records, the Avaya PDS calls the records in the order you set. Otherwise, the system calls them in the order they appear in the calling list.

Ascending is the default sort order. If you want to sort in descending order, move the cursor to the Sort Direction column, type D and press Enter. To skip the Sort Field Names and Direction screen, press F1 (Done).

Selecting Fields Names and direction

Use the following procedure to select field names and direction.

- 1. In the Sort Direction column, press Enter to leave the sort direction as Ascending or type D and press Enter to change to descending.
- 2. In the Field Name column, press F4 (View) to see a list of fields. Choose the sort field.
- 3. To add a subcategory to sort by, press Enter to move to the next line and repeat steps 1 and 2 for each subcategory. The Avaya PDS sorts first by the field in priority 1, then priority 2, and so on.
- 4. Press F1 (Done). The Select Recall Field Names and Values screen appears.



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Selecting recall field names and values

Overview

Use the Select Recall Field Names and Values screen to tell the Avaya PDS which agent set recalls to include in the record selection. If left blank, the system includes all agent-set recalls. To skip this screen, press F1 (Done). Set recall criteria the way you set field name and value selection criteria.

Selecting recall criteria

Use the following procedure to select recall criteria.

- 1. In the Name column, type a field name or press F4 (View) to select a field name from the calling list.
- 2. Type a value in the Value column and press Enter.
- 3. Press Done (F1). The Select Call Strategy File screen appears.



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CUI record selection quiz March 2002







CUI jobs activity March 2002

Complete the exercise found in your Student Workbook.

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Create a job

Create a job

Before creating a job for a campaign, load the calling list and prepare the phone strategy and record selection files. Execute the record selection file, then copy the job definition and edit the copy.

- 1. Choose Jobs from the Campaigns menu. The Jobs menu appears.
- 2. Choose Copy a job from the Jobs menu and press Enter. Type the item number for the job you want to copy and press Enter.
- 3. Type Y in response to the prompt.
- 4. Type a new name for the job.
- 5. On the Jobs menu, choose one of the following: Edit and start an outbound job, Edit and start an inbound job, Edit and start a blend job, Edit and start a unit work list job, or Edit and start an infinite job.
- 6. Type the item number of the job you want to edit. The Job Run Verification screen appears. See the following sections for details on each screen.



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Edit an outbound job

Edit an outbound job

Use the Outbound Job Run Verification screen to set and verify outbound job settings.

- 1. Choose Edit and start an outbound job from the Jobs menu.
- 2. Type the item number for the job you want to edit. The Outbound Job Run Verification screen appears. The cursor is in the first field.
- 3. If the value is correct, press Enter to go to the next field. If a value is incorrect, press Ctrl+C (Change). Type the new information and press Enter to move to the next field.
- 4. If a field uses only a yes or no response, use Ctrl+C to switch between YES and NO.



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Managed Jobs

Minimum hit rate

Type a number from 0 to 100 (without the percent sign) in increments of 5. Thirty (30) is the recommended setting. Minimum hit rate determines the maximum number of calls the system will make in attempting to make an agent connection. For example, a minimum hit rate of 30% means the system will make no more than three dialing attempts for each agent.

Use minimum hit rate to limit the number of lines a job can use, even if the hit rate falls below this rate. This prevents the system from allocating more pooled lines to a poorly performing job at the expense of a more successful job.

Initial hit rate

Type a number from 0 to 100 (without the percent sign) in increments of 5. Fifty (50) is the recommended setting.

Initial hit rate determines the average number of calls per agent the system makes during the job's first five minutes. 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.

When the system accumulates statistics from actual call attempts (after about five minutes), it readjusts the hit rate automatically to meet the minimum hit rate setting.

Use the following guidelines to set the initial hit rate.

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

The initial hit rate controls dialing attempts for the first five minutes only. If you set the rate too low (20 to 30), the system 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.

Expert calling ratio

Type a Q, a W, or a U followed by a number from 0 to 100. For example, type Q30 to tell the system to allow 30% of the calls into the wait queue. The major difference among Expert Calling ratio settings is that the system bases W and U on agent productivity and Q settings affect customer wait time. When you use W or U settings, the average agent idle time can be short; but there may be a large percentage of customers in the wait queue at any given time.

Parameter	Value	Recommended setting
Q	0-100	Q4 through Q31
W	0-100	W29 through W71
U	0-100	U32 through U78

See the following table for recommended settings.

The Expert Calling ratio tells the system how to predict when it should make the next call. You can select one of the following:

- Q mode The system achieves a balance between agents waiting for a call and customers placed in the wait queue. On average, when you use Q the agent idle time is longer to make sure that customers spend less time in the wait queue.
- W mode The system monitors the time agents take to complete calls and update records and adjusts the calling pace accordingly. When you use W, the average agent idle time can be short, but there may be a large percentage of customers in the wait queue at any given time.
- U mode The system monitors the time agents take to update records and adjusts the calling pace accordingly. When you use W or U, the average agent idle time can be short, but there may be a large percentage of customers in the wait queue at any given time.

Line types

Type the line type code(s). Separate multiple codes with commas. If your system has only one outbound line pool, this feature is not available for outbound calls. Line type codes are the same thing as line group (line pool) names. The ability to manage the phone lines depends upon your system configuration. If your system has multiple line groupings, use this parameter to select or clear the groups of lines the system uses for a job.

Control the number of lines available for a particular job by assigning it additional groups or

by moving a competing job to another line group. If you designate more than one line group, separate them with a comma. For example, type REG1, REG2, REG3.

Job description

Type a job description (not more than 30 characters). The job description appears on reports and in job history files. You can sort job reports by the job description.

Selection

Type the name of the record selection file. The file contains the criteria the system uses to select records from the calling list. It also includes the phone strategy.

Note

Always execute the record selection before you define or run a job.

End job when quota is met

Type YES to tell the system to end a job when the agents reach the quota. You set this quota with the Quota parameter.

Type NO to tell the system to disregard the quota setting. Use NO when using unit work list jobs, unless you are going to set a quota for the entire job. Once you start the job, you can set quotas for individual unit work lists using Job Monitor.

A job can end in one of the following ways:

- You can manually stop a job.
- You can tell the system to continue making calls until it calls all initial phones at least once.
- You can tell the system to continue calling until it has called all recalls at least once.
- You can tell the system to call scheduled recalls but stop calling when it has called all initial phones at least once.
- You can tell the system to stop calling when the agents meet the quota you set.

In any of the above cases, the system stops calling when the system time reaches the time set in the Latest time to stop calling parameter.

Order by time zone

Type YES to turn on time zone ordering or NO to call customers in mixed time zones.

When you set this parameter to YES, the system calls all the records in the eastern most time zone; then it calls the records in the next time zone to the west.

When you set this parameter to NO, the system calls records round robin through the time zones. This is useful when broad coverage is more important than completing calls in time zone order.
Quota

Type the call completion code number, a comma, and the quota. For example, type 16,4.

The system defines the quota as a specific number of successful calls assigned a call completion code. This parameter is only effective when you set the End job when quota is met parameter to YES. When a job reaches the quota, the system stops making calls.

You have the following choices:

- Set no quota for the job. Leave the field blank or erase the existing entry by pressing Ctrl+E.
- Set one quota for the entire job. When the job meets the quota, the job ends.
- Set one quota to apply to all unit work lists. Each unit shuts down when the agent reaches the quota for that list.
- Set different quotas for each unit work list. To do this, set the quota, then set individual quotas in the Settings menu on the Job Monitor Screen. See "Editing Unit Record Selections".

Allocate all units to agents

Type YES to let agents work all available unit work lists or NO to assign theagents to specific unit work lists. Use this parameter with unit work list jobs. If this is not a unit work list job, leave this field blank or type NO.

History reports by unit

Type YES to generate a report by unit work lists or NO to report by job. Use this parameter with unit work list jobs. If this is not a unit work list job, leave this field blank or type NO.

Managed dialing

Type YES to turn on Manage Dialing or NO to turn it off. Managed Dialing is an optional feature that lets agents preview records before the system dials the number. See "Editing Managed Jobs" for guidelines on other Managed Dialing settings.

Note Use Managed Dialing with normal outbound jobs, not unit work list or Predictive Blend jobs.

The Preview limit and Allow agents to cancel calls parameters determine the Managed Dialing settings.

Preview limit (sec.)

Type a number between 0 and 999 to set the seconds to allow for preview time. It sets the time that an agent can preview a record before the system dials the number.

Type 0 to specify unlimited preview time. This parameter is only effective if you set the Managed Dialing parameter to YES.

Allow agents to cancel calls

Type YES to allow agents to cancel calls before the system dials the number or NO to let them preview records but not cancel calls. This parameter is only effective if you set the Managed Dialing parameter to YES.

Earliest start time

Leave the field blank to accept the system recommended time or type the time using the 24-hour clock. Use a period to separate hours and minutes. For example, type 17.10 to enter 5:10 PM and 8.30 to enter 8:30 AM.

Change this setting to meet the objective of a particular job.

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 system does not begin dialing until the system clock reaches the recommended time.

Latest start time

Leave the field blank to accept the recommended time or type the time using the 24-hour clock. For example, type 17.10 to enter 5:10 PM and 8.30 to enter 8:30 AM.

The latest stop time tells the system when to stop making outbound calls. If you set a time that is later than the recommended stop time, the system stops dialing at the recommended time.

Outbound list

Type the name of the calling list. Choose the outbound calling list for the job. The outbound calling list needs to be the same for the job, the record selection, and the agent screen(s).

Agent key definition file

Type the name of the agent keys file. Choose the keys file that was designed to run with the job. These are the keys that agents use during an outbound job.

Start script label

Type the message script name or press Ctrl+D to choose from a list. Choose the message the customer hears in the wait queue.

Main data process label

Type the name of the data process label for an outbound job or press Ctrl+D to choose from a list.

Outbound screen(s)

Type the screen name. If agents use more than one screen, separate the screen names with a comma. For example, type screen1, screen2, screen3. Choose the outbound screen(s) that were designed to run with the job. These are the screens that agents see on their workstations during an outbound job.

Total Wait Delay

Type the maximum number of seconds (0-999) that a customer can wait in an outbound queue before the system hangs up on the caller.

Next linked job

Type the job name to run when the current job ends.

Link jobs when you want the system to start a job as the current 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. You can link an outbound job to any job that is not a unit work list job or a managed job. You can link multiple managed jobs to each other. Remember to run the record selection for the next job before it starts. If you do not, the job will not start.

Transfer to job

Type the name of the inbound or blend job to which agents can transfer calls.

Do not call group name

Type the Do Not Call group name if you want agents to mark records as Do Not Call. Do Not Call groups contain one or more inbound or outbound calling lists. To use the Supervisor menus to mark a record as Do Not Call, see "Marking Records as Do Not Call".

Recall notify (mins)

Type the number of minutes before the recall that the system will notify the agent who owns it. Use this parameter to set up the Agent Owned Recall feature. Leave it blank to disable Agent Owned Recall.

Recall reschedule (min)

Type the number of minutes the system will wait before attempting to notify an agent again.

Use this parameter to set up the Agent Owned Recall feature. Leave it blank to disable Agent Owned Recall.

Recall tries (times)

Type the number of times the system will attempt to find the agent who set the recall before it treats the call as a standard recall.

Type 0 (zero) to tell the system to look for the original agent indefinitely. Use this parameter to set up the Agent Owned Recall feature. Leave it blank to disable Agent Owned Recall.

Infinite job resort field

Type the name of the field from the calling list record that is used to sort records for infinite jobs.

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Edit Managed Jobs

Edit a managed job

A managed job is a job that uses Managed Dialing. It allows agents to preview a record before the system dials the number. You can also give agents the option to cancel a call before the system dials the number. To set up a managed job, choose Edit and start an outbound job from the Jobs Menu. The Outbound Job Run Verification screen appears.

Set managed job parameter

Follow the steps in "Editing Outbound Jobs" for all parameters that are not specifically for managed jobs. Follow the directions below for managed job settings.

- 1. Set Minimum hit rate to 100. Since the agents are previewing one record at a time, the hit rate must be set to 100. This forces the system to dial only one number per agent.
- 2. Leave Expert Calling ratio blank. The system sets it to the appropriate level after the first five minutes.
- 3. Type a Job description.
- 4. In the Start script label field, select a Managed Dialing script. The managed script tells the system to first pass the record to the agent for preview.
- 5. Set Managed Dialing to YES by pressing Ctrl+C to switch between NO and YES.
- 6. Set a Preview limit. The range is 0 seconds to 999 seconds. If the setting is 0, the agents have unlimited time to preview the record.
- 7. Set Allow agents to cancel calls to YES or NO. YES allows the agents to cancel the call.



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Edit Sales Verification Jobs

Edit sales verification jobs

A sales verification job is an outbound (target) job used to verify a sale or commitment that a customer made during a different (source) job. The system uses a different group of agents for the target and source jobs. For more information about sales verification jobs, contact your system vendor.

When setting up a sales verification job, follow the steps in "Using Verify Record Selections," "Creating Jobs," and "Editing Outbound Jobs". Use the following special instructions.

When executing a verify record selection file

• If prompted, choose the source job's calling list.

To set up the source job

- On the Outbound Job Run Verification screen, verify that the
- Completion Code parameter is 93. If it isn't, press Ctrl+D and choose this code.

To create the sales verification job (target)

- Choose the outbound job named Verify as the job you want to copy.
- Type a job name that identifies it as a verification job, such as verifyam.
- On the Jobs menu, choose Edit and start an outbound job.

To set up Outbound Job Run Verification screen parameters

- Calling List: choose the source job's calling list.
- Verification job: press Ctrl+C to change the setting to Yes.
- Main data process label: confirm that the setting is Verify. If it isn't, press Ctrl+C and choose Verify.

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Edit Infinite Jobs

Edit infinite jobs

An infinite job is an optional outbound job that can receive new records for calling while the job is active. An infinite job runs until you stop it manually. An infinite job uses a special record selection called an infinite record selection. Using this record selection, the system can add new records (downloaded from your host) to an existing calling list on an active infinite job. The system adds the new records to a list segment. See "Using Infinite Record Selections".

For more information about infinite jobs, contact your system vendor.

To edit an infinite job, choose Edit and start an outbound job from the Jobs Menu. Select the predefined infinite job (usually called infinity). Follow the steps in "Editing Outbound Jobs" for all parameters that are not specifically for infinite jobs.

Follow the directions below for infinite job settings.

- 1. Type infinity for the Job Description.
- 2. Set the End job when quota is met parameter to No.

To download and append a new list segment, use the Transfer and Process Records menu. See "Downloading Records for Infinite Jobs".

Type Y at the prompt to continue or N to cancel. The system receives the new calling list records. An infinite job runs for long periods and must be shut down manually. If you need to restart the job, run the infinity record selection again before restarting. This ensures that the new list segments are properly incorporated into the calling list.



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Edit Virtual Jobs

Edit virtual jobs

A virtual agent job is an optional outbound job during which the system manages calling activities without agents. This type of job places a call, connects the customer or answering machine to the system, and plays a recorded message. For more information about virtual agent jobs, contact your system vendor.

When setting up a virtual agent job, follow the steps in "Creating Jobs" on and "Editing Outbound Jobs" using the following special instructions.

When setting up a record selection file

• Select the phone strategy named virtual.

To create the virtual agent job

- Choose the outbound job named Virtual as the job to copy.
- Type a job name that identifies it as a virtual job, such as virtpm.
- On the Jobs menu, choose Edit and start an outbound job.

To set up Outbound Job Run Verification screen parameters

- Agents: press Ctrl+C to change the setting to No.
- Selection: press Ctrl+D and select the record selection file to which you assigned the virtual phone strategy.
- Start script label: press Ctrl+D and select the virtual job script label you want to use with this job.
- Main data process label: confirm that the setting is Virtual. If it isn't, press Ctrl+D and choose this setting.

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Edit Inbound Jobs

Edit inbound jobs

(Intelligent Call Blending systems only) Use the Inbound Job Run Verification screen to set and verify inbound job settings on Intelligent Call Blending systems. These settings do not affect Predictive Blend systems.

- 1. Choose Edit and start an inbound job from the Jobs menu.
- 2. Type the item number for the job you want to edit or start. The Inbound Job Run Verification screen appears. The cursor is in the first value field.

Set inbound job parameters

The following table describes each inbound job parameter listed on the Inbound Job Run Verification screen. The settings and parameters on your system vary depending upon your system configuration.

Parameter	Value	Recommended setting	
Inbound list	Inbound list file name	inbnd1	
Inbound screen(s)	Inbound screen name(s) separated by commas	inbnd1,inbnd2	
Wait queue limit (secs)	0-999 seconds	0 to 5 seconds set an unlimited wait queue time	
Job description	Up to 30 characters/spaces		
Agent key definition file	Agent keys file name	op_cmd	
Line type(s)	REG INB	INB1	
	OTHER		
Start answer label	Answer script starting label	in_wait_1	
Main data process label	Data process label	generic	
Enable call forwarding on ACD	YES or NO	NO	

Activate lines at logon	YES or NO	YES
Max agent wait (secs)	0-999 seconds	60
Max % of clients in queue	100 - 200	100
Verification job		NO
Next linked job	Job name	
Transfer wait queue label		
Do Not Call group name	Do Not Call group file name	

Inbound List

Type the name of the calling list. The inbound calling list is a template that contains the information you need from the customer. Each time the system receives a call, it adds a record to the inbound list. Some call centers upload this information to the system. In other call centers, the agents connect directly to the host and interactively update records.

Inbound Screen(s)

Type the name of the screen. If the agents use more than one screen, separate the screen names with a comma. For example, type screen1, screen2, screen3. Choose the inbound screen(s) that were designed to run with the job. These are the screens that the agents use during an inbound job.

Wait Queue Limit (Secs)

Type the maximum seconds (from 0-999) the system permits a call to remain in the inbound wait queue before it hangs up on the caller.

Job Description

Type a job description (not more than 30 characters). The job description appears on reports and in job history files. You can sort job reports by the job description.

Agent Key Definition File

Type the name of the agent keys file. Choose the keys file that was designed to run with the job. These are the keys that agents use during an inbound job.

Line Type(s)

Edit Inbound Jobs

Type the line type code(s). Separate multiple codes with commas.

Note

If your system uses line pooling, this feature is not available for inbound calls. Line type codes are the same as line group names. The ability to manage the phone lines depends upon your system configuration. If your system has multiple line groupings, use this parameter to select or clear the groups of lines the system uses for a job. Control the number of lines available for a particular job by assigning it additional groups or by moving a competing job to another line group. If you designate more than one line group, separate them with a comma. For example, type INB1,INB2,INB3 (no spaces).

Start Answer Label

Type the name of the message file. Press Ctrl+D to see a list of options. Choose the message that customers hear when they are in the wait queue.

Main Data Process Label

Type the name of the data process label for an inbound job or press Ctrl+D to choose from a list.

Enable Call Forwarding on ACD

Type YES to tell the system to pass an inbound call from the ACD to an available Avaya PDS agent. If an agent isn't available the system passes the call back to the ACD. Type NO to keep the call in the ACD wait queue. A confirmation prompt appears.

To use this parameter, your ACD must be configured to allow call forwarding through the system. For more information, consult your system vendor.

Activate Inbound Lines at Logon

Type YES to activate the lines as agents log on or NO to activate all lines at the start of the job.

You can activate an inbound line whenever a blend or inbound agent logs on. The system continues activating lines until it has activated all the inbound lines assigned to the job. Similarly, the system inactivates lines when agents log off. This keeps unused lines available to other jobs.

When this setting is on, the system keeps the number of ACD

extensions equal to the number of agents available to service the calls. When the ACD sends a call to the system and there is no agent available, the system returns a busy signal to the ACD. This keeps a caller from being placed on hold by both the ACD and the system.

Maximum Time Client Wait (Secs)

Type the maximum seconds from 0-999. This setting 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 Maximum

% of clients in queue overrides the Maximum client wait.

This parameter is used only for blend jobs. (This is the same parameter on the Blend Job Run Verification screen.)

Maximum % of Clients in Queue

Type a number from 100-200 to represent the maximum percentage of calls to be in the wait queue. This parameter is used only for blend jobs. (This is the same parameter on the Blend Job Run Verification screen. We suggest that you leave it blank on the Inbound screen and complete the setting on the Blend Job Run Verification screen.) It determines the percentage of calls that can be in the wait queue before the system moves a blend agent to take calls.

Verification Job

This parameter appears only if your system has the Sales Verification feature. Type yes if this job uses sales verification.

Next Linked Job

Type the name of the job to run when this job ends. Although it is unusual, you can link an inbound job to any job that is not a managed job or a unit work list job. Link jobs when you want the system to start a job as the current 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 screen message telling the agents that they are changing jobs.

Transfer Wait Queue Label

Type the name of the message file to be used with the Native Voice and Data Transfer feature. Choose the message that your customers hear when they are in the wait queue on a blind transfer to an inbound agent.

Do Not Call Group Name

Type the Do Not Call group name if you want agents to mark records as Do Not Call. Do Not Call groups contain one or more inbound or outbound calling lists. To use the Supervisor menus to mark a record as Do Not Call, see "Marking Records as Do Not Call".



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Edit Blend Jobs

Edit blend jobs

(Intelligent Call Blending systems only) A blend job is a combination of inbound and outbound jobs. The system moves agents between inbound and outbound calls to achieve a balance between customer service and agent activity. Before editing a job, create or edit the phone strategy and record selection for the outbound job. Execute the record selection file; then use the Blend Job Run Verification screen to set and verify the blend job settings.

- 1. Choose Edit and start a blend job from the Jobs menu.
- 2. Type the item number for the job you want to edit. The Blend Job Run Verification screen appears. The cursor is in the first field.
- 3. If the value is correct, press Enter and go to the next field. If a value is incorrect, press Ctrl+C (Change). Type the new information and press Enter to move to the next field. If a field uses only a YES or NO response, use Ctrl+C to switch between YES and NO.

Because a blend job is a combination of an inbound and outbound job, most of the blend job parameters are the same as the inbound or outbound side of the job.

The following section describes only the parameters that are unique to blend jobs. Refer to the outbound and inbound parameter sections for all other settings.

Maximum Time Client Wait (Secs)

Type the maximum seconds from 0-999. 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 Maximum % of client in queue overrides the Maximum client wait. This parameter is used only for blend jobs. (This is the same parameter on the Blend Job Run Verification screen.)

Maximum % of Clients in Queue

Type a number from 100-200. Specifies the percentage of inbound calls that can be in the wait queue before the system assigns a blend agent to inbound calling. The system bases this on the ratio of the wait queue calls to the number of inbound and blend agents. The minimum and recommended setting is 100. The Maximum % of clients in queue overrides the Maximum client wait.

In the following example, there are two blend agents and three inbound agents on a job. The example illustrates how Maximum % of clients in queue affects the system.

- If Maximum % of clients in queue is set to 100%, five calls must be in the wait queue before the system moves a blend agent to take inbound calls.
- If Maximum % of clients in queue is set to 200%, ten calls must be in the wait queue before the system moves a blend agent to take inbound calls.

Blend Agent Return Time

Type the maximum seconds from 5-995. This parameter sets the maximum time a blend agent on inbound can be idle before the system transfers an agent to take outbound calls. The minimum setting is 5; the recommended setting is 20.

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Copy a Job

Copy a job

To create a job, first copy an existing job. Assign the copy a new name and change the settings to meet your job's goals. If the new job doesn't use the same calling list as the original job, you need to select a new calling list and job screen(s).

- 1. Choose Copy a job from the Jobs menu.
- 2. In the Enter Item Number field, type the number of the job to copy.
- 3. Type Y at the prompt.
- 4. Type the new job name.
- 5. Type Y at the prompt to continue or N to cancel.



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Delete a Job

Delete a job

Use the following procedure to delete a job:

- 1. Choose Delete a job from the Jobs menu.
- 2. Type the item number in the Enter Item Number field.
- 3. Type Y at the prompt to delete the job or N to cancel.



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Start a campaign

Start a campaign

Use the following procedure to start a campaign.

- 1. Set up or select phone strategies.
- 2. Set up or review and run record selections.
- 3. Set up and start jobs.



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Edit a phone strategy

Edit a phone strategy

NEXT

Use the following procedure to edit an existing phone strategy.

- 1. Choose Edit a phone strategy from the Phone Strategies menu.
- 2. Type the item number for the strategy file you want to edit. The Select Initial Phone screen appears. Complete the following steps or, if the screen is correct, press F1 (Done) to move to the next screen.
- 3. Press down arrow to move to the field you want to change.
- 4. Type the new value.
- 5. Repeat steps 3 and 4 for each field you want to change.
- 6. Press F1 (Done) to continue to the next screen.
- 7. To edit the rest of the screens, follow the steps that begin with "Selecting Alternate Initial Phones".



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Record Selection

Overview

A record selection tells the system which records to use to call customers. This feature gives you the ability to target specific customers for calling. For example, you can select records from specific time zones such as Eastern, Central, or Pacific, or you can select records with specific call completion codes such as BUSY or NOANSWER. You can also select records that help you satisfy specific goals such as accounts more than 30 days overdue, accounts with a balance over \$2,000, or accounts in a particular city.

You can execute a record selection immediately after you define the selection criteria or save it and execute the selection at a later time.

Choose Record selections from the Campaigns menu. The Record Selections menu appears. These commands are also available in Campaign Editor's Selection Editor.

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

Use the following wildcard character in record selections.



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Set ring count and call connect criteria

Overview

Use the Select Ring Count and Call Connect Criteria screen to specify two settings:

- The number of rings to allow before the system records a NOANSWER call completion code.
- The call detection mode (Connect Criteria) to tell the system which calls to pass to agents.

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

The type of connect criteria determines what type of connects the system will pass to an agent. Remember, as you decide which ones to use, that you will increase your hit rate with each additional criteria selected, as more calls will be handled by your agents instead of by the system.

The connect criteria abbreviations are as follows:

- V Voice
- AV Autovoice
- INT- Operator Intercept
- NCN- Nonconnect
- DIS- Disconnected Number
- VAC- Vacant Number
- ORD Reorder

Set ring count and call connect criteria

Use the following procedure to set ring count and call connect criteria:

- 1. In the Phone Field column, type the phone type number (1, 2, 3, ...).
- 2. Type the number of rings to allow in the # of Rings column. (Low number recommended, such as 3.)
- 3. Type the letter(s) to designate the call detection mode in the Connect Criteria column.
- 4. Repeat steps 1 through 3 for each initial phone type.
- 5. Press F1 (Done). The Record Selections menu reappears.

Set ring count and call connect criteria



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Delete a record selection

Delete a record selection

Use the following procedure to delete a record selection:

- 1. Choose Delete a record selection from the Record Selections menu.
- 2. Type the item number of the file.
- 3. Type Y at the prompt to confirm the deletion or N to cancel.



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Infinite Job Record Selection

Overview

Use an infinite record selection with an infinite, outbound job to enable the Avaya PDS to call new records received from your host. The new records are called a list segment when the system adds them to an existing calling list.

When an infinite job receives new records from your host, the Avaya PDS processes the file and generates an index. The system sorts the index by category code (also called behavioral score) in descending order and recall time in ascending order. A behavioral score is a value the Avaya PDS assigns to a record that typically identifies the fraud risk associated with a given customer. If a record has no category code, the system treats it as if the code is zero.

Create, copy, & edit Infinite record selection

Creating an Infinite record selection is the same as creating a general record selection, but with one difference. To create an Infinite record selection, first copy and edit any existing record selection. Follow the procedure below to create an Infinite record selection.

- 1. Choose Execute infinite record selection from the Record Selections menu.
- 2. Type the item number for the infinite record selection file you want to execute.
- 3. Type a report description (not more than 30 characters).
- 4. Type Y at the prompt to confirm your selection or N to cancel.



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Final project March 2002

Complete the final project found in your Student Workbook.

HOME PREV NEXT

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Preparing for the test March 2002

In order to take this test you must be:

- Registered for this class.
- Have access to the Avaya corporate network.
- Have completed all of the modules in the course.

The test takes approximately 1 hour. Take your time. This test is automatically scored. Use the following procedure to access the test for this course:

1. Go to http://www.avaya.com/learning and select one of the three options:

Click Here For	Click Here For	Click Here For
AVAYA CUSTOMER	BUSINESSPARTNER	AVAYA ASSOCIATE
News and Training Information	News and Training Information	News and Training Information

- 2. Log into the Learning Center site.
- 3. Under My Learning, select current enrollments.
- 4. Find the course in the enrollments and select this course title.
- 5. Select **Test** on the components screen.
- 6. Follow the instructions on the test to complete it.

Warning: once you have submitted your answers, you cannot go back and change them, so take your time and make the right choices carefully.



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Resources March 2002

The following additional resources are provided to assist you in reviewing the material included in this course.

GUI/CUI activity

Character based menus

Using the Avaya PDS 12.0 course Student Workbook (Acrobat) Goals activity Procedural Rreference Student feedback form



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GUI / CUI activity March 2002

Fill in the blanks

GUI Applications		Tasks Create record selections, phone strategies, and jobs.
		Manage and monitor jobs and agents.
		Report on jobs, agents, and dialers.
		Manage agent, job and dialer hierarchies.
		Modify some completion code setting.
		Modify blend settings.
		Connect to the CUI.
What do they do?		
CUI Menus System 0. Exit		
1. Help		
2. Control		
	5. Users	
	8. Screen	
	9. DoNotCall	

3. Campaigns





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Goals March 2002

Now that you have a clear understanding of the Campaign Life Cycle, it is time to relate this process to several call center scenarios.

This exercise explores the goals met by the Avaya PDS in the customer contact center. This exercise should take approximately 15 minutes.

Instructions

Students should divide into three groups and each group should select a scenario from the three scenarios presented. The purpose of this exercise is to allow students to answer the basic questions about how the customer contact center is organized:

- Where customers are contacted
- What calls are made
- When calls are made

Can you think of any other criteria that are important for efficiently processing calls through the call center for the scenario?

How do you think the function of the system supervisor will be different for these different scenarios?

Scenario A - Credit Collections

This collections office has a territory covering 11 Northeastern and Midwestern states. Customers are called when they are 30 days, 60 days, and 90 days delinquent. Most customers speak English, but some only speak Spanish or Korean. There are three collections agents in the office who speak Spanish and one who speaks Korean. Local ordinances restrict the time of day and frequency of collection calls and these restrictions vary according to area code.

Scenario B - Insurance Sales

This insurance sales office covers the Western US. Past performance shows that the most effective sales calls are made at specific times of day, though this varies from state to state. Due to this varying outbound calling schedule, most agents are assigned to inbound calls for much of the day. There are five agents in this office who are multi-lingual and one agent who has access to a TTY for calling deaf customers.

Scenario C - Blood Bank



Goals

This blood bank is located in Cologne, Germany and is responsible for scheduling blood donors for 114 blood donation sites in 7 EU countries. Because this is a public service driven calling center, there are many fewer restrictions for calls than for collections or sales calls. However, one a party has been contacted, it is necessary to transfer calls to a different agent, if available, who specializes in taking patient information prior to scheduling the appointment.

HOME

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Character based menus March 2002

CUI Menus

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N11	nor	3710	nr
มน	per	VIC	SOI.
	1		

0. Exit 1. Help Closes the session. Displays help for system menu

2. Control	0. Exit	Returns to main menu
	1. Help	Displays help for system menu
	2. Count	Counts calling list records
	3. Create	Create a new calling list
	4. AppendList	Create an empty calling list
	5. Users	Manage User Accounts
	6. Purge	Purge some records
	7. Edit	0. Exit
		1. Help
		2. Edit
		3. Delete
		4. Edit with Quicksearch
		5. Delete with Quicksearch
		6. Outbound update
		7. Mark records ineligible
		8. Create outbound update
	8. Screen	Starts screenbuilder
	9. DoNotCall	Mark calling list records
	10. Job Lists	0. Exit
		1. Help
		2. Create job list
		3. Modify job List
		4. Turn on agent list
		5. Turn off agent list
3. Campaigns	0. Exit	Returns to main menu
	1. Help	Displays help for system menu
	2. Phone Strategy	0. Exit

http://pds.au.avaya.com/esp/mos12/Redtrain/UsingPDS/Qual/2000.html (1 of 5) [4/5/2002 3:27:22 PM]

us		
		1. Help
		2. Create
		3. Modify
		4. Copy
		5. Delete
	3. Record Selection	0. Exit
		1. Help
		2. Create record selection
		3. Edit record selection
		4. Execute record selection
		5. Create unit record selection
		6. Edit unit record selection
		7. Execute unit record selection
		8. Copy record selection
		9. Delete record selection
		10. Execute infinite record selection
		11. Execute verify record selection
		13. Reports Various reports
	4. Job	0. Exit
		1. Help
		2. Edit & start outbound job
		3. Edit & start inbound job
		4. Edit & start blend job
		5. Copy a job6. Delete a job
4. Manage	Job Monitor Applicati	on
5. Report	0. Exit	Returns to main menu
	1. Help	Displays help for system menu
	2. Agent	0. Exit
		1. Help
		2. Outbound Agent History
		3. Inbound Agent History
		4. Blend Agent History
		5. Agent Activity
	3. Job	0. Exit
		1. Help
		2. Outbound Job

	3. Managed Job				
	4. Inbound Job				
	5. Blend Job				
	6. Previously Run Jobs				
4. Dist	0. Exit				
	1. Help				
	2. Create list distribution				
	3. Edit list distribution				
	4. Execute list distribution				
	5. Cop list distribution				
	6. Delete list distribution				
5. List	0. Exit				
	1. Help				
	2. Generate days on PDS				
	3. Generate reject				
	4. Generate release code				
	5. Rawfile or calling list dump				
6. System	0. Exit				
-	1. Help				
	2. Agent Login				
	3. Multiple Call				
	4. Program Info. File				
	5. Hourly inbound activity				
7. Extract	0. Exit				
	1. Help				
	2. Create extract file				
	3. Edit extract file				
	4. Execute PC Analysis extract				
	5. Execute letter generation extract				
	6. Copy an extract				
	7. Delete an extract				
	8. Display release codes				
	9. Display available calling lists				
8. Tools	0. Exit				
	1. Help				
	2. Copy an extract print file				
			3. Delete an extract print file		
---------------	--------------	--------------------------------------	-----------------------------------	--	--
		9. Print	Prints reports		
	6. Predict	Configures predictive blend options.			
	7. Support	Displays customer s	support message.		
Administrator	0. Exit	Closes the session.			
	1. Help	Displays help for sy	stem menu		
	2. Admin	0. Exit	Returns to main menu		
		1. Help	Displays help for system menu		
		2. Change Administ	rator Password		
		3. Restart System			
		4. Shut down system			
		5. Set system Date and Time			
		6. Monitor agent lin	es		
		7. Terminate a user session			
		8. Edit Area Codes	/ Prefixes		
	3. Event Mon	0. Exit	Returns to main menu		
		1. Help	Displays help for system menu		
		2. Monitor system s	ecurity events		
		3. Change monitor refresh interval			
	4. Backup	0. Exit			
		1. Help			
		2. Backup	0. Exit		
			1. Help		
			2. Backup complete system		
			3. Backup PDS and calling lists		
			4. Backup PDS only		
			5. Backup PDS configuration files		
			6. Backup data/stat files		
			7. Restore all from tape		
			8. Restore a file from tape		
			9. List/Verify a file on tape		
			10. ListVerify tape contents		
			11. List tape volume info		
		3. Backup CL	0. Exit		
			1. Help		
			2. Backup all calling lists		

		3. Backup specific calling list		
		4. Restore all calling lists		
		5. Restore specific calling list		
5. Inbound	Sets Inbound calling of	options		
6. IVR	0. Exit	Returns to main menu		
	1. Help	Displays help for system menu		
	2. Set up IVR Connec	tions		
	3. Connect to IVR			
	4. Disconnect from IVR			
	5. Reset connection to IVR			
	6. Update list of IVR	scripts		
7. Transfer	0. Exit	Returns to main menu		
	1. Help	Displays help for system menu		
	2. Download Host records to PDS			
	3. Upload PDS Records to the Host			
	4. Recover old calling list			
	5. Count calling List records			
	6. Download records	for infinite job		
8. Support	Displays customer sup	pport message.		

. ...

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System report fields	•	
Generate system reports		

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(HOME)

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Feedback form March 2002

Please use the following form to send the instructional design team your comments and suggestions. This input is very important in changing the content of this course to better serve your needs.

Thank you.

Your name:

Your e-mail:

Telephone:

Comments:



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Resources March 2002

The following additional resources are provided to assist you in reviewing the material included in this course.

GUI/CUI activity

Character based menus

Goals activity Procedural reference

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Character based menus

Using the Avaya PDS 12.0 course Student Workbook (Acrobat) Goals activity Procedural reference Student feedback form

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Character based menus March 2002

CUI menus

Supervisor

0. Exit 1. Help Closes the session. Displays help for system menu

2. Control	0. Exit	Returns to main menu
	1. Help	Displays help for system menu
	2. Count	Counts calling list records
	3. Create	Create a new calling list
	4. AppendList	Create an empty calling list
	5. Users	Manage User Accounts
	6. Purge	Purge some records
	7. Edit	0. Exit
		1. Help
		2. Edit
		3. Delete
		4. Edit with Quicksearch
		5. Delete with Quicksearch
		6. Outbound update
		7. Mark records ineligible
		8. Create outbound update
	8. Screen	Starts screenbuilder
	9. DoNotCall	Mark calling list records
	10. Job Lists	0. Exit
		1. Help
		2. Create job list
		3. Modify job List
		4. Turn on agent list
		5. Turn off agent list
3. Campaigns	0. Exit	Returns to main menu
	1. Help	Displays help for system menu
	2. Phone Strategy	0. Exit

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ius		
		1. Help
		2. Create
		3. Modify
		4. Copy
		5. Delete
	3. Record Selection	0. Exit
		1. Help
		2. Create record selection
		3. Edit record selection
		4. Execute record selection
		5. Create unit record selection
		6. Edit unit record selection
		7. Execute unit record selection
		8. Copy record selection
		9. Delete record selection
		10. Execute infinite record selection
		11. Execute verify record selection
		13. Reports Various reports
	4. Job	0. Exit
		1. Help
		2. Edit & start outbound job
		3. Edit & start inbound job
		4. Edit & start blend job
		5. Copy a job6. Delete a job
4. Manage	Job Monitor Applicati	ion
5. Report	0. Exit	Returns to main menu
	1. Help	Displays help for system menu
	2. Agent	0. Exit
		1. Help
		2. Outbound Agent History
		3. Inbound Agent History
		4. Blend Agent History
		5. Agent Activity
	3. Job	0. Exit
		1. Help
		2. Outbound Job

	3. Managed Job
	4. Inbound Job
	5. Blend Job
	6. Previously Run Jobs
4. Dist	0. Exit
	1. Help
	2. Create list distribution
	3. Edit list distribution
	4. Execute list distribution
	5. Cop list distribution
	6. Delete list distribution
5. List	0. Exit
	1. Help
	2. Generate days on PDS
	3. Generate reject
	4. Generate release code
	5. Rawfile or calling list dump
6. System	0. Exit
	1. Help
	2. Agent Login
	3. Multiple Call
	4. Program Info. File
	5. Hourly inbound activity
7. Extract	0. Exit
	1. Help
	2. Create extract file
	3. Edit extract file
	4. Execute PC Analysis extract
	5. Execute letter generation extract
	6. Copy an extract
	7. Delete an extract
	8. Display release codes
	9. Display available calling lists
8. Tools	0. Exit
	1. Help
	2. Copy an extract print file

			3. Delete an extract print file	
		9. Print	Prints reports	
	6. Predict	Configures predictive blend options.		
	7. Support	Displays customer support message.		
Administrator	0. Exit	Closes the session.		
	1. Help	Displays help for system menu		
	2. Admin	0. Exit	Returns to main menu	
		1. Help	Displays help for system menu	
		2. Change Administrator Password		
		3. Restart System		
		4. Shut down system		
		5. Set system Date and	l Time	
		6. Monitor agent lines		
		7. Terminate a user session		
		8. Edit Area Codes / Prefixes		
	3. Event Mon	0. Exit	Returns to main menu	
		1. Help	Displays help for system menu	
		2. Monitor system secu	urity events	
		3. Change monitor ref	resh interval	
	4. Backup	0. Exit		
		1. Help		
		2. Backup	0. Exit	
			1. Help	
			2. Backup complete system	
			3. Backup PDS and calling lists	
			4. Backup PDS only	
			5. Backup PDS configuration files	
			6. Backup data/stat files	
			7. Restore all from tape	
			8. Restore a file from tape	
			9. List/Verify a file on tape	
			10. ListVerify tape contents	
			11. List tape volume info	
		3. Backup CL	0. Exit	
			1. Help	
			2. Backup all calling lists	

		3. Backup specific calling list	
		4. Restore all calling lists	
		5. Restore specific calling list	
5. Inbound	Sets Inbound calling	options	
6. IVR	0. Exit	Returns to main menu	
	1. Help	Displays help for system menu	
	2. Set up IVR Connec	ctions	
	3. Connect to IVR		
	4. Disconnect from I	VR	
	5. Reset connection to	o IVR	
	6. Update list of IVR	scripts	
7. Transfer	0. Exit	Returns to main menu	
	1. Help	Displays help for system menu	
	2. Download Host records to PDS		
	3. Upload PDS Records to the Host		
	4. Recover old calling	g list	
	5. Count calling List	records	
	6. Download records	for infinite job	
8. Support	Displays customer su	pport message.	

. ...

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Alerts

Overview

You can define up to 10 alerts that provide audio cues, visual cues, log files, e-mails, or pager signals when job/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.

For example, you might want to know when an agent takes more than five minutes on a call or when the hit rate on a job is less than 30%. Alerts can also be set to tell you when the system needs attention, for example, a job is approaching completion.

To access alerts, start Campaign Monitor and select Settings > Alerts.

Note

If you set an alert, you can close Campaign Monitor. When you restart Campaign Monitor, your alert will be saved. However, if Campaign Monitor is closed when you should receive your notification, you will not receive notification. In other words, Campaign Monitor must be active in order for you to receive a notification. After you receive an alert notification, the alert is not automatically enabled again. Open the Alert Viewer and select Enabled to reactivate an alert.

Alert examples

The Avaya PDS 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, as shown talking in real-time (rather than an average over multiple calls).
- Current Update Time the update time for all agents or a specific agent, as shown 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 utilized so that you can free up some lines (otherwise, when 100% of the lines are utilized, customers will automatically be placed in a wait queue when they call in).
- Current Hit Rate a hit rate is the ratio or percentage of call connects to call attempts (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 this feature is like an alarm clock: when the dialer hits a certain time of the day/night, you are alerted.
- 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; this is useful if, for example, 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; this is helpful if you want to shut down 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 called.
- Records Left as Percent of Total the percent of records in the entire job still left to be called.
- Time Remaining the estimated time left on a job.

Note

There is also one alert that you may receive that you do not configure yourself. The Avaya PDS automatically alerts you if new data has not appeared in the database for more than 12 minutes (12 is the current setting). This alert lets you know if the data you are viewing in Campaign Monitor is not being updated.



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Alert Settings

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
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	АМРМ
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.

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Avaya PDS User Guide

Overview

Purpose

The AvayaTM Predictive Dialing System (PDS) uses alerts to signal to supervisors of the end of a job, a goal being met, and other campaign events.

Contents

This section contains the following topics:

- <u>Alerts</u>
- <u>Alert Settings</u>
- Create an alert
- Edit an alert
- <u>Remove an alert</u>
- <u>View a log</u>
- Enable and disable alerts
- Check the status of each alert

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Create an alert

Overview

You create alerts in Alerts Viewer, which is a available in Campaign Monitor.

Create an alert

Use the following procedure to create an alert.

- 1. Select Start > Programs > Avaya > Campaign Director > Campaign Monitor.
- Select Settings > Alerts. (If an e-mail 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. You can skip this tab if you do not want to narrow your alert criteria.
- 6. On the Notifications tab, specify how Avaya PDS notifies you: a pop-up alert on your screen, an audible sound, a log file, or an e-mail.If you select Send to log, then you can view a log file that will contain all alert conditions that have been met. This log file is accessible using the View Log button on the Alert Viewer.

If Send e-mail is unavailable, configure your default e-mail client on your PC. If Send e-mail is available and you want to receive an e-mail alert notification, type your e-mail address in the To... box.

7. Click OK.

The alert name and summary information appear in the Alerts Viewer dialog box.



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