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AUTO ATTENDANT AND UNIFORM CALL DISTRIBUTION ADMINISTRATION GUIDE

iDCS 500 Release 2 / OfficeServ™

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OVERVIEW

Your iDCS 500 telephone system is equipped with an integrated option package to enhance call processing. The improved feature support is in the form of Auto Attendant and Uniform Call Distribution. One or both may be activated in your system.

AUTO ATTENDANT

The auto attendant will answer and process incoming calls without human intervention. The caller is answered and hears a message prompting him/her to dial numbers to reach extensions in the phone system or follow other options provided by the AA card.

Your installation and service company has already designed and programmed these options for you, including the greetings and messages that play at different times while the call is being processed.

The only administration associated with this card is the greeting change. Different day and night greetings may be programmed. These change when the iDCS 500 system switches from normal day operation to evening operation. Additionally, an alternate greeting may be recorded to indicate a holiday, an emergency or another temporary closure. From time to time, it may be necessary to manually change the active greeting from the current (day or night) to the alternate (holiday).

RECORDING GREETINGS

To record greetings (or prompts) you must have an **AA RECORD** key programmed on your keyset. Select a quiet place where you will not be disturbed. Each AA card has 2 minutes of recording time.

- Press the AA RECORD key
- Enter the passcode (this can be supplied by your installation and service company)
- Lift the handset and press HANDSET softkey
- Dial the first AA port (this will usually be 3951)
- Enter the number of the prompt to record (if in doubt get a list of the prompts from your installation and service company)
- Begin recording after the tone, when finished press the AA RECORD key
- Repeat as necessary

PLAYING GREETINGS

You may play the greetings to check that you are happy with the quality and content. To do this you must have an **AA PLAY** key programmed on your keyset.

- Press the AA PLAY key
- Dial the first AA port (this will usually be 3951)
- Enter the number of the prompt to play (if in doubt get a list of the prompts from your installation and service company)
- The prompt will begin to play along with all subsequent prompts

CHANGING THE GREETING

The AA card allows the system administrator to call in and change the current operating ring plan with its associated greeting to a different ring plan mode with or without an alternate greeting.

- Call the auto attendant and dial a special passcode while you are listening to the present operating ring plan's associated greeting. Your service company technician programs the special passcode for you.
- Dial **1** for the first ring plan with its preprogrammed greeting, **2** for the second ring plan with its preprogrammed greeting, **3** for the third ring plan with its preprogrammed greeting, **4** for the fourth ring plan with its preprogrammed greeting, **5** for the fifth ring plan with its preprogrammed greeting, or **6** for the sixth ring plan with its preprogrammed greeting.
- Dial a **0** to leave the greeting for that ring plan or a 1 to enable your alternate greeting.
- Hang up. The selected ring plan with its associated greeting is set.

MANUAL RING PLAN MODE SERVICE

- When the iDCS 500 phone system changes from one of its ring plans, the AA greeting associated with that ring will also change.
- When the ring plan of the phone system is changed remotely the ring plan status of the iDCS 500 phone system is also changed. This means that a customer who needs to put the system in a different ring plan can call in remotely and do it.
- When the alternate greeting is set, the iDCS 500 system will go into the ring plan selected. If a **RTO** or a **RP** key is programmed on the iDCS 500 and alternate greeting is enabled, then the **RTO** or **RP** key will **FLASH**.

AUTO RING PLAN SERVICE

- Manually changing an Auto Attendant to a different ring plan without an alternate greeting. The greeting will change the iDCS 500 system ring plan until the next scheduled change by the automatic time tables program.

- Manually changing an Auto Attendant greeting to an alternate greeting will flash the RTO and/or RP button to indicate that the alternate greeting is set. The system will continue in the selected ring plan until manually changed. The auto ring plan service will be suspended during this time.

UNIFORM CALL DISTRIBUTION

UCD is used to distribute calls to a group of agents. If the group members are all busy, UCD controls queue patterns and information messages. It also provides agent and call statistics in both real time on a keyset display and in the form of printed reports at a customer-provided printer.

Your installation and service company has already designed and programmed these options for you, including the group members, timing parameters, greetings and messages that play at different times while the call is being processed.

SUPERVISOR

Each UCD group can be assigned one or more optional supervisors. A supervisor can be responsible for more than one UCD group. If you are a supervisor, you will have a special key assigned to your display keyset that will allow you to administer the UCD group. Your keyset will have a separate **SUPERVISOR** key for each UCD group. UCD alarm conditions will show by flashing these keys.

ALARMS

Your installation and service company may have programmed alarm conditions to alert you to the following:

- The number of calls waiting at the UCD group has exceeded a specific programmed number
- The amount of time a caller has been waiting has exceeded a specific programmed time
- Both options above

When the alarm is activated at your keyset, one of the following will occur:

- Your **SUPERVISOR** key will flash and the keyset display will indicate the type of alarm condition (time or number of calls).

ALARM SUPERVISOR
5XX: RING TIME

or

ALARM SUPERVISOR
5XX: QUEUE TIME

- Your **SUPERVISOR** key will flash and the keyset display will indicate the type of alarm condition (time or number of calls) and an audible alarm will sound.

NOTES:

1. Pressing the **SUPERVISOR** key has no effect on the visual alarm but it will cancel the audio alarm (stop it from ringing until the next activation—it is not disabled permanently).
2. Your keyset will indicate a visual alarm condition for as long as the alarm condition exists.

SUPERVISOR KEY

Throughout this guide, the displays used are for example only. The numbers and names on your display may differ slightly.

Press the **SUPERVISOR** key. You will be presented with three options:

```
523: SALES
CALL ADMIN AGENT
```

The **CALL** and **AGENT** options allow the supervisor to view statistics for each of these areas while **ADMIN** is used to clear the saved data and run reports. Let's explore each of these options by pressing the key directly below the word on the display.

Call

When you press **CALL**, you will be presented with the following display. It shows you how many calls are *currently* in queue.

```
000 calls in
queue now
```

Press the **UP** key. You will be presented with the following display. It shows you the average amount of time it takes a caller to be answered after the call begins ringing at a station.

```
average ring
time is 00:00
```

Press the **UP** key. You will be presented with the following display. It shows you the number of C.O. calls that rang in when all members of the group were busy. It is possible for this total to represent more than one day's calls if the **AUTO CLEAR** option is not turned on.

```
000 times all
busy today
```

Press the **UP** key. You will be presented with the following display. It shows you the average time a caller waits in queue before being answered by an agent.

```
average time in
queue is 00:00
```

Press the **UP** key. You will be presented with the following display. It shows you the total number of calls received. It is possible for this total to represent more than one day's calls if the **AUTO CLEAR** option is not turned on.

```
0000 calls
received today
```

Press the **UP** key. You will be presented with the following display. It shows you the longest time a caller waited in queue before answered by an agent.

```
longest queue
time is 00:00
```

Agent

Throughout the **AGENT** menu, you can press the **SCROLL** key at any time to view an individual station's data. You can also use the **UP** and **DOWN** keys to move between stations.

When you press **AGENT**, you will be presented with the following display. The "available" number shows how many agents are programmed in this particular UCD group. The "logged in" number shows how many agents are currently available to take calls (not in Do Not Disturb (DND), logged out or busy).

```
06 available
05 logged in
```

Press the **UP** key. You will be presented with the following display. It shows you the first station in the UCD group, its associated directory name and the status of that station (in group, out of group or in DND).

```
212: FRED SMITH
status: IN
```

NOTE: Press the key directly below the word **IN** or **OUT** to change the status of the station to the opposite condition. DND cannot be changed here.

Press **SCROLL**. You will be presented with the following display. It shows you how many calls station 212 answered. It is possible for this total to represent more than one day's calls if the **AUTO CLEAR** option is not turned on.

```
212: answered
000 calls today
```

Press **SCROLL**. You will be presented with the following display. It shows you the average call duration for this agent.

```
212: average
call time 00:00
```

Press **SCROLL**. You will be presented with the following display. It shows you the average amount of time it take for this agent to answer a call.

```
212: average
ring time 00:00
```

Admin

When you press **ADMIN**, you will be presented with the following display. The **CLEAR** option is used to clear (set to 0) the CALL and AGENT data for the current group (in this case 529, the sales group). The **PRINT** option is used to print the CALL and AGENT data for the current group (in this case, 529, the sales group). It requires a customer-provided printer.

```
529: Sales group
PRINT      CLEAR
```

Clearing Stored Data

Select the **CLEAR** option. You will be presented with two options—**MANUAL** and **AUTO**.

```
CLEAR GROUP DATA
MANUAL      AUTO
```

- If you select **MANUAL**, choose **YES** or **NO** to immediately clear the data.
- If you select **AUTO**, you can turn the automatic clear function **ON** or **OFF** to clear the data automatically at a programmed time. If you select **ON**, you will be prompted to enter a new time to automatically clear the data. The time is entered in 24 hour format, for example, 11:30 p.m. is entered 2330. Select **VIEW** to see or change the currently selected **AUTO** option. Press the right soft key to turn automatic clearing **ON** and **OFF**.

Printing Data/Running Reports

Select the **PRINT** option. You will be presented with two options—**MANUAL** and **AUTO**.

```
PRINT GROUP DATA
MANUAL      AUTO
```

- If you select **MANUAL**, choose **YES** or **NO** to immediately print the data to your customer-provided printer.
- If you select **AUTO**, you can turn the automatic print function **ON** or **OFF** to print the data automatically at a programmed time. If you select **ON**, you will be prompted to enter a new time to automatically print the data. The time is entered in 24 hour format, for example, 11:30 p.m. is entered 2330. Select **VIEW** to see or change the currently selected **AUTO** option. Press the right soft key to turn automatic printing **ON** and **OFF**.

CALL STATISTICS

The following is a description of statistics that can be viewed by a UCD Supervisor.

Calls in Queue Now

How many calls are currently in queue.

This statistic is a real time statistic and so will not print on a report.

Abandoned Calls

This shows the number of callers that reached the UCD group, but hung up before being answered. A high number probably means that there are not enough agents available and the wait time is too long.

Average Ring Time

This is calculated from the time an agent begins to ring until the time an agent answers the call, this does not include ringing at an agent station that does not answer or is logged out because of the ring next option.

Number of Times All Agents Busy

This is the number of times that a call is placed to a UCD group and all agents are busy or out of group. This check is made when the call is first placed to the group. If all agents are busy or logged out this counter is incremented. It will not increment again for this call unless the call is answered and transferred back into the UCD group.

Example: If there are 5 members in a group, 3 are Out of Group one is busy and one is idle, and a call is placed to the group, because there is an idle station the all agents busy counter is not incremented.

If the idle station rings, does not answer and is logged out, although the condition of the group is now all agents busy, the check has been made and the agent busy statistic does not increment. Also if a call comes into a group with all agents busy and then one becomes idle, the busy counter will increment because the check has been made.

Average Time in Queue

This is calculated as an average of all the calls that were in queue.

Note that this is ONLY an average of the calls that were in queue. The caller must have heard the first UCD recording to be considered in queue.

Total Calls Received

The total number of times that calls were sent to the UCD group number. (This does not include calls sent to a station number that happens to be in a UCD group, the call must be sent to the group number 530 - 549).

This statistic includes calls that were answered by the group, Calls that went to a group with all agents busy or out of group, calls that are abandoned and calls that go to UCD final destination. This includes intercom calls to the UCD group.

If this number is less than the total calls received by all the agents it is possible that calls were transferred from one agent to another. If this number is more than the total calls received by all the agents it is possible that calls were unanswered by an agent and went to final destination or callers hung up while in queue.

This statistic includes:

- Calls answered by agent.
- Calls that are not answered by an agent and go to final destination.
- Calls that are sent to the UCD group but callers hang up before being answered.

Longest Queue Time Today

This shows the longest call in queue today.

The queue time is calculated as follows:

Queue time begins when a caller starts to hear the first UCD message. Queue time ends when a caller is either:

- Answered by an agent.
- System gets disconnect from C.O. or
- Caller is transferred to final destination.

Longest Queue Time Now

This shows the longest call currently in queue. The queue time is calculated as follows:

Queue time begins when a caller starts to hear the first UCD message. Queue time ends when a caller is either:

- Answered by an agent.
- System gets disconnect from C.O. or
- Caller is transferred to final destination.

AGENT STATISTICS

Each statistic in this category can be read individually for each UCD agent.

Logged In

The number of stations programmed in the UCD group and the number of stations that are currently logged in. This statistic is a real time statistic and so will not print on a report.

Status

This screen shows the agents name, extension number and status. The status can be in Group, Out of group or in DND. This statistic is a real time statistic and so will not print on a report.

Calls Answered

The total number of calls received by the agent. This does not include ring no answer to a agent station.

If the total number of all agent calls is less than the calls received by the group it is possible that calls were unanswered by an agent and went to final destination or that callers hung up while in queue.

If the total number of all agent calls is more than the calls received by the group it is possible that calls were transferred from one agent to another.

Average Call Time

This is an average of all the call durations for the agent.

Average Ring Time

This is an average of all the ring times for the agent. Ring times are previously explained.

CALL STATUS (CS)

This key may be programmed on each agent keyset to provide an indication of waiting calls at the UCD group.

This key has no effect when pressed, but will flash amber or red to indicate that calls are waiting.

There are two levels that can be programmed for this key, the are CS level 1 and CS level 2.

By default these levels are 05 for level 1 and 10 for level 2. This means that when there are 5 or more calls in queue at the UCD group the CS key will flash amber, when there are 10 or more calls in queue at the UCD group the CS key will flash red. These levels can be changed by your service company.

MANUAL WRAP-UP

When it is not practical for an agent to follow the preset wrap-up timer it can be manually controlled. Assign an Agent Busy Wrap-Up (**ABW**) key to select keysets.

- While on an UCD call press the **ABW** key. The LED will light red and you will not receive another UCD call.
- When finished with any work related to this call press the **ABW** key again. The LED will turn off and you are available for another UCD call.

AGENT PIN NUMBERS

The system has the capability to require agents to log in and log out with a PIN number. Ask the installing technician to enable this option on a per UCD basis (MMC 607). In addition you may be permitted access to MMC 718, Agent ID Code, where you can assign up to 300 (L version) and 100 (M version) agents. Codes can be from 1-4 digits in length.

Dial code entry number **001-300** (e.g., 005) or press **UP** or **DOWN** keys to select index number and press **RIGHT** soft key to move cursor.

```
AGENT PIN (005)
ID:  GRP:
```

Enter **ID code** via keypad (e.g. 1234) and press **RIGHT** soft key to move cursor.

```
AGENT PIN (005)
ID:1234 :GRP:
```

Enter group number **501 to 519** (e.g., 505) or press **UP** or **DOWN** key to select group or press the **ANS/RLS** to select all **UCD** groups and press **RIGHT** soft key.

```
AGENT PIN (005)
ID:1234 :GRP:505
```

SAMPLE UCD REPORT

```
=====
UCD GROUP 530 : SALES
```

```
FROM: SUN 02 Feb 00:00
TO   : SUN 02 Feb 02:54
```

CALL STATISTICS

```
=====
AVERAGE RING TIME (TIME TO ANSWER).....00:40
NUMBER OF TIMES ALL AGENTS BUSY.....00002
AVERAGE TIME IN QUEUE.....00:51
TOTAL CALLS RECEIVED.....00011
LONGEST QUEUE TIME (TODAY).....02:14
TOTAL CALLS ABANDONED.....00004
```

AGENT STATISTICS

```
=====
MEMBER  AGENT  NAME           CALLS      AVERAGE    RING
          ANSWERED  CALL TIME    TIME
-----
01      210    JOHN           0002      01:55      00:05
02      211    SAM            0001      02:18      00:06
03      208    MIKE           0003      01:22      00:04
04      207    PETER          0001      03:16      00:05
```