Quick Reference Guide

Empowered by Innovation

NEC

UC for Business Administration

002NEC-05QRGR

NEC Corporation of America
www.necam.com

Revision History

Document No.	Release Date	Change Description
002NEC-05QRGR	04/13/11	Complete document update.
002-04QRGR	08/16/10	**Updated:** • "Configure a Queue Mode to Deliver to a Mailbox." **Added:** • "Holidays." • "Use Callback within Progress Announcements." **Deleted:** • Step 5 under "Create a New Mailbox."
Admin-03QRGR	03/31/10	**Updated:** • Step 5 under "Create Queue Modes." • Step 3 under "Edit a Console Queue Mode."
Admin-02QRGR	01/28/10	**Updated:** • Priority level in "Combine Delay with Priority." • "More Progress Announcement Settings."
Admin-01QRGR	12/30/09	**Updated:** • More detail and minor text changes. • "Configure a Queue Mode to Deliver to a Mailbox." • Step 3 in "Service Level Tab." • "Delivery Section." • "Reset a PIN." • "Create a New Auto Attendant." **Added:** • "Console Administration." • "Voice Messaging Administration." • "Security."
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Contact Center Functionality

This section provides information designed to establish call delivery to queues, agent login classes, and agents. Although these steps are generally used for creating a contact center environment from scratch, they can be shortened for use when adding new queues if the UCB software is already up and running.

Help: While following the steps, press **F1** on the keyboard at any time to access online help.

Create a Department

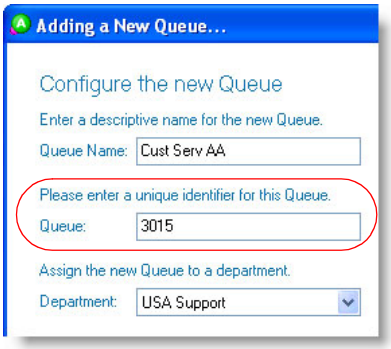
Departments can help keep employees from seeing data from other departments (e.g., Support staff should not have access to the Human Resource queues). Create the Department(s) early in the process so you can add each queue, class, agent, announcement, or mailbox in the department of choice and then secure them afterward.

- Edit departments under the **General** group | **Companies** | double-click the company.

Queues

Create a Queue

1. Add a new queue under the **Queuing** group | **Queues** | **Add Wizard** icon from the toolbar.
2. Select which PBX to add the new queue to.
3. In the **Queue** field, the unique identifier is the extension for this queue. This generally needs to be preconfigured in the PBX for the queue to work.



4. Use **Tenant Number** if there are multiple companies working from the same system but want to be billed separately.
5. A **System Queue** (NEC PBXs only) routes calls to selected extensions upon a system failover (could be called an *Operator System Queue*). These calls are routed directly from the PBX and not by the UCB server. Different system queues can be used to route calls to varying extensions upon failover.

   For instance, you may want calls from your sales queue(s) to be delivered to your sales staff, and calls from your support queue(s) to be delivered to your support staff. Creating a new system queue requires the PBX to be preconfigured to work correctly.

6. Click:
   - **System Default Settings** if creating a new queue with no pre-existing settings.
   - **Existing Queue Settings** to create a new queue based off of the settings from a pre-existing queue.
7. Click **Finish**.

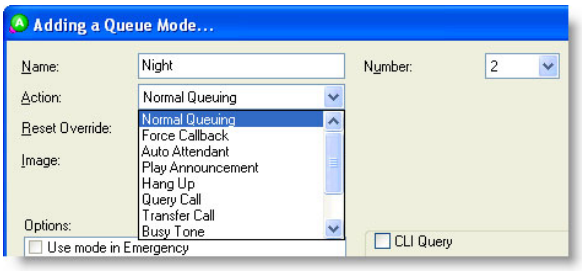
Configure Queue Modes

Use queue modes to specify the way calls in a queue are handled by the system. In its most basic form, a mode is an action that acts on every call as it comes into the queue.

1. Add a mode to a queue under the **Queuing** group | **Queues** | double-click the queue.
2. Under the **Modes** tab, click the **Add** button to create new modes. Generally, the following four modes are created:
   - Day
   - Night
   - Holiday
   - Emergency
3. Set up the mode **Name** and **Number**. Name the mode and allow the wizard to determine the mode number.

Note: Mode numbers appear in place of the mode name in some reports.

4. Select the **Action** mode.



Action Option	Description
Normal Queuing	Routes calls to the next available agent.
Auto Attendant	Routes calls to a pre-created auto attendant.
Force Callback	Callers are not allowed to wait in the queue—they must leave a callback number. ***Note:*** A **Mailbox Owner** must be configured on the **Advanced** tab for this option to be available. You also need to go through the Configuration Wizard on the **Callback** tab.
Play Announcement	Routes calls to an announcement (pay close attention to the Next Action of the announcement to see where the call goes from there).
Hang Up	To your callers, this action is exactly the same as the Play Announcement action, but appears as a Hang Up call-type in your reporting as opposed to an Abandoned call.
Query Call	Asks the caller for information prior to delivering their call to an agent (e.g., "Please type in your account number now"). Information that the caller enters can be set up to transmit to the agent and also placed on their Windows clipboard.
Transfer Call	Routes the call to an internal extension or outside phone number (displays as a Transfer call-type in the reporting).
Busy Tone	The caller hears a busy tone instead of being delivered to the queue (does not appear in the reporting).
Transfer to Mailbox	Transfers the caller to a voice messaging mailbox and to a chosen profile. ***Note:*** This option only appears in the list if the queue has a mailbox associated with it in the **Advanced** tab under **Mailbox Owner**. *Reminder:* Record the audio in your mailbox profile.
IVR	Routes the call to the Interactive Voice Response system (requires licensing).
Forward No Answer	Select this action to forward the call to a different location after a specified amount of time of waiting in the queue.

5. From the **Reset Override** list, select how you want that mode to transition to the next mode configured in the schedule if a supervisor overrides the mode of a queue:
   - **Next Scheduled Change** to have the mode changes follow the schedule of the queue without further input from a supervisor.
   - **Supervisor (Manually Reset)** to force the supervisor to change the mode by hand. Generally used for the Emergency mode.

Help: Press **F1** for more information on any of these topics.

Configure a Queue Mode to Deliver to a Mailbox

1. Create a mailbox for a queue under the **Voice Messaging** group | **Mailboxes** | **Add Wizard** icon from the toolbar.
2. Click the mailbox(es) to create.
3. When prompted, click **Create Company Mailboxes**. Company mailboxes are used for queues instead of user mailboxes because they provide different presence profiles.
4. Click **System** for the class.
5. Click **Finish**.

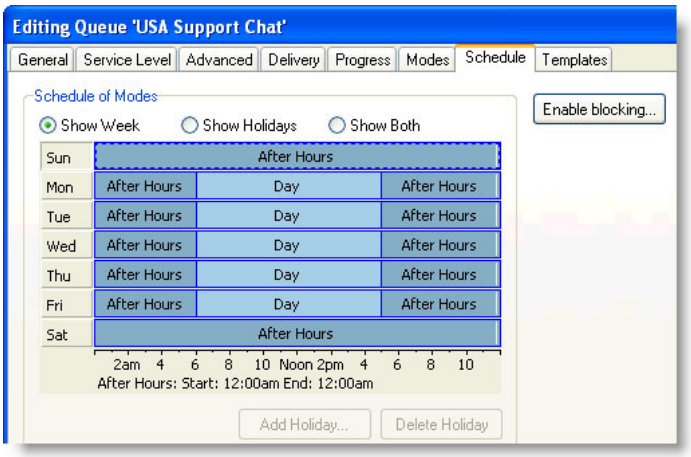
Reminder: Record the audio in the selected profile.

6. Switch back to editing the queue, and configure the **Mailbox Owner** under the **Advanced** tab.
7. Create or edit a mode in the **Modes** tab, select **Transfer to Mailbox** from the **Action** list, and select which **Profile** of the mailbox to play.

Edit the Queue Schedule

The schedule determines when a queue is open or closed based on the standard work week. The Schedule tab can also be used to choose which mode your holidays should be in when they occur.

1. Edit a queue's schedule under the **Queuing** group | **Queues** | double-click the queue.



2. Under the **Schedule** tab's calendar section, right-click to:
   - Insert a slot. Slots are used to divide a day so you can have the queue open and closed at particular times. When entering a new slot, drag-and-drop its borders to adjust the time.

Note: Press the **Shift** key and use the arrow keys to adjust these settings minute by minute.

   - Change the mode for any given day/slot.
   - Copy the schedule to the other days in the week.

3. Click the **Show Holidays** option to configure modes for pre-entered holidays. Holidays can be entered into the system under **Holidays** in the **General** group.
4. Click the **Enable Blocking** button to reduce the amount of calls in a queue when the queue is overly impacted with calls. Set the queue to block calls (plays a busy signal) after a specific number of calls hit the queue (high watermark), and lift the block when the number of calls is more manageable (low watermark).

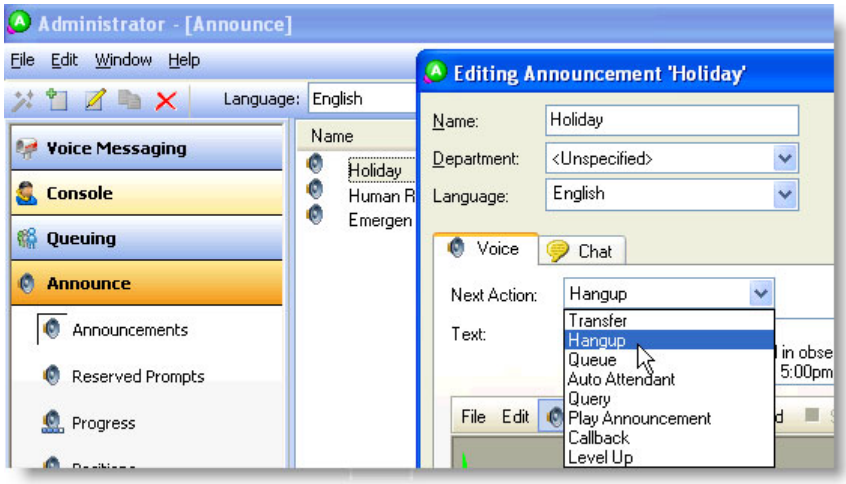
Holidays

This section describes how to create a holiday, and then apply it to queues and mailboxes.

1. If the intention is to play an announcement and then hang up on the callers, ensure that the holiday announcement and mode actions are set to **Hang Up**.

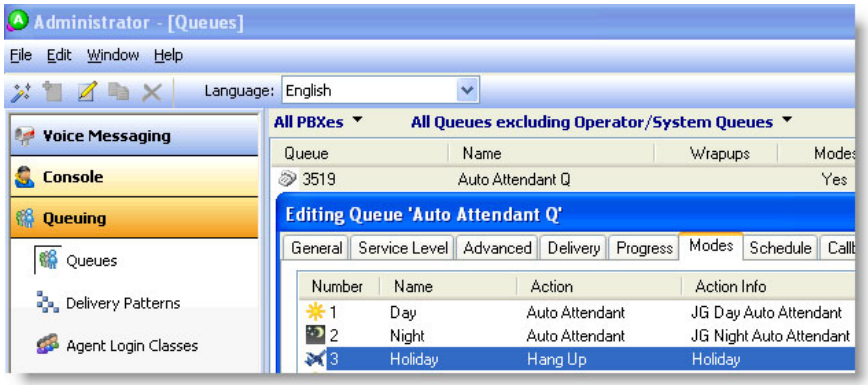
   Best Practice: If the **Play Announcement** action is chosen for the mode, the holiday call shows up in the reporting as an abandoned call. For holidays, it is best to have reporting show calls as hang ups rather than abandoned.

   a. Go to the **Announce** group | **Announcements** | double-click the **Holiday** announcement in the work area.

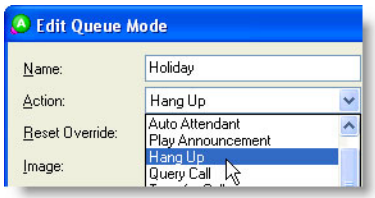


   b. Under the **Voice** tab, select **Hang Up** from the **Next Action** list.

   c. Go to the **Queuing** group | **Queues** | double-click the queue name in the work area.



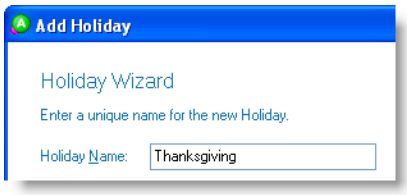
   d. Under the **Modes** tab, double-click **Holiday**.



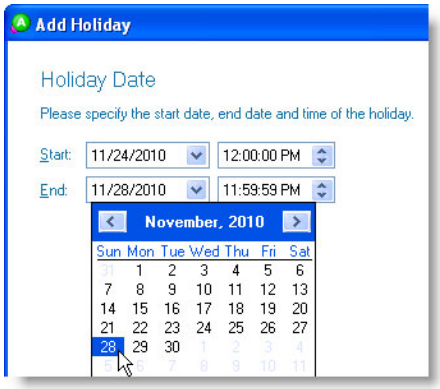
   e. From the **Action** list, select **Hang Up**.

2. Create a holiday.

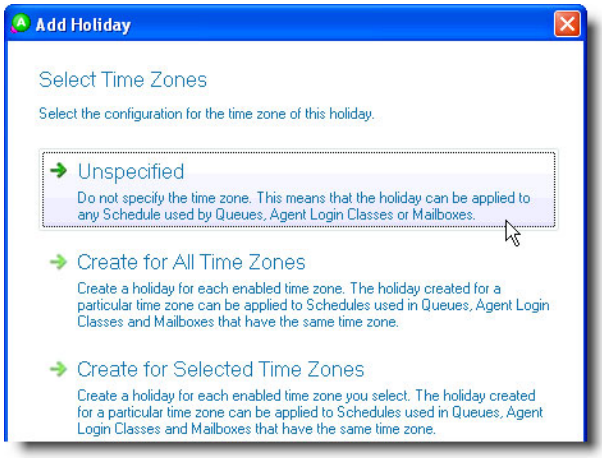
   a. Go to the **General** group | **Holidays** | **Add Wizard** icon from the toolbar.



   b. Name the holiday.



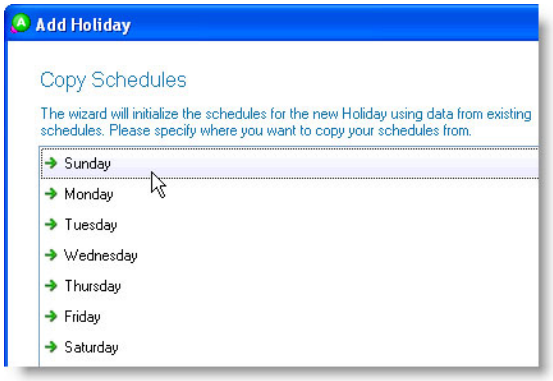
   c. Select the start and end dates and times for the new holiday.



   d. If applying a time zone to the holiday, then the holiday can only be applied to schedules having the same time zone. Choose the preferred time zone option:
      - **Unspecified** allows the holiday to be applied to any schedule, regardless of the time zone.
      - **Create for All Time Zones** allows the holiday to be applied to all enabled time zones in a schedule.
      - **Create for Specific Zones** allows the holiday to be applied to the selected time zones.

   e. Choose the queue(s) to apply the holiday to.

   f. Choose the company mailbox(es) to apply the holiday to.



g. Each day of the week can have different schedule settings. Choose the day that best resembles what the schedule settings should be for the holiday (e.g., if a company is closed on Saturdays and Sundays, then choose one of these days as they best resemble the settings for a holiday).

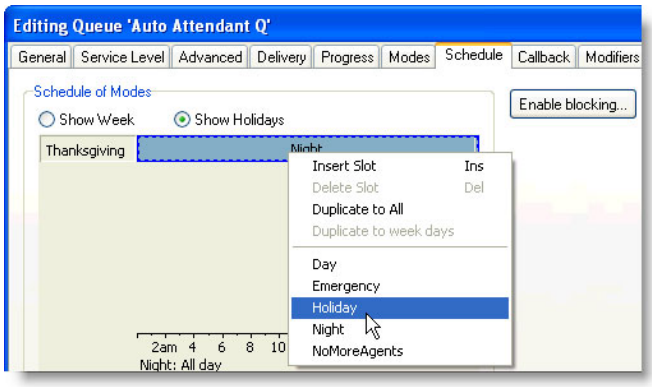
h. Verify the holiday settings, and then click **Finish**.

The new holiday displays in the work area (under the **General** group | **Holidays**).

3. Change each queue's holiday schedule setting to the new holiday.

a. Go to **Queuing** group | **Queues** | double-click the queue to change.

b. Under the **Schedule** tab's calendar section, click **Show Holidays**.



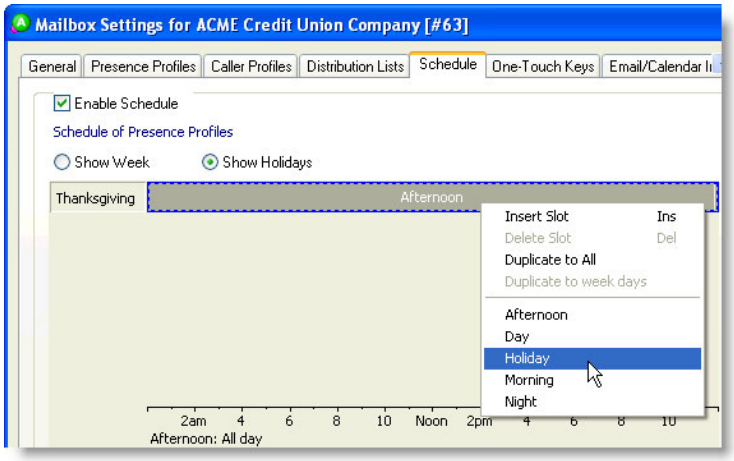
c. Right-click the holiday, and then select **Holiday** from the menu.

Important! Repeat these steps for each queue chosen for this holiday.

4. Change the voicemail mailbox's holiday schedule greeting to the new holiday.

a. Go to the **Voice Messaging** group | **Mailboxes** | double-click the queue to change.

b. Under the **Schedule** tab's calendar section, click **Show Holidays**.

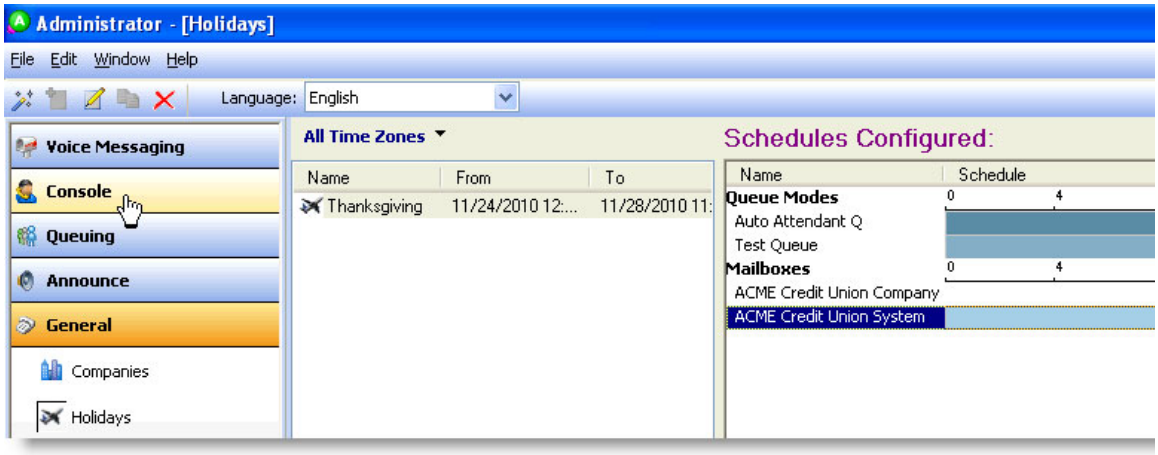


c. Right-click the holiday, and then select **Holiday** from the menu.

Important! Repeat these steps for each mailbox chosen for this holiday.

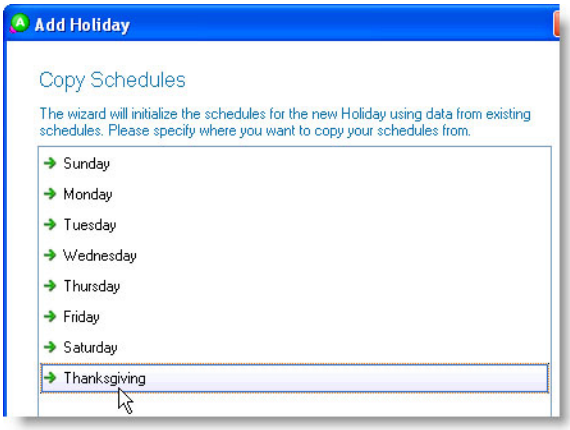
5. Ensure that the schedules are configured for the new holiday.

   a. Go to the **General** group | **Holidays**.



   b. In the **Schedules Configured** section, ensure that all the queue and mailbox schedules are set to **Holiday**. If not, go to the incorrect schedule and set it to **Holiday**.

6. When creating a second holiday, repeat step 2 and choose the first holiday to copy its mode settings (described in step g).



7. Double-click the holiday to make any edits (e.g., change the dates and so forth).
8. If preferred, create custom announcements/greetings for each holiday.

Agent Login Classes

Agent login classes are used to segment agents into skill sets and deliver calls in the most appropriate manner for a business. This process is known as skills-based routing, and UCB uses a mixture of queues and agent login classes to accomplish this.

The following lists some of the tenants of the agent login classes:

- Agents do not log into queues—they log into agent login classes.
- Agent login classes can take delivery from multiple queues of differing media types.
- Queue call delivery to agent login classes can be manipulated by delays and priorities.

Delay

In a skills-based routing environment, agents are delivered calls based on their skill sets. These skill sets determine which agents are able to handle queue calls in the most proficient way and customer-friendly manner. This process often means immediately delivering calls to the strongest agents (primary agents) and delaying delivery to the weaker agents (backup or overflow agents). This delay gives primary agents a chance to take queue calls first; therefore improving the customer experience.

Class ⇩ / Queue ⇨	Product Sales	Product Support
Sales Agents	0 second delay	30 second delay
Support Agents	30 second delay	0 second delay

In the previous scenario, even though all calls are equally important, we are allowing both of the following:

- Sales agents immediately take calls from the Product Sales queue, and if necessary, can take product support calls after 30 seconds.
- Support agents immediately take calls from the Product Support queue, and if necessary, can take product sales calls after 30 seconds.

Priority

Priority allows for choosing which queue calls are most important to the agents in a given agent login class. Queues can be prioritized on a 0–9 scale, with 0 equating to no delivery and 9 being the most important queue/call in the class. A queue call with a delivery priority of 6 is delivered before a different queue call that came in at the same time with a priority of 5.

UCB configures the default priority for every queue as a level 5. The default priority allows the company to grow and build queues in the future that are more important (a level greater than 5) and queues that are less important (a level less than 5).

Class ⇩ / Queue ⇨	Product Sales	Product Support
Sales Agents	6 priority	5 priority
Support Agents	5 priority	6 priority

In the above scenario, even though we are immediately delivering calls, we are choosing which calls are more important and delivering them to agents first.

Combine Delay with Priority

Unified Communications for Business allows for combining the delay with priority, which gives optimum flexibility in the way calls are delivered. When both are combined, queue calls can be both delayed and prioritized at the same time.

In agent login classes, new queues are added to the Delivery tab with a setting of 0–5. The first number (in this case, 0) represents the delay, and the second number (in this case, 5) represents the priority. The following table provides examples of how delays can be configured with different priority levels.

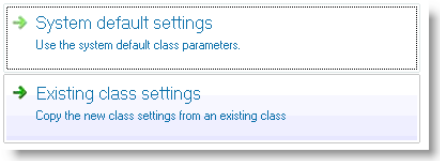
Class ⇩ / Queue ⇨	Product Sales	Product Support
Sales Agents	0–6	30–5
Support Agents	30–5	0–6

In the above scenario, if a call comes into the Product Sales queue, it is delivered to the sales agents immediately at a level 6 priority. If no sales agents are available, the call is routed to the support agents after a delay of 30 seconds. If a sales agent becomes available at the 30 second mark, they get the call first because they have a higher priority.

Create an Agent Login Class

1. Create an agent login class under the **Queuing** group | **Agent Login Classes** | **Add Wizard** icon from the toolbar.
2. Name the class.

Best Practice: Try not to name classes the same name as queues. Both are easier to distinguish when they do not share the same name.



3. Click either:
   - **System Default Settings** = Creates a new generic class with nothing preconfigured.
   - **Existing Class Settings** = Creates the new class based on a class that has been previously configured.
4. Click either:
   - **Select Queues** = When agents are taking calls from the same queues throughout the entire day. This is the most common usage of agent login classes.
   - **Use an Existing Delivery Pattern** = When agents need to take calls from different queues throughout the day based on a pre-configured schedule. The **Delivery Patterns** need to be preconfigured for this to work.

     Example: Night agents take calls from standard queues for the first-half of their shift, and take over responsibility for every queue in the company for the second-half of their shift. Delivery patterns allow you to configure this in one agent login class, alleviating the need to use two separate classes for one group of agents.
5. Confirm the settings, and then click **Finish**.

Edit the Agent Login Class

Edit an agent login class under the **Queuing** group | **Agent Login Classes** | double-click the agent login class.

General Tab

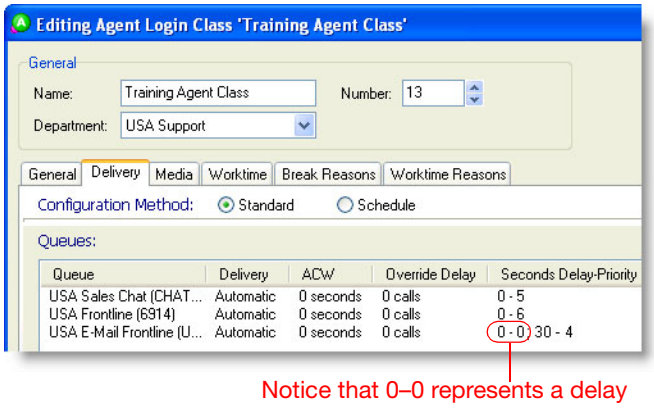
➢ Click the **General** tab to select **Auto Logout Action**. This action takes place when an agent does not answer a queue call that has been delivered to their extension.

Action	Pros	Cons
Logout	Helps reporting when agents forget to logout at the end of their shift.	May look as if the agent was not at work for their entire shift time.
Break	A more accurate setting for when agents take their breaks and forget to go into break time.	• Reporting may look like the agent took extended breaks. • End of shift shows the breaks instead of logging out the agent.
Worktime	Does not reflect as either a break or as time logged into the system.	May take the agent out of their allotted worktime and deliver more queue calls to someone who is not there (depends on the worktime settings).

Help: Press **F1** for more information on any of these topics.

Delivery Tab

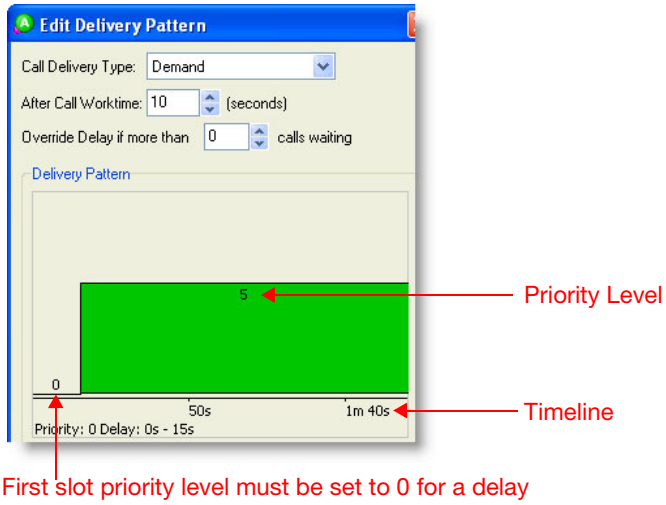
➢ Click the **Delivery** tab to set up which queues or delivery patterns this class takes delivery from.



Insert a Delay

For a delayed delivery, the first slot in the delivery pattern must have a priority of 0.

1. Under the **Delivery** tab, select a queue and then click **Edit**.
2. Press the **Insert** key on your keyboard.
3. Click-and-drag the top border of the left-hand slot down to **0**.

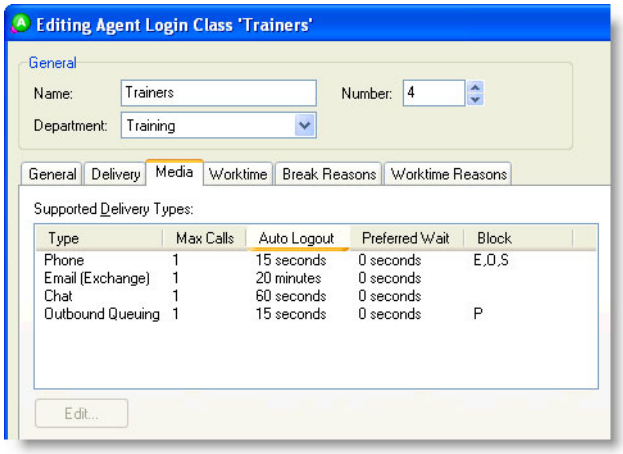


Other Settings

Item	Description
After Call Worktime (ACW)	Puts the agent into worktime after hanging up a call. Each queue can have a different ACW.
Override Delay if More than X Calls Waiting	This option was formerly known as the *Avalanche* mode. If X number of calls are waiting in the queue, this setting overrides any delay time that is configured in this window.

Media Tab

➢ Click the **Media** tab to set up maximum calls allowed, auto-logout, and preferred agent wait times, and call type blocking.

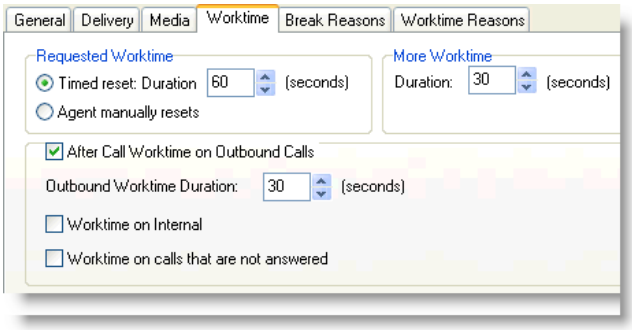


Item	Description
Max Calls	Set up the maximum number of calls for a media type that an agent is allowed to take (e.g., an agent might take three chat calls at one time, but only one phone call at a time).
Auto Logout Time	Set up the amount of time before the Auto Logout Action (see the **General** tab) takes place. This time can be configured differently for each media type.
Preferred Wait Time	Set up how long the system is to wait for delivery to a preferred agent as configured in a query.
Block Calls	Set up so certain other call types are blocked when an agent is on a call (e.g., when an agent is on a phone call, do not deliver a chat call at the same time).

Worktime Tab

Worktime is what agents go into when they are on a work-related task and need to remove themselves from taking queue calls. Worktime is tracked separately from breaks in most reports.

➢ Click the **Worktime** tab to configure the requested worktime settings, after call worktime settings on outbound calls, and other minor worktime settings.



Requested and More Worktime

In Desktop, agents can click the:

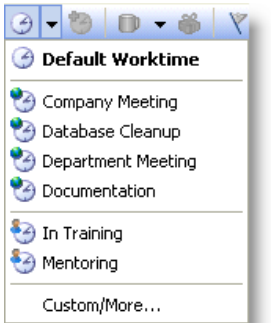
Worktime button to go into requested worktime

More Worktime button to add additional worktime

Item	Description
Timed Reset: Duration	Sets a pre-determined amount of worktime that counts down to 0. When the timer reaches 0, the agent is enabled to take queue calls.
More Worktime: Duration	Adds additional worktime to the Timed Reset setting when agents click the **More Worktime** button within Desktop.
Agent Manually Resets	There is no pre-determined amount of worktime—it is infinite. The timer starts at 0 and counts upward. The agent must take themselves out of worktime when they are done, and then the More Worktime button is unavailable.
After Call Worktime on Outbound Calls	Determines if the agents in this login class should have automatic worktime after outbound calls

Break Reasons and Worktime Reasons Tabs

These two tabs are used for setting up specific reasons for agents to go into breaks and into worktime. Reasons display in Desktop and allow supervisors to have a better grasp of what their staff is doing at any given time. Reasons also display in various reports helping managers to account for agent time.



Worktime Reasons

Item	Description
Break Reasons	Used when agents need to remove themselves from taking queue calls for non-work related functions. These breaks are configured in Administrator under the **Queuing** group | **Break/ Worktime Reasons**.
Worktime Reasons	Used when agents need to remove themselves from taking queue calls for work-related functions. These reasons are configured in Administrator under the **Queuing** group | **Break/ Worktime Reasons**.

Definitions of Worktime

Item	Description
After Call Worktime (ACW)	Automatically places agent into worktime after hanging up a queue call.
Requested Worktime	Agents manually places themselves into worktime (not related to any type of call).
Timed Reset	The requested worktime starts at a specific number of seconds and counts downward to 0, at which point the agent can take queue calls again.
Agent Manually Resets	The requested worktime starts at 0 and counts upward. The agent must take themselves out of worktime.
Personal Worktime Reasons	Reasons that the agent can configure in Desktop under the **File** menu | **Preferences** | **Break/Worktime Reasons**. ***Note:*** The agent must have the security rights. to set up this option

Agents

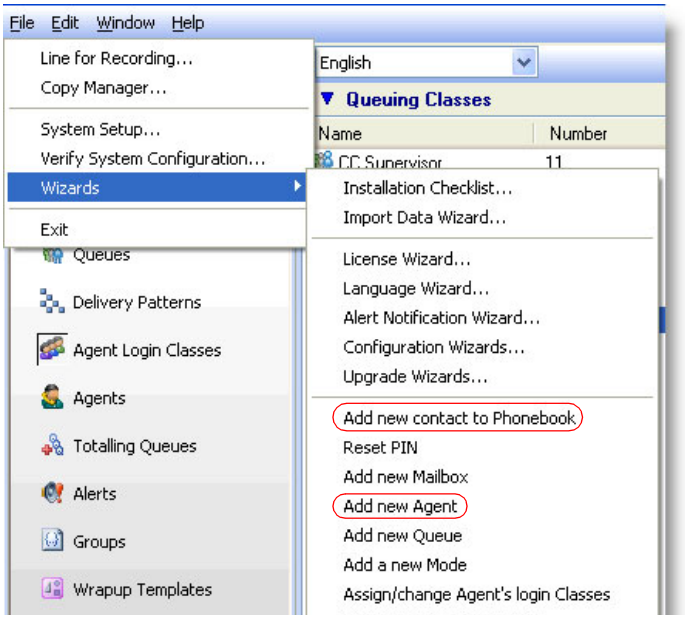
Add Agents to the Phonebook

The term *agents* is used rather loosely in UCB terminology. Agents are generally thought of as employees who take/make queue calls through the UCB system. However, other job functions in a business also need to be agents—specifically contact center supervisors and managers. So who should be configured as an agent? Anybody who:

- Needs to take/make queue calls
- Needs to view detailed statistics of queues or agents
- Is responsible for remotely logging employees in/out or putting them on breaks or worktime
- Wants to monitor other employees' phone calls

Add Agents

The methods described in this section can be found in Administrator by going to the **File** menu and selecting **Wizards**.



The image above displays the two primary ways of adding an agent to the system:

- Add a new contact to the Phonebook
- Add a new agent

Add a New Contact to the Phonebook

➢ Add a new contact under the **General** group | **Phonebook** | **Add Wizard** icon from the toolbar. Unified Communications for Business recommends to use this method to add anybody to the system, whether or not they are an agent. The wizard is very comprehensive and asks for the following information:

- Contact's name.
- Which company and department they should belong to.
- Any relevant phone, fax, and pager numbers, as well as an email address.
- Which security class the contact should belong to.
- Security classes determine what rights the contact should have to the various modules and licenses contained within the UCB system.
- If the contact should have a mailbox in the system, and if so, which mailbox class should they get.
- The primary purpose of a mailbox class is to determine how many messages a user can keep, and how long they can keep them.
- Is the contact an Agent, and if so, which agent login class should be their default.

Note: Based on the previous configuration, the wizard may contain other options to choose from than those listed in this section.

Add a New Agent

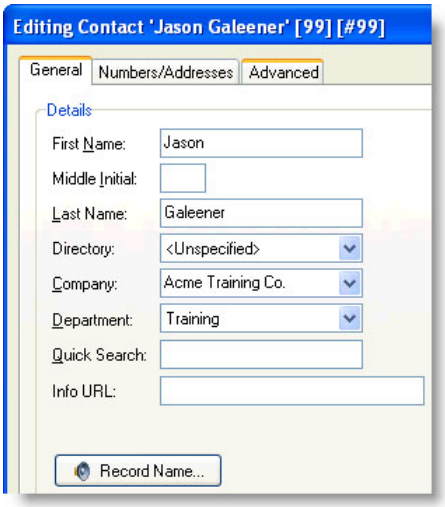
➢ Add a new agent under the **Queuing** group | **Agents** | **Add Wizard** icon from the toolbar. This method is slightly less comprehensive and is used in the following instances:

- When the person being added is already in the phonebook.
- When agents need to have specified User IDs different from their primary extension (usually found when agents hotseat or work in multiple shifts).
- When agents do not need to have mailboxes (these can always be added later).

Edit a Phonebook Entry

When a new contact has been added to the system (whether or not that contact is an agent), they can be found in the **Phonebook** (under the **General** group | **Phonebook**). Use the Phonebook to edit names, departments, and phone numbers, or to remove users from the name directory/dynamic presence pages.

➢ Double-click a **Phonebook** entry to edit it.



Should an agent be deleted from the Phonebook when they quit?

Not if there is a need to report on that agent after they have left. When agents are deleted from the Phonebook, they no longer appear in any queue/agent related reports. If future reporting is necessary, then the agents name can be substituted with a placeholder (i.e., Available Agent) that can be used temporarily until the agent can be replaced.

Notes:

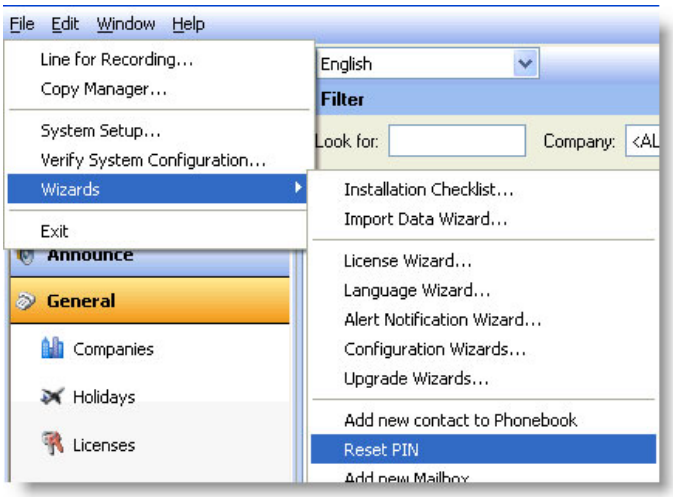
- Technically, the problem is with deleting the agents' User ID; not deleting the agent from the Phonebook. Although agents can be deleted from **Queuing** group | **Agents** without being deleted from the Phonebook, reporting on them still remains a problem.
- Unified Communications for Business's Custom Reporting license alleviates this problem as all data is retrievable regardless of whether or not an agent is delete.

Edit Agent Settings

1. Edit individual agent settings under the **Queuing** group | **Agents** | double-click the agent.
2. Make changes to the settings, such as:
   - Change the agents **User ID**.
   - Configure the **Default Agent Login Class**.
   - Change the **Login Type**, which is how the system should handle an agent logging into multiple computers at the same time. Also allows for locking an agent out of the system.
   - Choose which **Media Types** the agent is allowed to work with.

Reset a PIN

1. From the **File** menu, select **Wizards** and then **Reset PIN**.



2. Select which company the user resides in.
3. Choose which users need their PIN reset.
4. Click whether or not to force the selected users to change their PIN.
5. Click **Finish**.

Reminder: The default PINs are always set to **2222**.

Announce

Line for Recording

The **Line for Recording** tells the system where all audio is recorded from.

1. From the **File** menu, select **Line for Recording**.
2. Type an extension or a home or cell phone number if working from home.

Best Practice: Recording through the phone provides better quality then through the sound card on the computer.

Announcements

Announcements are used in queue modes or as options within Auto Attendants.

➢ Set up announcements under the **Announce** group | **Announcements**.

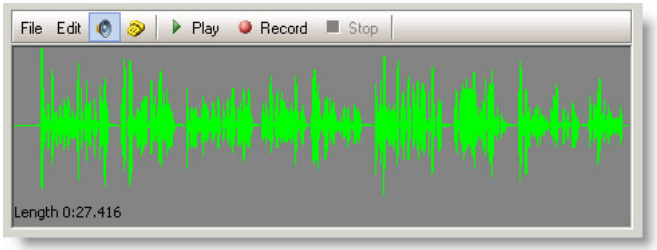
Announcements have two major features that need special attention:

- **Audio Recording** = Important for providing callers with accurate information.
- **Configuring the Next Action** = Important for telling the system where to route the call *after* the audio recording has played.

Recording Audio

This section provides information on recording audio, and can be used in all areas of UCB software that contain this feature.

1. Double-click the announcement to be recorded.
2. Click the **Use Telephone** icon to choose the phone as the microphone.
3. Click **Record**, and record the announcement.
4. Click **Stop**.



Item	Description
File menu	Import or export audio.
Edit menu	Cut, copy, and paste features, insert silence, change sample rate, and so on.
Use Sound Card	Use the internal sound card and speakers of the computer to record and play audio.
Use Phone	Use the phone for recording and play back. ***Note:*** Recording is best when done through a phone.
Play	Play back the entire audio clip or only the highlighted area.
Record	Click to record. Overwrites any previously-recorded audio.
Stop	Stop recording or stop playback.

Next Action

The Next Action may be the most important setting within an announcement, as it tells the system how/where to route the call *after* the recorded audio has played.

➢ From the **Next Action** list, select the preferred action.

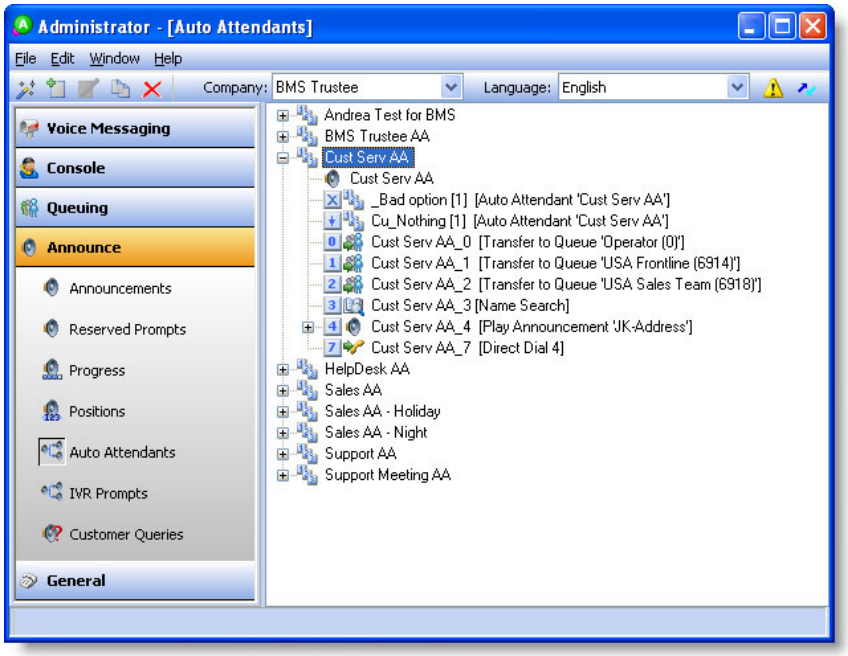
Item	Description
Transfer	Plays the announcement, and then transfers the call to an internal extension or outside phone number. Calls concluded at this point display as *Abandoned* in Reports.
Hang Up	Plays the announcement first, and then hangs up. Calls concluded at this point display as *Hang Up* in Reports.
Queue	Transfers the call to a specific queue.
Auto Attendant	The announcement leads directly to the chosen Auto Attendant.
Query	Plays a pre-recorded query to callers. ***Example:*** "Please enter your account number now."
Play Announcement	The announcement leads directly to another announcement.
Callback	The announcement leads to a queue, and callback is initiated immediately.
Level Up	Sends the call back to the queue it came from and delivers it to the next available agent.

Help: Press **F1** for more information on any of these topics.

Auto Attendants

Auto Attendants give the callers options to route the call themselves. Calls can be routed to queues, transferred to internal extensions or outside phone numbers, queried, played announcements, and more.

Best Practice: New Auto Attendants are best created using the wizard.



Create a New Auto Attendant

1. Create a new Auto Attendant under the **Announce** group | **Auto Attendants** | **Add Wizard** icon from the toolbar.
2. Name the new Auto Attendant.
3. Click the preferred level(s), and then set up the Auto Attendant action for each level.

Item	Description
Transfer	Routes the call to an internal extension or outside phone number.
Hang Up	Hangs up on the caller (helps some PBXs conclude the call).
Transfer to Queue	Sends the call to a queue in the UCB system.
Auto Attendant	Routes the call to a nested/secondary Auto Attendant, or can route the call back to this Auto Attendant.
Query	Asks the caller to enter data into their phone that the agent can use later. ***Example:*** "If you are a Platinum member, please press 4 and have your account number ready."
Direct Dial	Use when the only purpose for this key is to transfer to extensions in that number range (e.g., if the extensions are in the 7000 range and there is no other purpose for the number 7 in the auto attendant, then set the 7 key to Direct Dial).
Play Announcement	Plays a pre-recorded announcement. The next action configured in the announcement is critical to call flow.
Leave Message	Routes the call to a pre-existing mailbox.

Item	Description
Callback	Allows the caller to leave a callback so they can be called back during the next standard business day/hours.
Level Up	Sends the call back to the queue that it came from and delivers it to the next available agent. Does *not* play the Auto Attendant again. If there is a nested Auto Attendant, the system sends the call back to the Auto Attendant that it came from.
Name Search	Plays the name directory to the callers. Options can be configured under **File** menu | **System Setup** | **Dial by Name**.

4. Record the audio prompts.
   - The **Introduction** of an auto attendant should be reserved for just the introduction, and should not have each of the individual option recordings.

     Example: "Thank you for calling the XYZ Travel Agency. Your call may be monitored for quality assurance. If you know your parties' extension, you can dial it at any time."

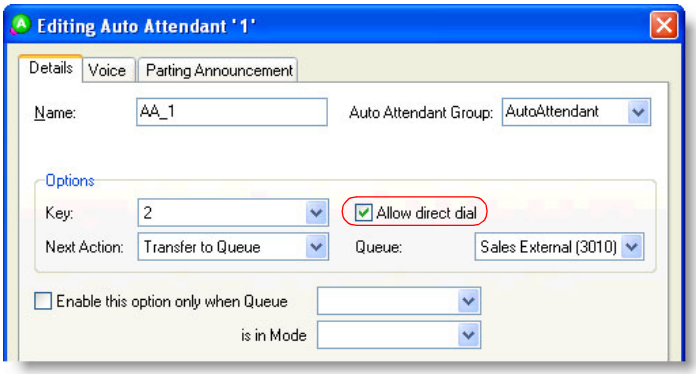
   - Audio does *not* have to be recorded for all prompts. Many choose to leave the *Transfer to Operator* and *Direct Dial* options un-recorded.

Edit an Auto Attendant

After creating an Auto Attendant, Unified Communications for Business recommends to go back through each option and confirm that it is configured correctly. Also, Auto Attendant options frequently change.

1. Edit an Auto Attendant by double-clicking the **Auto Attendant**'s option in the window.

Important! If an Auto Attendant key is used for one of the actions listed above *and* needs to be used as a direct dial as well, double-click that option and enable the **Allow Direct Dial** option.



2. The **Introduction** often needs to be re-recorded, as the introduction is not used for recording all announcements in the Auto Attendant. The Introduction is also where the **No Option Delay** timer is set.

Progress Announcements

Progress Announcements are what callers hear while they are waiting in queue for the next available agent.

Create a New Progress Announcement

Progress Announcements are comprised of an Introduction ("Intro"), Position in Queue, and an Outro. Because these are played as one long audio file, it sounds as if they are recorded together.

	Intro	Position in Queue	Outro
Level 1	*"Thank you for calling Company XYZ…*	*…you are third in line…*	*…a representative will attend to your call as soon as they can."*
Level 2	*"All representatives are currently attending to other calls…*	*…you are second in line…*	*…please hold for the next available agent."*

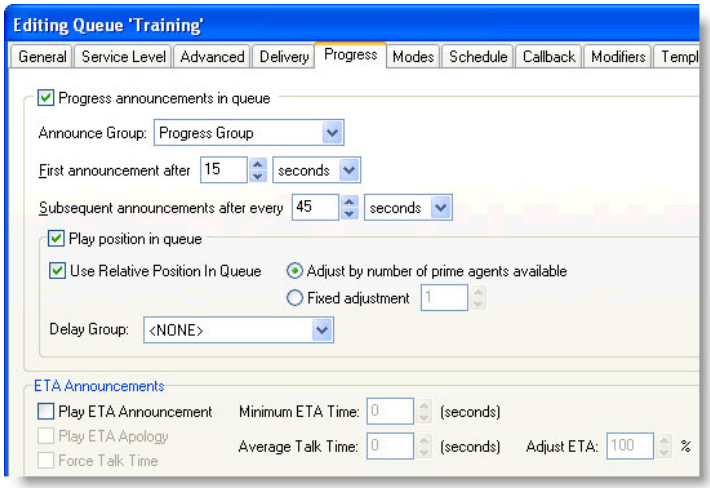
1. Create a new progress announcement under the **Announce** group | **Progress** | **Add Wizard** icon from the toolbar.
2. Name the new progress announcement.
3. Click the number of **Group Levels**.

   Note: The wizard maxes out at five levels, but more levels can be added later if needed.

4. Select either:
   - **No, Use Generic Announcements**
   - **Yes, Record the Announcements** = If yes, click the number of **Positions** (in queue) to record.
5. Record all audio.

Enable the Progress Announcement in the Queue(s)

1. After creating a progress announcement using the wizard, turn it on in each queue under the **Queuing** group | **Queues** | double-click the queue | **Progress** tab.



2. Enable the progress announcement by turning on **Progress Announcements in Queue**.
3. Click which **Announce** group (progress announcement) to play.
4. Set up the **First Announcement** timer and **Subsequent Announcement** timers.
5. Enable **Play Position in Queue** and any other options.

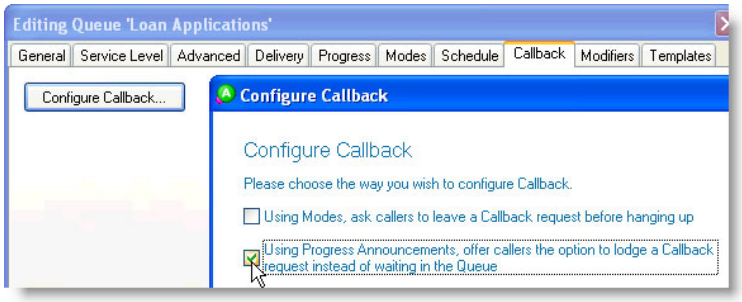
   Caution: Be careful if using the Estimated Time to Answer (ETA) option, because the skills-based routing can seriously affect the timing of when a call is answered.

Use Callback within Progress Announcements

The licensed Callback feature allows a caller in a queue to leave a phone number (and voice message if necessary) and request to be called back by an agent rather than wait in the queue.

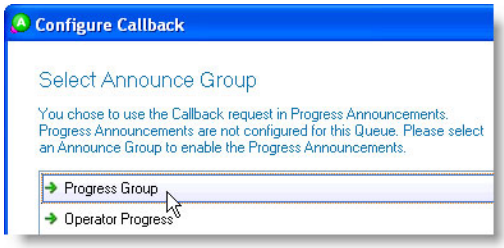
1. Set up a Queue Callback

   a. Go to the **Queuing** group | **Queues** | double-click the queue | **Callback** tab | **Configure Callback** button.

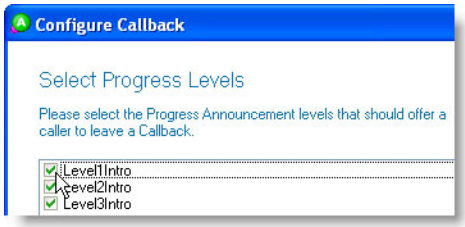


   b. Clear the **Using Modes, Ask Callers to Leave a Callback Request Before Hanging Up** option.

   c. Click to enable the **Using Progress Announcements, Offer Callers the Option to Lodge a Callback Request Instead of Waiting in the Queue** option.

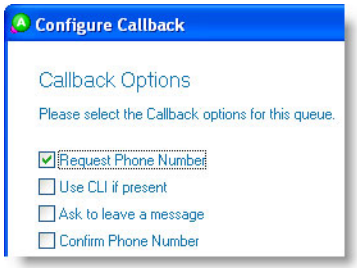


   d. Click the announce group to configure and enable the progress announcements.



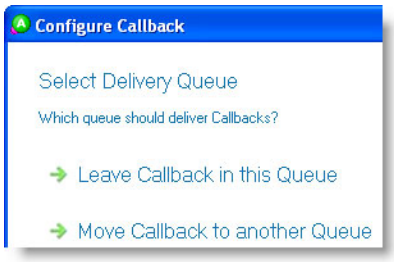
   e. Click the progress announcement level(s) of when to make the callback available to a caller.

   Most progress announcements have three different levels that play periodically to callers to try and keep the callers on hold until an agent can take the call. Clicking all three levels enables callers to request a callback as soon as the Level1Intro plays (and on all subsequent intros).



   f. Click the preferred callback options for the queue:
   - **Request Phone Number** = Requests callers in the queue to enter their phone number.
   - **Use CLI if Present** = Instructs the system to capture the calling line ID of a call, if available.

- **Ask to Leave a Message** = Requests callers in the queue to record a message relating to their call. This option allows the agent returning the call to understand the customer's requirements. The time defaults to 1 minute per message.
- **Confirm Phone Number** = If the **Request Phone Number** option is chosen, this option enables callers to confirm their phone number. The system repeats the caller's number and then asks the caller to confirm the number.



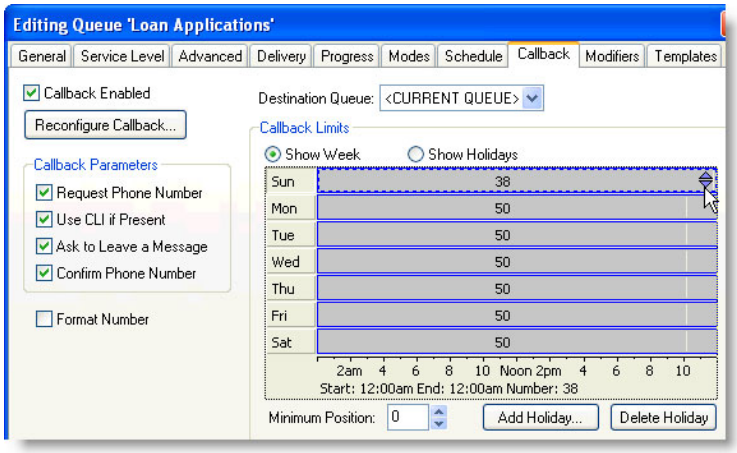
g. Choose either to **Leave Callbacks in this Queue** or **Move Callback to Another Queue** to specify how the queue is to deliver callbacks.

h. If **Move Callback to Another Queue** was chosen, click the queue where the callback is to be moved.

i. Click either:
- **Create a New Mailbox** if a mailbox has not been created for this queue in the past.
- **Select an Existing Mailbox** if a mailbox has already been created for this queue.

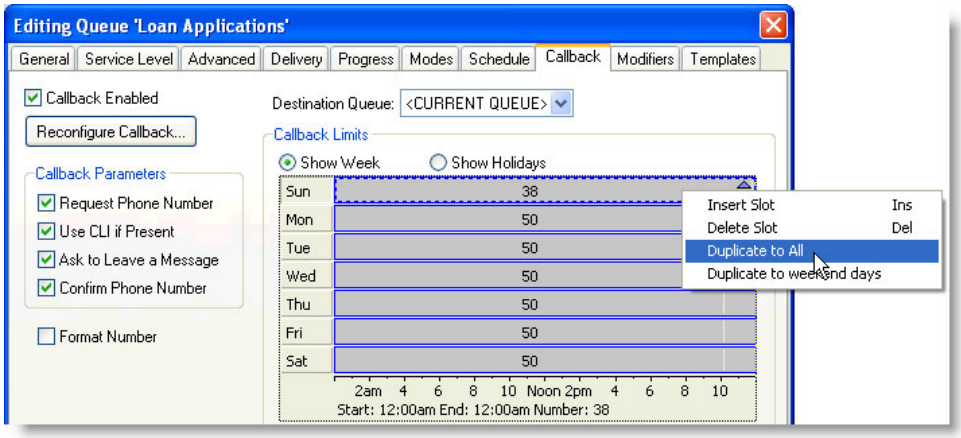
j. Verify the settings, and then click **Finish** to complete the callback.

The new callback's options display in the **Callback** tab in the open Editing Queue window.



2. Set up the callback limits for each day of the week.

a. Under the **Callback Limits** section, click the arrows on the right of the **Sunday** timeslot to adjust the number of callbacks allowed during that slot.



b. Right-click within the **Sunday** timeslot, and then select **Duplicate to All** to copy this limit to all the days of the week.

Console Administration

Operator Queues

Create a Operator Queue

Working with Console queues is similar to working with Contact Center queues. This section provides the steps for creating a new Console queue.

1. Add a new queue under the **Console** group | **Operator Queues** | **Add Wizard** icon from the toolbar.
2. Select which PBX to add the new queue to.
3. In the **Queue** field, the unique identifier is the extension for this queue. This generally needs to be preconfigured in the PBX for the queue to work.

4. Use **Tenant Number** if there are multiple companies working from the same system but want to be billed separately.
5. A **System Queue** (NEC PBXs only) routes calls to selected extensions upon a system failover (could be called an *Operator System Queue*). These calls are routed directly from the PBX and not by the UCB server. Different system queues can be used to route calls to varying extensions upon failover.
6. Click:
   - **System Default Settings** if creating a new queue that is not based off of another queue.
   - **Existing Queue Settings** to create a new queue based off of the settings from a pre-existing queue.
7. Click **Finish**.

Edit an Operator Queue Mode

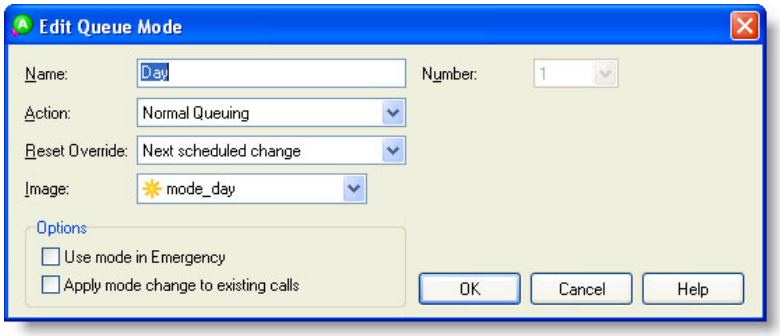
Use queue modes to specify the way calls in a queue are handled by the system. In its most basic form, a mode is an action that acts on every call as it comes into the queue.

When creating a new Console queue, the following five modes are automatically created:

- Day
- Night
- Unattended
- Holiday
- Emergency

Each of these modes associate with an action. Familiarize yourself with each of these actions.

1. Double-click the Console queue to edit.
2. Under the **Modes** tab, double-click the mode to edit.



3. Select the **Action** mode.

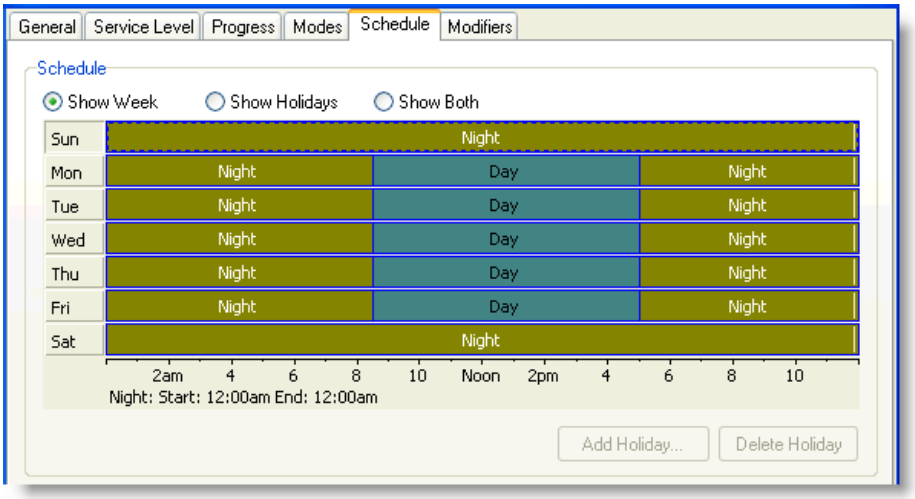
Action Option	Description
Normal Queuing	Routes calls to the next available operator.
Auto Attendant	Routes calls to a pre-created auto attendant.
Play Announcement	Routes calls to an announcement (pay close attention to the Next Action of the announcement to see where the call goes from there).
Hang Up	To your callers, this action is exactly the same as the Play Announcement action, but appears as a Hang Up call-type in your reporting as opposed to an Abandoned call.
Transfer Call	Routes the call to an internal extension or outside phone number (displays as a Transfer call-type in the reporting).
Busy Tone	The caller hears a busy tone instead of being delivered to the queue (does not appear in the reporting).
Transfer to Mailbox	Transfers the caller to a voice messaging mailbox and to a chosen profile. ***Note:*** This option only appears in the list if the queue has a mailbox associated with it in the **General** tab under **Miscellaneous** | **Mailbox Owner**.
Forward No Answer	Select this action to forward the call to a different location after a specified amount of time of waiting in the queue.

4. From the **Reset Override** list, select how you want that mode to transition to the next mode configured in the schedule if a supervisor overrides the mode of a queue:
   - **Next Scheduled Change** to have the mode changes follow the schedule of the queue without further input from a supervisor.
   - **Manual Change** to force the supervisor to change the mode by hand. Generally used for the Emergency mode.
5. Click the **Apply Mode Change to Existing Calls** option to take calls waiting in queue and transition them to the current mode.

Edit the Operator Queue Schedule

The schedule determines when a queue is open or closed based on the standard work week. The Schedule tab can also be used to choose which mode your holidays should be in when they occur.

1. Edit a queue's schedule under the **Console** group | **Operator Queues** | double-click the queue.



2. Under the **Schedule** tab's calendar section, right-click to:
   - Insert a slot. Slots are used to divide a day so you can have the queue open and closed at particular times. When entering a new slot, drag-and-drop its borders to adjust the time.

   Note: Press the **Shift** key and use the arrow keys to adjust these settings.

   - Change the mode for any given day/slot.
   - Copy the schedule to the other days in the week.
3. Click the **Show Holidays** option to configure modes for pre-entered holidays. Holidays can be entered into the system under **Holidays** in the **General** group.

Operator Login Classes

Operator Login Classes intelligently route calls to an operator, and are preconfigured for the following delivery types:

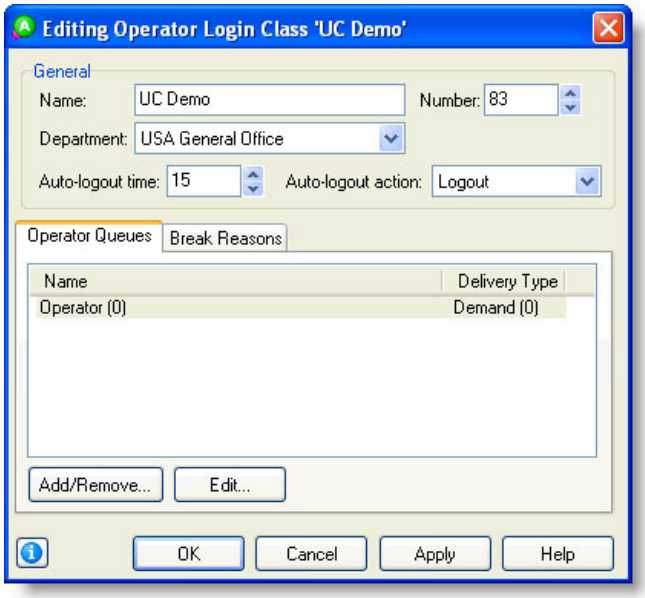
- Automatic delivery (no delay) = Delivers the call to the operator immediately upon entering the queue.
- Automatic delivery (with delay) = Delivers the call to the operator after a pre-determined amount of time. Generally used for backup operators.
- Demand delivery = The call is only delivered to the operator when he/she demands it. This setting is appropriate when the operator has responsibilities other than answering the phone (e.g., greeting customers, handling deliveries, and so on).

Create an Operator Login Class

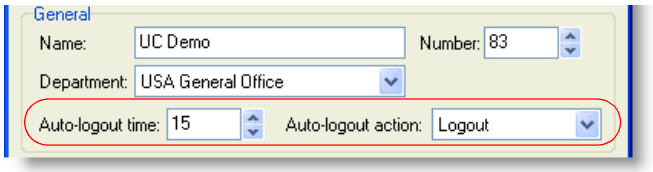
1. Create a new Operator Login Class under the **Console** group | **Operator Login Classes** | **Add Wizard** icon from the toolbar.
2. Name the class.
3. Click the department that the Operator Login Class should be a part of.
4. Click if delivery should be **Automatic** or **Demand**.
5. Click either:
   - **System Default Settings** to create a new generic class that can be customized.
   - **Existing Class Settings** to create a new class based on a pre-existing class, and then click the class to use as a template.
6. Select the queue(s) to be delivered to the Operator Login Class.
7. Confirm the settings, and then click **Finish**.

Edit an Operator Login Class

➢ Double-click the Operator Login Class to edit.

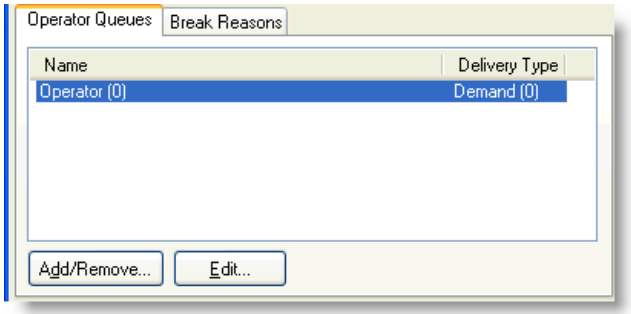


Auto-Logout Options



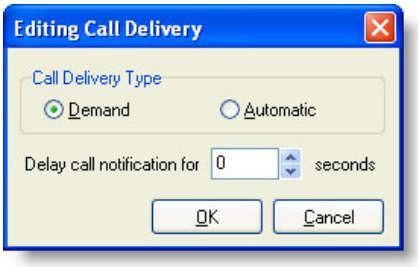
- **Auto-logout Time =** Specify how long a call rings at an operator's extension before the call returns back to the queue and the operator is logged out.
- **Auto-logout Action** = Generally set to **Logout** so that the calls do not repeatedly transfer to an operator that is not at his/her desk.

Operator Queues Tab



Click the:

- **Add/Remove** button to add new queues to/remove queues from the Operator Login Class delivery.
- **Edit** button (or double-click a queue in the list) to edit an Operator Login Class delivery.

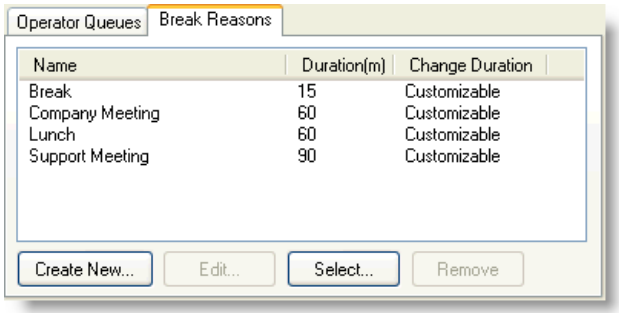


When editing call delivery, an Operator Login Class does not prompt for priorities like a Contact Center Login Class; instead this class prompts as to:

- Whether calls should deliver on **Demand** or **Automatic**.
- If there should be a delay before the notification/delivery.

Break Reasons

Use the **Break Reasons** tab to configure the available breaks for the operators in this class.



Create an Operator

If an operator is:

- New to the system, the optimal way to create a new operator is by using the Phonebook wizard under the **General** group | **Phonebook** | **Add Wizard** icon from the toolbar.
- Already in the system but needs to be specified as an operator, use the **Add Wizard** icon from the toolbar under the **Console** group | **Operators**.

Important! Make sure to choose the correct security class (which is generally called **Operator**) as this gives the operator rights to open the Console application (which the Agent security class does not by default).

Note: If an operator quits and an agent needs to be taken out of the Contact Center to replace the operator, right-click the agent under the **Queuing** group | **Agents** | and convert the agent to an operator. Do not forget to change the agent's Security Class and Agent Login Class before the agent tries to log into the system.

Voice Messaging Administration

Mailboxes

Create a New Mailbox

The procedure in this section describes how to create a mailbox for a contact or queue that already resides in the Phonebook.

Note: A mailbox can also be created when adding a new user to the Phonebook using the wizard.

1. Create a new mailbox under the **Voice Messaging** group | **Mailboxes** | **Add Wizard** icon from the toolbar.
2. Click the user(s) for the new mailbox(es).

   Note: Although creation of multiple mailboxes can occur at the same time, User or Company mailboxes can only be created in one instance of the wizard (not at the same time). The next step provides a description of User and Company mailboxes.

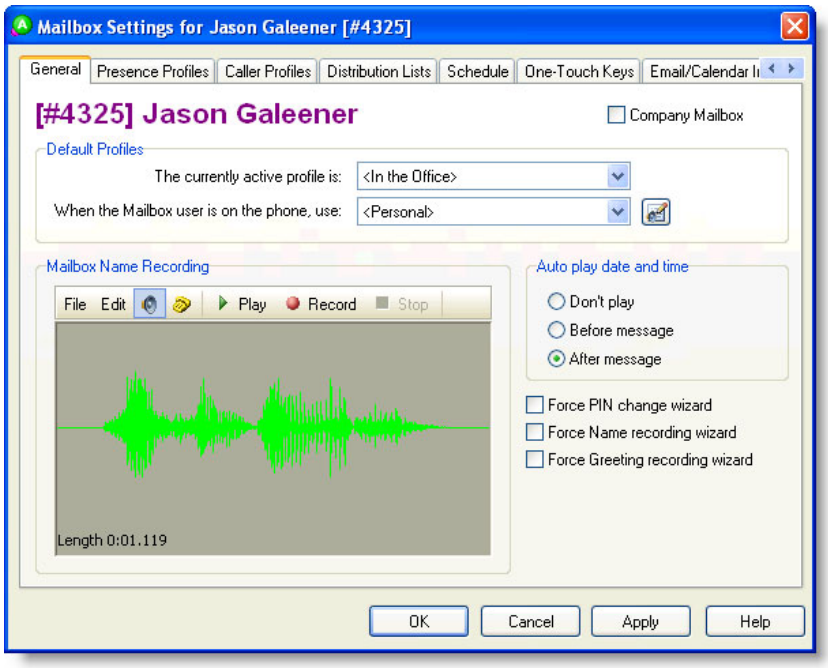
3. Click the mailbox type:
   - **Create User Mailboxes =** Click to create a mailbox for a person. Presence Profiles include options such as:
     - In the Office
     - Out of the Office
     - On Vacation
   - **Create Company Mailboxes =** Click to create a company mailbox for a queue. Presence Profiles include options such as:
     - Day
     - Night
     - Holiday
4. Click **Mailbox Class**.
5. Verify the settings, and then click **Finish**.

Edit a Mailbox

Double-click a mailbox under the **Voice Messaging** group | **Mailboxes** to edit. Users can edit their own mailboxes using the **Mailbox Settings** button from within Desktop, Executive Insight, or Console.

Note: To bulk-edit mailboxes, select the mailboxes and then click the **Edit** icon from the toolbar.

General Tab



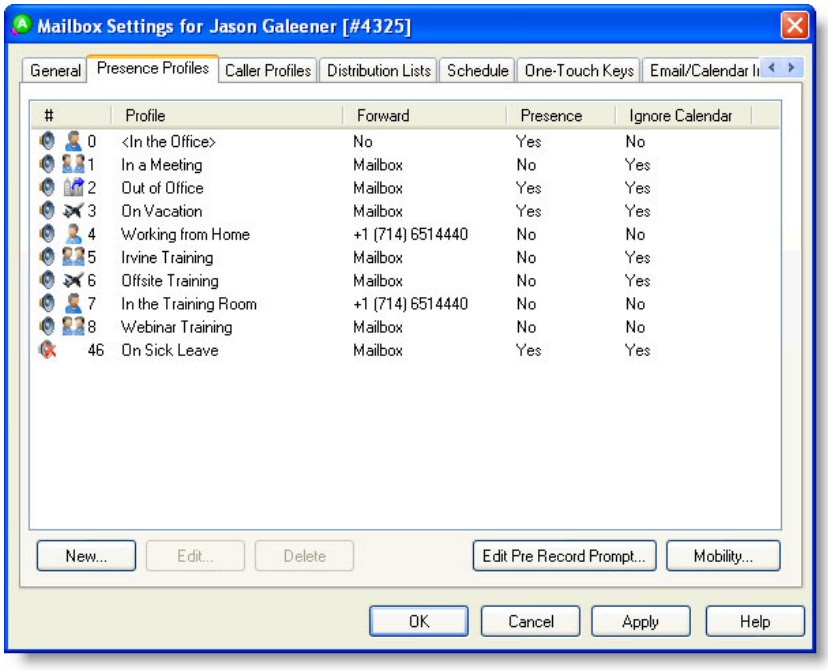
Use the **General** tab to:

- Select a profile for a mailbox from **The Currently Active Profile is** list.
- Select a Busy greeting using the **When the Mailbox User is on the Phone, Use** list.
- Record your **name** in the **Mailbox Name Recording** section (*not* the greeting).

Caution: This is an extremely common place for users to make a mistake, as there is a tendency to record the *greeting* here instead of just the *name*.

Help: Press **F1** for more information on any of these topics.

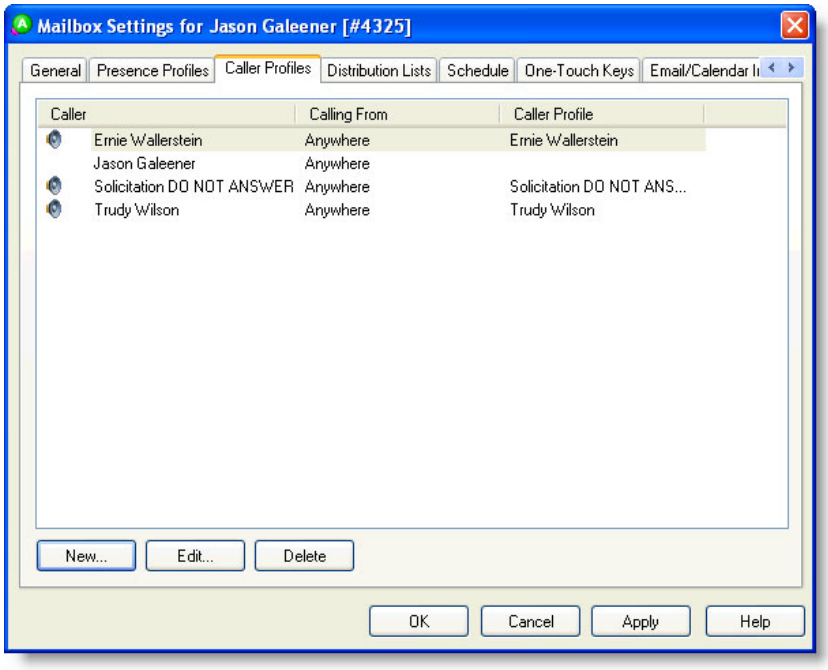
Presence Profiles Tab



Use the **Presence Profiles** tab to:

- Add custom Presence Profiles
- Edit current Presence Profiles
- Edit the Pre-Record Prompt
- Configure the Mobility greetings and one-touch keys

Caller Profiles Tab



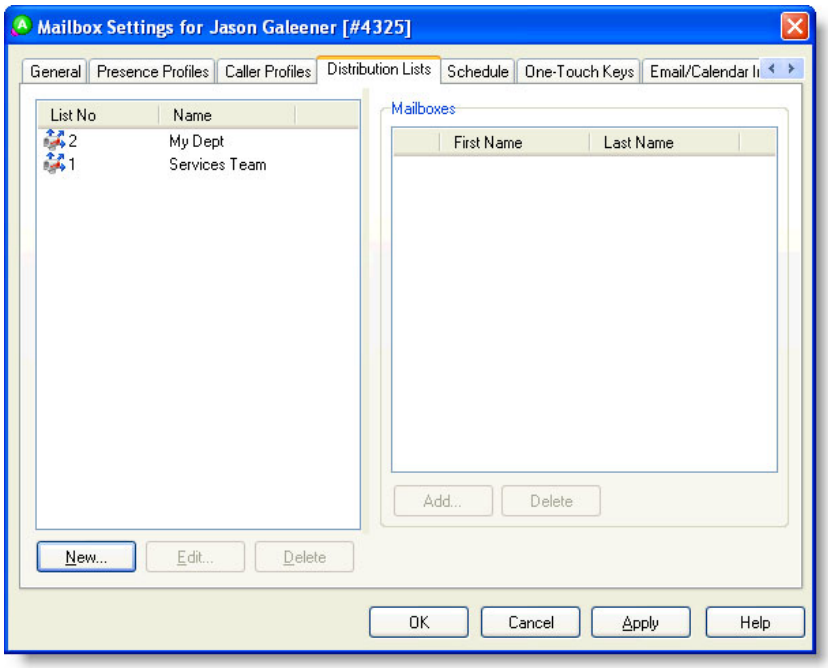
Use the **Caller Profiles** tab to:

- Create custom greetings for VIP or exceptional callers who hear a different greeting than everybody else.
- Create a **New** caller profile.

  Note: The contact has to be in the Phonebook. Individual caller profiles can have their own greetings and one-touch keys that are only available to them.

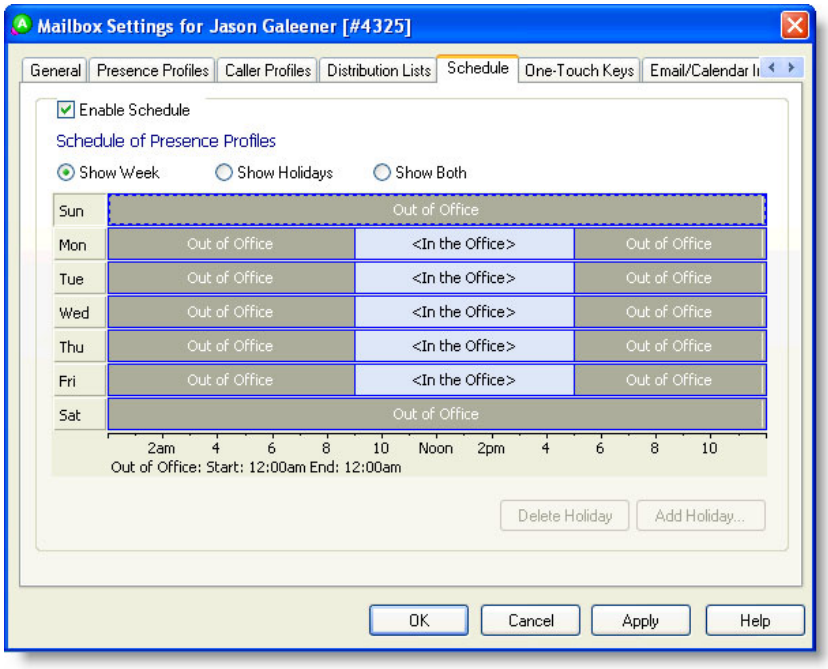
- **Edit** your own caller profile. When calling into the phone system to check messages, the system uses your profile and a special login that automatically:
  a. Logs you in.
  b. Bypasses your PIN entry.
  c. Auto-plays your new messages.
  d. Enables the Toll Saver (the phone rings multiple times if there are no messages).

Distribution Lists Tab



Use the **Distribution Lists** tab to create distribution lists for leaving voicemails to large groups of people at the same time (similar to email distribution lists). Users can create distribution lists numbered 1 through 9, while System Administrators can create company-wide lists numbered 10 through 99.

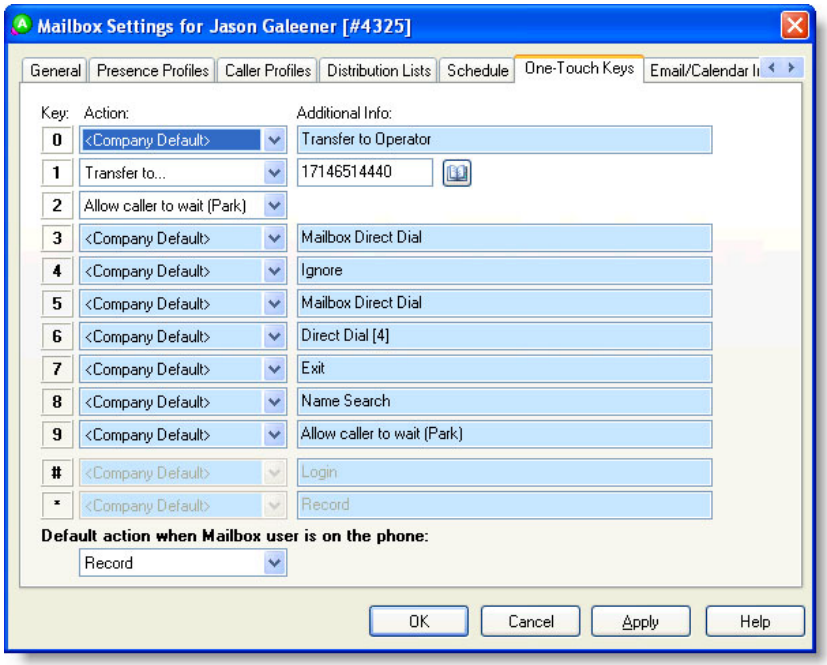
Schedule Tab



Use the **Schedule** tab to change a users presence profile at pre-configured times of day. The schedule can be enabled or disabled using the **Enable Schedule** option. Right-click to insert slots in the schedule, and then right-click again to change the profile selection.

Note: Holidays can be configured from here as well if the Administrator has already added them to the system (in Administrator, go under the **General** group | **Holidays**).

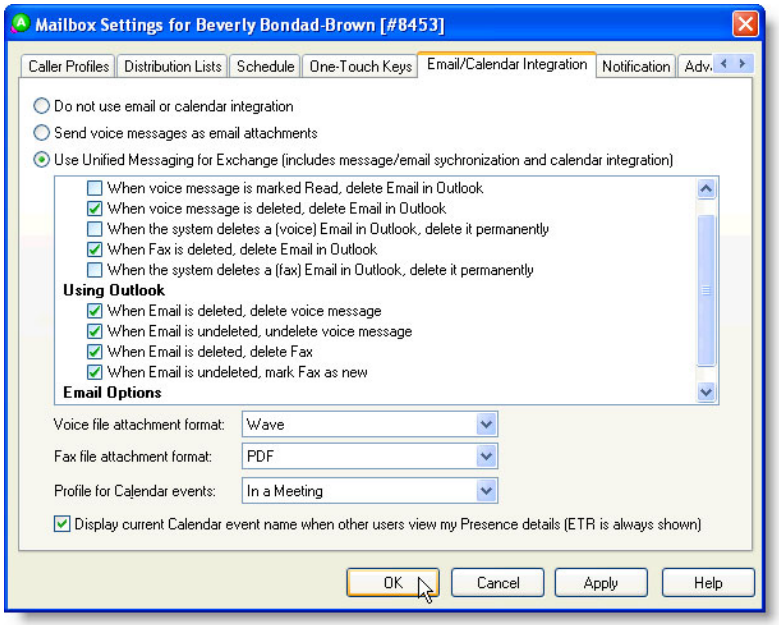
One-Touch Keys Tab



Use the **One-Touch Keys** tab to set mailbox-wide default one-touch keys. Any changes made here change the other locations in the same mailbox where one-touch keys are available (presence profiles, caller profiles, and so forth). The one-touch key options are available for the Busy greeting that is configured under the **General** tab.

Note: To set the **Company Default** settings, edit the one-touch options for the system mailbox, and then use security to disable the users' ability to make any changes (see "Security" on page 40).

Email/Calendar Integration Tab

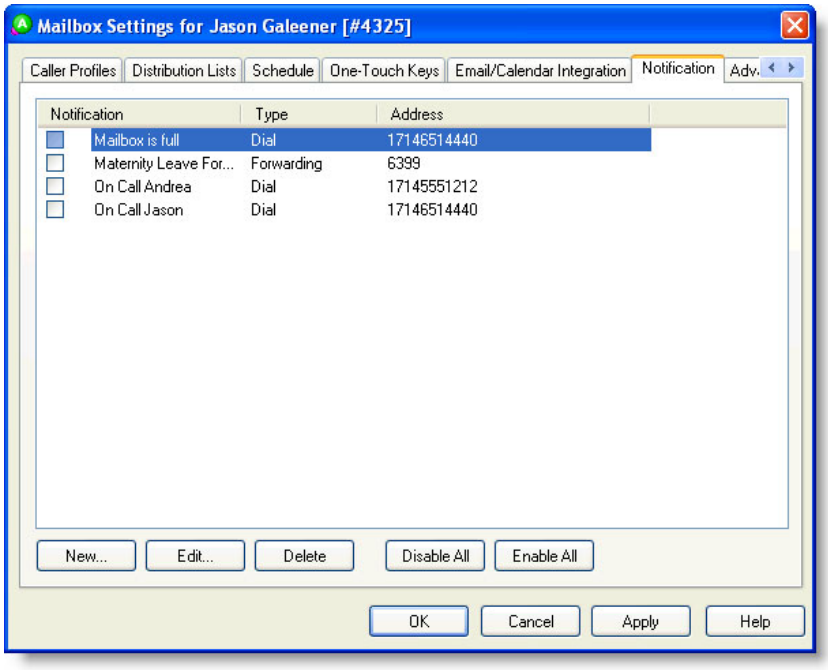


Use the:

- **Email/Calendar Integration** tab to configure the settings when an incoming voicemail or fax is sent to a user's email Inbox as an email. Most of the settings in this tab are related to Unified Messaging, which is a licensed option.
- **Attach Voice Message as File** option to attach the message instead of *linking* the message. This option can also be set up system-wide to attach the file as a Wave or MP3 file (in Administrator, go under the **File** menu | **System Setup** | **Voice Messaging** tab).
- **Fax File Attachment Format** option to set the format of a fax as a PDF or TIFF file.

Note: The **Profile for Calendar Events** option is a specific feature of Unified Messaging, which is a licensed option.

Notification Tab

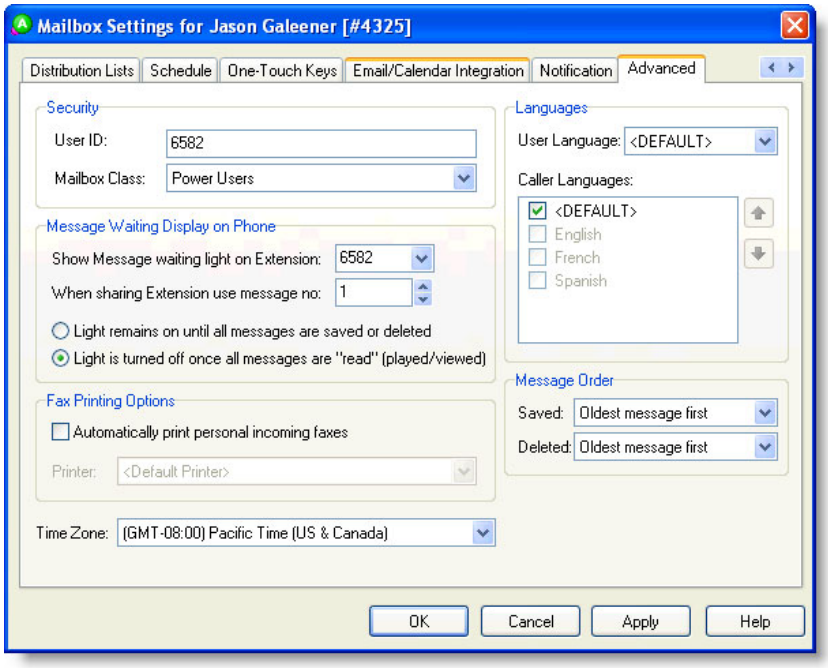


Use the **Notification** tab to notify people when a mailbox has urgent or regular messages. Use the **Notification** tab to:

- Dial a phone number or extension
- Page a person
- Email a person
- Forward a message to another mailbox (either copy or move)
- Light the message waiting lamp on a different extension
- Forward a message to a distribution list

Note: You can enable/disable any of the notifications for use in the future.

Advanced Tab



Use the **Advanced** tab to:

- Change a user's **Mailbox Class** (only available to System Administrators)
- Change the **Message Waiting** options
- Change the **Time Zone** of a mailbox
- Set the user and **Caller Languages**
- Set the order of messages

Help: Press **F1** for more information on any of these topics.

Security

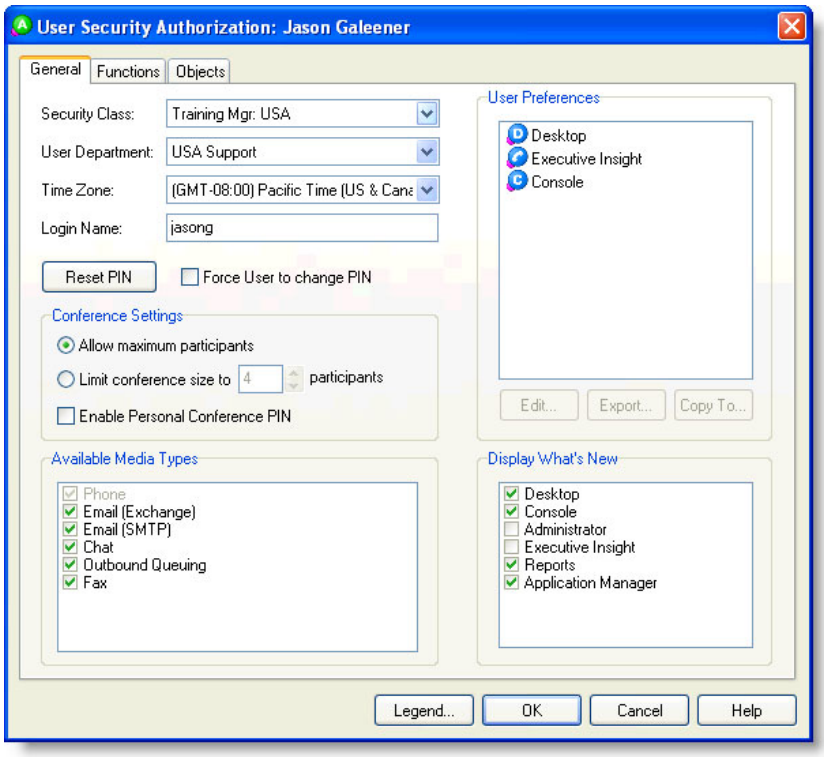
Security uses roles-based permissions to determine what access users have to certain functions in Desktop, Console, and other modules. Security in Administrator follows a number of tenants and best practices:

- Users always have the permissions of the class they belong to. To reduce users' permissions, reduce them from the entire class.
- To add special permissions to a single person, add them to the user security.
- Keep individual permissions to a minimum, and make most changes to the class.
- Keep the classes to a minimum. Avoid individual security classes whenever possible.

User Security

➢ Set up a user's security under the **General** group | **Security** | double-click a user.

General Tab



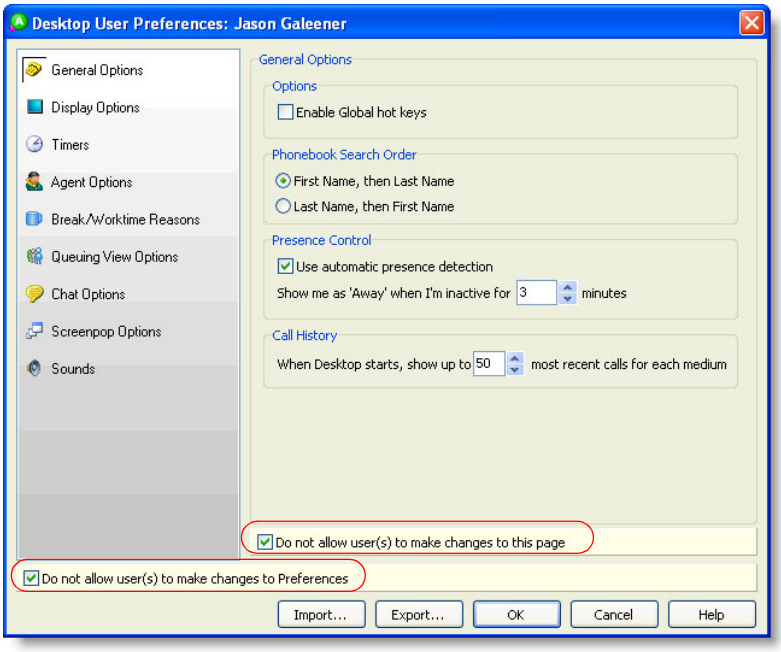
The General tab allows an Administrator to perform tasks such as:

- Set a user's **Security Class**
- Reset a user's PIN
- Set conference limitations
- Enable specific **Media Types** for queue delivery
- Set, copy, or export **User Preferences** in Desktop, Executive Insight, or Console

Enable/Disable the Editing of User Preferences

The Administrator can enable or disable a user's ability to change the configured preferences.

1. Under **User Preferences**, select **Desktop**, **Executive Insight**, or **Console**, and then click **Edit**.



2. Click:
   - **Do Not Allow User(s) to Make Changes to This Page**
   - **Do Not Allow User(s) to Make Changes to Preferences**

Security Classes

Although Security Classes have the same General, Functions, and Objects tabs as user security, the settings configured for Security Classes affect the entire class of users instead of individuals.

Reminder: Users have the rights of their classes. To remove a right from a user, you must remove the right from the user's class.

Glossary

Item	Description
.MP3	MPEG-1 Audio Layer-3. A format for compressing and storing a sound sequence into a small digital formatted file (about 1/12 the size of the original .wav file), while preserving the original level of sound quality.
.VOX	Voice Operated eXchange. A 16-bit mono sound file (typically sampled at 6kHz) that has been compressed using a proprietary ADPCM algorithm to use only four bits per sample (thereby using only 25% of its original size).
.WAV	Sound file format used by Microsoft Windows. Information within the .wav file allows Windows to correctly identify and play many different sample rates and sample sizes (including stereo/mono). Not all sound cards are capable of playing all possible .wav file contents.
0120	Toll-free (receiver pays) service number.
0800/1800	Toll-free (receiver pays) service number.
900/0900	Caller pays service number.
ACD/UCD	Forms of PBX-automated call distribution: • Automatic Call Distribution = Calls are directed to agents based on time spent on the phone (e.g., the agent who has been off the phone the longest receives the next call). • Uniform Call Distribution = Calls are directed to agents in a circular distribution pattern (e.g., A, B, C, and so on) based on which agent took the last call, regardless of the time spent on the phone.
Administrator	• A user on the system that can make changes to the configuration, security settings, and overall functionality within the system. • A software application that allows the system Administrator(s) to set up and maintain the system by utilizing comprehensive, Wizard-driven instructions. Access to the Administrator application can be limited to only allowing certain functions for specific users. ***Example:*** Supervisors may need to make changes to queuing environment, but they do not require access to voice messaging or user database settings.
Agent	A person who takes Contact Center calls delivered from a queue. Agents can also handle email, Web Chat, and fax calls (depending on what modules and licensing have been acquired). Any use of the term "calls" can also refer to these various types of media. Agents log into an Agent Login Class, and then determine which queues and media types the agent can take delivery from and what attributes those types of calls follow (e.g., skills-based routing or priority delivery being given to specific calls). Also known as a *CSR* or Preferred Agent/CSR.
Agent Login Class	A class that determines which queue/queues the agent is to be taking calls from. Agent Login Classes also define other agent class-specific functions such as work and break timers, automatic after-call work timers, prime or back-up agent settings, etc.
Alert (Agent)	An agent activates an "alert" to inform a Supervisor that she/he requires assistance.
Alert (Queue)	A queue can go into alert mode if a pre-specified threshold is reached (e.g., too many calls, calls waiting too long, or not enough agents are logged in to handle the amount of calls waiting). The alert can activate a sound effect as well as on-screen and wallboard visual notification.
Analog	Non-digital; applies to a phone, PBX, or line. The input and signal are analogous (i.e., similar to each other) rather than digitally processed. An analog phone is a standard tone or pulse phone.
ANI	Automatic Number Identification. A telephone service, available in analog and digital phone systems and most Voice over Internet Protocol (VoIP) applications, that transmits a caller's number to the called party's telephone equipment during the ringing signal, or when the call is being set up but before the call is answered (i.e., when receiving a call, the phone or PC displays the caller ID). Where available, caller ID can also provide a name associated with the calling telephone number. The information made available to the called party can display on a telephone's display or on a separately attached device.

Item	Description
Announcements	Pre-recorded audio messages that play to callers at various stages, both in and outside of a queue. The system can be programmed to perform various actions after an announcement plays, such as transferring the caller to a voicemail box or another destination, sending the caller to an Auto Attendant, or connecting the caller to an agent. An unlimited number of announcements can be created within the system.
Announce Ports	Ports that are either analog (Dialogic, Aculab) or digital (ProTIMS, TAPI Wave, etc.), or extensions that are programmed on the customer's PBX that allow audio recordings to play back to a caller. Announce ports can also provide the mechanism to receive or transmit faxes or to capture Dual-Tone Multi-Frequency (DTMF) touch-tones when a caller makes a selection from within an Auto Attendant or IVR.
Asterisk/Star	The asterisk (*) key on the phone or keyboard.
Auto Attendant	An announcement that plays to callers and allows callers to choose their own destination with pre-programmed key-press options (e.g., press 1 to speak with Customer Service, press 2 for hours of operation, press 3 for a dial-by-name directory, etc). Like queues, Auto Attendants can be programmed to have different actions available to callers based on time-of-day or day-of-week routing rules (i.e., callers do not have an option to speak with a Customer Service agent when the business is closed or on weekends). An unlimited number of Auto Attendants can be created within the system.
Baud	A unit of speed in data transmission usually equal to one bit per second.
Break	Instead of logging out for unspecified periods during a day, an agent may take a break (e.g., lunch or morning coffee break). Selecting the relevant break provides more accurate reporting information within Desktop and in reports. Designed for non-work related activities.
Break Modes	Default Break reasons can be programmed that allow managers and contact center supervisors to see how agents are using their time when they are unavailable to take calls, helping to improve efficiency and productivity. Break modes include Lunch, Errands, Restroom, etc.
Call Center	A service department that answers, originates, and queues phone calls. Typically, call centers have many agents, an automatic call distributor, and computer connection for order entry and customer database details. These centers often contain help desks and service lines.
Callback	Enables callers in a queue to request to be called back. Callers leave their number and name, hang up, and still maintain their position in the queue. When an agent becomes available, the Callback is delivered. The agent can then have the system automatically dial the caller to return their call.
Caller ID	See ANI.
Class	See Agent Login Class. Can also refer to Security Class or Mailbox Class.
CLI/CLID	Calling Line Identification. When receiving a call, the phone or PC displays the caller's number. Also see ANI.
CNID	Calling Number Identification. See ANI.
Company	A business having its employees' extensions, phone/fax numbers, and email addresses configured within the system.
Contact Center	A service department that answers, originates, and queues calls, emails, faxes, and so on, via both the phone and Internet. Typically, contact centers have many agents, an automatic distributor, and a computer connection for order entry and customer details database. These centers often contain help desks and service lines.
CPN	See ANI.
CSR	Customer Service Representative—see Agent.
CTI	Computer-Telephony Integration. Integrates a company's voice and data lines and enables the computer to handle phone calls.

Item	Description
DDI/DID/Trunk	Direct Dial In/Direct Inward Dialing. The process of a PBX routing calls directly to a specific extension. The telephone company provides one or more trunk lines to the customer for connection to the customer's PBX, allocates a range of telephone numbers to this line (or group of lines), and forwards all calls to such numbers via the trunk. As calls are presented to the PBX, the dialed destination number (DNIS) is usually partially transmitted (i.e., the last four digits), so that the PBX can route the call directly to the preferred telephone extension within the organization without the need for an operator or attendant. The service allows direct inward call routing to each extension while maintaining only a limited number of subscriber lines to satisfy the average concurrent usage of the customer. Also called *indial*.
Departments	A division within a company (e.g., Customer Service, Sales, IT, etc.) that groups individuals and activities for reporting purposes, or to control specific software functionality with department-based security settings.
Dialogic Card	A card connected to the server that enables voice recording in applications such as Voice Messaging, Auto Attendant, queuing software, and so on.
Digital	Applies to a phone, PBX, or line. The input is processed into numeric data for coded processing and delivery.
DNIS	Dialed Number Identification Service. A service provided by telecommunications companies to corporate clients that determines which telephone number was dialed by a customer (the called number or digits received). This information is useful in determining how to answer an inbound call. The businesses' telecommunications provider sends a DNIS number to the client phone system during the call setup; the DNIS number is typically 4 to 10 digits in length. Calls can then be routed to a specific destination (such as a queue) based on what number the caller dialed.
DTMF	Dual-Tone Multi-Frequency. Push button touch-tone dialing. Each tone consists of two frequencies, one high and one low.
EWS	Exchange Web Services. Used for integration between .NET applications and Exchange 2007 and later. Effectively replaces the MAPI.
Grade of Service	Commonly known as *service level*, these parameters allow the performance of the contact center to be quantified, in terms of calls answered within a pre-specified period of time.
Greeting	Recorded speech that welcomes callers and provides a user with information. Also see Announcements
Hash	The number sign (#) key on the phone or keyboard. Also known as the *pound* key.
Holidays	Holidays are defined as a date with a name (e.g., December 25, Christmas Day) and used to increase flexibility of pre-set schedules.
Hotseating	A process where an agent takes calls at different phones and operates Desktop at different desks while still using their own User ID number.
Hunt Group	A series of phone lines organized in such a way that if the first line is busy, the next line is hunted until a free line is found.
ICD	Intelligent Call Delivery. Calls are delivered according to time, availability, and the preferred agent.
IDDD	International Direct Distance Dialing. The capability to directly dial phones in other countries from an office or a home phone.
ISDN	Integrated Services Digital Network. A digital connection to the phone exchange (CO) that provides voice and data services. ISDN comes in Basic Rate (BRA or BRI) or Primary Rate (PRA or PRI). ISDN provides value added services such as call redirect, faster dialing, multiple subscriber numbers, a clearer connection, and the ability to share voice and data on the same connection.

Item	Description
IVR	Interactive Voice Response. Allows users to interact with a company's database via a telephone keypad or by utilizing speech recognition to perform activities normally be handled by an agent, such as checking an account balance, making a payment, etc. IVR systems can respond with prerecorded or dynamically generated audio to further direct users on how to proceed. IVR applications can be used to control almost any function where the interface can be broken down into a series of simple interactions. IVR systems deployed in the network are sized to handle large call volumes and can help to alleviate peak-call volumes by allowing callers to find the answers they need without having to speak with a live agent.
LAN	Local Area Network. A short distance (typically within a building) data communications network used to link computers and peripheral devices.
LCD	Liquid Crystal Display. Used on phones to display time, date, messages waiting, interactive login information, and so on.
MAPI	Messaging Application Programming Interface (MAPI). A system built into Microsoft Windows that enables different email applications to collaborate to distribute email. Only MAPI-enabled applications can share messages with each other (e.g., Microsoft Outlook with Microsoft Mail, Microsoft Exchange server, and so on).
Messages	Recorded speech or email left by a caller to provide information or ask for assistance. Desktop can be configured to give callers in a queue the option to leave a Callback message.
MOC	Microsoft Office Communicator. The instant messaging client application that is used in conjunction with the Microsoft Office Communications Server.
MSF Key	Mode Set Facility. An interactive macro used to program PBX keys.
Notification	A small popup window that appears in the corner of a user's monitor to inform about specific events. Notifications are used as a method of ensuring that users are aware of important occurrences on the system, such as when an agent is automatically logged-out for missing a call or when a queue has a pre-determined number of callers waiting to speak with an agent. The majority of notifications are optional, and users can choose what notifications they want to see. Certain notifications are enabled by default: • Incoming phone calls • Calls parked • Fax calls • Email calls • When a call arrives in the voice mailbox • Queue alerts • Auto-logout • Expired break time
OCS	(Microsoft) Office Communications Server.
Outdial	An integrated module that automates outbound calling of numbers.
PABX/PBX	Private Automatic Branch Exchange/Private Branch Exchange. The in-house phone system that serves the telephonic needs of a specific business or office, as opposed to the Public Switched Telephone Network (PSTN). PBXs make connections among the internal telephones of a private organization, and connect the organization to the PSTN via digital trunk or analog copper lines.
Pattern	A call delivery pattern that determines the conditions under which a call is to be delivered to a queue/queues.
PIN	Personal Identification Number. Also called *Security Code* or *Password*.
Pound	The number (#) key on the phone or keyboard. Also called *hash*.
Preferred Agent/CSR	A CLI query can be used to direct calls to a specific agent or agents if available.

Item	Description
Presence	Provides real-time visual information on the activities and availability of employees throughout the day, such as each user's phone status, login status, voice messaging greetings and profiles, and time of return information. The Desktop application provides Presence management functionality via Presence buttons. A Presence button is a shortcut that allows a user to easily view information about other users in the system. Presence buttons can be used to initiate or transfer a call, check the current status of another user (e.g., on the phone, away at lunch, out sick for the day, etc.), send a call to the voice mailbox of an associate, etc.
PSTN	Public Switch Telephone Network (as opposed to the PABX/PBX).
Queue	The delivery/stacking/holding of phone calls (and other media types, such as email and fax) to an agent in a contact center environment. Calls in a queue are managed by the software's queuing system, and the delivery follows whatever rules or parameters have been programmed for the queue to which they belong. Calls in a queue are most often delivered to agents, but a queue can also take other actions before, or instead of, delivering a call. Some of these other actions can include playing an announcement or an Auto Attendant, forwarding the call, querying a database, and others. These actions are controlled with queue modes.
Queue Mode	Modes specify the way calls in a queue are to be handled by the system, and can be controlled automatically by a pre-programmed schedule based on day-of-week and time-of-day. ***Example:*** During regular business hours, a queue is typically in the Day mode (programmed to deliver calls to agents), and then automatically switches to Night mode (programmed to play an announcement stating that the business is closed) after-hours and on weekends. Up to 32 modes can be programmed for each queue. Some other examples of common modes are Meeting, Holiday, Emergency, etc.
ScreenPop	Calling line ID, client data (from a contact database or IVR), and/or product and service information that appears on an agent's PC screen as a call is delivered. Call resolution ScreenPops such as Wrapup templates and Callback resolution are displayed at the end of a call.
Security	The software security model's concept includes class-based access control managed via the Administrator application. Each user on the system belongs to a security class that allows for specific permissions and restrictions. When a user needs permissions beyond those set by their class, additional permissions can be enabled on a per-user basis.
Service Level	Service Level parameters that allow the performance of the Contact Center to be quantified in terms of calls answered within a pre-specified period. Also known as *Grade of Service* (GOS).
SMDI	Station Message Desk Interface or Simplified Message Desk Interface. Links the users to their mailboxes and tells them when a voice message is in the mailbox.
Speed-dial	See Presence.
Star/Asterisk	See Asterisk/Star.
Supervisor	A team lead in charge of managing agents within a contact center environment. Supervisors typically have more permissions and privileges on the system than agents or other users, but fewer permissions than an Administrator. Certain system functionality is typically only granted to Supervisors, such as: • Log agents in and out of the queues • Change the modes of queues • Run reports on queue and agent activity • Place an agent in work-time or break-time modes • Monitor and/or record activity on an agent's extension
STD	Subscriber Trunk (or Toll) Dialing. The local area call charge identifier from the phone's service provider (e.g., nine or ten digits in NZ 09 898 7654, cellular 025 299 9999, or freephone 0800 801 802).
TAPI	Telephony Application Programming Interface (TAPI). A Microsoft Windows API that provides computer telephony integration, and enables PCs running Microsoft Windows to use phone services.

Item	Description
TCP/IP	Transmission Control Protocol/Internet Protocol. The server and client address and data-resolution codes.
TMF	Terminal Multi-information transfer Facility. A batch macro used to program PBX keys. The TMF protocol is used so that PCs can talk to each other.
Trunk	A communication link between two switching systems; typically includes a phone service provider and a PBX.
UCD/ACD	See ACD/UCD.
Unified Messaging	Synchronizes voice messages and faxes with the Microsoft Exchange-based email client. Users can manage their voice mailbox via their Inbox, and are able to listen to and manipulate voicemail messages from within Outlook. Unified Messaging for Exchange allows the user to keep the voicemail mailbox and Microsoft Exchange Inbox in real-time synchronization, so that if a voicemail message is deleted, it is deleted on both the voicemail and Exchange servers. Unified Messaging also allows users to easily and quickly share relevant voicemail messages with other users by providing the ability to forward specific voicemail messages to specific recipients as an attachment.
Voice Mailbox	A mailbox or mailbox system to receive, save, send, and forward voice messages.
Voicemail Profiles	Enables a user to provide profile-based greetings (e.g., In the Office, Out of Office, Vacation, Meeting, etc.) to callers, and allows the caller to record a message. Profiles can be set up according to user availability (location), or matched against incoming numbers using Caller ID (known as a Caller Profile) so that specific callers receive a unique greeting. Up to 90 profiles can be pre-stored for each mailbox. Voicemail profiles can also be used for system-based or company-based mailboxes that can be programmed to notify multiple parties that a message has been received and needs attention.
Voice Port	An announcement port (e.g., for a Dialogic card).
Wallboard	A display screen of LED lights fixed to wall or roof of a contact center that shows the status of the local queue(s) in real time.
WAN	Wide Area Network. Data communications network using common carrier-provided lines that cover an extended geographical area.
Work Mode	Default Worktime reasons can be programmed that allow managers and contact center supervisors to see how agents are using their time when they are unavailable to take calls, helping to improve efficiency and productivity. Work modes include Research, Training, Meeting, etc.
Worktime	A call delivery delay following the resolution of a previous call, during which an agent can conclude the previous service response, enter a Wrapup code, and prepare for the next call (used with automatic delivery).

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